



Sizing the Impact on International Enrolment

Short- and Long-Term Consequences of COVID-19



Five Themes on the Future of Int'l Recruitment



2

1

Global Positioning Will Continue to Shift Post-Covid

Pandemic-era gains and losses will likely reverberate for years to come

2

Global Rise in Price Sensitivity

Pandemic will exacerbate price concerns, particularly in growth markets

3

Inside-Out Marketing Approach Equally Valuable

Leveraging existing capabilities, offerings key to establishing pipeline sustainability

4

Instructors, Students an Underleveraged Resource

Quality, authenticity signaled by campus stakeholders in high demand for prospects

5

Virtual, Career-Aligned Recruitment Key for Future

Restricted travel, economic uncertainty requires new approach to engagement



Global Positioning Will Continue to Shift Post-Covid

SECTION

1

Student Priorities: From Existential to Experiential

Face-to-Face Learning Opportunities Take Precedence Over Virus Concerns

Early 2020



Virus mitigation drove destination preferences



Deferral and visa policies take center stage



Widespread uncertainty around future study plans

The Peri-Pandemic Shift

2021 and Beyond



Students willing to change destination to access in-person learning



Sharp rise in importance of career, student support



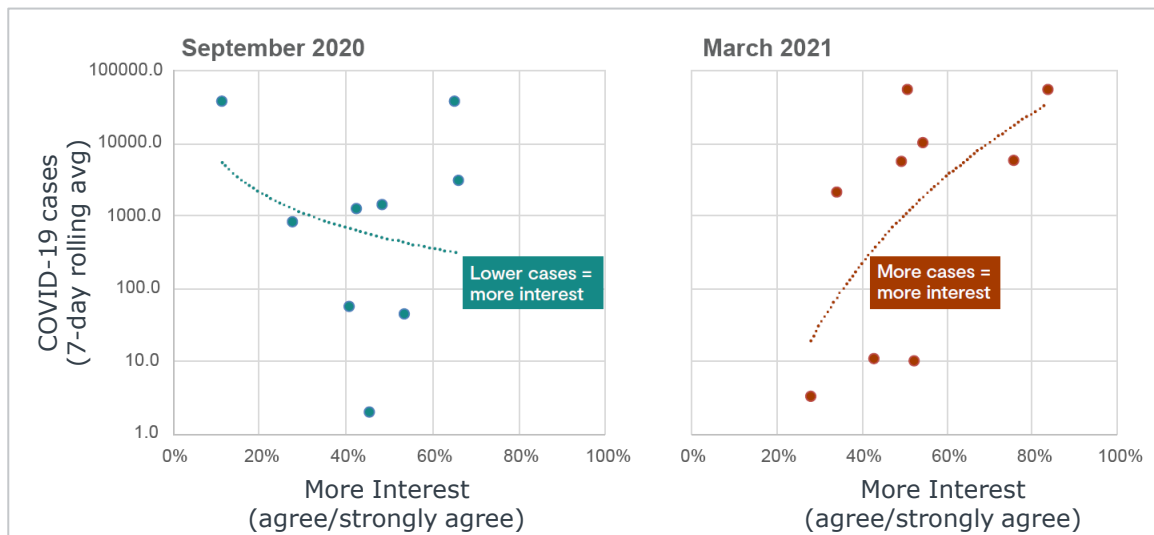
Open borders, campuses equated with positive welfare

COVID-19 Took A Back Seat for Students

5

Student Interest and Enrolment Less Influenced By Virus Containment

Per cent of agents reporting greater relative student interest in destination, by COVID-19 case count (log); Navitas Agent Perception Report, May 2021



Institutions Must Prepare for Long-Term Volatility

6



HE Sector

10-20%

HE workforce laid off in US and Australia



Recruitment

47%

Of international education agents cut staff during 2020



Global Markets

-3.2%

Growth in the global economy, 2020

Long-Term Consequences

- Regions with growing youth populations and high incurrence of debt during COVID (Canada, Australia, UK) face dire HE funding environment



Funding, staffing losses could leave some markets unprepared for demand

Long-Term Consequences

- Limited ability to travel, plus pent-up demand could make agent market more competitive and central to recruitment



Diversified recruitment levers a must for long-term success

Long-Term Consequences

- Regional economic projections diverge, with key student source markets lagging behind advanced economies

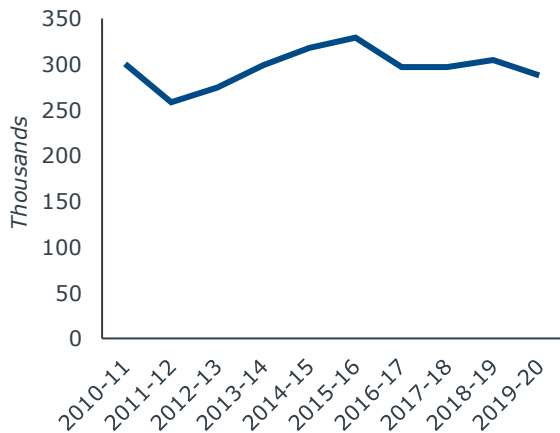


Enrolment growth opportunities concentrated in price-sensitive regions

Our '7-Day Forecast' Methodology

7

Postsecondary International Enrolment Trajectory



Current Learner Experience

- Availability of face-to-face learning opportunities
- Access to in-person activities

Government Policy

- Funding, travel, visa provisions
- Impact on the student experience

Student Perceptions

- Student attitudes and intentions
- Agent reporting of prospect interest

Eye on the Horizon

- Competitive pressures and future positioning
- Key strategic opportunities—and risks—for future growth

Our '7-Day Forecast' Methodology

8

Actions, conditions that have produced consistent growth or positive student experiences



Current Learner Experience

- Availability of face-to-face learning opportunities
- Access to in-person activities

Actions, conditions that have had mixed results in terms of growth and student experience



Government Policy

- Funding, travel, visa provisions
- Impact on the student experience

Actions, conditions that have produced consistent declines in enrolment, student experiences



Student Perceptions

- Student attitudes and intentions
- Agent reporting of prospect interest

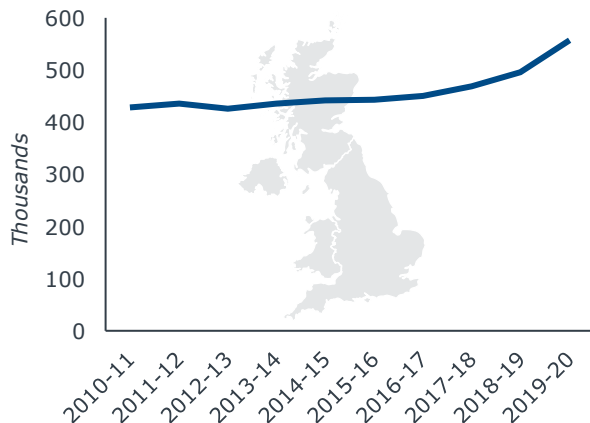
Eye on the Horizon

- Competitive pressures and future positioning
- Key strategic opportunities—and risks—for future growth

Short-Term Forecast: United Kingdom



Postsecondary International Enrolment in UK



Current Learner Experience

- Most institutions keeping lectures online
- Blended approach, with some in-person activities the norm



Government Policy

- Updated International Education Strategy provides new investment, post-study opportunities
- Brexit: Steep EU enrolment declines



Student Perceptions

- 76% of agents reported greater student interest in UK¹ in early 2021
- Viewed as less affordable, welcoming, as other destinations

Eye on the Horizon

- Impact of Brexit, ANZ reopening could quickly reverse growth
- Market share losses in growing markets (Nigeria, India, Pakistan) compound risk of China-heavy growth

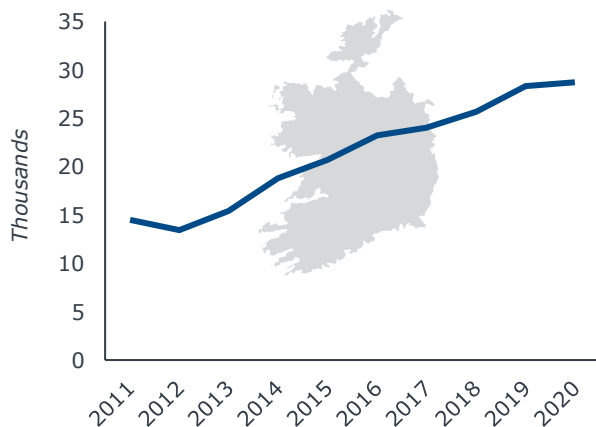
¹) Compared to USA, UK, Australia, New Zealand

Short-Term Forecast: Ireland

10



Postsecondary International Enrolment in Ireland



Current Learner Experience

- In-person learning, campus activities have largely resumed
- Govt. providing antigen tests for staff and students



Government Policy

- Updated strategy prioritises international enrolment, research growth
- Federal investment lags behind those of other key destination markets



Student Perceptions

- Brexit, successful pandemic response has bolstered reputation in Asia
- 40% of int'l students witnessed or experienced racism during pandemic

Eye on the Horizon

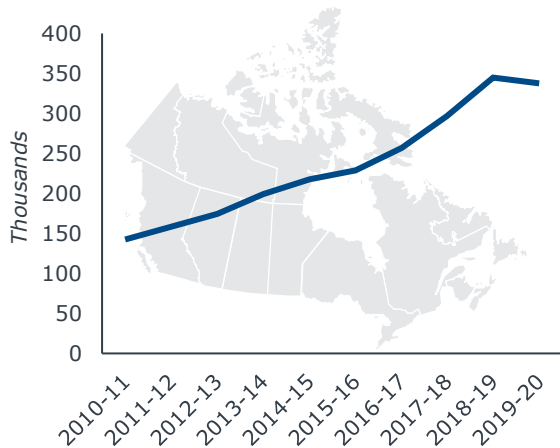
- Strong pandemic response, federal investments in research and innovation provide momentum for future growth
- Will continue to face stiff competition from lower cost EU destinations in the wake of Brexit

Short-Term Forecast: Canada

11



Postsecondary International Enrolment in Canada



Current Learner Experience

- Face-to-face learning widely available
- Campuses and residence halls open, with widespread vaccination mandates in place



Government Policy

- Expansion of post-study visa programmes
- Visa processing times lag significantly behind other countries



Student Perceptions

- Ranks¹ #1 in international student welfare and policies, economic stability, and post-study work visa policies

Eye on the Horizon

- Rebound in US likely to come at Canada's expense
- Declining provincial funding putting increased pressure on international enrolment for revenue purposes

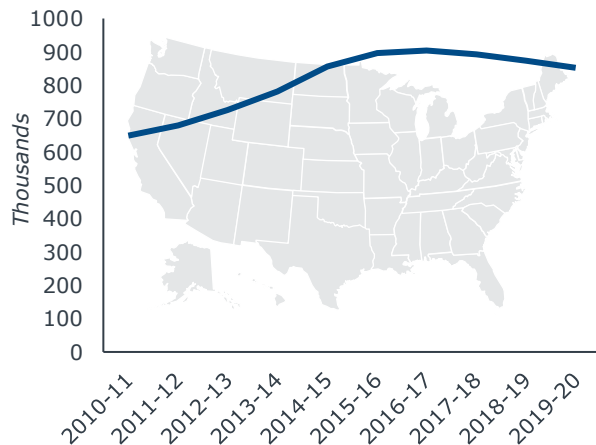
1) Compared to USA, UK, Australia, New Zealand

Short-Term Forecast: United States

12



Postsecondary International Enrolment in United States



Current Learner Experience

- Face-to-face learning widely available
- Campuses, residence halls open, widespread vaccine requirements



Government Policy

- Reversal of some Trump-era student visa restrictions
- Government proposed first national international education strategy



Student Perceptions

- Ranks behind other countries in handling of pandemic, student policies
- Since Sept. 2020, 39% agent-reported increase in student interest

Eye on the Horizon

- Brand still has power, but requires decisive federal action to fully restore
- Perceptions of safety, welcoming still a major liability

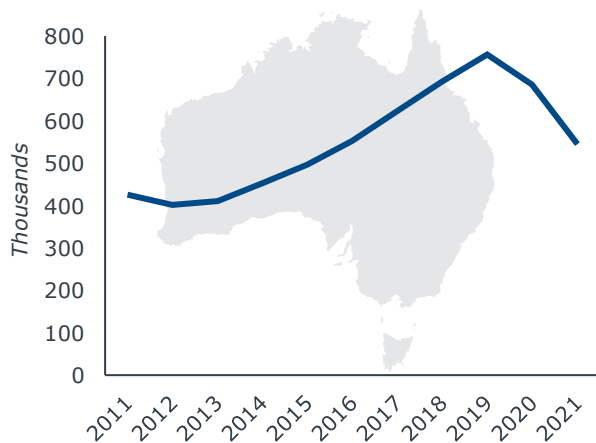
Source: [Open Doors Data](#); [Times Higher Education](#), Jul 2021; [Inside Higher Ed](#), Jul 2021; [ICEF Monitor](#), June 2019; [CNN](#), Aug 2021; [New York Times](#), Aug 2021; [Inside Higher Education](#), July 2021; [IDP Crossroads IV International Student Survey](#), June 2021; [Agent Perception Report](#), Navitas, April, 2021; EAB interviews and analysis

Short-Term Forecast: Australia

13



Postsecondary International Enrolment in Australia



Current Learner Experience

- Almost entirely dependent on remote
- Pilot programmes offer limited opportunities for inbound students



Government Policy

- Borders remained closed until Feb 2022, could reclose if COVID worsens
- New federal budget projects ~10% cuts



Student Perceptions

- Students extremely reluctant to begin classes online
- <50% agents report 'significant' interest

Eye on the Horizon

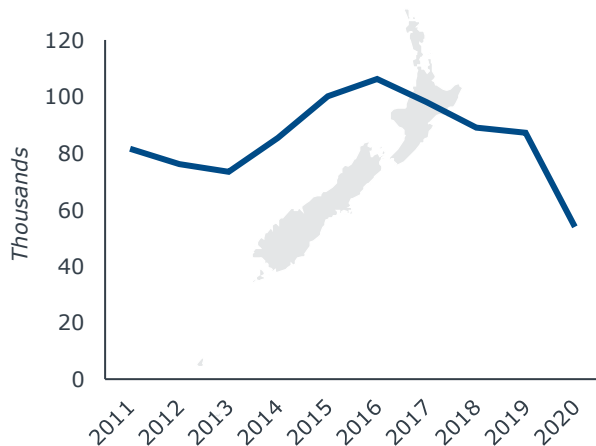
- Funding, staffing losses likely to hinder recovery efforts even after borders re-open
- HE will need to rearticulate value proposition post-pandemic

Short-Term Forecast: New Zealand

14



Postsecondary International Enrolment in New Zealand



Current Learner Experience

- Almost entirely dependent on remote
- Pilot programmes for some students, but delays hamper success



Federal Policy

- Five-step plan allows international students to re-enter throughout 2022
- New federal proposal emphasises risk-minimisation, 'quality over quantity'



Student Perceptions

- 59% of students plan defer until in-person learning is available
- Agent-reported student interest is lowest among top destinations¹

Eye on the Horizon

- Educator, housing shortages may further restrict international education even after borders reopen
- Maintaining agent relationships will be especially challenging

1) Includes USA, UK, Australia, Canada, UAE, Germany, Netherlands, Singapore



Global Rise in Price Sensitivity

SECTION

2

Supporting Students Through and After Covid-19

16

Over a Decade of Research and Tools Available On Top Priority Issues

Mental Health

[EAB Mental Health Resource Centre](#)

[Guide: How to Build a Mental Health Stepped Care Model](#)

[Toolkit: Establish a Sustainable Scope of Service](#)

Wellbeing and Belonging

[Roadmap: Develop Student-Centered Well-Being Support](#)

[EAB Student Belonging Resource Centre](#)

[5 Components of Student Belonging Infographic](#)

Student Activism

[Engaging Today's Student Activists Infographic](#)

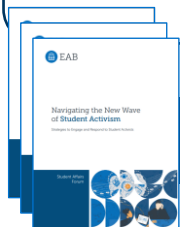
[Resource Center: Build and Maintain Trust with Activists](#)

[Support Campus Activists Toolkit](#)

Scarcity Mindsets

[Serving the Students of the Pandemic Presentation](#)

[Reimagine the Student Experience: Six 'What Ifs to Inspire Innovation Infographic](#)



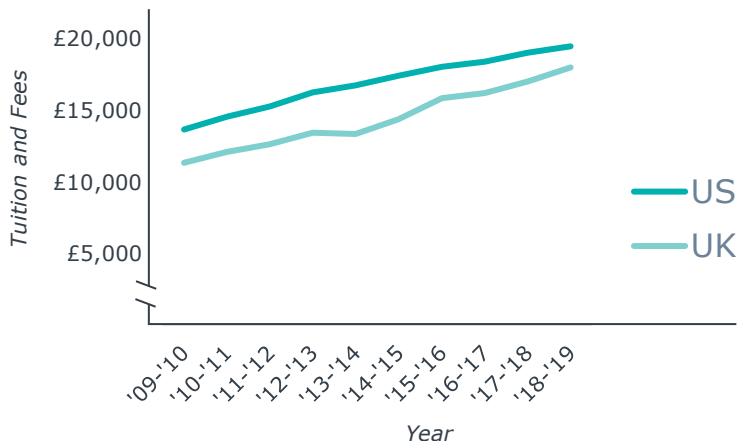
EAB's Existing Suite of Student Research and Resources

Finances Not a New Concern for Int'l Students

17

Pre-Pandemic, Int'l Student Tuition Steadily Rose

Average Int'l Student Tuition and Fees at Universities, 2009-2019



59%

International student tuition increase in UK, compared to **34% UK inflation**

42%

International student tuition increase in US, compared to **19% US inflation**

55%

Institutions cited the **high cost** of tuition as one of the **reasons for declining int'l student enrolment** in 2018

Parents Also Feeling the Pinch

'What do you see as a potential barrier to your child studying abroad?', HSBC Global Report 2017

40%

Higher cost to me/my partner

33%

Higher cost for my child

1) *UK universities' statistics are averages pulled from 28 Russel Group universities.

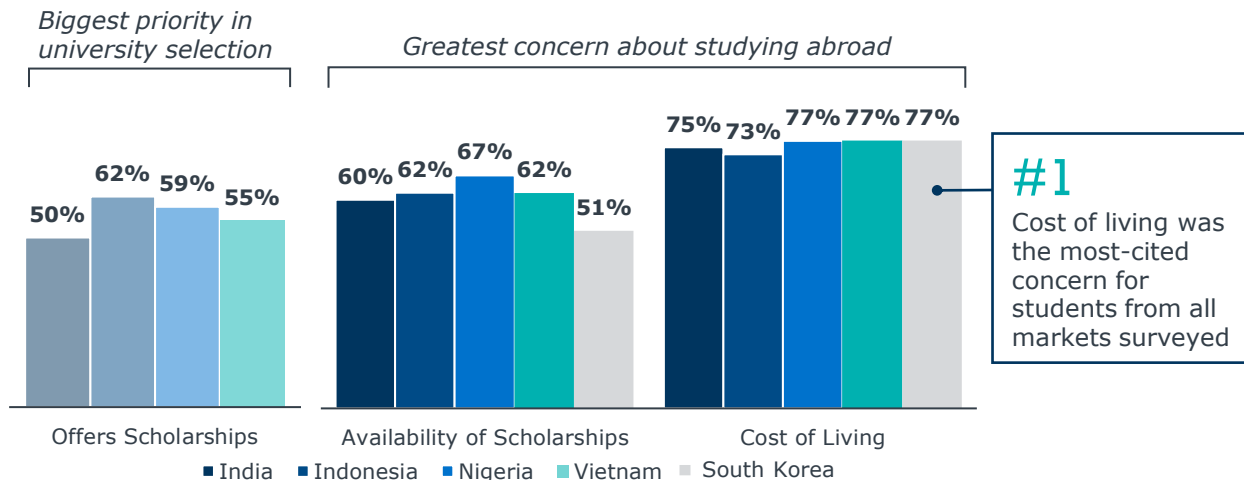
Source: [Reddin Survey Annual Tuition Fees](#), [In 2013 dollars Inflation Calculator](#), [Study International](#), "Charted: How International Student Fee at US Universities are Going Up, Up, Up," Dec. 2018; Baer, Julie, "Fall 2018 International Student Enrollment Hot Topics Survey, *IIE Center for Academic Mobility Research and Impact*, Nov. 2018; "The Value of Education: Higher and Higher," HSBC, 2017

But Costs Now Top of Mind For Nearly All

Pandemic Leading Students to Prioritise Cost in Enrolment Decisions

Cost a Major Draw, Concern for Students from Major Growth Markets

Per cent of students reporting #1 priority/concern in studying overseas, QS ISS 2021: UK

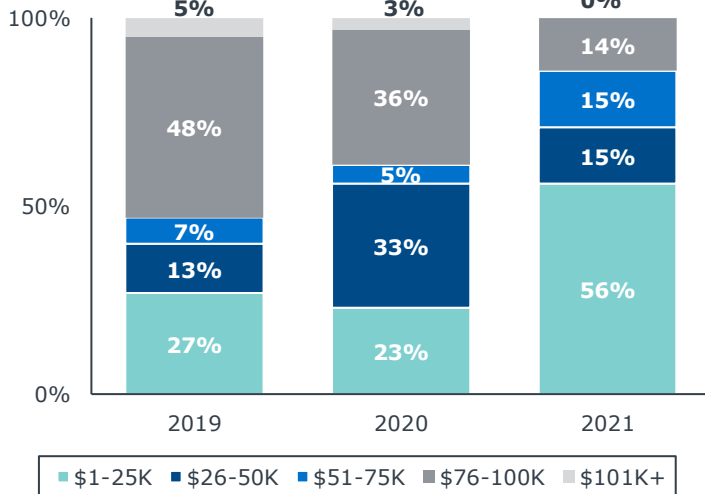


Pandemic Spurring Flight to Low-Cost Programmes

19

International Students Seeking Lower-Cost Programmes

Maximum tuition filter selected, ApplyBoard Platform data



Economic Anxiety Present Across the Globe

Per cent of prospects who cite lack of financial access as top study abroad concern, by market:

63% Latin America

53% Europe, Middle East, and Africa

49% Asia-Pacific

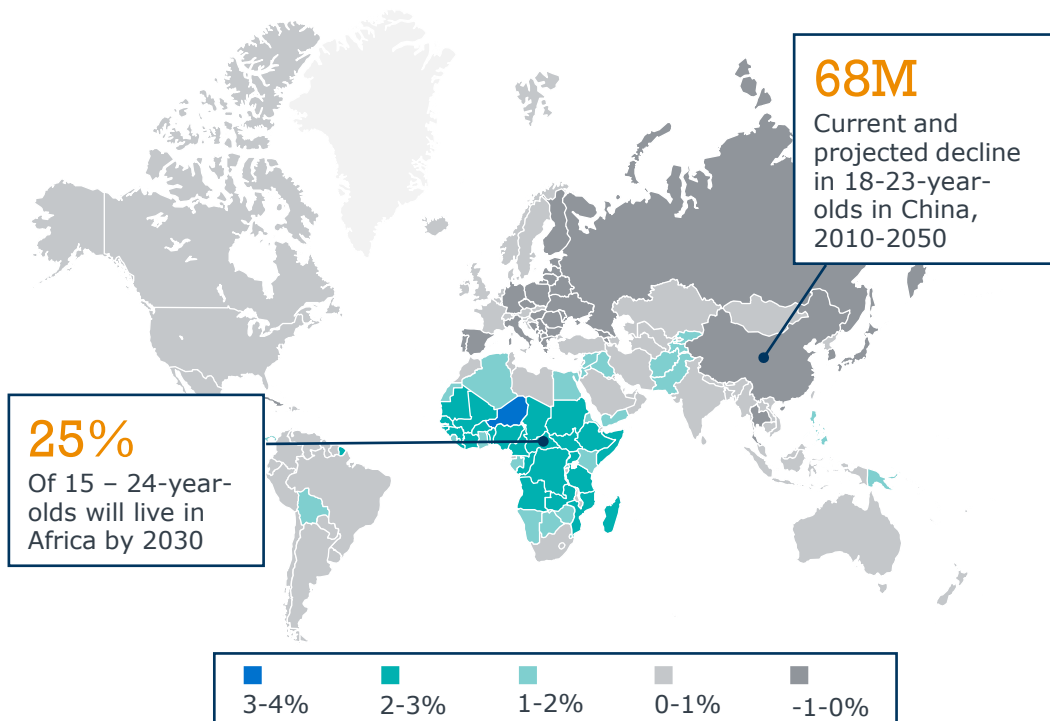
43% North America

Tomorrow's Market is Even More Price-Sensitive



Population Growth Increasingly Concentrated in Price-Sensitive Regions

Average annual rate of population change, 2030-2035; United Nations DESA



Major Competitors are Already Investing

21

Destination Market Governments Expand Investment in Population Growth Markets

Canada and Germany are prioritising Latin America as growth targets; **Australia** plans to expand TNE footprint in **Latin America**

France identified **10 African nations** as 'priority' markets and plans to **triple** the number of **international scholarships** available

Nigeria and Pakistan are priority regions for **UK's** International Education Champion and potentials for 'significant immediate growth'

China launched academic collaborations with universities in **9 African countries** as part of their Belt & Road initiative

Emerging Destinations Add Competitive Pressure

126

Chinese programmes now ranked in top 50 by discipline globally, up from 100 in 2020 and 97 in 2019

-16%

Decline in the US share of institutions in QS top 50 global rankings from 2019 to 2022

Striking a Delicate Balance

Diversification Goals Often At Odds with ROI Realities

Diversification

- Minimise risk of recruitment strategy
- Broaden access to international education
- Increase diversity of perspectives, experiences on campus



Sustainability

- Pandemic exacerbated price concerns globally
- Business model pressures favor full-pay students
- Declines in HE spending increase reliance on tuition

‘Everyone agrees with [the idea of diversification], but the challenge is that the two biggest markets, China and India, offer the best ROI. So we can establish markets in Latin America, but that might only bring in 50 [full-pay] students vs. 1,000 from India.’

Director of International Student Recruitment
Australian University



Inside-Out Marketing Approach Equally Valuable

SECTION

3

'Outside-In' is the Dominant Recruitment Strategy

24

Start with Student Needs and Interests



Build A Strategy Around Student Preferences

- What is the ultimate goal for international students looking to study in my country?
- What types of opportunities are popular with international students?



- Advertise the companies that international students have worked for under CPT/OPT
- Offer regular information sessions on top popular programmes and opportunities

Why It Works for International Student Recruitment



Resources Allocated to Known Wins



Market-Responsive



Allows for Targeted Messaging

The Limits of 'Market Intelligence'

25

'Outside-In' Relies on Market Assumptions Over Institutional Strengths



Real-time, **comprehensive data doesn't exist** in international recruitment



Based on assumptions of **narrow range of programmes and experiences** that attract int'l students



Marketing efforts **rarely differentiated by target market**

Building from the Inside-Out

26

Start with Existing Capabilities



Build A Strategy Around Institutional Strengths

- What experiences or opportunities do current international students value?
- What unique or niche programmes do we offer?
- What perspectives can other international stakeholders contribute?



- Grow international networks with current international student participation
- Showcase niche programmes, or other programmes with international appeal
- Design marketing campaigns that place current and former international student experience at the center

Why It Works for International Student Recruitment



Increased Output for Existing Resources



Engages Stakeholders from Across Campus



Promotes Differentiation

Three Opportunities to Advance Inside-Out Efforts

27

Most Universities Overestimate Barriers and Underestimate Incentives for Instructor Recruitment Support

- Global Advisory Board
- Int'l Travel Stipend
- Instructor Social Media Takeover
- Instructor-Led Workshops

Current Students are Underutilised as Informal Network Managers

- Student Focus Groups
- All-in Global Ambassadors
- Coffee with an Ambassador

Institutional Investment in Career Support Doesn't Align with Growing Market Demand

- International Student-Specific Career Development Support
- Proactive Emerging Programme Alignment



Three Opportunities to Advance Inside-Out Efforts

28

Most Universities Overestimate Barriers and Underestimate Incentives for Instructor Recruitment Support

- Global Advisory Board
- Int'l Travel Stipend
- Instructor Social Media Takeover
- Instructor-Led Workshops

Current Students are Underutilised as Informal Network Managers

- Student Focus Groups
- All-in Global Ambassadors
- Coffee with an Ambassador

Institutional Investment in Career Support Doesn't Align with Growing Market Demand

- International Student-Specific Career Development Support
- Proactive Emerging Programme Alignment



Show of Hands

How engaged are academic staff in international recruitment at your institution?

- A. Extremely engaged
- B. Somewhat engaged
- C. Not very engaged
- D. Not at all engaged



Engaging Instructors is a Delicate Balance



Instructors Uniquely Speak to Int'l Student Interests

- Trusted by international students and parents
- Provide first-hand glimpse into the academic experience
- Knowledgeable about the institution and campus experience without training



Recruitment Just Another Ball to Juggle

- Most instructors see recruitment as outside their role or scope
- Limited time and resources to dedicate towards recruitment events
- Protective of existing international relationships
- Not trained in hard-sell recruitment

Pros Outweigh the Cons for Instructor Involvement

'When instructors are directly involved with recruitment efforts, they provide **more meaningful and better insight** into the student experience.'

*Rachel Salinas, Director of International Admissions
University of Indiana, Bloomington*



Appeal Directly to Instructor-Specific Motivations

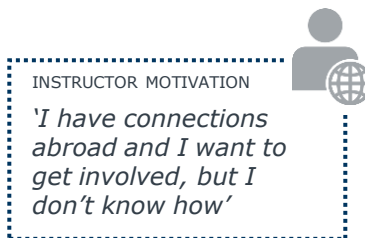
31

Balance Time and Resource Commitment with Incentives



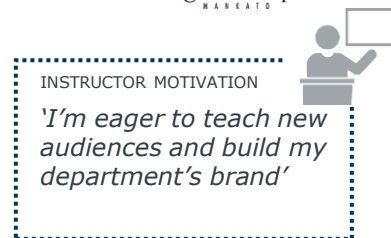
Global Advisory Committee

- Engages instructors, staff, from across campus, typically those interested in global engagement
- Group meets monthly
- Instructors can pitch new study abroad programmes, recruitment practices



Int'l Travel Stipend

- Offered to instructors with existing int'l travel plans
- Instructors add recruitment visit to their trip
- Admissions office supplies PPT and talking points
- Jumpstarted enrolments in secondary market and saved travel costs



Instructor Social Media Takeover

- Popular and niche programmes highlighted on social media
- Instructors upload content (e.g., AMAs, lab experiments)
- Content sent via CRM to interested and admitted students

Ask Instructors to Do What They Do Best: Teach

32

York's Leverages MOOCs in Two Ways



UNIVERSITY
of York

Future
Learn

Massive Open Online Courses (MOOCs)



Special Private Online Courses (SPOCs)

Non-traditional (incl. international) students **don't have access** to traditional university experience

Students want opportunity to **experience university programmes**, esp. non-A levels, before enrolment

4-week MOOC 'Everyday Chemistry' that **connects real-world ideas to chemistry concepts**

Today's new students faced **massive disruption** to their high school experience during the pandemic

Students **need additional support** before transitioning to university life, delivered in an accessible format

Two 2-week courses geared towards **helping students adapt** to university life (e.g., seminar vs. lecture, etc.)

24k

Total learners
engaged in course
since Jan. 2017

50%+

Of participants
are international

5.3k

Total learners
engaged in SPOCs
since June 2020

~30%

Of participants
are international

Paying Dividend with Future Students

“This course tells you a lot more about uni than a lot of prospectuses and open days do. I am absolutely much more excited to start at the University of York this September now!

- Chloe, York FutureLearn student

'Soft-Sell' Instructor-Run Workshops Hook Prospects on Subject Matter

Workshops (Sample)

Oct and Nov 2021



- Cybersecurity in 2021
- Journalism Bootcamp: Learning the Basics
- Scholarly Writing Workshop
- UI/UX: Thinking like a UX Designer



INDIANA UNIVERSITY
BLOOMINGTON

Case-in-Brief

- Workshops run by regional outpost offices for students at local schools
- Instructors recruited based on areas of expertise
- Most content adapted from existing instructor work

247 Students attended workshops across Spring 21 and Fall 21

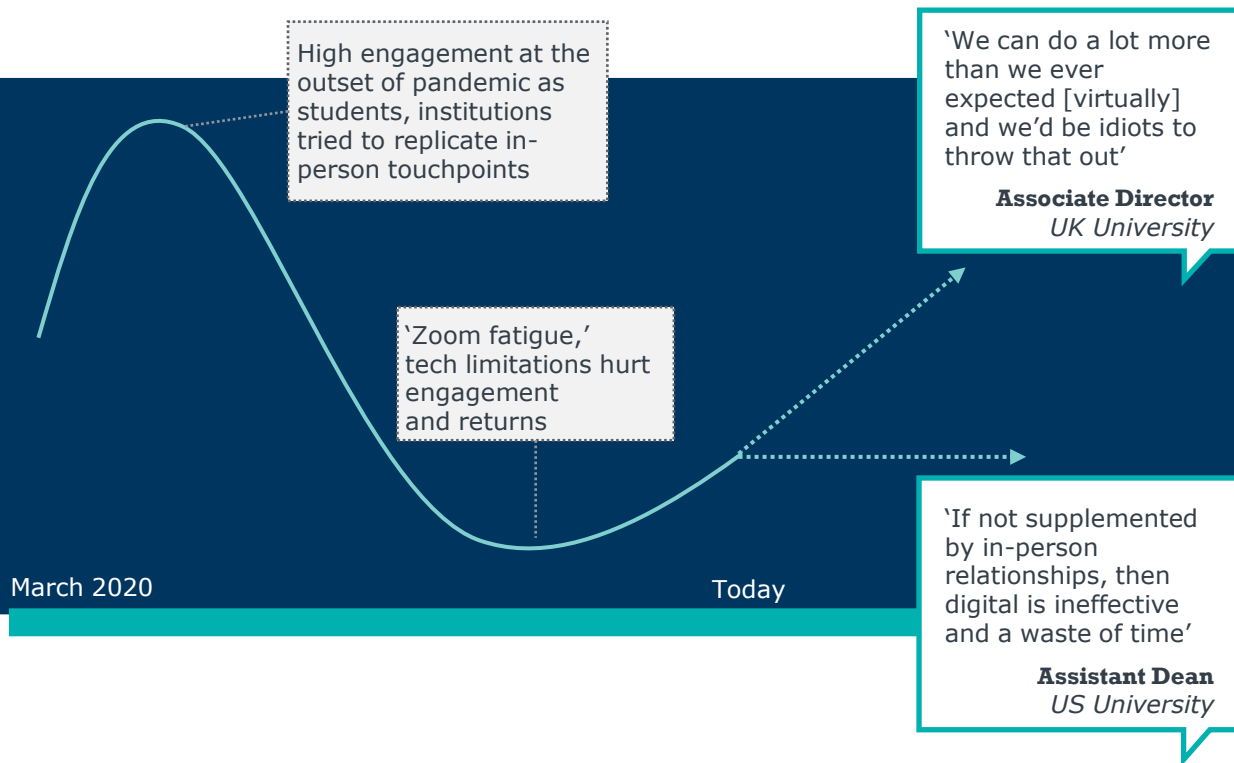
95% Of workshop attendees indicated they would recommend the workshop to a friend



Instructor workshops give prospects a **taste of the classroom experience** and build university brand of offering **high quality academics**

Virtual Recruiting: Boom and Bust

Student Engagement Has Waxed and Waned Across COVID



Three Opportunities to Advance Inside-Out Efforts

36

Most Universities Overestimate Barriers and Underestimate Incentives for Instructor Recruitment Support

- Global Advisory Board
- Int'l Travel Stipend
- Instructor Social Media Takeover
- Instructor-Led Workshops

Current Students are Underutilised as Informal Network Managers

- Student Focus Groups
- All-in Global Ambassadors
- Coffee with an Ambassador

Institutional Investment in Career Support Doesn't Align with Growing Market Demand

- International Student-Specific Career Development Support
- Proactive Emerging Programme Alignment



Help Shape the Narrative



Students are Already Representing Your Institution – How Well is Up to You

From my personal experience, I have heard students come because they have **upperclassmen already at IU who rave about the wonders of IU**, and others who found IU themselves and looked at images of IU or the admission process and wanted to come due to that.

Iswerya Ajay, *Student*
Indiana University



One happy student spreads the message among peer and family network back home

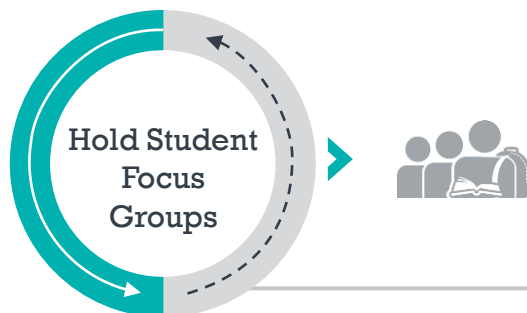


One unhappy student can sour a relationship with an entire region

Shape Recruitment While Growing Networks



Int'l Student Focus Groups Source Feedback and New Leads



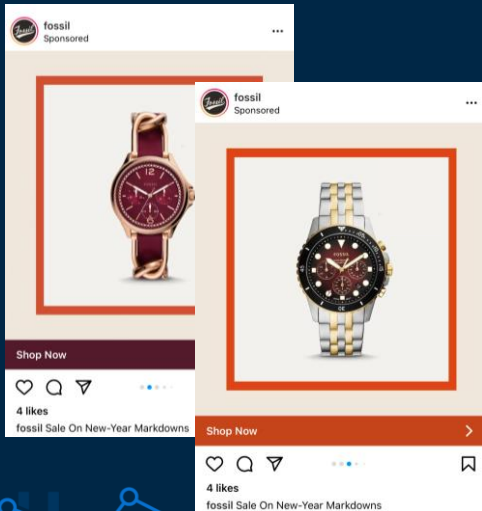
Student Intel Drives Continual Improvement

- ✓ 15-person groups organised by country of origin
- ✓ Participation motivated by community service credit
- ✓ *Focus Group Win:* Corrected for application fee barrier

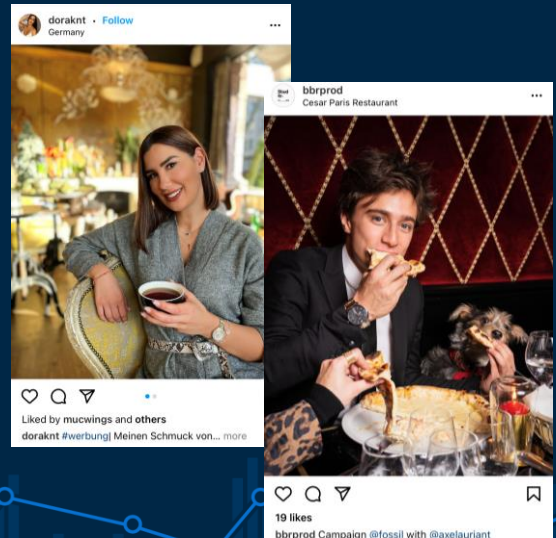
Influencers vs. Advertisements

Which Posts Resonate with You/Students?

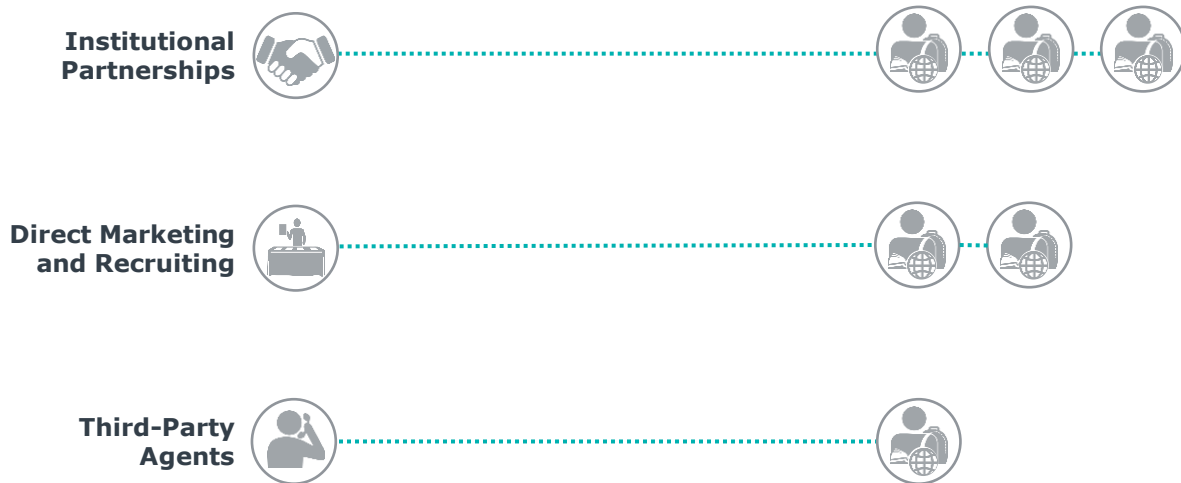
A.



B.



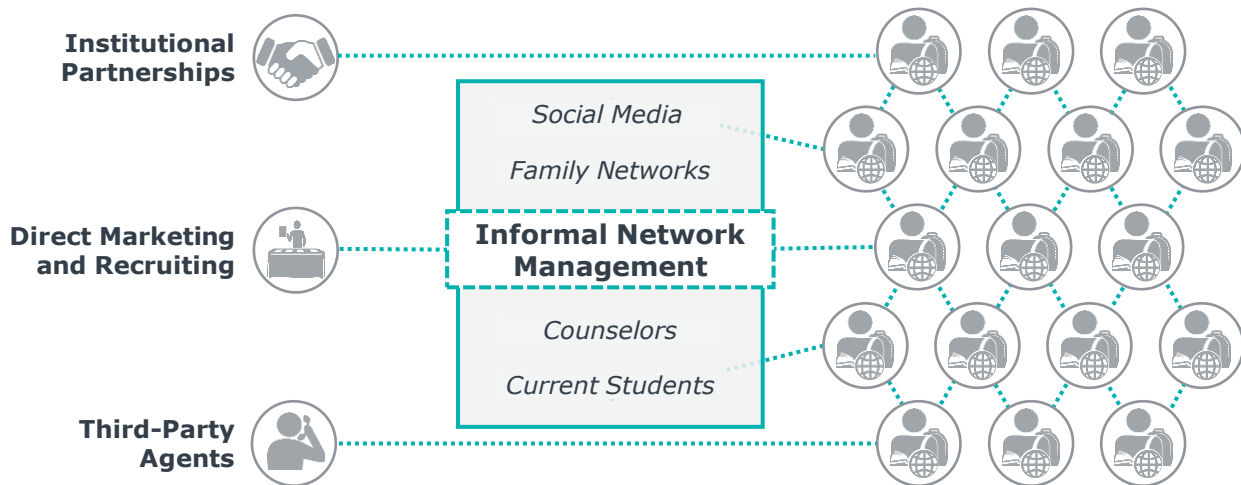
Traditional Advertising Has Its Limits



Informal Network Management Expands Reach

41

'Influencer' Networks Amplify Impact of Traditional Recruiting Practices

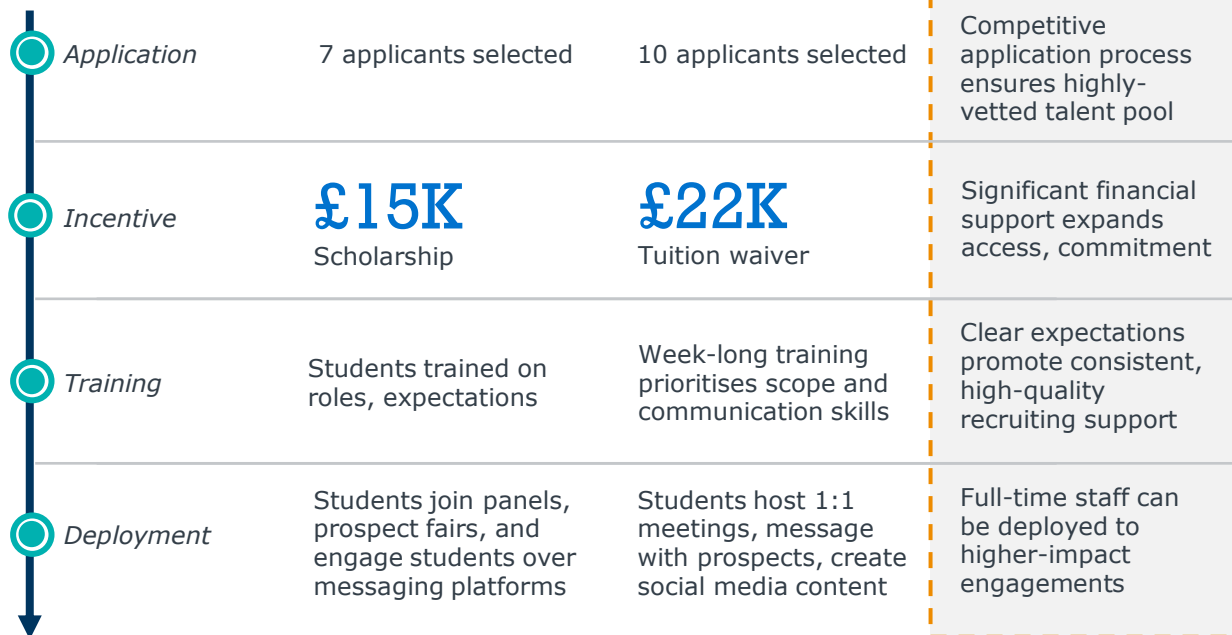


Investing in Informal Network Management

42

All-in Global Ambassadors Add Staff Capacity, Deliver Authenticity

PEPPERDINE
UNIVERSITY



Energise Engagement with Current Student Voices

43

Student-Prospect Interactions are a Must-Have Recruitment Driver



Register for a one-on-one meeting with an International Student Ambassador to learn more about:

- Student life in Canada & Niagara;
- Brock's online learning platform;
- Getting more involved in the Brock community;
- Working on or off campus; and
- Helpful tips about textbooks, studying, or their favourite courses

Book a time ➔



Current Students Are Uniquely Positioned To Convey Value



In-demand from international prospects



Implicit trust and authenticity



Personalises the recruiting experience



Informal Networks, Interactions Key to Success

Investing in Authentic Student Interactions Has Outsized Returns

“

Paying to have those student ambassadors have those [prospect] interactions is worth it because the money you save on commissions pays for those students. **It's an absolutely huge ROI.**

Camille Rutherford

Associate Vice Provost, Brock University

”

1



Prospects

Offers **authentic glimpse into university life** and helps avoid misinformation

2



Current Students

Provides **valuable financial support** and builds engagement and investment in university

3



Institution

Expands recruiting office reach, penetration **at lower cost than hiring full-time admissions staff**

Discussion

Investing in the Influencer Effect

1 *What other some other ways you've successfully engaged current international students in recruitment?*

2 *How might your full-time marketing staff profile change? Will you hire for different social media or influencer skillsets in the future?*



Three Opportunities to Advance Inside-Out Efforts

46

Most Universities Overestimate Barriers and Underestimate Incentives for Faculty Recruitment Support

- Global Advisory Board
- Int'l Travel Stipend
- Instructor Social Media Takeover
- Instructor-Led Workshops

Current Students are Underutilised as Informal Network Managers

- Student Focus Groups
- All-in Global Ambassadors
- Coffee with an Ambassador

Institutional Investment in Career Support Doesn't Align with Growing Market Demand

- International Student-Specific Career Development Support
- Proactive Emerging Programme Alignment



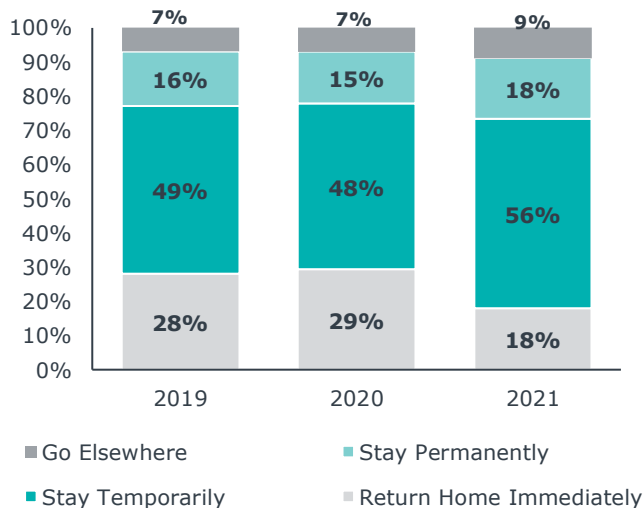
Seeking Post-Study Work Opportunities

47

Economic Uncertainty Drives Demand for In-Country Career Preparation

More Students Seek to Remain Post-Grad

Post-Grad Travel Plans,¹ QS ISS: UK, 2019-2021



Pandemic Has Not Driven Flight to Post-Graduate Programmes

Per centage of students who plan to work immediately after graduation:

55%
in 2021

52%
in 2020

But Students Concerned About Labour Market Prospects

49%

Of international students cited job uncertainty in foreign countries as their top study abroad-related concern

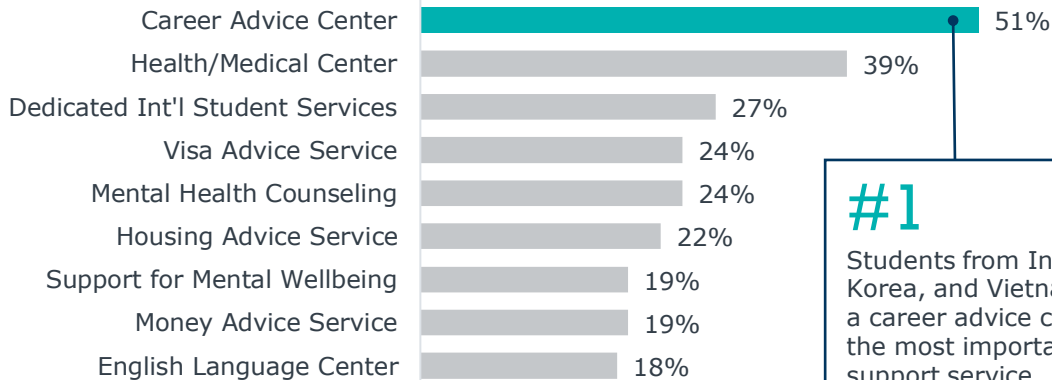
1) Excludes 'I don't know' responses (~15%)

Int'l Students Prioritise Career Support, Outcomes

48

Career Services Top List of Most Important Student Support Services

QS International Student Survey 2021 (UK)



#1

Students from India, South Korea, and Vietnam rated a career advice center as the most important support service

University Investments Don't Align With Student Priorities

96%

Of incoming international students said **'future career impact' was a key deciding factor** for institution choice

9x

Institutions spend **9x more on marketing** to prospects **than they do on career development** and support

Embedded Career Support a Key Differentiator

49

Status Quo Practice:

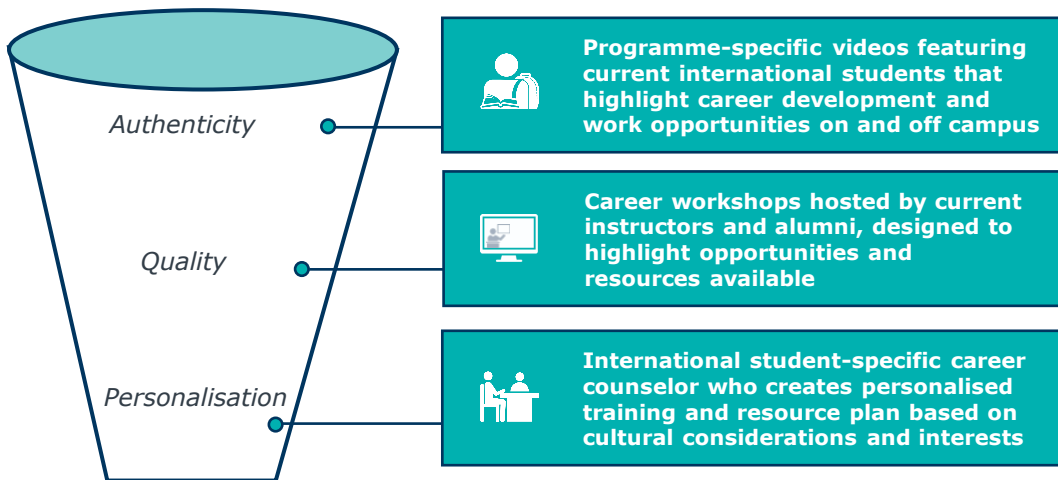
Post-grad outcomes marketed sporadically, but dedicated career support only available after enrolment



Next-Level Service:

Personalised career guidance is embedded within each stage of the enrolment funnel

Meet Student Needs with Dedicated Career Support at Every Recruitment Stage



Career Development Programme INSPIREs Students

50



Pace University's International Student-Specific Career Development Curriculum

INSPIRE Programme

Mandatory Modules

- ☐ Rock Your Resume
- ☐ CPT Guidelines for Internships
- ☐ Winning Strategies for Job Search
- ☐ Ace Your Interview

Recommended Modules

- ☐ Cover Letter Writing
- ☐ Interview Lab
- ☐ LinkedIn Lab
- ☐ Virtual Interviewing

Programme required for international students

Modules available asynchronously, live, or 1:1

Cultural competencies addressed throughout the curriculum

Resumes fine-tuned before applying to internships

Programme available to students once enrolled (including pre-INSPIRE modules)

Programme Optimises Institutional and Student Needs



Timeline prioritises int'l student career readiness and staff capacity



All content adapted from existing Career Services materials



Programme developed with input from entire Career Services team

91%

Of students were employed or continuing education within six months

Tailor Support for the International Audience

51

Strategies for Supporting Career Development from Across the Globe

Offer an International Student-Specific Career Counselor

Hire a career counselor to work directly with international students and other international student support staff to deliver high-impact career support



Build an International Student Internship Programme

Develop relationships with local employers to offer paid internships specifically for international students



Connect Students with a Professional Mentor

Create a professional mentorship programme that connects current students with a professional in their field of interest for online mentoring support



Facilitate International Career Placement Opportunities

Identify skills gaps in foreign countries and build employer partnerships/tuition reimbursement arrangements with overseas employers



Anticipating Programme Demand

52

Align Emerging Industries Data with Institutional Offerings

Regions of Interest



Zimbabwe



Nepal



Colombia

Emerging Opportunities

Federal push to modernise **agricultural infrastructure** in response to climate change

14%

Increase in Zimbabwean students in U.S., 2014-2020

Government prioritises major investments in **infrastructure development** and energy generation

0.39%

Per capita university-age mobility to US (highest in Central/South Asia)

National investment in Orange Economy, focusing on role of **creative/cultural industries** in economic development

1.9M

Jobs created in Latin America and Caribbean

In-Demand Programmes

- Agricultural engineering
- Irrigation development
- Agricultural science
- Energy science
- Info. and communication technology
- Tourism and hospitality
- Journalism
- Visual arts
- Information services

Five Themes on the Future of Int'l Recruitment



1

Global Positioning Will Continue to Shift Post-Covid

Pandemic-era gains and losses will likely reverberate for years to come

2

Global Rise in Price Sensitivity

Pandemic will exacerbate price concerns, particularly in growth markets

3

Inside-Out Marketing Approach Equally Valuable

Leveraging existing capabilities, offerings key to establishing pipeline sustainability

4

Faculty, Students an Underleveraged Resource

Quality, authenticity signaled by campus stakeholders in high demand for prospects

5

Virtual, Career-Aligned Recruitment Key for Future

Restricted travel, economic uncertainty requires new approach to engagement

Discussion

Supporting Int'l Students Past Recruitment

1

How does your university prepare and support int'l students for campus life far from their home?

2

What are some unique challenges your university has identified for int'l students on campus? How do you address those challenges?

3

What barriers do int'l students face in accessing services, particularly in regards to mental health and well-being? How do you address those barriers?

