



# Recruiting Online International Students

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Recommendations for Institutions Seeking to  
Expand Their Cross-Border Footprint

Professional & Adult Education Forum

# Professional & Adult Education Forum

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# Table of Contents

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Executive Overview . . . . .	5
Sizing the International Online Opportunity . . . . .	6
Enrollment Expectations Often Exceed Reality . . . . .	7
Global Recruitment Readiness Diagnostic . . . . .	8
Characteristics of High-Performing International Online Institutions . . . . .	9
Three Characteristics of Success . . . . .	10
Characteristic #1: Extensive On-Ground Networks	
Adapt Joint Degree Programs to Support Global Networks . . . . .	11
Religious Institutions Benefit from Existing Networks . . . . .	12
Promote Programs Through International Associations . . . . .	13
Characteristic #2: Locally Targeted Program Offerings	
Develop Programs That Fill a Local Market Need . . . . .	14
Characteristic #3: Adapted Recruitment Strategies	
Determine Role of International Social Media . . . . .	15
Learn Country-Specific Social Media . . . . .	16
Customize Online Content for Country of Origin . . . . .	17
Find Your International Online Market . . . . .	18
Appendices . . . . .	19
Appendix #1: English Proficiency Index . . . . .	20
Appendix #2: Gross National Income Data . . . . .	21
Appendix #3: Internet Speed Data . . . . .	22

# Executive Overview

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## Online International Enrollment Efforts Unlikely to Succeed

**Online delivery avoids visa challenges and negative attitudes toward living in the U.S. but fails to solve all international enrollment obstacles.** Increased competition abroad causes international students to enroll in programs closer to home, especially in the wake of the COVID-19 crisis. As other countries, in addition to domestic institutions, compete for online students, U.S. institutions struggle to find their niche in an over-saturated market, especially at the undergraduate level. Although professional and adult education programs may experience more success, complex barriers including legal issues, health concerns, high cost, internet accessibility, and language requirements make it difficult for international students to enroll in online programs at U.S. institutions.

**Barrier #1: Legal challenges in home countries prevent international students from pursuing online programs from U.S. institutions.** Legislation may prohibit or discourage enrollment in online courses, or online courses delivered by international institutions. Additionally, some countries limit access to web content from the United States. Of the top 25 universities by international enrollments, 68 percent had admissions content blocked within China.<sup>1</sup>

**Barrier #2: The continued spread of the pandemic in the United States has led to a sharp decline in international student interest in U.S. higher education.** While the top five English-speaking countries by number of foreign students all experienced a decline in demand from international students in March 2020, every country apart from the United States recovered demand in the following months. The U.S. also ranked last among English-speaking countries for perceived welfare of international students.<sup>2</sup>

**Barrier #3: Countries must meet internet speed requirements for students to access course content.** Many countries lack the connection speeds for students to participate in online courses. Online course features such as video conferences and discussion boards require internet speed of at least 10 Mbps.

**Barrier #4: Expensive online degree programs reduce access for lower-income students. Wealthy students who could enroll also have the option to choose in-person programs or online programs closer to home, especially at the undergraduate level.** Countries with a high gross national income per capita offer institutions the best potential to find audiences able to afford online American tuition. Administrators should consider that students may choose from options that are more prestigious, in-person, or closer to home. If institutions subsidize tuition to expand access, enrolling international students online loses its financial incentive.

**Barrier #5: English language proficiency requirements create an additional cost and time barrier to international students.** Programs must establish a minimum TOEFL score for students to ensure that students can succeed in their courses. Otherwise, course translation costs would be prohibitively high for institutions to generate revenue from online international enrollments.

**Few schools succeed in recruiting and enrolling international students to online programs. Institutions that do well have a combination of three factors: extensive on-ground networks, locally targeted program offerings, and adapted recruitment strategies.** While one aspect can primarily fuel institutional success, all three must be present to enroll more than a negligible online international student population.

**Characteristic #1: Extensive on-ground networks** consisting of religious communities, alumni, or an international association which supports recruitment at scale offer a recruiting edge.

**Characteristic #2: Locally targeted program offerings** such as veterinary medicine or social justice pique student interest, especially if a nearby institution does not already offer these programs.

**Characteristic #3: Adapted recruitment strategies** using international social media platforms and customized landing pages for international visitors yield higher returns than one-size-fits-all approaches.

1) Inside Higher Ed, 2017  
2) [International Student Crossroads II](#), IDP Connect



# Sizing the International Online Opportunity

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# Enrollment Expectations Often Exceed Reality

As the global pandemic continues to shrink institutional budgets, necessitate remote learning, and create uncertainty in domestic enrollments, higher education leaders may look abroad for new online student audiences. Yet recruiting, enrolling, and serving international students proves difficult for most institutions, especially in the wake of COVID-19.

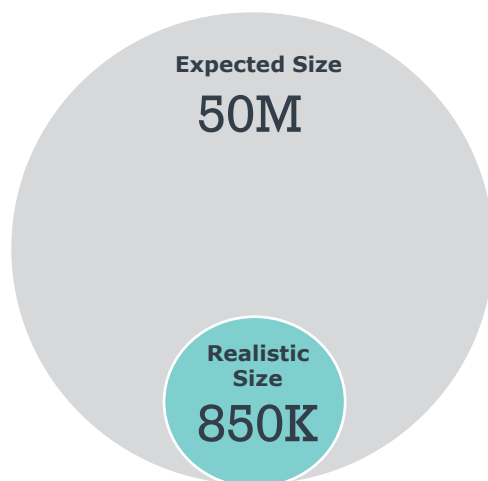
Worries over high coronavirus transmissions and visa policy changes have damaged U.S. institutions' international brand. Competition for international students also increases as more options exist to study at local institutions where students can secure a recognized degree on an accessible campus. For example, over 2,600 English-taught academic programs exist throughout Asia. These programs in Asian countries now compete with each other for international students. This competition spans countries: 440,000 international students attend Chinese institutions, and Malaysia hopes to reach 250,000 international students by 2025. U.S. institutions struggle to compete in this saturated market.

Institutions that succeed have:

1. Extensive on-ground networks
2. Locally targeted program offerings
3. Adapted recruitment strategies

## International Students Infrequently Enroll in Online Programs

### Realistic Audience Size Smaller than Expected

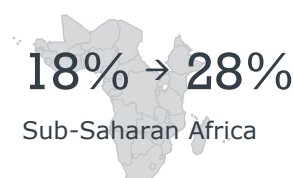
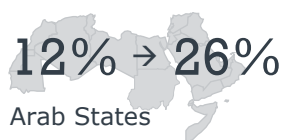


#### Reasons for Smaller Audience Size

- Competition in country of origin
- Internet access for online students
- Visa eligibility for F2F

### Increased Regionalism and Competition

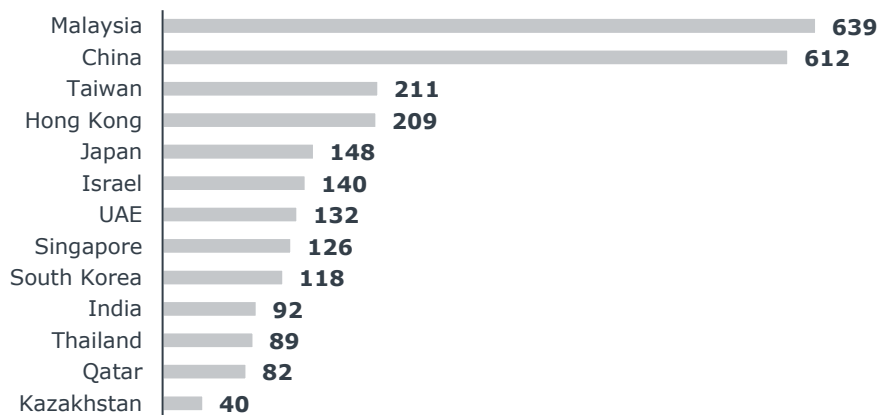
*Change in Portion of Students Enrolling in Region, 1999 and 2012*



### Asian Countries with English-Taught Programs

*StudyPortals, February 2017*

n=2,638



Source: EAB analysis of sources available upon request.

# Global Recruitment Readiness Diagnostic

Opportunities for international student recruitment are limited by forces outside of your unit's control, including relationships with global partners, management of the COVID-19 pandemic, and career paths alumni take.

Before setting new strategies or reallocating investments for international student recruitment, complete the following diagnostic to determine the size of the opportunity at your institution.

If you determine your institution is equipped for online international recruitment, continue reading this white paper and see the diagnostic on page 16 for market selection.

## Diagnostic Instructions

For each statement listed in the table below, place a checkmark in the column that best describes its status at your institution.

Criteria	Yes	No
My institution currently has a strong on-ground presence (e.g., engaged alumni network, affiliated corporate partners, joint degree offerings) in at least one country.		
My institution has the capacity to offer prospective international students personalized interactions with support staff from either our institution or a contracted vendor.		
My institution offers programs that can be targeted to local needs across the world (e.g., livestock health management).		
My institution offers degrees that are unique from in-market competitor programs in our target locales.		
My institution can access international demand data and the perspectives of international partners to determine needs.		
My institution has the capability of developing customized landing pages for international visitors on our website.		
My institution can dedicate staff to international student recruitment, including the development of a bespoke international marketing strategy and the use of international social media platforms.		

## Analyzing the Results

After completing the diagnostic, add up the checkmarks in each column.

If you have **five or more checkmarks in the "Yes" column**, your institution may be ready to invest more heavily in international online student recruitment strategies.

Continue reading this white paper for additional recruitment strategies and complete the diagnostic on page 16 to determine where you should focus your market strategy.





# Characteristics of High-Performing International Online Institutions

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# Three Characteristics of Success

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Despite the challenges of recruiting students globally, some colleges and universities have managed to successfully enroll large numbers of international students in online programs.

Institutions that effectively attract international students typically demonstrate three characteristics:

1. They maintain on-ground networks in foreign countries,
2. They target programs to local demand, and
3. They adapt their recruitment strategies to meet the needs of and allow access to students around the world.

This whitepaper details how successful colleges and universities have recruited international students.



## Extensive On-Ground Networks

- Religious community network
- Large, involved international alumni network
- International associations



## Locally Targeted Program Offerings

- Programs aligned with unique local market demand, and not already filled by institution closer to home, such as:
  - Civil engineering
  - Veterinary medicine
  - Global business
  - Social justice



## Adapted Recruitment Strategies

- International social media platforms
- Online marketing materials
- Customized webpages for international viewers

## Adapt Joint Degree Programs to Support Global Networks

Creating joint degree programs can be an affordable option for institutions to reach students across the globe without requiring them to come to the United States. Institutions can reserve space at local universities rather than finding a suitable building themselves. Joint degree program partnerships can be beneficial for both the U.S. institution and the host institution; the U.S. institution can expand its reach to international students, while host institutions can leverage their global partnership to boost their image.

The University of Arizona currently operates 36 microcampuses, smaller campuses housed at partner universities. Currently, 13 microcampuses exist with a student capacity of 25,000. The University of Arizona also recently announced a partnership with WeWork to expand this global network in over 490 locations in 80 cities and 37 countries. This partnership will allow students to complete their U.S. degree from the safety of their own country during the global pandemic with wi-fi, space to study, and an in-person community.

The microcampus model also creates a pipeline for international students to enroll in person at the University of Arizona; many international undergraduates who enroll online express interest in attending graduate school on campus at the University of Arizona.

### University of Arizona's Microcampuses Bring Online Education Abroad

#### University of Arizona Expands Access, and Revenue Potential, by 'Exporting' Education



36

Campus partnerships

\$250K

First year revenue at one microcampus

#### Case Study: University of Arizona Partnership with Ocean University in Qingdao, China

- Emerged out of a five-year-old dual-degree program with Ocean University
- ~\$9,000 per year in fees for students – much lower than local universities
  - Students also pay tuition at Ocean University
- 98 in 2017, an increase from 77 students the previous year
- \$250,000 in new revenue for the University of Arizona in its first year
- 10 percent of students finish their degree at the University of Arizona – Tucson

Source: EAB interviews and analysis. University of Arizona, 2017; "University of Arizona Expands Global Microcampus Network Through Partnership with WeWork;" University of Arizona

## Religious Institutions Benefit from Existing Networks

Religious institutions can use their pre-existing global networks to recruit international students. Employer partnerships, word-of-mouth marketing, and in-country infrastructure supported by networks allow international students to access online American higher education.

Beyond recruitment, institutions' religious networks and churches' reputations can increase experiential learning opportunities, as well as support post-graduate employment through existing corporate relationships.

Administrators at Andrews University and Brigham Young University-Idaho use their church structures to reach and recruit students across the globe, mainly through word-of-mouth marketing. Interested students apply to programs that are financially accessible due to tuition rates highly subsidized by the church.

### Andrews University and BYU-Idaho Use Religious Structure to Expand Reach



#### On-Ground Network Recruits International Students and Connects them with Jobs After Graduation

- Andrews partners with the Seventh Day Adventist Church, Adventist hospitals, Whirlpool, and local organizations to recruit and employ students.



#### Strong Reputation Allows Word-of-Mouth Marketing

- Andrews recently started using Facebook to reach international students by targeting students within the Adventist Church network. This approach led to 79,000 page views in one week alone.



#### Pre-College "PathwayConnect" Program Engages International Students

- Students must complete the PathwayConnect program or have at least 15 credit hours from BYU, BYU-Idaho, BYU-Hawaii, or LDS Business College to become an online student at BYU-Idaho.
- The PathwayConnect program gathers at 450 locations in 70 countries and runs with support from missionary staff members.
- At the end of the one-year program, students can matriculate into online or on-campus programs.



#### Church Infrastructure Allows BYU-Idaho to Run a Low-Cost Program

- Program tuition rates are highly subsidized by the Church, which helps students who may not be financially ready for college.
- BYU-Idaho focuses budget on instructional quality and capacity, while replying on church infrastructure for student aid and recruitment.
- The Church provides potential employment opportunities through industry partnerships and alumni networks.

Source: EAB interviews and analysis.  
Andrews University, 2018.  
"International Degree-Seeking Students," BYU Idaho:  
[http://www2.byui.edu/IR/stats/international\\_F17.htm](http://www2.byui.edu/IR/stats/international_F17.htm).

## Promote Programs Through International Associations

Best-practice institutions promote programs through the educational outreach services of international academic and professional associations. Associations such as the Institute of Electrical and Electronics Engineers (IEEE) and the Association for Computing Machinery (ACM) host events in many countries that provide opportunities to meet prospective students, network with potential program advocates, and learn about international trends in the field.








Associations provide the following opportunities for student recruitment:

- Advertising through trade presses and websites
- Scholarship programs for prospective students
- Referral services that match qualified students to approved institutions

The table on the right profiles associations in three disciplines identified as high priorities for international audiences: engineering, business, and computer science. These associations were selected based on their large membership, high frequency of events, and extensive education initiatives.

### Academic and Professional Associations Provide a Pipeline of Prospective Students

#### International Associations in High-Demand Industries

	Engineering 	Business 	Computer Science 
Association 	Institute of Electrical and Electronics Engineers (IEEE)	DECA, Inc.	Association for Computing Machinery (ACM)
Membership Size 	400,000 members 50 percent of membership from outside the U.S.	200,000 students of marketing, finance, and management	100,000 members 200 chapters based in 50 countries
Conferences & Events 	1,000+ annual conferences and meetings held around the world	17,000 members attend the annual International Career Development Conference (ICDC)	170+ field-specific conferences, workshops, and symposia hosted annually
Education Initiatives 	Registered Education Providers (REPs) connects international students with IEEE-approved educational programs	Corporate sponsors, institutions, and business organizations award over \$300,000 in scholarships annually	Dedicated conferences, committees, and partnerships for promoting global access to quality computing education

## Develop Programs That Fill a Local Market Need

Online international expansion must consider local programming needs to attract students away from regional competitors. Programs such as livestock health management or global development and social justice may highlight subject matter unavailable at regional institutions but needed locally. Local partners can help identify which topics best fit student needs.

St. John's University formulated an innovative master's degree in Global Development and Social Justice to reach international students. While the program is currently offered exclusively online due to the coronavirus crisis, St. John's University typically offers a hybrid program where international students attend two sessions in Rome, Italy and then finish the rest of the program online in their home countries.

This innovative hybrid approach creates a true sense of community by bringing students together in person for the program's beginning. Institutions seeking to develop a similar community during the coronavirus crisis could offer multiple synchronous sessions to allow students to connect in real-time despite differences in time zone and country of origin.

### Hybrid Program Extends St. John's University's Reach



**ST. JOHN'S  
UNIVERSITY**

**Master's in Global Development and Social Justice at St. John's University**

9

Full scholarships offered which include tuition, fees, airfare to Rome, housing, and meal vouchers

50%

Students who attend the program directly from undergrad

15

Partial scholarships given with a 40% discount

1

Graduate assistant who receives free tuition and \$6,000/year stipend

18-22

Students that enroll per year



Students are given a free laptop with pre-loaded program content when they enroll in the program. Upon completion, students get to keep the laptop.

### Accessible to Students All over the World

Current students hail from:

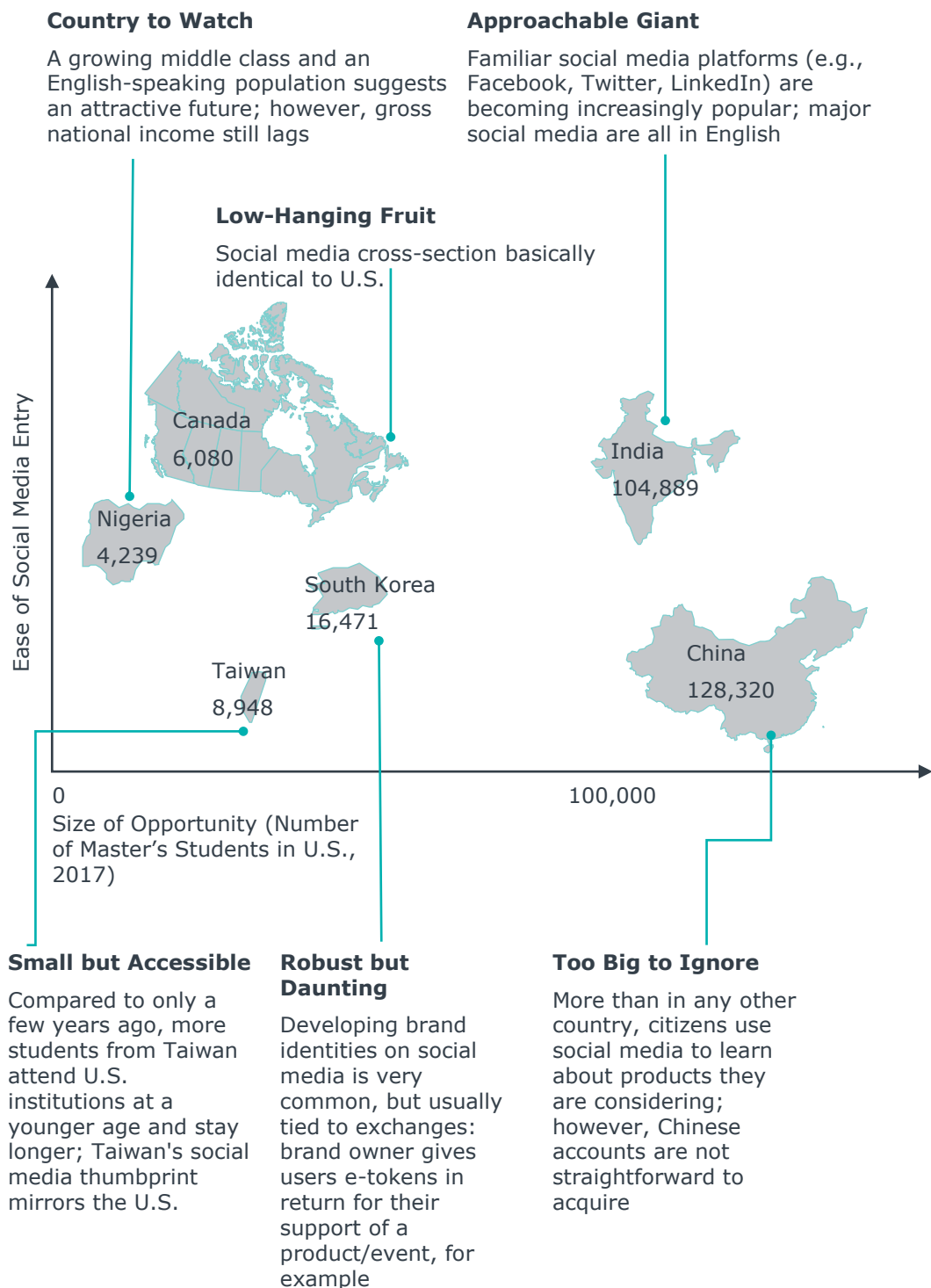
- Brazil
- Canada
- Colombia
- Ghana
- India
- Malawi
- Nigeria
- The Philippines
- The United States

## Determine Role of International Social Media

U.S.-based social media sites (e.g., Facebook) may not provide the best method of communicating with students in target countries. However, learning country-specific social media proves time consuming for admissions staff. Investing in foreign social media is advisable only if the country presents a viable recruitment market.

The Professional and Adult Education Forum sized the opportunity for international social media in the matrix at right. The size of the professional and adult education market varies based on each institution's unique offerings (e.g., degree level, discipline). At the suggestion of our partners, the Forum used the number of master's students in the U.S. as a rough proxy for opportunity size. This is compared to the relative ease of social media entry for staff primarily versed in American social media platforms.

### Local Populations with U.S. Social Media Familiarity Make Compelling Cases for Entry



Source: EAB interviews and analysis, IIE 2017 Open Doors briefing, The World Bank, "GNI Per Capita, Nigeria," 2016.

## Learn Country-Specific Social Media

Recruitment staff looking to launch a country-specific social media campaign must answer two questions: First, what platforms does the age group of interest use most frequently in the country? And second, what are the user habits and preferences associated with each platform?

Before launching a Chinese social media presence, Brock University conducted an analysis of the relative strengths and weaknesses of different platforms. After this investigation, Brock formulated a plan based on the fact that different Chinese social media platforms are better suited for different purposes.

The University of Wisconsin-Milwaukee recognized the popularity and sheer size of WeChat as an opportunity to connect with prospective Chinese students and parents. Now, after college fairs, one staff member uses the platform to answer questions about the application process, majors offered, visa requirements, etc.

### Understand the Audience, Features, and Use of Specific Social Media Channels to Engage International Students

#### 1 Audience

What platforms does each age group of interest use most frequently?



WeChat



QQ & Qzone



Weibo

#### 2 Features and Use

What are the user habits and preferences associated with each platform?

All Ages: China's "app for everything" with over 902 million daily users	Used for everything including: messaging, paying bills, ordering food, hailing cabs, etc.
Under 21: Instant messaging client (QQ) and Facebook style personal pages (Qzone)	Used for call, text, and video (QQ) along with publishing content (Qzone)
All Ages: A microblogging platform similar to Twitter	Used to discuss products, culture, and personal topics



#### Brock's Plan: Different Channels for Different Purposes

- Uses QQ and Weibo accounts to answer questions and engage in conversations
- Trained student ambassadors answer questions
- Students available during peak activity hours (9-11 AM EDT)



#### UWM's Plan: Continue Relationship After College Fairs with Prospective Chinese Students Through WeChat

- Uses WeChat account to connect with prospective Chinese students and parents
- One staff member responds to questions up to a month after college fairs

Source: EAB interviews and analysis.



## Customize Online Content for Country of Origin

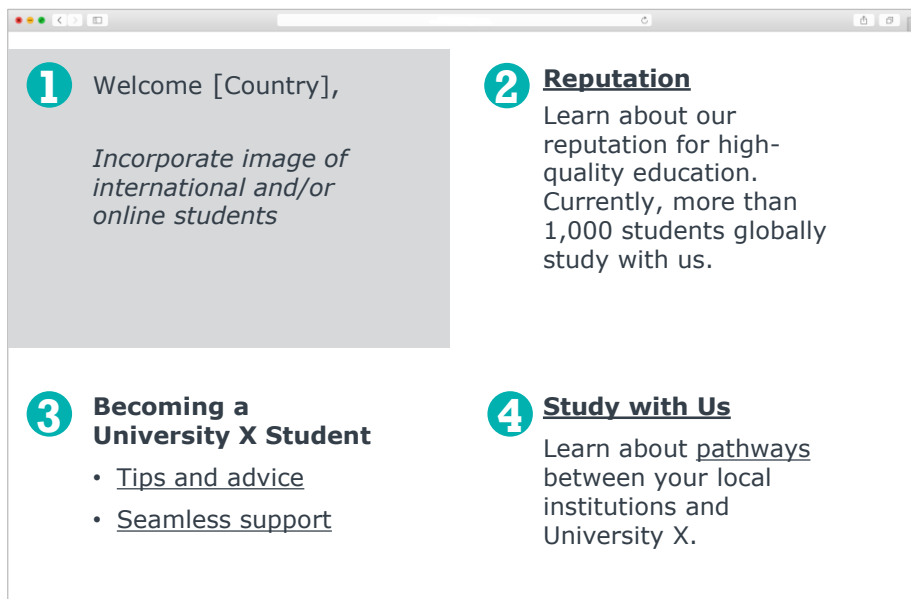
To connect with international students, program marketing staff should rewrite major headings and topics on webpages to better address their relevance.

Web development staff can build a website that automatically adjusts based on the IP address of the visitor. Best-practice institutions use the location of the internet connection to customize the language and content of the page automatically.

Geo-targeted websites can address:

- Distance to closest satellite campus
- Application requirements
- Required TOEFL scores
- Visa regulations, including ineligibility of online students
- Partnerships that apply to specific countries
- Adjusted tuition and fees in local currency, or at an affordable rate based on the country's ability to pay

### Address Common Concerns and Interests based on Global IP Addresses



- 1 Distinct landing page, determined by:
  - IP Address, OR
  - Pop up window to enter home country

With welcome message based on visitor origin
- 2 Mention of institution's international reputation and feature of international enrollment figures
- 3 Information on online platform, program costs, admissions requirements, and support services all in one place
- 4 Promoted placement of pathways for students from visitor's location

**3x**  
inquiries

**2x**  
page views

Increased inquiries and page views by geo-targeted websites at ASU Online.

# Find Your Online International Market

If your institution:

- ☐ Has extensive on-ground networks,
- ☐ Can offer locally targeted programs, and
- ☐ Will adapt recruitment strategies

You and your colleagues may want to further explore online international enrollment.

Consider market opportunities on a by-country basis. Distinctions such as the competitiveness of the market and prospective students' ability to afford online American education determine viability, and institutions' limited resources may prevent entry into endless new markets.

To find the highest-potential online international market, evaluate:

- ☐ English language proficiency
- ☐ Ability to pay
- ☐ Internet accessibility
- ☐ Alignment of institutional offerings to their market needs
- ☐ Regional competition and educational access

To inform institutional discussions, data tables as of 2018 available in the following appendices.

## Evaluate Market Accessibility and Fit to Offerings

### 1 Level of English Proficiency in Target Country<sup>1</sup>

Criteria	Point Value
Very low proficiency (e.g., Mexico with a score of 48.99 or Libya with a score of 40.87)	1 point
Moderate proficiency (e.g., India with a score of 55.49 or South Korea with a score of 55.04)	2 points
Very high proficiency (e.g., Philippines with a score of 60.14 or Nigeria with a score of 58.26)	3 points

### 2 Resources in Target Country to Pay Tuition

Criteria	Point Value
Does not have a gross national income per capita over \$40,000 nor an elite population with a high income	0 points
Has a gross national income per capita over \$40,000 (e.g., Hong Kong, United Arab Emirates) or maintains an elite population with a high income (e.g., China, India, South Korea)	1 point

### 3 Internet Access Speeds in Target Country

Criteria	Point Value
Internet access speeds are below 4.0 Mbps	0 points
Internet access speeds are between 4.0 and 10.0 Mbps (e.g., Uruguay, China, Serbia)	1 point
Internet access speeds are above 10.0 Mbps (e.g., Canada, Hong Kong, Thailand)	2 points

### 4 Market Need in Target Country

Criteria	Point Value
There are other institutions in the country that teach similar programs to the one you are planning to offer	0 points
There are no or few institutions in the country that teach similar programs to the one you are planning to offer	1 point

### 5 Competition in Target Country and Region

Criteria	Point Value
There are multiple universities offering English-speaking programs in the country and region.	0 points
There are few universities offering English-speaking programs in the country and region.	1 point

After completing the diagnostic, add the total points accumulated. If you have six or more points, your institution may be ready to partner with this target country. If you have less than six points, focus investment efforts on another target country or region.

1) [Education First English Proficiency Index 2019](#)



# Appendices

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- English Proficiency Index
- Gross National Income Data
- Internet Speed Data

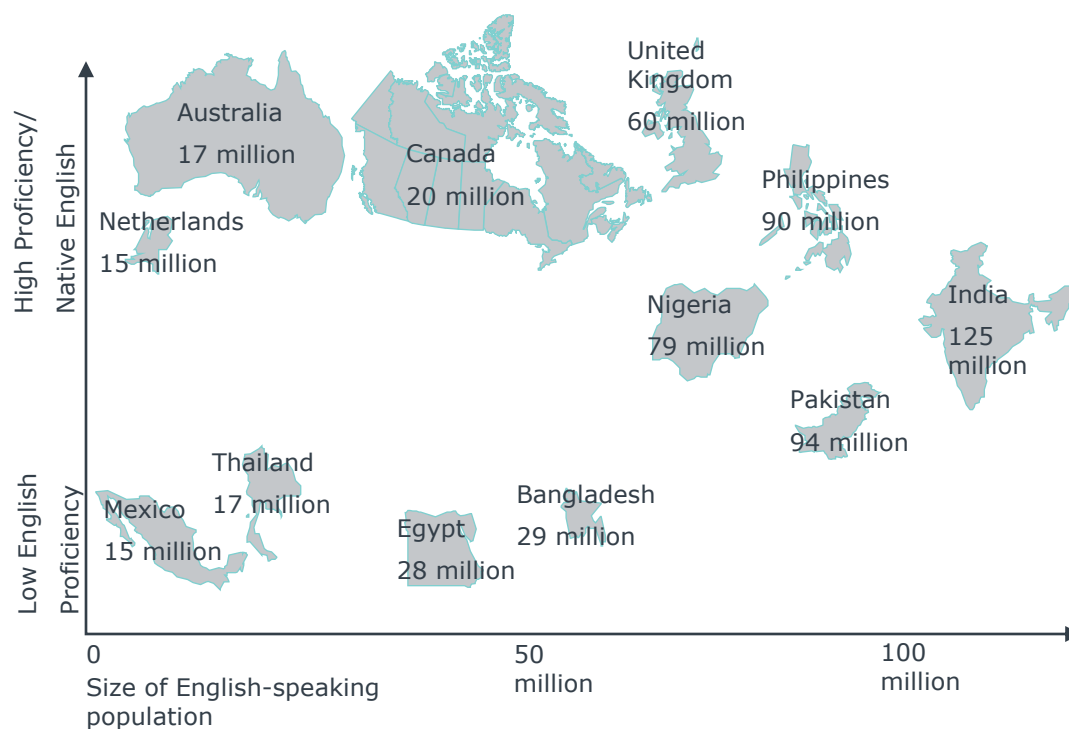
# English Proficiency Index

## Ensure a Sufficient Population Prepared for English-Language Instruction

Education First, a global education company, publishes an [English Proficiency Index](#) that can inform selection of target countries. The index ranks countries, and provides a description of residents' English proficiency on a spectrum from:

- *Very high proficiency*: ability to read, interpret, and negotiate text in all circumstances, to
- *Very low proficiency*: understands simple signs and being able to introduce oneself. These students would not be successful in a program taught in English.

### Population Size and English Proficiency Level of Selected Countries



## Gross National Income Data

### Determine if Population Can Afford American Tuition Costs

The World Bank offers reliable data on [countries' gross national income per capita](#) (GNI). Institutions aiming to generate revenue from online international enrollment must seek countries with a GNI greater than \$40,000 or with a select population that can afford American tuition. Institutions serving low-income countries and populations should expect to discount tuition or will require scholarships to subsidize enrollment.

Note that most countries with high income and very high English proficiency will prove prohibitively competitive due to regional educational offerings.

#### Countries With High GNI on The EF English Proficiency Index

*Excludes countries with a GNI per capita below upper-middle income and English proficiency below a "low" rating*

English Proficiency	Tier 1 (GNI above \$40K)	Tier 2 (GNI \$20K-\$40K)	Tier 3 (GNI \$8,470-\$20K)
<b>Very High</b>	Singapore Luxembourg Norway Denmark Netherlands Sweden Finland		South Africa
<b>High</b>	Switzerland Austria Belgium	Czech Republic Slovakia Portugal Malaysia Poland Hungary Romania	Serbia Philippines
<b>Moderate</b>	Hong Kong France	Italy South Korea Spain Lithuania	Argentina Bulgaria Costa Rica Dominican Republic
<b>Low</b>	U.A.E. Japan	Russia Chile Uruguay Panama	Mexico Thailand China Brazil Colombia Peru Tunisia Ecuador

Source: EAB research and analysis.  
World Bank GNI per capita, 2018,  
<https://data.worldbank.org/indicator/ny.gnp.pcap.pp.cd>. EF English Proficiency Index, 2018,  
<https://www.ef.edu/epi/>.

# Internet Speed Data

## Seek Populations that Can Access Course Content Online

Akamai, a cloud delivery platform company, publishes quarterly [reports on internet connectivity](#). Online students will need access to internet speeds of at least 4 Mbps to stream video and to video conference. For high-definition connections, online students need speeds of 10 Mbps or greater. As average national internet speed declines, higher internet speeds are typically concentrated in cities, offering potential for recruitment in countries with lower average internet speeds.

### Average Internet Connection Speed (Mbps) of Countries Meeting GNI and English Proficiency Requirements

*2017 Akamai's State of the Internet Report*

- |                       |                    |                    |
|-----------------------|--------------------|--------------------|
| • South Korea 28.6    | • Ireland 15.6     | • Uruguay 9.5      |
| • Norway 23.5         | • Spain 15.5       | • Chile 9.3        |
| • Sweden 22.5         | • Bulgaria 15.5    | • Italy 9.2        |
| • Hong Kong 21.9      | • Hungary 14.8     | • Malaysia 8.9     |
| • Switzerland 21.7    | • New Zealand 14.7 | • U.A.E. 8.6       |
| • Finland 20.5        | • Lithuania 14.6   | • Serbia 8.5       |
| • Singapore 20.3      | • Austria 14.1     | • China 7.6        |
| • Japan 20.2          | • Slovakia 13      | • Mexico 7.5       |
| • Denmark 20.1        | • Portugal 12.9    | • Brazil 6.8       |
| • Netherlands 17.4    | • Poland 12.6      | • South Africa 6.7 |
| • Romania 17          | • Russia 11.8      | • Argentina 6.3    |
| • United Kingdom 16.9 | • Luxembourg 11.6  | • Peru 6.2         |
| • Czech Republic 16.9 | • Australia 11.1   | • Ecuador 6.2      |
| • Belgium 16.3        | • France 10.8      | • Panama 5.9       |
| • Canada 16.2         |                    | • Philippines 5.5  |
| • Thailand 16         |                    | • Colombia 5.5     |
|                       |                    | • Costa Rica 4.1   |

Source: EAB interviews and analysis. Akamai State of the Internet, 2018, <https://www.akamai.com/us/en/about/our-thinking/state-of-the-internet-report/global-state-of-the-internet-connectivity-reports.jsp>.



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