



Welcome back!

Please sit at a different table with new colleagues. Introduce yourself and share a takeaway from yesterday.

Our Agenda

Day 1

- 12:00 Lunch
- 12:30 Kickoff
- 12:40 Signals to Stories:
Higher Education 2028
- 14:00 'Outside-In' Strategy
- 17:30 Reception and Dinner
at Patina

Day 2

- 8:00 Breakfast
- 8:30 EAB Update
- 8:45 Research Preview:
International Student
Recruitment
- 10:00 Can Organisational
Transformation Save Us?
- 12:00 Adjournment

Partnership Update

EAB's Strategic Advisory Services Partnerships



Enabling Higher Education Leaders to Implement Change with Confidence

How We Serve You



Deep support for 2-3 strategic priorities on an ongoing basis



Analysis of sector-wide trends to keep you informed and prepared



On-demand research and expertise as new needs arise

Building Blocks of Our Support

Best Practice and Future-Focused Research

Annual research agenda set and guided by the sector's most meaningful challenges

Diagnostics, Decision Tools, and Signature Services

Proprietary tools and resources to help activate our recommendations

Implementation and Change Management Expertise

Subject-matter experts who understand your problems and how to drive change

Global Network of 2,300+ Higher Education Institutions

In-person, virtual, and 1:1 convenings to share best practices from across the sector

Ask EAB First!



We Want to Be Your First Port of Call for Questions Big and Small

“Ask EAB” early and often so we can triage support based on our expertise.

Recent questions from partners:

- How do others institutions structure their resource allocation models to fund central strategic initiatives?*
- How should we recruit for and define the role of a Chief Marketing Officer?*
- Where have ‘smart’ devices had the biggest impact on energy and space utilisation in the sector?*
- What mechanisms are other universities using for evaluating new program proposals?*
- How can we better engage our global alumni to cultivate a donor pipeline?*
- How should our website evolve to meet new student expectations?*

Possible support levers:



Best-practice report from the EAB library



Facilitated workshop to educate and make a decision



Expert consultation to share unbiased advice



Diagnostic tool, audit, or implementation guide

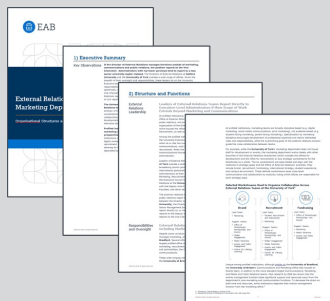


Sector-wide networking with relevant institutions



Responsive research projects aligned with your needs

(Re)introducing Responsive Research Projects



Short, tailored research projects to provide you with tactical information to make better decisions

Where we excel in supporting your decision-making:

- Profiles of best practice to build a case for change
- Evaluation of proposed models, policies, or structures
- Communication and stakeholder buy-in guidance
- Documenting missteps and failure paths that stall progress

Project inputs:

- Interviews with sector practitioners
- EAB's best practice library
- Data analysis
- AI-fueled analysis

Responsive Research Project Logistics





EAB

International Recruitment

Preview of our Global Research Agenda

RESEARCH IN PROGRESS

EAB – Where Local Perspective Meets Global Scale

80+

Research interviews
completed (and
counting...)

5+

Regions
represented

Canada

- Nigeria the fastest-growing source in '23; study-permits up +44 %

BUT

- Nigeria's currency collapse drove the UK's international student dip

Will over-reliance continue to bite?

United Kingdom

- Postgrad appeal remains strong, accounting for >60 % of study visas

BUT

- 'Dependents ban' prompted quick shift of applicants from UK to the US

Can we escape boom-and-bust?

United States

- International enrolment hit 1.13 M in '23/'24, an all-time high

BUT

- Visa backlogs, cultural concerns prompt Indians to pivot to Australia

Who wins from the 'Trump bump'?

Australia

- International student enrolments rose 12 % on '24 levels

BUT

- Student-visa fee jumped 125 %, while Canada's remains at CAD150

Will visa hurdles scare applicants?

- 1 Occasion for this Research**
- 2 Notes from the UK Research Desk
- 3 Where We Are Headed with This Research

Headwinds Reshaping the 'Big Four'

Financial, Policy, and Reputation Headwinds are Reshaping the 'Big Four'



US

National Policies

- Increased scrutiny for all visa applicants
- Travel bans and potential deportation for political speech or protests

Financial challenges

- Proposed education and research cuts of USD 163bn
- Decline in UG home enrolments, 2.4% below pre-pandemic levels

Reputation Abroad

- Only 38.2% intl students viewed the USA positively post-presidential election

Intl PG student

13% Enrolment decline projected for 2025-26



CAN

- Intl student study permits reduced by 10% in 2025

- Increase in financial requirements for all visa applicants

- In Ontario, CAD 1.3bn in cuts planned in next 3 years

- Decline in UG home enrolments, 5.7% from 2013/14 to 2022/23

- Only 41% of intl students would recommend Canada or their institution to others

31% Enrolment decline in 2025

Headwinds Reshaping the 'Big Four'

Financial, Policy, and Reputation Headwinds are Reshaping the 'Big Four'



UK



AUS

National Policies

- In May 2023, banned intl PGT dependents
- Higher financial restrictions, visa fees, and proposed post-study work barriers

- Proposed caps ping-pong up and down annually
- Increase in financial requirements, visa fees and English-language proficiency

Financial challenges

- 72% of English universities will be in deficit by Dec 2025
- Although high in 2024, the 36.4% home UG entry rate was 1.8% below 2021 peak

- 64% of universities expect budget cuts in the next year
- Decline in UG home enrolments, 8.2% since 2021

Reputation Abroad

- Reputation remains high in the UK, but a recent poll reported a 7% decline in intl student satisfaction

- Negative sentiment towards studying in Australia rose 16% post-2025 election

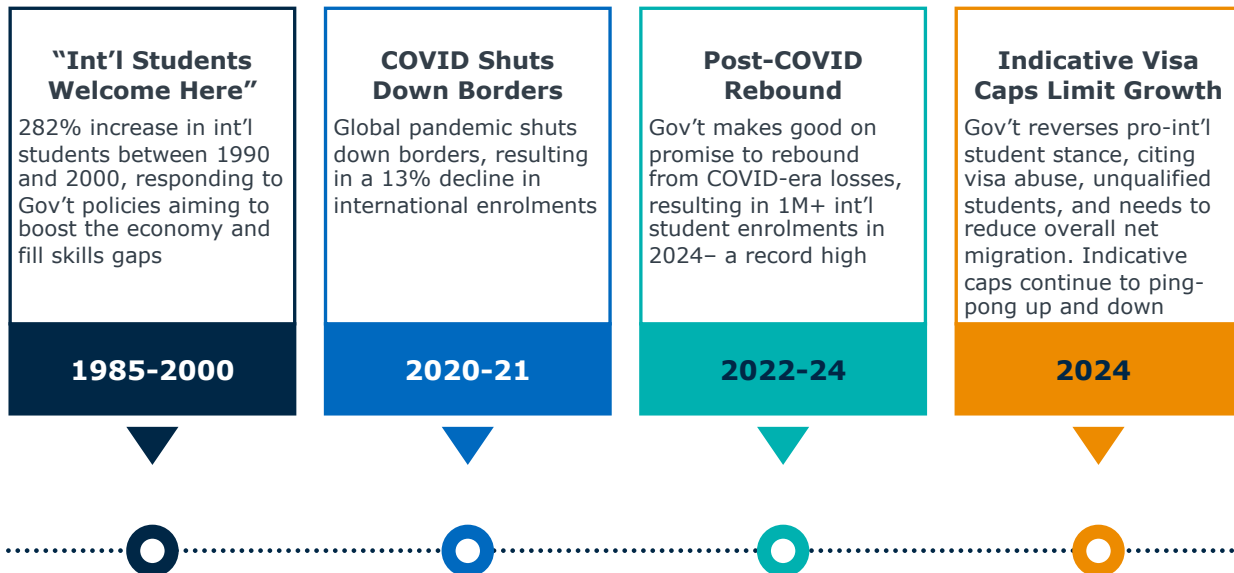
Intl PG student

10% Decrease in non-EU int'l new entrants in 2025

13% Enrolment decline in 2025

A Familiar (if Overwhelming) Story

International Student Numbers Surge and Dip in Lock-Step with Policy



Focusing Energy Where Our Decisions Matter



Global, National Forces Tying Our Hands...

...But Some Things Remain in Our Control



Global
Demographic
Changes



Rise of New
Study
Destinations



Home Gov't
Immigration
Policy



Spend and
Margin Control



Diversification
Strategy



Source Market
Government
Policy



Fee Caps and
Controls on
Student Numbers



Realistic Target-
Setting



Principled
Growth

Discussion Question #1

How are you responding to the levers within your control?

- a. Spend & Margin Control
E.g., re-visiting pricing, aid, discounting
- b. Diversification strategy
E.g., TNE, deploying market sensitive strategies
- c. Realistic Target-Setting
E.g., strategic enrolment management planning
- d. Principled Growth
E.g., new program launch

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Beware the Golden Goose



Universities Turned to Intl Students to Stave off Financial Challenges at Home...

THE PIE

Income from UK tuition fee rise not enough to offset national insurance hikes

technology

Universities set to lose £17bn by 2027 as inflation bites

Rising Costs



Declining Funding

RUSSELL GROUP

University tuition fees now worth just two-thirds of their value in real terms

THE Times Higher Education

OfS strategic priority fund cut by £100 million

...BUT Increased Reliance on Intl Students Created New Financial Vulnerabilities

23%

Of all university revenue came from intl student fees in 2024

10%

Decrease in non-EU intl PGT new entrants in 2025

72%

Of English universities will be in a deficit by the end of 2025

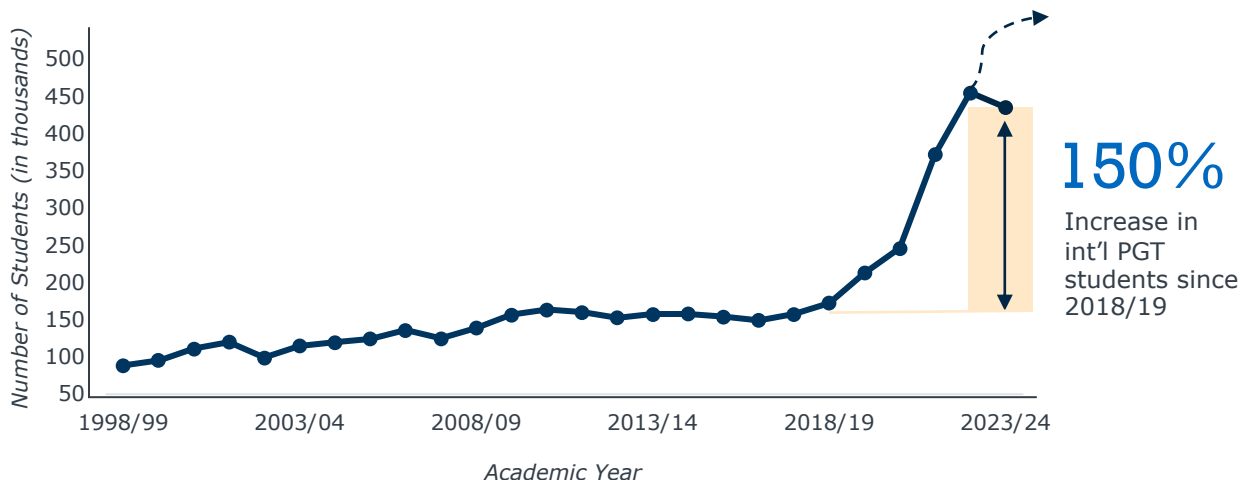
A Terrible Year for Student Numbers?



Despite Dip, 2024 is Second-Highest Enrolment Year on Record

Number of International Students in 2024 Far Outstrips Pre-COVID Numbers

International PGT Student Numbers in the UK, 1998-2024

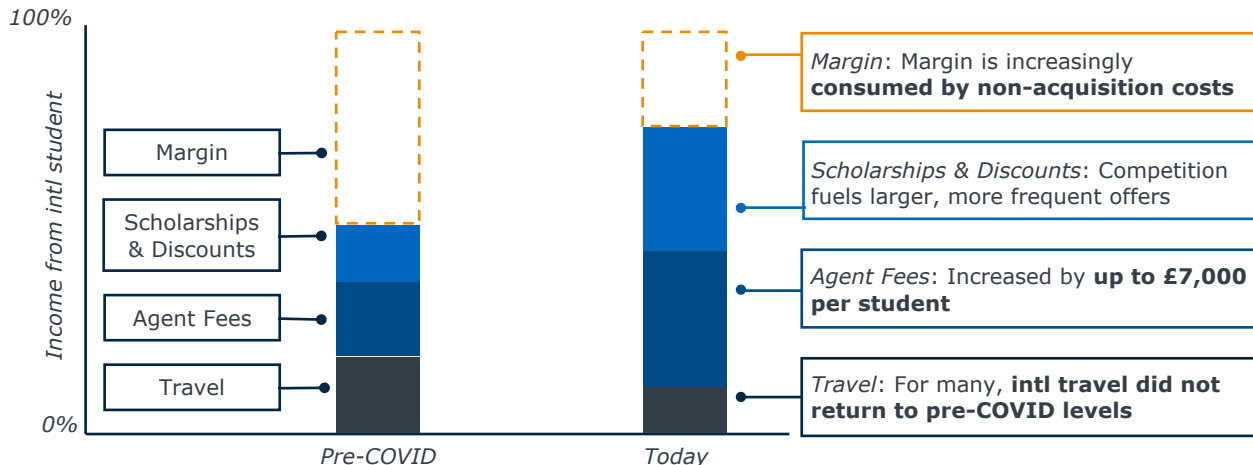


Rising Costs of Acquisition Diminish Margin



Institutions Spending More to Recruit, But Earning Less Per Student

Representative University Spend on International Student Recruitment



“At least **one-third of revenue** is lost to agents and scholarship fees; **once you’ve increased agent fees, you can’t walk it back...and we engage in scholarship bidding wars** to recruit students.”

Head of International Recruitment, Plate-Glass University



Discussion Question

Have you noticed that your costs of acquisition are increasing? How is that impacting your margins?

- Are agent fee hikes starting to affect you?
- How does competition for students affect you in an environment where everyone is 'capped'?
- Has anyone found a good strategy for protecting against 'margin creep'?

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Best Practices We've Identified So Far



And we're still hunting for more!

Cost-focused tactics

1. Net Tuition Revenue Calculator
2. Maximum Spend Thresholds
3. *Market Affordability Assessment*
4. *Recruitment Channel Diversification*
5. *Pipeline-Building Partnerships*

Revenue-focused tactics

1. *Surge & Shortfall Scenario Plans*
2. *Agility-Based Decision Fail-safes*
3. Program-Based Growth Strategy
4. Market-Responsive Pricing
5. *KPIs Beyond Headcount Incentives*

Activity

Tell us where you would direct us! Where should our research team spend more time?

On your hand out:

- Circle the tactics you'd like to learn more about
- Star the tactics where you are particularly strong (we might profile you!)
- Cross out the tactics that feel less directly relevant
- Fill out additional strategies you're currently employing to get ahead challenges discussed today, or any additional thoughts or concerns you may have.

Discussion Question

As you look to 2026 and the 9% increase in student places...

- Do you know where your additional students may come from?
- Are you planning any adjustments to your recruitment playbook?
- How are you balancing capacity, NTR, and demand?

Representative Interviews Completed

80+

Research
interviews
completed

5+

Regions
represented



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Research
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completed (and
counting)

5+

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represented



Sign Up for An Interview TODAY!

- On your evaluation form, 'opt-in' to a research interview
- Name the contact we should follow up with; e.g., *VP International Strategy, COO, CFO, VP Enrolment Strategy*



University of
Sheffield



QUniversity
AUSTRALIA



Support Growth Strategy with EAB's Market Insights

25

Support Growth Strategy with EAB's Market Insights

EAB Market Insights reports **analyse real-time global labour market demand data and competitor intelligence** to help universities:

- ▶ Revitalise and reposition underperforming programs to unlock growth
- ▶ Diversify and prioritise new markets and program offerings
- ▶ Defend high-performing programs to sustain enrolment and relevance

Tailored reports feature **concrete recommendations for next steps** and an **honest assessment of risks and unknowns**.



With Market Insights, Partners Are Equipped to Make Progress on Recruitment Diversification Goals

What programs would be most competitive for our new TNE venture in India?

How can we structure our MSc Data Analytics course to better serve online students?

Which markets have skills gaps that match our existing healthcare program strengths?

What new programs are likely to best serve students in our core source markets?

Are program webpages and institution websites optimised to attract and convert students?

Labour Market Analyses to Support Program Performance in a Global Market



Opportunity to Leverage New Data in Making Informed, Data-Driven Growth Decisions

EAB Market Insights now provides labour market analyses to inform program alignment with market demand in select regions.

Possible Global Data Use Cases



Vet **programs** to maximise attractiveness to students from specific source countries



Accelerate **diversification strategy** with programs aligned to in-demand skills in new markets



Refine **TNE portfolio** to ensure program quality, attractiveness, and alignment with employer needs

Global Data Scope

- Average monthly demand growth for professionals with a particular skillset vs. all professionals
- Relevant jobs posted in the past year
- Top occupations, titles, skills, employers

Current Labour Market Data by Region

Long-Running Data

- United States
- Canada
- United Kingdom
- Australia

Newly Vetted Data

- Argentina
- Austria
- Belgium
- Brazil
- Chile
- Colombia
- Costa Rica
- Croatia
- Czech Republic
- Denmark
- France
- Germany
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Italy
- Japan
- Luxembourg
- Malaysia
- Mexico
- Netherlands
- New Zealand
- Philippines
- Poland
- Portugal
- Puerto Rico
- Romania
- Singapore
- South Africa
- South Korea
- Spain
- Sweden
- Switzerland
- UAE

Simplified Market Insights Project Timeline



Pick a program



Pick a region(s)



Kickoff call with EAB



Receive report



Debrief call with EAB

← Two months →

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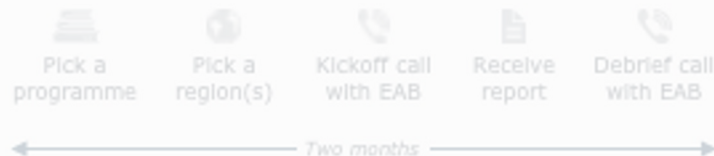
Newly Vetted Data

- Argentina
- Austria
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- Brazil
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- Indonesia
- Ireland
- Italy
- Japan
- Luxembourg
- Malaysia
- Mexico
- Netherlands
- New Zealand
- Philippines
- Poland
- Portugal
- Puerto Rico
- Romania
- Singapore
- South Africa
- South Korea
- Spain
- Sweden
- Switzerland
- UAE

Want to Get Started?

- On your evaluation form, 'opt-in' to get more information about the Market Insights request process
- Name the contact we should follow up with; e.g., *Head of Program Planning & Analysis, Director of Marketing, or equivalent*

Simplified Market Insights Project Timeline



Why Use Labour Market Data?

Align Your Recruitment Growth Strategy with Real-World Skills Demand to Attract Today's Students

Align your professionally focused programs with today's labour market needs to best attract students driven by career outcomes. This includes not only students preparing to enter the workforce, but also prospective students who are:

- ▶ Looking to upskill in their current role or pursuing a promotion
- ▶ Facing replacement due to AI or automation, or looking for a career change
- ▶ Returning to the workforce and rebuilding career confidence

Labour market data—such as job postings and projected employment trends—helps you align programs with market skills gaps and real-world employer demand. By understanding which skills are in highest demand regionally, nationally, or globally, you can ensure your offerings stay competitive and strengthen your recruitment appeal.

Use EAB's Market Insights Reports and Labour Market Data to:

1

Strengthen program relevance by mapping course content and assignments to high-demand skills in the job market

2

Communicate program outcomes and career opportunities so students understand the value of their education in the market

3

Identify top employers to develop possible internships/work placements and strengthen industry partnerships

4

Target regions where skills gaps align with institutional strengths to inform diversification and/or marketing strategies



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