

ICEF INSIGHTS

Charting
a new
approach to
international
student
recruitment

What Next?

- Policy shock
- Top sending markets
- How to think like a student
- Better payment systems
- Shifting rules around dependants



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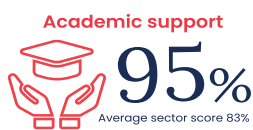
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(International Student Barometer, 2023)

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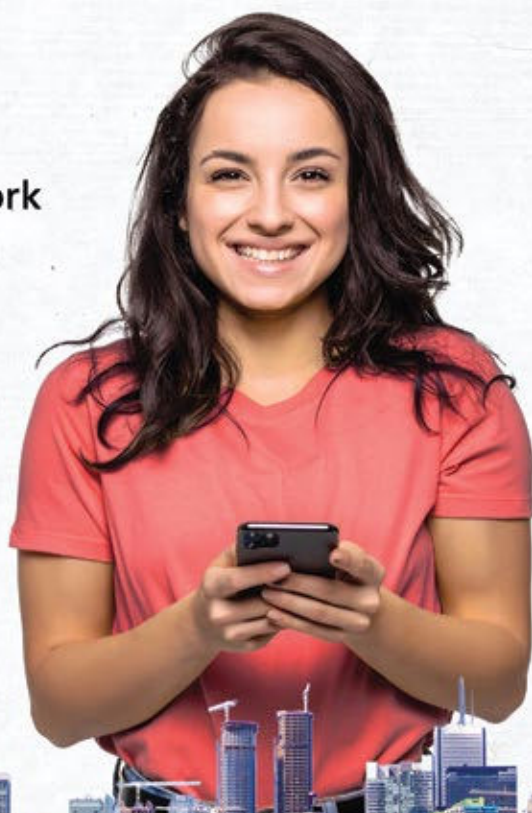
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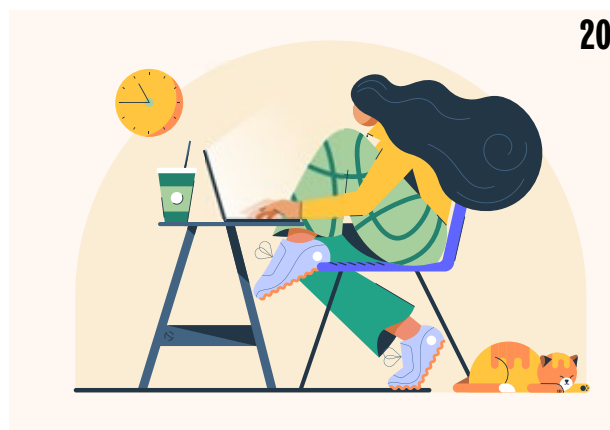
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ICEF INSIGHTS



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WELCOME

Welcome to the new issue of *ICEF Insights*, which we publish in a context of immigration policy upheaval in major destinations and shifting demand for study abroad. There are both challenges and opportunities resulting from this disruption, and we explore both in the pages of this magazine.

If there is one opportunity that stands above the rest, it is to take a close look at how we have been recruiting and hosting international students over the past few years and to consider whether we need a new approach. Ever more, a student-first mindset is required.

This means placing student satisfaction at the forefront of every interaction and experience a student has with your brand. It means anticipating students' needs; leveraging efficient systems and staff training; and having the capacity, supports, and facilities to promote student well-being.

Customer relationship management systems (CRMs) and AI can provide quick service to students, an urgent priority given that 85% of students now expect a response to their query within 24 hours. These systems can also help agents and institutions to collaborate and nurture leads.

At the staff level, empathy and communication skills are essential at a time when students may feel overwhelmed by options and unsure about which path will allow them to meet their career goals.

To thrive in our new context, we need strategies to recruit only best-fit students, which will improve visa approval rates and avoid student disappointment due to a refusal or a programme they aren't suited for. One of our special features is devoted to this topic.

As always, the articles in *ICEF Insights* cover current trends in international education and offer ideas for how best to respond to the change always swirling through our industry.

With best wishes,

Markus Badde
CEO, ICEF





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NEW & NOW

Mobility trends, better payment systems, policy shock, and more



SUPANUT ARUNOPRAYOTE

Singapore's Jewel Changi Airport is one of the world's 20 busiest airports with nearly 60 million passengers in 2023 alone. See "In Context" on page 16 for more on historically high levels of migration.



Where do students choose to study abroad?

As the middle-class expands across Asia, Africa, and the Americas, demand for study abroad is building ... and not just for the traditional English-speaking destinations*



Mexicans

1. Canada	17,000
2. US	14,500
3. Spain	7,300
4. Australia	3,600

Brazilians

1. Australia	25,000
2. Portugal	17,000
3. US	16,000
4. Canada	15,600
5. France	5,700

Nigerians

1. UK	72,400
2. Canada	46,000
3. US	17,600
4. Malaysia	4,400
5. Germany	4,000

Colombians

1. Australia	39,700
2. Spain	19,400
3. Canada	15,200
4. US	9,100

Cameroonians

1. France	10,900
2. Canada	8,100
3. Germany	7,300



DID YOU KNOW?

Brazilian students are mainly drawn to Portuguese/Spanish-speaking destinations for degrees but to Australia, Canada, Ireland, and the UK for English-language training.



DID YOU KNOW?

Vietnamese students are more likely to study in Asia than in the West. The top hosts of Vietnamese students are South Korea and Japan.

**NOTE**

The extent to which Chinese international enrolments have recovered since the pandemic has not been disclosed by the Chinese government, but anecdotes suggest that China has resumed recruiting in Asian and African countries. The top five destinations for Bangladeshi, Korean, Indonesian, and Vietnamese students shown on the map do not include China due to the lack of publicly available data, but it is possible that China has regained its status as a top destination in those markets.

Pakistanis

1. UK	34,700
2. Australia	23,400
3. US	10,200
4. Germany	8,200
5. Malaysia	4,300

Nepalis

1. Australia	62,400
2. Japan	37,900
3. Canada	20,500
4. US	15,100
5. India	13,100

Vietnamese

1. South Korea	70,200
2. Japan	36,300
3. Australia	32,900
4. US	21,900
5. Canada	17,200

Bangladeshis

1. Canada	15,800
2. UK	15,000
3. US	13,600
4. Australia	11,800
5. UAE	11,200

Iranians

1. Canada	25,000
2. Türkiye	22,600
3. US	10,800
4. Germany	3,300

**DID YOU KNOW?**

Bangladesh is a top 10 market for Japan, Malaysia, South Korea, and the UK – but Canada is currently the leading host of Bangladeshi students. In 2023, close to 16,000 Bangladeshi students studied in Canada, up 29% over the previous year and almost double the number from 2019.

Indonesians

1. Australia	21,300
2. Egypt	13,000
3. Malaysia	10,200
4. US	8,500
5. France	5,700

*Latest national government sources inform map data

Top 10 markets for leading destinations on page 14 ➔



Top markets for leading destinations

Collectively, Australia, Canada, France, Germany, Japan, Malaysia, the UK, and the US enrol millions of international students

Australia

1. China 166,400
2. India 126,500
3. Nepal 62,400
4. Colombia 39,700
5. Philippines 35,600
6. Vietnam 32,900
7. Thailand 25,900
8. Brazil 25,000
9. Pakistan 23,400
10. Indonesia 21,300

+104%
y-o-y

Source: Australian government data for all sectors in 2023.



DID YOU KNOW?

The number of Indian students in Germany has more than doubled in the past five years, and there was 15% growth in the past year alone, according to the German Academic Exchange Service (DAAD).

Canada

1. India 427,100
2. China 101,200
3. Philippines 48,900
4. Nigeria 46,000
5. France 27,000
6. Iran 25,000
7. Nepal 20,500
8. Vietnam 17,200
9. Mexico 17,000
10. South Korea 15,900

+167%
y-o-y

Source: Canadian government data for international students in programmes of at least 6 months in 2023.

Germany

1. India 42,600
2. China 39,100
3. Syria 15,600
4. Austria 14,800
5. Türkiye 14,700
6. Iran 13,300
7. Russia 10,500
8. Italy 10,200
9. Ukraine 9,100
10. Pakistan 8,200

+25%
y-o-y

Source: German government 2022/23 data. Higher education enrolments only.

France

1. Morocco 43,400
2. Algeria 34,300
3. China 27,100
4. Italy 21,000
5. Senegal 17,000
6. Tunisia 15,300
7. Spain 12,100
8. Côte d'Ivoire 11,800
9. Lebanon 11,200
10. Cameroon 10,900

+11%
y-o-y

Source: French government 2023 data. Higher education enrolments only.



**DID
YOU
KNOW?**

- Nigeria has been the second-fastest growing source country for UK universities in recent years, after India, but the UK's dependant ban that took effect in 2024 has dramatically dampened demand from this key market.
- After years of decline, the number of Korean students in the US began to grow again in 2021 and picked up speed in 2022, when Korean enrolments in US institutions increased by over 7%.
- Nepal has been the number three source market for Australia for years, but plummeting visa approval rates in 2024 for Nepali students applying to Australian institutions may see Japan become even more competitive in this hotly contested student market.

Japan

1. China	115,500
2. Nepal	37,900
3. Vietnam	36,300
4. South Korea	14,900
5. Myanmar	7,800
6. Taiwan	7,000
7. Sri Lanka	6,800
8. Indonesia	6,600
9. Bangladesh	5,300
10. US	4,000

+104%
y-o-y

Source: Japan Student Services Organization (JASSO) 2023 data. Higher education and language enrolments.

Malaysia

1. China	39,000
2. Indonesia	10,200
3. Bangladesh	6,300
4. Pakistan	4,300
5. India	4,000
6. Nigeria	4,400
7. Yemen	2,900
8. Sri Lanka	2,800
9. Egypt	2,200
10. Iraq	2,200

+94%
y-o-y

Source: Statista 2022 data, higher education enrolments only. Bangladesh was the fastest-growing market in 2023 in terms of applications (the Malaysian government has not made public enrolment growth for that year).

US

1. China	289,500
2. India	268,900
3. South Korea	43,800
4. Canada	27,900
5. Vietnam	21,900
6. Taiwan	21,800
7. Nigeria	17,600
8. Japan	16,100
9. Brazil	16,000
10. Saudi Arabia	16,000

+25%
y-o-y

Source: IIE Open Doors 2022/23 data. International students enrolled in colleges and university programmes in the US.

UK

1. India	173,200
2. China	154,300
3. Nigeria	72,400
4. Pakistan	34,700
5. US	22,500
6. Hong Kong	17,000
7. Bangladesh	14,900
8. Malaysia	13,000
9. Saudi Arabia	9,000
10. UAE	8,400

+50%
y-o-y

Source: UK government 2022/23 data. Higher education enrolments only.



In context: International education under pressure

Declining political and public support for immigration profoundly affects our industry – what can we do?



IT ALL SEEMED to happen quite suddenly, and then relentlessly. Beginning in mid-2023 and stretching through 2024, several national governments – notably those in the UK, Australia, and Canada – tightened their immigration settings, increased their scrutiny of education providers and agents, and made it more difficult for foreign students to obtain visas. In the Netherlands, universities are reducing international student volumes to avoid imminent legislative intervention.

We came to expect an announcement every week or two – whether it was news of an immediate cap on new study permits, a massive visa application fee increase, higher

financial requirements for students, amendments to work rights, or the withdrawal of most dependants' permission to accompany students.

The question is: why? Why would governments stem the flow of bright international students capable of alleviating critical skills shortages and declining economic productivity? What ended a post-pandemic enthusiasm for welcoming record-high numbers of foreign students?

The answer is a global migration crisis that is overwhelming critical infrastructure, including healthcare and housing. Related economic pressures are weakening public support for immigration and current levels of international students.



A shift in priorities

The more restrictive immigration policies signal that the cultural and economic value of international students is now secondary to an urgent new priority for governments in many advanced economies: reducing migration at seemingly any cost.

Among policymakers, there appears to be little memory of – or concern about – the devastating toll of plummeting international student numbers during the COVID-19 pandemic. Interrupted student mobility flows when borders were closed impacted not only the revenues and staff of education providers, but also the fortunes of whole communities and other business sectors.

When borders reopened, governments enacted all manner of policies to attract new international students, knowing full well the billions of dollars at stake. Foreign enrolments quickly surged to record-high levels in Australia (nearly 800,000 in 2023), Canada (over 1 million in 2023), and the UK (over 750,000 in higher education alone in 2022/23).

But in tandem with these new peaks, more and more stories appeared in national media outlets about a disturbing trend: growing numbers of people in major cities in Australia, Canada, the UK, and elsewhere struggling to access affordable housing and other vital services, including healthcare. And all this amidst a backdrop of surging inflation, rising costs of living, and economic uncertainty.

The result is a potent political cocktail that is making immigration a hot-button electoral issue in leading study destinations. For example, in Canada, 50% of Canadians responding to a survey conducted by Leger in February 2024 said that “there are too many new immigrants” – a proportion that had more than doubled over January 2023. This stands in sharp contrast to a long-standing belief among Canadians that immigration is a public good.

A quest for security

The global migration crisis is defined by historically high numbers of people attempting to cross borders in search of safety and opportunity. The crisis stems from a horrible combination of wars, natural disasters, and crumbling economies. Any or all of these elements are present in dozens of countries, especially in the Global South (a designation often understood to contain large swaths of Africa, Latin America, and Asia). Millions of people in affected regions face difficult or unsafe circumstances. Many are driven to seek temporary or permanent settlement elsewhere.

UNESCO figures indicate that there were 281 million international migrants in 2020 (the latest year for which global data has been compiled). Of that total, 169 million were labour migrants and 117 million were displaced people (mostly asylum and refugee claimants).

In 2024, 50% of surveyed Canadians said there are too many new immigrants in Canada



There are about 8 million international students abroad today – a tiny fraction of all migrants

International students, who fall under the category of “temporary migrants,” currently number about 8 million worldwide. This segment is a drop in the bucket, even a rounding error, when you consider the total migrant population of over 280 million people. But international students are nevertheless caught up in the same migration politics. They are explicitly counted in net migration figures in the UK, for example, and in temporary migration figures in Canada.

What can we do?

There is no debate about the following facts:

- Rising numbers of people moving from country to country *do* place pressure on local services, labour markets, and housing markets.
- There remains an undersupply of housing and healthcare services – and persistent concerns about costs of living and the economy in general – in many top study abroad destinations.
- Growing segments of the public in those destinations want to see immigration levels reduced. This has fuelled not only the rise of ultra-nationalist and/or far-right movements, but also more restrictive immigration policies in liberal democracies such as Australia, Canada, and the UK.
- What is sometimes known as the “social licence” afforded to the international education sector has been eroded due to shifts in public support for immigration,

media coverage of unethical practices on the part of a small segment of education providers and agents, and a perception in some circles that the sector is more concerned with revenues than with the well-being of international students.

Across our industry, we all have a role to play in restoring the standing of international education in the eyes of government and the public. The way forward includes a renewed commitment to providing an outstanding study experience to all students: in the classroom, through student services, by securing more and better student housing, and by improving graduate outcomes.

It will be crucial to:

- Build stronger links between recruitment and housing availability;
- Align recruitment with labour market needs;
- Collaborate with industry to improve career outcomes for international students;
- Improve communications with government agencies and the public at large;
- Advocate for international student numbers to be tracked separately from net migration figures.

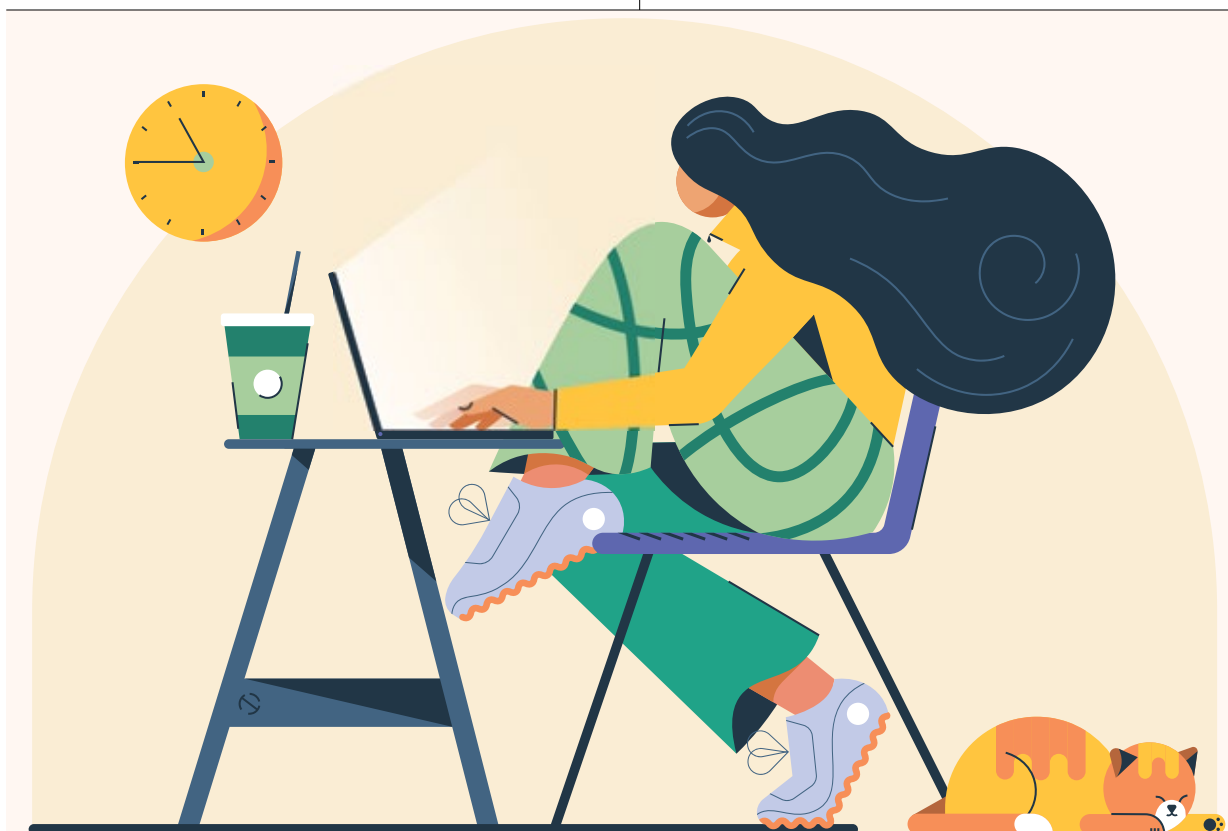
We must work together to push back against policies so sweeping that they ignore the multifaceted contributions of international students to schools and universities and to the innovative potential of economies.



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Reflections on the contributions of international students

“ In 2018, there were 21 billion-dollar US startups with a founder who first came to the US as an international student. Fast forward to 2022, and the number of billion-dollar startups with an international student founder has exploded to 143. Barring any major policy changes over the next three years, by 2025, the US could easily be the home of over 300 billion-dollar companies founded by an international student.”

*ApplyInsights
(Source: ApplyBoard)*

“ International education doesn't just benefit individuals. It's also vital to American diplomacy, to our economic competitiveness, even to our national security.”

Secretary of State Antony Blinken (Source: Forbes)



“ International students pay their tuition, earn their qualifications, and underpin outstanding research. They also help put food on our tables, care for our loved ones, and teach us how to dance. International students help Australia thrive.”

*Phil Honeywood, CEO,
International Education
Association of Australia
(IEAA) (Source: The PIE)*

“ In 2023, over one-quarter of the world's countries (58) are headed by someone educated in the UK, which is second only to the USA (65).”

*House of Commons
Library (Source: UK
Parliament)*

“ International education represents Australia's fourth largest export and its largest service export; employs more than a quarter of a million Australians; funds the lion's share of research at universities; subsidises the facilities, staffing, and programme development for domestic students' studies at university; and provides a much needed part-time labour force for Australia's retail, hospitality, childcare, aged-care, and construction sectors.”

*English Australia, the national
association for ELT providers in
Australia (Source: ICEF Monitor)*

“ Knowing us isn't an imposition – in fact, often the opposite: research by the House of Commons shows 76% of home students believe 'studying alongside their peers from overseas would give them a better worldview' and 85% said, 'It would be useful preparation for working in a global environment.'”

*Joyce Yang, writer and
international student alumnus
(Source: The Guardian)*

“ International students are now a key talent pipeline, representing almost 40% of new economic-class immigrants [in Canada]. They are twice as likely as domestic students to study engineering and more than 2.5x as likely to study math and computer sciences – two top areas of projected labour shortages.”

*Royal Bank of Canada
(RBC) (Source: RBC)*



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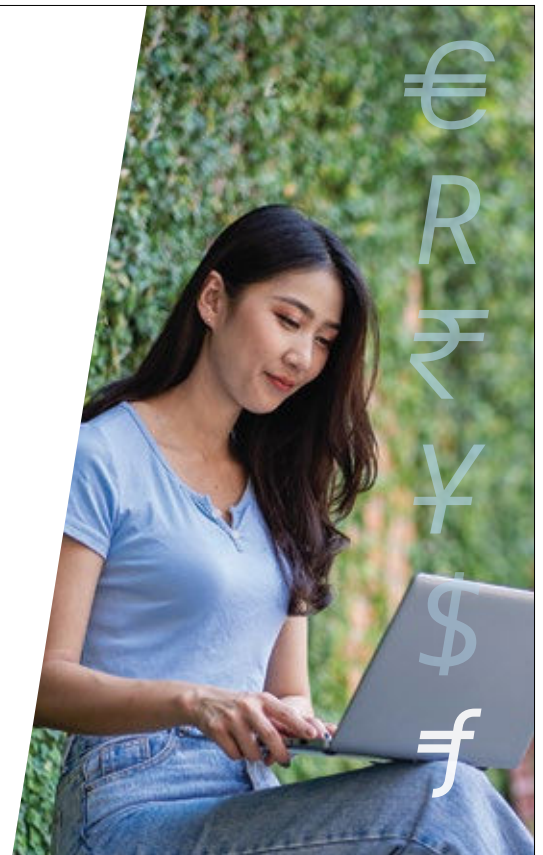
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Opportunity alert: Better payment systems

It should be easy for students to send you money. But is it?

THERE IS A STORY, famous in some circles, about an international student who once sent US\$53,000 to an Ivy League institution in the United States. But something went wrong: the university received the payment, but then it got lost. The university apparently did not have a way to connect the payment to the student who sent it.

Can you imagine the extra work, stress, and confusion that followed? Because the transfer was not attributed to the student at the time of payment, the student spent a difficult few weeks trying to demonstrate that they had, in fact, paid their fees.

That is an admittedly extreme example, but variations on it are common. Consider the hundreds of thousands of students studying abroad today, and you quickly understand the importance of making it simpler for students and families to pay fees across borders, currencies, and financial systems.

The point at which a student makes a payment is a crucial step towards their enrolment, but it is one that often doesn't get enough attention. In fact, if you don't make it simple enough for students to



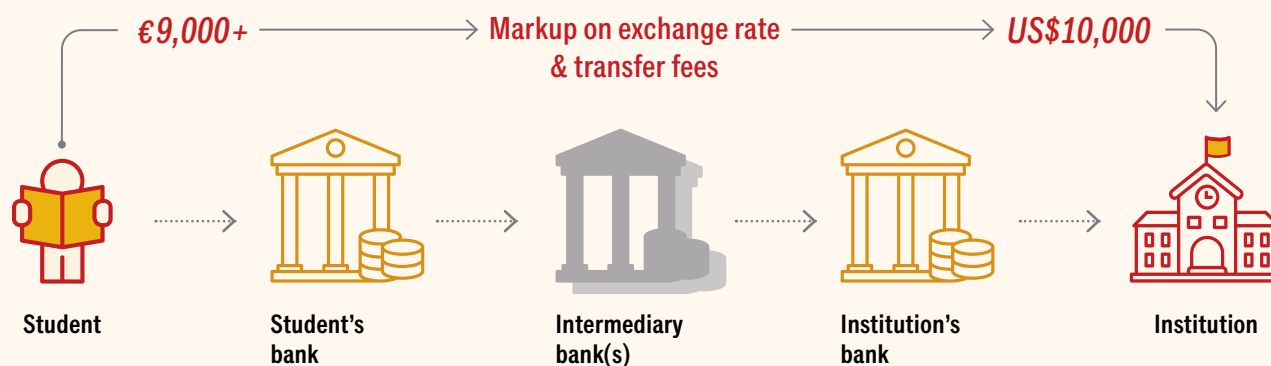
transfer fees to your institution, you may be sacrificing student recruitment and retention.

Financial transactions are part of the student experience

The number of institutions that have been grappling with this problem explains why a new category of payment services designed for the international student sector is expanding rapidly. Service providers in this space – such as Flywire, Convera, EbixCash, Vavita, Flutterwave, TransferMate, and



Conventional funds transfer via banks



Imagine that a student in Germany needs to send US\$10,000 to a university in the US for an upcoming semester's tuition. If the student goes to their own bank to send that transfer, the bank will charge a markup on the foreign exchange

rate and generally an international transfer fee as well. There may well be additional fees levied by intermediary banks along the way, not all of which will be apparent to the student. The result is that even if the student pays an amount equivalent to

US\$10,000 in euros at the start of the process, plus whatever banking fees are billed up front, a different amount might end up in the university's account (if exchange rates change during the transfer or if additional banking fees come into play). In this

case, the student may not even be aware of a balance owing until they arrive on campus, and they certainly will not be able to trace their payment or monitor any additional charges during the transfer.

NexPay – harness technology and expertise in foreign exchange and financial systems to offer students and their families more affordable, faster, and easier ways to transfer funds abroad.

"When we started, the international student was completely neglected in terms of institutions understanding [these students'] payment experience," says Flywire executive vice president of global education, Sharon Butler. "[Institutions] didn't know that

students climbed mountains and swam rivers to get payments to them. You think about all of the investment that people make in marketing and recruitment, but that last step, the payment, is often overlooked."

Localisation is key

The goal is to reduce the complexity of moving money from country to country. Ms Butler explains: "If it is really going to be a great experience for families, it has to be localised to that market. We need to allow



them to pay with something that is familiar. If it is easy and familiar, that is a great experience."

Localisation can take many forms. For example:

- A Chinese student who routinely uses Alipay Wallet might also want to use Alipay to pay international school fees.
- The parent of an Indian student who needs to file tax declarations when making overseas payments might appreciate a payment process that provides them with those documents and prompts them to complete and file them.

Beyond transfers

New systems can also eliminate the need to transfer funds between countries, by instead "netting out" funds across foreign currency accounts operated by payment service providers. NexPay CEO, Piew Yap, explains:

"Say a student in Vietnam wants to send AUD\$20,000 to a university in Australia. Instead of a traditional wire transfer, we leverage our network of held funds in multiple countries. For instance, if we have sufficient AUD funds in Australia, we simply debit the equivalent amount in VND from our local account in Vietnam and credit the university's account in Australia with AUD\$20,000. This minimises transfer times, reduces transaction costs, and avoids the complexities of cross-border remittances."

Speed matters

Speed in payment processing is another top goal for every payment provider, and reconciliation – which is the critical step of verifying payment X was made by student Y – can often slow things down. Many experts see blockchain technology as a solution.

"I believe blockchain technology will revolutionise the foreign exchange business," says Mr Yap. "One of the most significant impacts is the potential for near-instant settlement times, eliminating the traditional delays associated with cross-border payments. Additionally, the decentralised nature of blockchain can reduce the risk of fraud and improve the overall security of transactions. As blockchain adoption grows, we anticipate a more efficient and streamlined foreign exchange market."

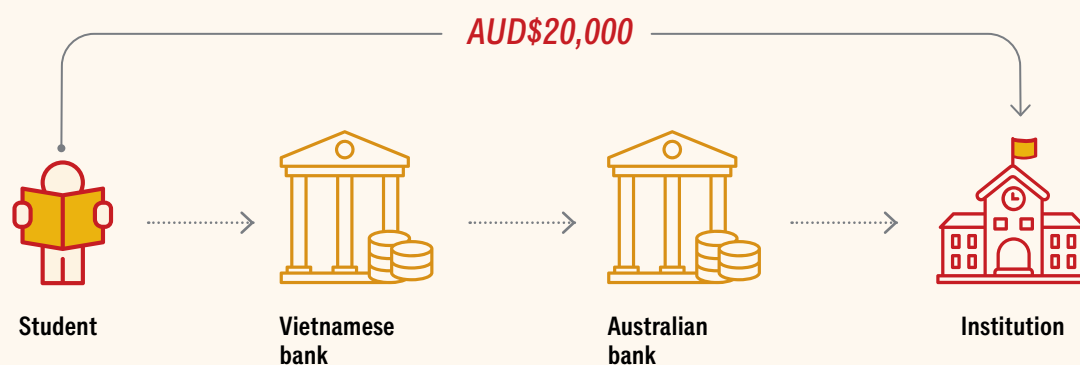
That speed of processing is more than just a matter of customer service or expedited reconciliation.

What is a blockchain?

A blockchain is a distributed database shared across a computer network. Because there is no way to change a block, the only key point of trust in the system is the point where a user [or computer program] enters data. This reduces the need for trusted third parties along the way, thus improving transaction time and costs.



“Netting out” payment process



The student deposits equivalent fees in Vietnamese currency. The payment service debits the Vietnamese account and credits the Australian account. The payment is remitted to the Australian institution.

Not everything can be simplified, but specialised payment services are making transactions easier

It can also affect how quickly students can receive admissions documents to support visa applications, be eligible to register for courses, and arrange housing.

Set exchange rates

Much reporting and reconciliation is automated within specialised payment systems, and this opens the door to new payment models, such as instalment programmes. “We offer flexible payment plans to accommodate the financial situations of students,” says Mr Yap. “For example, a student might choose to pay their tuition fee in up to 48 instalments [in advance of programme start], with the exchange rate set at the beginning of the

payment plan. This allows them to manage their cash flow more effectively, knowing that their rate won’t change throughout the period.”

Simple solutions

Sending funds internationally has always been a complex business with significant compliance and regulatory requirements and many other moving parts. Not everything can be simplified, but specialised payment services are making transactions easier, faster, more affordable, and more transparent for students, parents, agents, and institutions alike. As such, they represent an important new lever for improving international student experience and satisfaction by reducing transactional friction.



Facts & Figures

Stats that provide fascinating insights into our industry right now



Top 5

The 5 best-performing types of content marketing are video, short-form articles, success stories, long-form blog posts, and case studies (Source: Forbes Advisor).

#1

Surveyed marketers said that social media is the most common content area in which they use AI tools, followed by emails and blog posts (Source: HubSpot).

95%

Marketers using AI tools were 95% more likely than those who weren't using AI to say their marketing strategy was very effective in 2023 (Source: Hubspot).

More than half

Employment outcomes (52%) and internships (54%) are the top priorities for international students researching schools and programmes (Source: Keystone Education Group).

1 in 6

About 1 in 6 students surveyed in March 2024 said they had changed their destination preference in the past 12 months (Source: AECC Study Abroad Consultants).

Three-quarters

Study abroad decisions are increasingly focused on cost, according to 75% of agents (Source: INTO Global Agent Survey 2024).

24%

The US – chosen by a quarter of surveyed international students – emerged as the preferred study abroad destination in March 2024 following immigration policy announcements in Australia, Canada, and the UK (Source: IDP Emerging Futures).

6 in 10

In June 2024, more than 60% of prospective international students said that if Australia's visa application fee were to rise (which it then did), they "might" or "would" change their choice of destination (Source: IDP).

400,000

Japan aims to attract 400,000 students by 2033, and other Asian destinations such as Taiwan (320,000 by 2030) and South Korea (300,000 by 2027) are also setting ambitious targets (Source: Government statements).

250%+

The rate of increase of prospective international students applying to 4 or more programmes in 2024 versus 2023 was over 250% (Source: Keystone Education Group).

63%

Almost two-thirds of the world's population now consider climate change impacts when deciding where to live and work, and what to buy (UN Peoples' Climate Vote 2024).

2 years

In January 2024, the Canadian government capped new international study permits for at least 2 years, projecting a 35% decrease in issued permits in 2024 that is tracking to be much steeper (Source: IRCC).

£60+ billion

From 2019/20 to 2023/24, the UK's Graduate Route programme led to 32,000 additional international first-year enrolments and contributed £62.6 billion (net) to the national economy (Source: Universities UK/ London Economics).

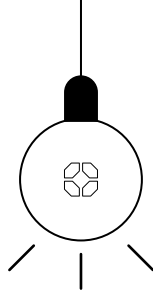
+8.5%

Ireland's English-language sector had record-high enrolments in 2023 (8.5% higher than before the pandemic), as did Australia's English-language training providers (Source: Marketing English in Ireland and Australian government data).

2 of 5

QS considers 2 Canadian universities, University of Toronto (#1) and University of British Columbia (#4), to be among the world's top 5 most sustainable universities, along with University of California, Berkely (#2), The University of Manchester, UK (#3), and The University of Auckland, NZ (#5) (Source: QS).

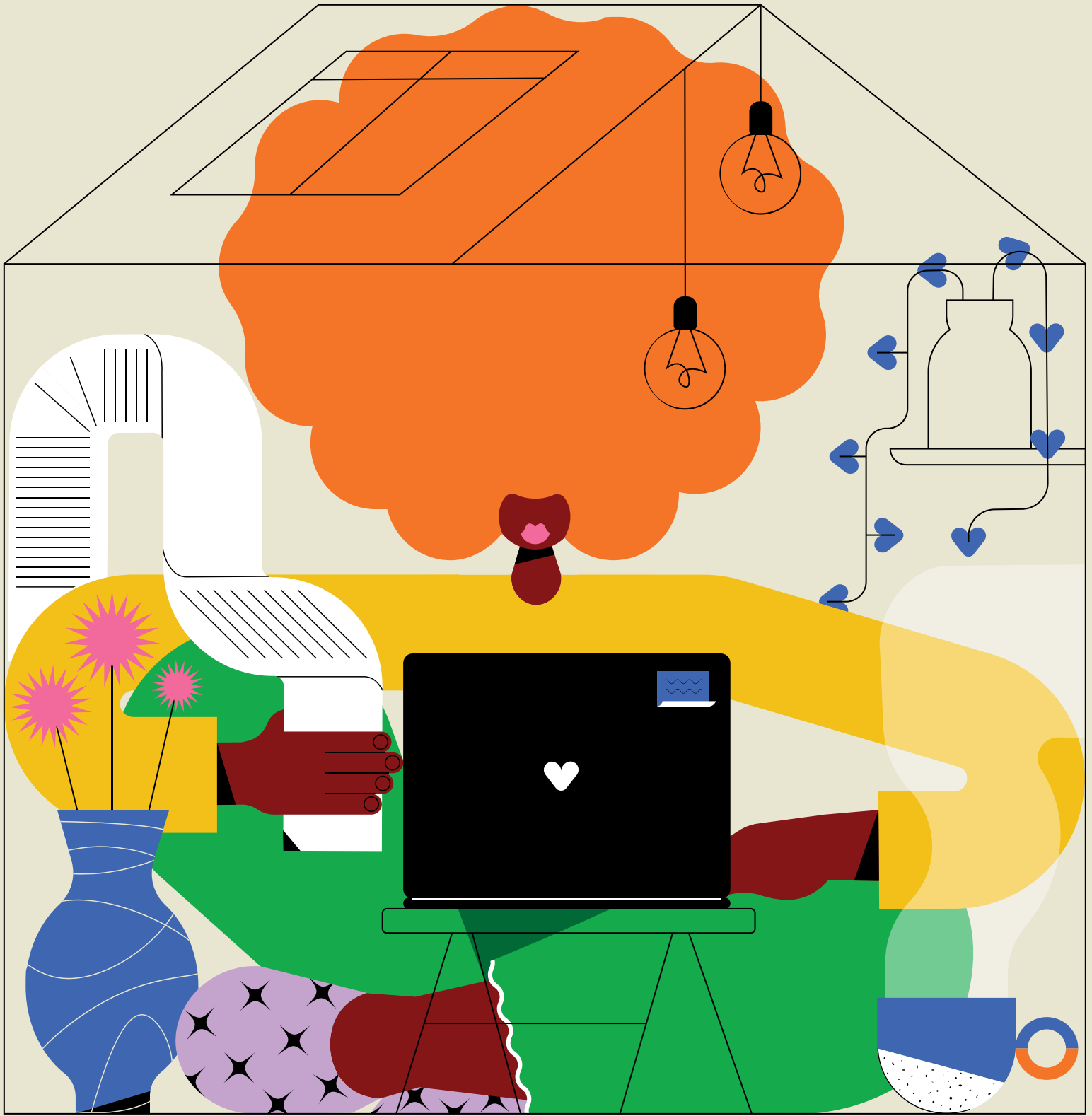


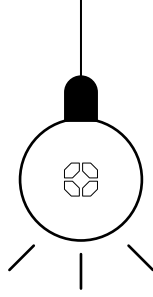


Midway through the 2020s, it is astonishing how much has changed since we braved, and then emerged from, the COVID-19 pandemic. International student demand for study abroad bounced back quickly, remains strong, but is diffused across more destinations. There is more openness to alternatives.

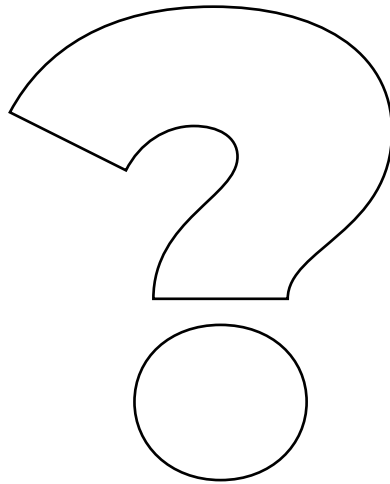
More understanding of how programmes link to career opportunities. Targeted marketing and admissions strategies – including a greater focus on student fit – are much needed. It's a new era, and it's time to listen more, sharpen screening, collaborate, and embrace the power of data.

What next?

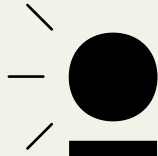




What do students want



Research highlights the importance of quick response times and programmes that provide an extra edge in the marketplace



If you think about it, one of the most pressing questions we all want answers to is, “What do students really care about when making study abroad decisions?”

The answers will differ based on factors including a student's country of origin, degree of financial security, and intention to return home or seek permanent residence in a new country. But if we take a macro lens and explore significant global research conducted this year, we get insights into common themes to consider when recruiting and hosting students.

Practical priorities

Keystone Education Group's *State of Student Recruitment 2024* survey asked more than 27,000 students not just what they consider when comparing institutions, but also what matters to them in a programme. If you look at the chart on page 33, there are some clear implications. For example:

At the institution level:

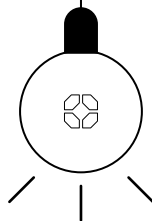
- Gather and communicate data on graduate employment outcomes. If this is hard to come by, feature successful alumni in marketing campaigns.
- Highlight rankings. If programme/field rankings are more impressive than institutional rankings, focus on those.
- Understand that accommodation is a top five issue for students researching institutions. Good student housing is a competitive differentiator.

At the programme level:

- Programmes become more competitive if they have an internship/work placement component. This priority was cited 46% more in 2024 than in 2023.
- Students need to know about funding and fees sooner rather than later. Don't make them hunt for answers in these areas, and don't let them (or you) be surprised late in the game when they realise they can't afford your programme after all.

Speed matters

One of the statistics we saw cited the most this year is Keystone's finding that 85% of students expect a response within 24 hours – a 35% increase



Top factors influencing student choice

...in a school

52%

Employment
outcomes

49%

Reputation
& ranking

33%

Unique/
specialist
programmes

30%

International
community

30%

Accommodation

...in a programme

54%

Work
placement/
internship

49%

Funding
opportunities

47%

Affordable
fees

46%

Opportunities
for networking

17%

Teaching
staff

Source: Keystone Education Group's
State of Student Recruitment Report
(2024)



Programmes become
more competitive if
they have an internship
or work placement
component

Mystery shopping highlights

60%

felt all their questions were answered

50%

got a warm and friendly feel

45%

said their enquiry experience was "excellent"

33%

did not feel persuaded or inspired

25%

did not receive a response

20%

did not get a follow up

over 2023. What's more, 17% expect a response immediately, up 55% since 2023.

Student recruitment firms Edified and Uniquet collaborated on the 2024 edition of the *Enquiry Experience Tracker* mystery shopping survey, which found that too many student leads are being neglected. Six international student personas "shopped" 102 institutions in Australia, New Zealand, Europe, and North America. They submitted their questions through enquiry forms, live chat, social media, email, and peer-to-peer platforms. The highlights on the left show where there is room for improvement.

Efficient staff structures, a well-implemented customer relationship system, and AI tools can help to respond to the need for speed in international student recruitment (see page 64 for more).

Communication is crucial

IDP Education conducted important research this year looking at how much international students are influenced by government policies in destination countries. The answer: a lot, as you can see on page 35.

Institutions and associations must continue to advocate for responsible policies that address immigration needs without damaging the ability of countries to attract talented international students. At the same time, institutions and agencies must endeavour to communicate policies in a timely and accurate manner to students and to provide expert advice on applying to programmes that offer them the highest chance of being accepted.

Open to alternatives

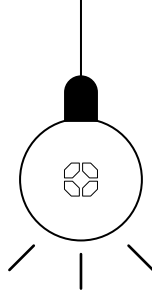
During the pandemic, students got used to having back-ups to their preferred destination – and to thoroughly researching border policies, vaccination and test requirements, and rules about on-campus study. These research habits are proving useful again.

In response to quickly changing immigration environments, students are:

- Exploring alternative places to study, researching cost of living, fees, visa rules, etc.;
- Looking into programmes tied to labour market demand. Canada and New Zealand are two examples of countries that now tie better post-graduation work rights to programmes leading to specific occupations (and those occupations are not always STEM-based).

In addition, a 2024 QS survey of more than 11,000 international students interested in business schools found that demand is spiking for programmes that:

- Include a focus in other fields, reflecting the niche and increasingly specialised needs of global employers;



The impact of policy

54%

of prospective and applied students are aware of policy changes in their intended study destination

41%

of prospective students are reconsidering their study abroad plans, unsure how policies will affect them

37%

of prospective and applied students say policy updates have a high impact on their study abroad decisions

Source: IDP Education's Emerging Futures research (2024)

- Have a sustainability orientation. The survey found that an institution's commitment to sustainable values (including the UN's Sustainable Development Goals, or SDGs) is now a top three factor affecting students' choice of institution.

The QS research suggests that there is an urgency to informing students about niche potentials of programmes. Think of ways to market programmes in a creative light that goes well beyond mere description.

Eager for ROI

Students choose to study abroad for many reasons, but research shows time and again that employability is the top driver. For the past five years, for example, "future career impact" has topped the list of student motivations (96%) on i-graduate's International Student Barometer (ISB). This year, the ISB included 122,975 international students studying at 155 institutions in 24 countries, and as always, its data is definitely worth paying attention to.

More than half of students keep up with policy updates that would affect them in major destinations

“When graduates can unpack what they have gained abroad, employers become keener in hiring that person.”

— Nannette Ripmeester



Nannette Ripmeester, i-graduate's director of client services for Europe and North America, wrote in *ICEF Monitor* earlier this year:

“What can institutions and providers do to support this quest for employability? Take employability skills seriously. Globalise your curricula, build in global orientation and skills training because that career workshop at the end of a study programme will not be enough to create employable graduates. Maybe it all starts with the understanding that, for recruitment of new students, you need to start at the end of the student journey by taking steps to ensure better graduate outcomes for your students.”

Ms Ripmeester also believes that institutions – especially through their career services department – must help students to maximise the impact of their study abroad experience:

“When we asked employers [in two Erasmus Impact studies] if they recruit students simply because they have studied abroad, ... we found there is no guarantee that study abroad in itself makes someone employable – there is more needed to make that happen. For starters, a graduate should be able to explain what they have gained while being abroad and how these skills can support them in their new role. When graduates can unpack what they have gained abroad, employers become keener in hiring that person. When that graduate can ‘repackage’ their skills in the language of a hiring manager (word of warning: there is no one-size-fits-all approach – this may differ per sector and per country), an employer is more likely to be interested in that graduate. After all, study abroad provides, by its very nature, situations where people develop the skills sought after by the future world of work.”

Key takeaways

There is a theme running through this issue: think like a student. Think about their priorities, how they make decisions, their demand for immediate answers, and their increasing willingness to consider alternative destinations and programmes. Consider their need to show employers why investing in study abroad was such a good decision. Successful alumni are perhaps the best asset you have. Their success can drive the sustainability of your programmes, your marketing, and your reputation in key target markets.



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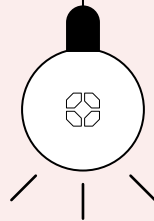
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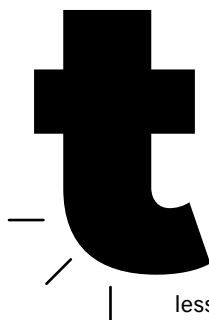
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The way forward



Shifting to more strategic and student-centred recruitment



his year's sweeping policy changes in Australia, Canada, and the UK have created major challenges and confusion for thousands of schools, universities, agents, and students. But they also underline the significance of goals that many in our industry have already been pursuing, such as improving student experience and being more deliberate and targeted in marketing.

Important conversations are taking place across our sector about lessons learned from the events of this year and how to move forward, including at the inaugural ICEF Monitor Global Summit that took place in London in September 2024.

This article is based on the dialogue at that event, and even if you haven't been directly affected by volatile policy settings, read on for insights on fresh approaches to recruiting and hosting foreign students.

Focus on student fit

Without doubt, meeting enrolment targets and diversifying sending markets remain essential goals. But there is a growing consensus that there must be an overarching mission to attract students most suited to programmes, national policy parameters, and economic trends. This mission can be accomplished by placing a greater emphasis on recruiting for student fit.

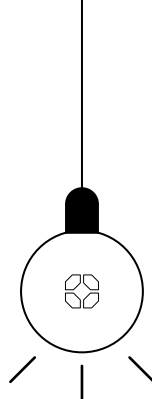
This approach involves creating protocols and processes designed to build a carefully targeted prospect pool. Admissions offers are then sent only to students who have met criteria qualifying them as likely to acquire a study visa and complete programmes successfully.

At the end of the day, students enrolled in programmes that match their goals, academic preparedness, and financial means are much happier than students who – because they weren't well screened – soon struggle with courses, mental health, language issues, cultural adjustment, or a higher cost of living than they can afford.

Sharpening the recruitment lens makes particular sense in destinations that have witnessed rapid growth in international student numbers over the past few years. That growth put pressure on housing, programme capacity, and student support services. It has made it more difficult for some institutions to apply quality controls and improve graduate outcomes.

How to measure success

Dr Fanta Aw, executive director and CEO of NAFSA, says that “economic value is absolutely important, that is indisputable, but we have to put students at the centre.”



She elaborates: “This means our institutions need a student success model [to guide them]. Outcome data is absolutely important. Pathways to employment are absolutely important. Fit is very, very important. And we’ve been very clear with our institutions: Do not bring international students if you do not have the structures in place to do right by those students and their families.”

Students have their own criteria

Joanna Kumpula, head of international education and integration support at Tampere University in Finland, points out that students, too, are thinking more carefully about fit: “International students are becoming much more discerning ... they are now looking for niche programmes and specific career paths, and institutions must recognise these individual goals rather than relying on broad assumptions.”

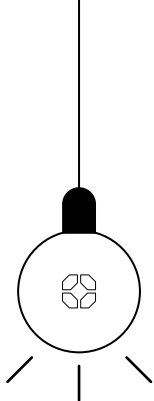
Better screening leads to better outcomes

Marie Braswell, associate vice president of global strategy and market development at Canada’s Centennial College, says: “Institutions often look at student success only in terms of enrolment numbers, but we need to assess whether students are achieving academically and integrating socially.” Ms Braswell emphasises that diversification strategies remain important, but at the same time, “We also have to think about economic feasibility: Are students able to meet the cost-of-living requirements for a visa?”

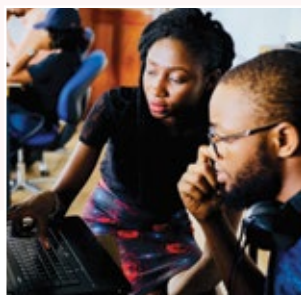
Judith Lamie, pro vice chancellor for international engagement at Swansea University in the UK, explains that firm entrance requirements are required to ensure an institution is selecting students who are ready for programmes: “We should be careful about lowering entry standards for international students ... this is not sustainable and sets them up for failure.”

“We need a new narrative around international higher education and the global role of universities. It’s about foregrounding the academic, social, and cultural benefits that come from internationalisation, and bringing those to the fore in the public discourse and public policy.” — Jamie Arrowsmith, director of Universities UK International





A focus on student fit works for everyone



Benefits to institutions

- ▷ Clarity on what to promote in different countries/ regions and to different types of students;
- ▷ Ability to provide clearer guidance to agents, who can then help to screen leads;
- ▷ Improved visa acceptance rates;
- ▷ Greater stability for enrolment management because accepted students are more likely to receive visas;
- ▷ Productive conversations with employers because labour market needs have informed recruiting.

Benefits to prospective students

- ▷ Better study abroad experiences for students who are academically prepared and have sufficient funds;
- ▷ More clarity on what an institution and country offers them;
- ▷ Advice about which programmes provide clear pathways to post-graduation work opportunities;
- ▷ Information about pathway programmes and language training should these be needed for admission.

Ms Braswell and Ms Lamie's points emphasise that offering a "quality" experience starts well before a student is admitted. It starts as soon as the student makes contact, whether through the website, social media, an agent, or institutional staff.

Strengthening the narrative

"We know that demand for international student mobility is going to be there," says Bobby Mehta, pro vice-chancellor for global engagement at the University of Portsmouth in the UK. "Understanding where it is, what it is, and how we can work together to [recruit effectively] in a safe, compliant, and organised way is the challenge we need to address as we go forward. [This approach] will provide national and global assurance of international education's broader value."

The shift from quantity to quality

A shift to student-fit recruiting may change the amount of budget or staff time allocated at various points along the enrolment funnel – especially at the beginning of the transition. Preparing for recruiting will become almost as important as recruitment campaigns, because:

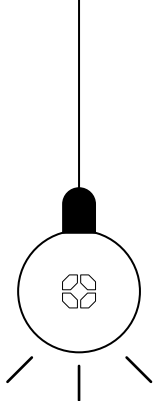
- Ideal student personas will need to be developed;
- Marketing and admissions staff must be crystal-clear on policies, education systems, and assessment standards in target markets;
- Agents must be thoroughly vetted and receive excellent training;
- Marketing materials, social media, and website content and structure will likely need tweaking to encourage only best-fit students to apply;
- Student journey mapping and CRM training will be essential to keeping all teams collaborating and nurturing the most promising leads (see page 64).

Once the shift is underway, international recruitment will be more efficient than any kind of volume strategy. Along with a promising prospect pool, you will also have much better ratios of students approved for visas, completing programmes, landing high-skilled and well-paid jobs, and transforming into powerful alumni.

What's more, your admissions staff can concentrate on reviewing higher quality applications rather than sifting through mountains of unsuitable ones.

Don't forget the data

Student fit is also about better data collection and analysis so you can make evidence-based decisions to drive your recruitment plans and track



“[Agent/counsellor] training is hugely important. Every representative has to be trained comprehensively because ultimately, they’re the ones talking to the students.”

— Andrew Bird, chief marketing officer, Southampton Solent University



what is and isn't working. Which overseas schools and cities are yielding the ideal student profile for your programmes? Which agents? If you don't track what is and isn't working, the result will be sub-optimal.

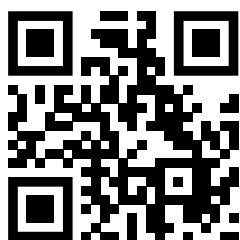
“Recruitment is now much more data-driven,” says QS chief executive officer Jessica Turner. “Knowing employer needs is crucial for aligning recruitment with labour markets.”

Collecting data on post-graduation outcomes – outcomes that will improve as you commit to student-fit marketing – is also incredibly important. This is because:

- Students want to know what proportion of graduates go on to get jobs – it proves ROI;
- Employers are impressed by good graduate outcomes;
- Peak body associations are in dire need of more data to show governments the value of international education – and that means:
 - Quantifying value in more ways than revenue or economic contribution;
 - Demonstrating that international students are indeed essential to filling skills gaps and innovation.

NAFSA's Dr Fanta Aw underlines the need for better data by saying: “As international education increasingly works to link student mobility to larger economic goals, the necessity of data to help address skills gaps and meet labour market demands is increasingly obvious.”

Dr Aw provides examples: “The fact that we can cite that one in four of the United States' billion-dollar start-ups was founded by former international students is powerful. We can show that 42% of the major companies making advances in AI have been established by former international students. That's important. We use this data to prove the value of international education.”



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- Dorm and Homestay accommodations
- Preparation for postsecondary success
- In House Accommodations Coordinators

Study in Canada

Your Assurance of Quality Kindergarten to Grade 12 Education



**Hastings and Prince Edward
District School Board**
Belleville, Ontario
+1-613-966-1170
isp@hpedsb.on.ca
[HPE - ISP Website](http://HPE-ISP-Website)

**Welcome to a World of
Opportunities in a Highly
Supportive Environment!**

- Exceptional academics, athletics & extracurricular activities
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- Coordinator meets students weekly at school
- Full range of programming to meet the interests & needs of each student
- State of the art facilities, highly specialized teachers
- Designated ESL & Guidance support
- Full year or semester offerings
- Monthly excursions & events



**Holy Spirit Catholic
School Division**
Lethbridge, Alberta
+1-403-331-4458
international@holyspirit.ab.ca
holyspirit.ab.ca/educational_services/international

**Embrace the Canadian
School Experience in
Sunny Southern Alberta!**

- Our Catholic Community welcomes everyone!
- Division owned Homestay Program
- ELL Programming, Core Subjects, Options
- International Student Trip and Activities
- Athletics, Arts, Clubs & more
- Student Ambassador Program
- Close to the Rocky Mountains & USA Border



**Kamloops-Thompson
School District**
Kamloops, British Columbia
+1-778-471-6075
kbrewer@sd73.bc.ca
ispcanada.ca

**The Natural Choice
to Study in Canada**

- Innovative educational excellence
- Pathway programs
- Individual support
- Specialized educational programming
- Discover BC through weekly activities (best in Canada)
- Amazing climate
- District managed homestays



Langley School District
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+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.



Lester B. Pearson School Board
Montreal, Quebec
+1-514-798-8787
IPDyouth@lbpsb.qc.ca
lbpsb.qc.ca/international

**Grow in an environment that will
challenge you and provide an
enriching educational experience.**

- Innovation and immersive learning experiences
- Affordable tuition
- Linear school year
- Extracurricular activities for all interests: sports, arts, robotics, etc.
- Community focused
- Bilingual environment
- Montreal voted #1 city in North America for students!

Your journey awaits!



**Lethbridge School Division
International Services**
Lethbridge, Alberta
+1-403-380-5323
International.Services@lethsd.ab.ca
lethsd.ab.ca/departments/international-services

Succeed With Us!

- Excellence in Academics
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Maple Ridge-Pitt Meadows SD42
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inted@sd42.ca
inted.sd42.ca

**Join us for an Authentic
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- Outstanding academic experience
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- English language learning support
- Supportive in-house homestay program



**Medicine Hat Catholic
Board of Education**
Medicine Hat, Alberta
+1-403-527-2292
international@mhcbe.ab.ca
international.mhcbe.ab.ca

**Study in Canada's
Sunnier City!**

- Affordable tuition
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- Athletic & Recreation opportunities
- Achieve your Alberta Diploma!
- A safe and welcoming community
- Full activities program
- Banff & Southern Alberta excursions
- 3 month, 5 month or 10 month opportunities



**New Brunswick
International Student Program**
Province of New Brunswick
+1-506-453-8300
jeff.holder@gnb.ca
nbisp.ca

**Your Unforgettable Adventure
Starts in New Brunswick**

- Excellent academic programs for students ages 11 to 18
- Access to sports and arts/music programs
- A safe and welcoming Canadian Experience
- Management of our own homestay program
- An active and social lifestyle
- Access to over 40 schools in a mix of urban and rural settings
- Experience four seasons of adventure



**Newfoundland International
Student Program**
Newfoundland & Labrador
+1-709-728-6833
mark.ward@niseip.ca
niseip.ca

**Discover yourself in
Newfoundland, Canada!**

- NISEP has its own homestay program
- Over 500 Brazilian student participants
- Short-term, one semester and full-year programs
- Improve written and spoken English skills through a number of academic and ESL supports
- IB, AP, Fine Arts, Academic and Athletic programs and clubs across the province



Canadian Association of
Public Schools - International

Association canadienne des
écoles publiques - International



OTTAWA-CARLETON
DISTRICT SCHOOL BOARD

**Ottawa-Carleton
District School Board**
Ottawa, Ontario
+1-613-239-0314
ocenet@ocdsb.ca
studyottawa.ocdsb.ca

We Welcome the World

- Study in the Capital of Canada
- Academic Excellence
- ESL program
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- Arts High School
- Welcoming homestay families that speak English, French or they are Bilingual
- Safe city with many activities throughout the year



**OTTAWA
CATHOLIC
SCHOOL BOARD**

Ottawa Catholic School Board
Ottawa, Ontario
+1-613-691-8805
discover@ocsb.ca
international.ocsb.ca

Where the world meets

The Ottawa Catholic School Board provides faith-based education with a focus on community, wellness and innovation. We support our international students in welcoming environments and provide a great pathway to prepare for top post-secondary studies in North America. Our Deep Learning approach helps students develop global competencies: citizenship, character, communication, critical thinking, collaboration, and creativity.



Pembina Trails
International Student Program
Winnipeg, Manitoba, Canada

**Pembina Trails
School Division**
Winnipeg, Manitoba
+1-204-488-1757
tcordeiro@pembinatrails.ca
pembinatrails.ca/isp

'Accomplish Anything' in the heart of Canada – Winnipeg

- Quality education at a very affordable price
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- Enjoy all four seasons
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- Excursions
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Powell River School District
Powell River, British Columbia
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Brin.L.Bymin@sd47.bc.ca
sd47.bc.ca

Powell River eco-education "where learning comes naturally"

- High School graduation and college credits
- 100% Canadian English speaking
- One international student in each class of 25 Canadian students
- 100% of graduates attend universities!
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Dunmore, Bow Island, Foremost, and Oyen, Alberta
+1-403-527-5516
andreapillman@prrd8.ca
sites.google.com/view/internationalstudentprogram/home

Ignite Minds, Kindle Hearts, Forge Futures

- A safe and welcoming Canadian Experience in Southeastern Alberta, in a mix of urban and rural settings
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- Foremost Rodeo Academy
- Equine Program
- South Alberta Hockey Academy
- Badlands Baseball Academy
- Management of our own Homestay Program
- Monthly Activities
- Experience Four Seasons of Adventure



**Qualicum
SCHOOL DISTRICT**
International Student Programs

Qualicum School District
Parksville, British Columbia
+1-250-951-0857
isp@sd69.bc.ca
schoolincanada.ca

Imagine yourself here! On beautiful Vancouver Island

- Academic/ELL support/ Tutors
- Extensive student activity and excursion calendar
- Supportive, English speaking homestay families
- Year round moderate climate
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**Red Deer Catholic
School Board**
Red Deer, Alberta
+1-403-341-4423

international@rdcrs.ca
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
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**River East Transcona
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Winnipeg, Manitoba
+1-204-667-7130
intl@retsd.mb.ca
intl.retsd.mb.ca

The Right Choice!

- Multiple Diploma and Certificate options from Advanced Placement to Fashion Design
- 25 years placement experience, 42 schools
- Safe, in the heart of Canada
- Wide selection of program choices and electives
- Manage our own homestay program
- Immersion guaranteed!
- Full Year, Semester and Short-term academic programs



**Saskatoon International
Education**
(Saskatoon Public Schools)
Saskatoon, Saskatchewan
+1-306-683-8425
sie@spsd.sk.ca
SaskatoonInternationalEd.ca

Unique Programs for Unique Students

- Outdoor School, Media, Trades, Engineering, Social Justice, Ecology; Soccer, Softball, Dance Academies; IB, AP.
- Personalized service ensures engaging experiences for all
- In-school advisors directly support students
- Welcoming, experienced host families and coordinators
- Lifelong relationships and memories



**Simcoe County
District School Board**

**Simcoe County District
School Board**
Simcoe County, Ontario
+1-249-388-2981
studyinsimcoecounty@scdsb.on.ca
studyinsimcoecounty.ca

Study in Simcoe County — Learn Here, Succeed Anywhere!

- Academic Year, Semester & Short-Term Programs
- Academic Excellence
- ESL Support
- Designated Guidance Counsellor
- Athletic Teams & Clubs
- Safe Communities
- Supportive Homestay Families
- One Hour North of Toronto
- Orientation Program and Student Excursion program administration

Study in Canada

Your Assurance of Quality Kindergarten to Grade 12 Education



Sir Wilfrid Laurier School Board
Montreal's north shore
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isp@swlauriersb.qc.ca
bilingualtraining.ca/international-students/apply

An English education, a bilingual future!

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- We offer payment flexibility and medical insurance coverage



Sooke School District
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sookeschools@sd62.bc.ca
sookeschoolsvictoria.com

Many Nations. One Remarkable Experience.

- Located in greater Victoria on Vancouver Island
- New, modern secondary school facilities
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- District-run Homestay accommodation
- Sports Academies: Soccer, Dance, Golf, Equine, Climbing
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- Outdoor Education, French Immersion, Video Game Design, and more!



Sudbury Catholic School Board
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cometostudy.ca

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- An authentic Canadian experience
- High-quality education
- A safe and caring community
- Experiences to support strong English-Proficiency



Vernon School District
Vernon, British Columbia
+1-250-549-9263
admissions@sd22.bc.ca
vernoninternational.ca

Take flight!

Experience world class academic programs, amazing activities, terrific skiing/snowboarding, great homestay families, beaches, lakes, and a true Canadian lifestyle.

- ELL support in all schools
- top-quality academics (soccer, skiing, golf, volleyball, dance, baseball, hockey)
- safe, close-knit city



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
- ESL Supports in all schools
- School District Custodianship
- Welcoming Host Families
- Full Year, Semester and Short-term academic programs
- Short-Term Cultural Immersion programs for School Groups
- One hour West of Toronto



Winnipeg School Division, International Education Program
Winnipeg, Manitoba
+1-204-789-8086
international@wsd1.org
wsdinternational.ca

Start as Strangers, Leave as Family

- Strong programming, relationship building
- Strong student support
- Program managed Homestay
- Committed to student diversity, equity and inclusion
- Economical choice
- Winnipeg, small city with a big-city feel
- IB, Advance Placement, French Immersion Programming and ESL Programs
- Numerous extracurricular opportunities



York Catholic District School Board
York Region, Ontario
+1-905-713-1211
ie.ycdsb.ca

Your gateway to success!

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

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

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Apprendre

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Global

Education

Integrity

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Vivre et apprendre au Canada

Représentant plus de 1100 écoles secondaires publiques d'un océan à l'autre

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Connexions

Succès

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Where Excellence is the Standard

rutherfordschool.ca/gvl

Innovative online school offers new pathways – for both students and partners – to high school study in Canada

Sparked in part by the widespread adoption of online learning during the pandemic, we continue to see explosive growth in virtual high school programmes worldwide. The factors behind that surge are clear, and they include major improvements in the technologies and practices that support online learning, massive demand for high-quality, international high school programmes, and expanding adoption of online learning by governments and other stakeholders around the world.

“Virtual high schools are opening up new opportunities for students around the world,” says Dr Igor Sarjinsky. “This is leading us to new models for teaching and learning as well as new ways for students to prepare to come to Canada to study at either the high school or post-secondary level.”

Dr Sarjinsky would know: he is the principal and founder of the Rutherford School, a private high school based in Toronto offering grades 9 to 12 with a strong focus on STEM subjects (science, technology, engineering, and math). During the pandemic, Rutherford introduced its online division: Canada Zoom School

(CZS). Like Rutherford, CZS is fully accredited by the Ontario Ministry of Education, meaning that graduates from the school are awarded a Canadian high school diploma, an invaluable foundation for post-secondary study or even permanent residency in Canada.

This year, Rutherford is launching a new online division alongside CZS called Global Virtual Learning (GVL). GVL will draw on the same curriculum and learning system as Rutherford and Canada Zoom School, but what makes it different is that all GVL programmes will be delivered in collaboration with local partners around the world.

Dr Sarjinsky explains: “Our vision for Global Virtual Learning is that it is an equal partnership with locally based agents or educators in a network of sites around the world. We will provide the live streaming school programme from our head office in Toronto, and the local partner will provide the classroom facilities, student support, and social or extra-curricular activities. The local GVL site will not be registered as a school but as a virtual learning centre, which reduces the administrative burden and the need for more extensive regulatory compliance.”

Under this model, students of different ages and grade levels will study together in the same facility, but will of course all be able to follow grade-appropriate course material in their virtual classrooms. That flexibility opens the door to providing a wide variety of students with access to a high-quality Canadian secondary school programme. For example, GVL can serve as a university pathway programme for high school leavers or for those who have been out of high school for a few years. It can also be a foundation or preparatory programme for students transitioning to post-secondary education in Canada. Students gain the advantages of a Canadian diploma, a good grounding in a Canadian high school curriculum, and the ability to reference their Canadian study experience when it comes time to apply for their study permit to pursue further studies in Canada.

With all those advantages in mind, GVL is projecting that its network will scale to 50 learning centres around the world by 2027. “It’s like a franchise to operate a Canadian school in your home country,” adds Dr Sarjinsky.



TRENDS

Big-picture strategies and new rules affecting the families of international students



UNSPLASH / DAIGA ELLABY



Internationalisation goals in 10 leading destinations

Official government strategies say a lot about how foreign students factor into national immigration and economic development goals



Ask 10 people working in our industry what “internationalisation” means, and you’ll get 10 answers. For some, it simply means attracting a certain volume of foreign students to a campus. For others, the goal is broader: programmes, campus, and partnerships are designed to have a global flavour.

At the government level, the concept of internationalisation changes over time and according to considerations that include foreign enrolment growth rates, labour market gaps, demographics, geo-politics, domestic politics, and the need to participate in global science or research projects.

The official international education strategies highlighted on pages 54 to 56 emphasise the great extent to which foreign students figure into larger narratives around globalisation, security, and soft power. As those narratives evolve, so too do the strategies.



Australia

*Strategy for International
Education 2021–2030*

Priorities

- Pursue sustainable growth¹
- Diversify student nationalities
- Meet national skills needs
- Enhance student experience
- Improve global competitiveness

International enrolment goal

No, rather a cap on the number of new students beginning in 2025.

Target markets

Not specified.

International student population (2023)

786,900 (+27% y-o-y).²



Canada

*International Education
Strategy 2019–2024³*

Priorities

- Encourage Canadian students to go abroad, especially to Asia
- Diversify (source countries and students' fields, levels of study, and locations of study within Canada)
- Increase support for Canadian educators
- Increase scrutiny and regulation of agents
- Invest more in digital marketing

International enrolment goal

No, rather a cap on new study permits for 2024, 2025, and 2026.

Target markets

Brazil, Colombia, France, Indonesia, Mexico, Morocco, Philippines, Thailand, Turkey, Ukraine, Vietnam.

International student population (2023)

1,041,000 (+29% y-o-y).⁴



France

Bienvenue en France

Priorities

- Diversify beyond Africa
- Triple scholarships
- Simplify visa processes
- Make it easier for students to find housing
- Increase French campuses/partnerships abroad

International enrolment goal

500,000 international students by 2027.

Target markets

Expand recruiting outside Africa.

International student population (2023)

430,500 (+5% y-o-y).⁵



¹ Not being pursued anymore as the government is trying to curb international student numbers.

² All sectors.

³ Expired in March 2024. A new strategy is in development.

⁴ All sectors.

⁵ Higher education only.



Germany

Strategy 2025

Priorities

- Make Germany a top five study abroad destination
- Increase academic success of international students
- Increase share of international academics at German universities to 15%
- Encourage German students to study abroad
- Invest in more collaboration with foreign institutions

International enrolment goal

350,000 international students by 2020 – met in 2021.

Target markets

Not specified.

International student population (2023)

367,600 (+5% y-o-y).⁶

Ireland

Global Citizens 2030

Priorities

- Attract the highest quality students and researchers
- Adopt a “moderate” growth strategy of about 10%
- Position Ireland as a thought leader in talent, innovation, and science policy in “small advanced economies”
- Enhance student experience
- Measure impact of international students beyond enrolments and economic value

International enrolment goal

15% of overall student population by 2025
– nearly met (international students now compose 14% of overall student population).⁷

Target markets

Vietnam, Thailand, South Korea, Africa, South America.⁷

International student population (2023)

35,100 (+11% y-o-y).⁸



⁶ Higher education only.

⁷ Identified in the previous strategy.

⁸ Higher education only.



Japan

*Council for the Creation of
Future Education Goals*

Priorities

- Improve learning environments to attract promising foreign students
- Send 500,000 Japanese students abroad by 2033
- Develop a multinational labour market
- Make it easier for foreign graduates of top 100 universities to immigrate
- Streamline visa processes

International enrolment goal

400,000 by 2033.

Target markets

Not specified.

International student population (2023)

279,300 (+21% y-o-y).⁹



Malaysia

Education Blueprint 2015–2025

Priorities

- Claim position as an international education hub with a difference: values-driven and globally relevant education
- Provide rich cultural experiences, balance of quality and affordability, and good quality of life
- Reach new markets through innovative programmes and partnerships
- Improve and streamline visa and immigration processes
- Communicate niche strengths in academic and research expertise (e.g., Islamic banking and finance, and tropical-related science and technology)

International enrolment goal

250,000 by 2025.

Target markets

Iran, East Africa, China, India, Indonesia.

International student population (2023)

Over 170,000 (+30% over 2021).¹⁰

⁹ Higher education and language education.

¹⁰ Higher education only.



South Korea

Study Korea 300K Project

Priorities

- Expand scholarships for STEM students
- Stimulate economy through foreign talent
- Enhance global competitiveness of domestic universities and high-tech companies
- Become a top 10 "study abroad powerhouse"
- Increase Korea's share of the global study abroad market from 2% to 3%

International enrolment goal

300,000 by 2027.

Target markets

China, Vietnam, Poland, UAE, India, Pakistan.

International student population (2023)

207,100 (+24% y-o-y).¹¹

New Zealand

International Education

Strategy 2022–2030

Priorities

- Diversify sending markets and products, services, and modes of delivery
- Spread out international enrolments across regions
- Prioritise student well-being and excellence of education
- Commit to a sustainable sector that brings economic, social, and cultural benefits to the whole country
- Retain talented international graduates

International enrolment goal

No.

Target markets

China, India, and intent to diversify further.

International student population (2023)

69,100 (+67% y-o-y).¹²



UK

International Education Strategy

to 2030 (2023 Progress Update)

Priorities

- Increase education exports to £35 billion per year by 2030
- Host 600,000 international students per year
- Expand transnational education
- Collect accurate and coherent data for the sector
- Improve visa processes for students, including increased personalisation

International enrolment goal

600,000 by 2030 – met in 2020.

Target markets

China, Hong Kong, Kenya, Nigeria, South Africa, the Middle East and North Africa, Latin America, and the Association of Southeast Asian Nations (ASEAN).

International student population (2023)

758,855 (+12% y-o-y).¹³

^{11,12} All sectors.

¹³ Higher education only.



Family ties

Where in the world can international students go if they want to bring their family?



KELLY SIKKEMA/UNSPLASH

Global research consistently finds that quality of education, work rights, career aspirations, tuition fees, and costs of living greatly influence where students choose to study. But another crucial – and less studied – factor for many students is whether their family members (i.e., dependants) can accompany them abroad. If it seems there might be an opportunity to do so, students then explore questions such as:

- Is the right to bring dependants restricted to those studying in certain levels or fields of study?
- Which family members are eligible? Spouses/partners and children? Extended family?
- Can dependants stay for the entirety of a study programme?
- Can spouses/partners work? Full time? In any job?
- Can children attend public schools for free or do tuition fees apply?

Bringing family linked to greater success

The rights of dependants are especially consequential for students intending to study abroad for years, rather



“If spouses can’t get work permits, they’ll be highly unlikely to join their partner in Canada.”
– ApplyBoard

than months, and for those aiming to work or immigrate after graduating. The longer students stay abroad, the more likely they are to need their family with them, whether to maintain emotional bonds, help raise children, or integrate family members into the student’s new community.

Consider that:

- International students frequently experience culture shock, social isolation, loneliness, and difficulty making friends when they are studying far from home without their family.
- Research shows that foreign students’ success cannot be measured by their academic performance alone. Another key gauge is a student’s ability to engage with and positively contribute to a host society. This ability increases when students are supported by family and community connections.

Dependants’ rights restricted in some destinations

Policies affecting the families of international students have always been important, but they do not usually capture media headlines. That changed this year when Canada, France, and the UK rejigged rules as part of an effort to curb migration (see page 16). Specifically:

→ **Canada:** Only spouses/partners of students pursuing degrees at the master’s (16 months or more), doctoral, or professional level are eligible for an open work permit.

→ **France:** Only if a student has lived in France for at least 24 months may dependants join them, and unmarried partners must be at least 21 years of age, up from 18.

→ **UK:** Dependants can come to the UK only if the student is on a government scholarship or enrolled in a research-oriented postgraduate programme. Family of taught master’s students and undergraduate students cannot join.

The impacts of changes to dependants’ rights are already being felt by educators in Canada



Opportunities for dependants in major destinations

	Are dependants allowed to join?	Which dependants can join?	Are dependants allowed to work?
Australia	Yes	Spouses/partners and dependant children.	Yes
Canada	Yes	Spouses/partners and dependant children.	Yes, if student is in a 16-month+ postgraduate programme or professional programme (e.g., Doctor of Medicine).
France	Only if student has resided in France for 24 months. Unmarried spouses must be at least 21 years of age.	Spouses/partners and dependant children.	Not on a tourist visa but eventually if they get a residence permit.
Germany	Yes	Spouses/partners and children under and over 16.	Yes, with a residence permit.
Ireland	No	None	No
Malaysia	In general, only if student is enrolled in postgraduate courses of more than 12 months, with the exception of undergraduates from just under 20 countries (mostly in the Middle East).*	Spouses, dependant children, and parents.	Yes, with permission from the immigration department.
New Zealand	Yes	Spouses and dependant children can get visitor visas, and in some cases, work visas/student visas.	Yes, if student is enrolled in certain fields of study and/or levels of study.
Singapore	No, but the spouse and children of graduate students can visit for up to 4 weeks with a special pass.	None for longer than 4 weeks.	No
UK	Only if student is in a research-oriented postgraduate programme or on a government scholarship.	Spouses/partners and dependant children.	Yes, if over the age of 16.
US	Yes, if they go through a detailed process.	Spouses/partners and dependant children.	No

* Saudi Arabia, Bahrain, UAE, Turkey, Qatar, Azerbaijan, Palestine, Kuwait, Yemen, Iran, Syria, Oman, Jordan, Lebanon, Iraq, Libya, Maldives.



The longer students stay abroad, the more likely they are to need their family with them, whether to maintain emotional bonds, help raise children, or integrate into a new society

and the UK. They are experiencing lower demand from key non-EU markets, especially Nigeria and India, according to various data indicators (e.g., applications, visas processed, deposits, visas granted).

Which countries are the most open to dependants?

The more restrictive rules in effect this year in Canada, France, and the UK are now in line with those in Ireland, Singapore, and the US. Germany and New Zealand offer more opportunities (if students meet certain conditions or are enrolled in certain levels/programmes).

Technically, Australia occupies the middle ground. Spouses/partners and children under the age of 18 may join international students in Australia, and partners can usually work (48 hours per fortnight if the student is an undergraduate and unlimited if the student is in a research-oriented postgraduate programme).

However, partners/spouses must show savings of AUD\$10,395, and each child must have funds of at least of AUD\$4,450. This is on top of the AUD\$29,710 required for the main student applicant. In effect, the amount of savings required of students and their dependants – and the new, non-refundable visa application fee of AUD\$1,600 – is enough to discourage many international students with families from applying to Australia.

Canadian institutions, too, are experiencing lower demand this year from Nigeria due to dependant policies.

The coming months will provide a more complete picture of how significantly rules about international students' families affect destination choice. Our guess is that it will change the decisions of thousands of students who want partners to be able to work, and to have children with them, while they study.



How much do dependant policies impact mobility?

Students planning study abroad are often influenced by policies that would affect their family.








Immigration officials in the UK issued nearly 150,000 dependant visas in 2023. While some students attached to those visas would still have chosen the UK if they hadn't been able to bring dependants, many would not have, as suggested by some theoretical math:

In the first three months of 2024, the number of dependant visas fell by 80% compared with the same period in 2023. The number of visas granted to main (student) applicants fell by 15%. If we applied that partial-year drop of 15% to the 758,855 foreign enrolments in UK universities in 2022/23, it would equate to 115,000 fewer visas granted to main student applicants.

Of those 115,000 students, the largest losses would be from non-EU countries, including Nigeria and India. The impact on Chinese students would be minimal, if we go by "dependant-to-main applicant ratio" trends. In 2023, for example, UK Home Office data indicate that the dependant-to-main-applicant ratio for Nigerian students was 1.16, compared to less than 0.01 for Chinese students.

It is not surprising, therefore, that:

- In January 2024, the Enrolly Data Insight platform registered a 76% decrease in UK visa issuances to Nigerian students.
- Between March 2023 and March 2024, the number of Nigerians applying for study visas fell by 38% according to UK Home office data.

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OUTREACH

Fresh ideas to keep student leads progressing towards enrolment



EKATERINA BOLOVTSOVA/PEXELS



Mapping the student journey

Good data, student-centric strategies, and a customised CRM are must-haves for recruitment



You are committed to your organisation's internationalisation goals and targets and dedicated to guiding students to the programmes that suit them best. But commitment and hard work are one thing and having the right supports to achieve results is another.

Is your organisation optimised for international student recruitment? Consider the following questions:

- Where are students **discovering** your school/university?
- What proportion **take the next step** (e.g., engage, enquire, apply)?
- What are common **pain points** for students trying to interact with your institution?
- What are **individual students'** goals, priorities, barriers, and interests?
- Which **communications and website content** do students engage with, and which do they ignore?

If you don't have these insights, it could be time for your institution or agency to invest in student journey mapping and a customer relationship management system (CRM).



What is the student journey?

The path that students follow from first awareness of an institution to enrolment is called the student journey. It can also be extended to encompass graduation and even employment.

The journey metaphor illustrates how many decisions students make as they proceed towards enrolment, and it prompts institutions and agents to:

- Map out all the brand touchpoints and phases of engagement/activity that can influence a student's decision to enrol;
- Create a plan to nurture leads at each phase;
- Make customer satisfaction a priority from the time a student indicates interest to the time they graduate.

Studyportals envisions the student journey as a series of actions that leads take: discover, shortlist, apply, commit, prepare, and study. We illustrate and annotate this progression on pages 68–69.

What is a CRM?

Salesforce explains: “A CRM system helps with contact management, sales management, agent productivity, and more. CRM tools can now be used to manage customer relationships across the entire customer life cycle.”

The consulting firm Higher Education Marketing (HEM) elaborates on what a CRM can do:

- **Contact management** – build and store individual contact profiles, segment them according to your needs, and track your interactions with each one.
- **Team management** – collaborate, schedule tasks, track leads, and plan workload.
- **Communications tools** – log and detail

communications with contacts via phone, email, SMS, instant messaging, physical meetings, and even social media.

- **Reporting** – synthesise valuable, granular data on your audience and your own team's work into reports that can be used to improve your efforts.

Consider what is truly expensive

It's common for marketing and admissions teams to be told by management that their existing systems (e.g., their original, poorly performing CRM or Excel) have been paid for and must therefore remain in place. This is a huge mistake for at least three reasons:

1. Excel does not offer marketing automation.
2. An outdated CRM that nobody knows how to use is pointless.
3. What is truly expensive is recruiting inefficiently and ineffectively.

When staff lack tools or training to respond immediately and helpfully to prospective student queries, they can easily lose leads through no fault of their own. When they are trained on a well-configured CRM, they can focus on providing the strategic thinking and human touch that remain crucial to customer service.

Alejandra Otero, founder and CEO of education marketing and recruitment consultancy geNEOUS, says:

“Viewing [CRM and staff training on it] as a cost is missing the point. Remember, cost is part of an equation. If the cost is outweighed by incoming revenue, it is not a cost; it is an investment that is paying off.”



Common pitfalls

Ms Otero's company helps institutions and agents to replace inefficient marketing and admissions structures and technologies with new systems and ways of working. These systems are set up with one overarching goal: to track and nurture student leads along the student journey to enrolment.

When brainstorming geNEOus, Ms Otero considered common issues that can derail a recruitment drive:

- **Slow responses to student enquiries.**

According to Keystone Education Group's *State of Student Recruitment (2024)* global survey, 85% of students expect a response within 24 hours, preferably through email (70%) or instant messaging (12%, a marked 36% increase over 2023).



What is customer friction?

Customer friction is when a customer encounters something that makes it difficult or annoying for them to buy a product or service. In other words, it is anything that frustrates

the customer's progression from interest to conversion. For example, "I wanted to buy this, but the checkout took too long and asked for too many personal details." Or, "No one got back to me on my question." Or, "I could never find a way to talk to an actual human – all the website gave me was a chatbot."

- **Lack of coordination.** Ms Otero explains:

"We have seen cases where agents are recruiting diligently and according to an institutional contract, but the admissions team isn't aware that the agent channel is even being used. The marketing team knows, but this information hasn't been shared or isn't visible in the CRM to admissions. The student – after having spoken to an agent – contacts admissions, and admissions tells them they aren't working with agents. This undermines both the agent's and institution's trustworthiness in the market. The silos within an institution should not hinder student experience."

- **Frustrating processes.** Asking students to complete many forms with the same basic information, or overly long forms, is a sure way of annoying leads. So is a website chatbot that leaves students with no answers and no idea where to turn to next.

- **Lack of personalisation.** Are you collecting the right information from students to personalise your communications? Ms Otero notes that when students click on a paid ad or search on a webpage, heated zones where they have lingered can provide data on their top interests (e.g., programmes, scholarships, etc.). Marketing may have this information, but admissions should have it as well for their own interactions with students.

- **Limited collection/use of data.** Ms Otero says: "Everyone should have data showing where leads are at in the student journey – whether you're an agent, an admissions officer, or a marketing director. That data is like gold. It reveals opportunities as well as signs that a lead is about to drop off. Data signals where an intervention is required (e.g., a personalised email, an application fee waived, an early admissions offer). Many clients think they need more leads, but better lead management through a CRM is really what is required."



Customisation is key

When Ms Otero's team begins to work with a client, the first thing they do is an audit of what data is available (and often not being used) and how marketing and admissions are functioning and interrelating. The team discovers where leads are coming from, enrolment trends, opportunities for better synergies between departments, and common points at which prospects are leaving the enrolment funnel. Ms Otero says:

"You have to know what is and what is not working before coming up with a plan. Every institution is unique, so when we implement a CRM or train staff on new systems, it's always customised. Everything you do should be for a reason, and each element of a plan must relate to all the other elements."

A main goal is always to empower people: "It is amazing how much more satisfied and committed marketing and admissions teams become when they have the right tools to do their jobs well."

Student-first thinking

A good way of approaching recruiting and admissions management, says Ms Otero, is to ask: "Am I making it easy enough for students to (a) become aware of our brand, (b) interact with our staff and agents, and (c) enrol?' Part of that is collecting and acting on data, and the other is responding quickly and well to students. A CRM empowers staff with good data, and it frees them from the impossible task of responding immediately to all queries."

No need for chaos

Students now have almost endless ways of discovering institutions and deciding whether to enrol. They have far more resources available to them now as they research – just think of all the social media channels they are active on!



Studyportals has a great (free!) student journey mapping resource that includes customisable templates. Using the templates, you can identify student needs at each step of the student journey and match these to the content you will create and communicate, the tools you will use, and the timeline for all initiatives. Just scan the QR code for this resource!



Without student journey mapping and associated data, it is next to impossible to properly identify and nurture leads. The result is that leads are poorly managed or even squandered and the ROI on your recruitment effort suffers. A student-centred strategy, backed by an effective CRM that everyone on the team knows how to use, is a reliable path to meeting your recruitment goals and achieving better student outcomes. As staff become adept with new systems, and as students achieve more success, everyone wins.



The student journey

1. Discover

The student becomes aware that your institution is an option, whether through a school counsellor, an agent, a student fair, social media, or otherwise. If intrigued, they explore your website, social media channels, programmes, and campus facilities.



3. Apply

The student applies to your institution (and likely others as well).



2. Shortlist

The student weighs the pros and cons of your institution versus a narrowed-down list of alternatives. They may decide to engage with a student ambassador, agent, or admissions counsellor, or they may submit an online enquiry.





Troubleshooting the journey

There are a couple of important points to consider about the phases of the student journey:

- ➔ **During phases 1–3 (discover, shortlist, apply),** the student can easily lose interest if they receive poor service from marketing and admissions teams or if their digital experience is sub-par.
- ➔ **During phases 4–6 (commit, prepare, study),** if the student is not well supported and treated like a VIP, they will begin their study abroad experience and life on campus with a negative mindset. If so, they will share their experience with friends and family back home, weakening your branding in that market.

It's essential to have a great plan for every phase – one designed to nurture leads and reduce customer friction. A CRM is the optimal tool for executing your plan, not least because it automates key actions needed to keep leads progressing rather than dropping out. Students expect immediate answers and timely customer service, and marketing automation is made for that reality.



AGENT VOICE

Top ways schools can support agents when it comes to enrolling students



50%

Quick responses to queries/issues

24%

Fast application processing

10%

Scholarships/discounts

5%

Flexibility with admissions process

4%

Commission terms

4%

Fast invoice payment

2%

Flexibility with payment options/cancellation terms

Half of agents responding to our 2024 ICEF Agent Voice survey ranked quick responses to questions as the number one way that schools and universities can support them in recruiting effectively. Relatedly, “fast application processing” came in at number two at 24%.

These findings reflect the fact that agents are working with students who demand answers about visas, fees, scholarships, housing, and other questions almost instantly (see page 68). Speedy communications with agents are therefore directly linked to an institution’s ability to nurture best-fit student leads.

This year more than ever, students are turning to agents to help them make sense of the barrage of policy changes and significant hikes in application fees and savings requirements in top destinations. Providing agents with accurate, up-to-date information is an absolute must.

SOURCE: ICEF AGENT VOICE (2024)

ILLUSTRATION: SERGE BLOCH



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