



# Competing in a Global Market Place

Strategic Advisory Services



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# Meet Your Research Team



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Research focus:  
student recruitment and  
experience, strategic  
planning, global trends

*International student to  
the US from Egypt & India*



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student recruitment,  
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*Irish academic, experience  
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*International student to  
Scotland from the US*



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Research focus:  
enrolment growth,  
strategic planning,  
market expansion

*Minnesotan through-and-  
through*

**100+** Interviews  
Conducted

**5+** Regions  
Represented

**360°** Cross-Campus  
Perspective

# A Quick 'Temperature Check' As We Get Started

1. What is one win from the 2025/26 recruitment cycle?
2. Looking ahead, what factor do you expect will matter *most* for success in the next cycle?

- 1 Challenges in the International Recruitment Landscape
- 2 Responding to Market Reality #1: Rising Costs of Acquisition
- 3 Responding to Market Reality #2: There is No New China



# International Students Link Our Aspirations to Impact

## Aspiration

## International Students

## Outcomes

Cultivate a diverse and inclusive learning environment



Bring diverse perspectives that enrich teaching and research



Equip students to lead and collaborate across borders

Build knowledge through collaboration and exchange



Strengthen networks and connections that power global partnerships



Generate research and new ideas with global impact

Drive regional innovation and economic growth



Contribute skills, entrepreneurship, and investment to local economies



Connect region to a global network of talent and ideas



# Recruitment Headwinds Intensify Across the 'Big Four' <sup>7</sup>

Policy Matters, But it's Not The Only Force Reshaping Demand

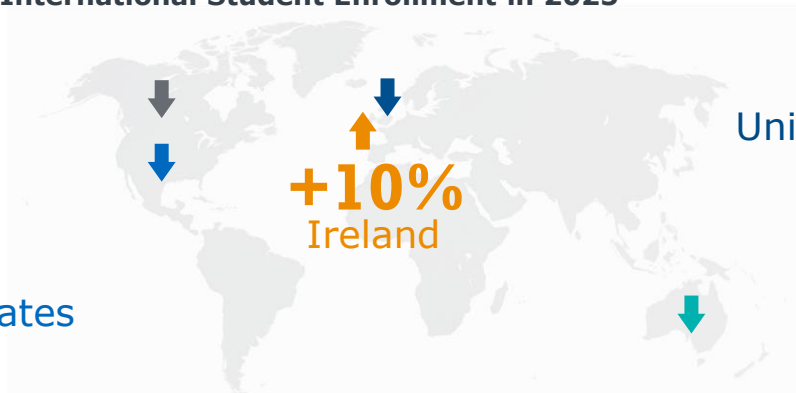
## Drop in New International Student Enrollment in 2025

**-61%**  
Canada

**-6%**  
United Kingdom

**-17%**  
United States

**-15%**  
Australia



## Traditional Source Markets Are Eroding



Saudi Arabia's outbound demand **down 50%** since the 2015 scholarship reforms



Nigerian student mobility **disrupted by the 2023-naira devaluation**



**Chinese enrolments down 13%** since 2019 peak as youth population shrinks and domestic HEIs strengthen

Source: [Canada records 60% fall; US international student enrollment](#); [UK: International student numbers fall for second year; Why do people come to the UK?](#); [Australian international students](#); [Can the private sector help Saudi meet its demand for HE?](#); [Demand from Chinese students declines Down Under: International Enrolments in Ireland Rise](#); EAB interviews and analysis

# Growing Competition Is Reshaping Recruitment



## New Destinations Rise as Big Four Lose 10% of Market Share

“

International students are...increasingly turning away from the traditional 'Big Four' destinations in search of stability, opportunity, and affordability.

**It is really about the 'Big Ten' now.**

*Fanta Aw, Association of International Educators (NAFSA), CEO*

”

### Most Popular After Big Four



Germany



Sweden



France



Netherlands

### Fastest Growing Asian Hubs



Malaysia



Japan



China



S. Korea

### Disruptors On The Rise



UAE

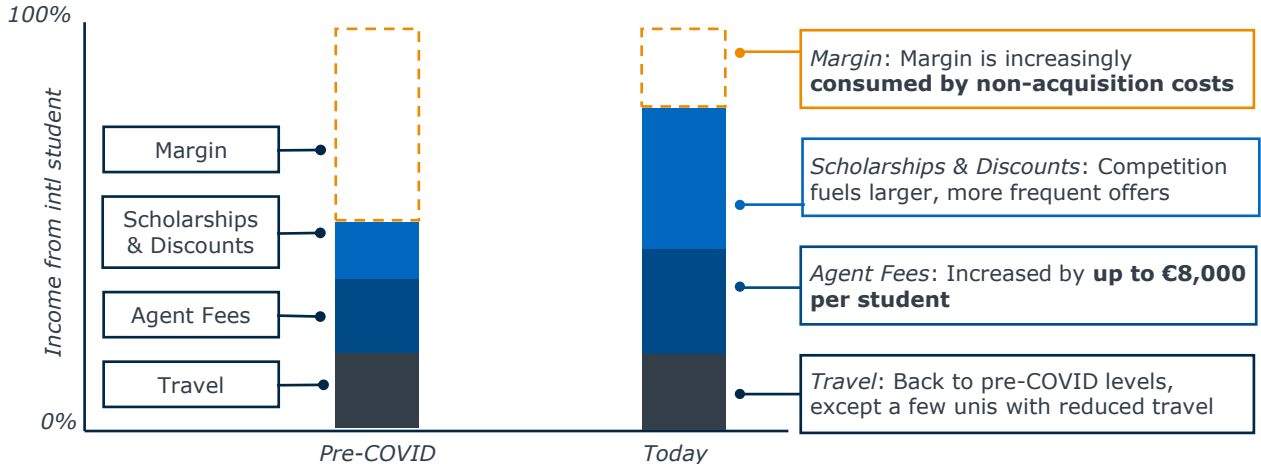


Turkiye

# Our Growing Challenge: Rising Costs of Acquisition

## 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*

Source: [Finance options to study in UK](#); [UK universities paying millions in agent fees](#); EAB interviews and analysis.



# There Is No New China to Replace Lost Scale

## Unique Confluence of Forces Drove China's Outbound Boom

### Domestic Structural Drivers

- ▶ **Expanding Middle Class**  
*Middle class grew from 3% of the population in 2000 to over 50% (707M people) by 2018*
- ▶ **Gaokao Entrance Exam Pressure**  
*Families see overseas study as a way to sidestep a high-stakes exam that shapes university access and career paths*
- ▶ **Common to Study Abroad**  
*Over 8M Chinese students have studied overseas, making international education a common and socially accepted pathway*



### Graduate Returnee Incentives

- ▶ **Entrepreneurial Support**  
*Policies assist returnee entrepreneurship with start-up funding, innovation support and tax relief*
- ▶ **Fast-Tracked Hukou Access**  
*Top 100 university graduates gain priority urban hukou access, linking elite education to residency benefits*
- ▶ **Clear Career ROI for "Haigui"**  
*Preferential hiring in strategic sectors, with returnees leading 70% of national projects and university president roles*

## India Builds Domestic Capacity, As Outbound Mobility Faces Constraints

50%

Increase enrolment in domestic higher education by 2035

15

Foreign universities open campuses in 2025-26

-31%

Fewer Indian students abroad since 2023

71%

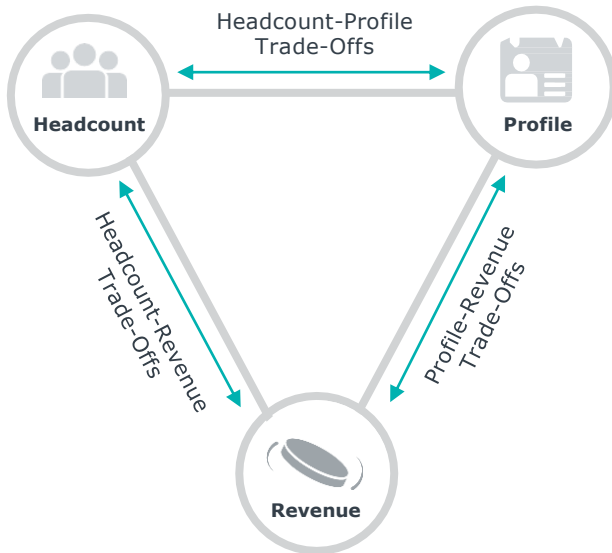
Rejection rate in Canada for Indian applicants vs 58% average

# Setting the Scene: Recruitment's Challenge

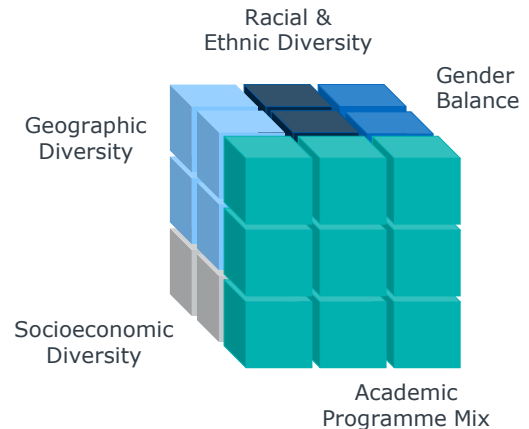


Many Layers of Complexity to Consider When Recruiting and Enrolling

## The "Iron Triangle" Reveals Recruitment's Conflicting Goals



## Institutional Goals Add Another Layer of Complexity



# Focusing Energy Where Our Decisions Matter



## Factors Influencing International Recruitment Success

Global and national forces beyond our reach

Internal levers within our control



Home Gov. Immigration Policy



Global Demographic Changes



Rise of New Study Destinations



Inflation and Exchange Rate



Fee Caps and Controls on Student Numbers



Source Market Government Policy



Recruitment Spend



Target Setting



Growth Strategy

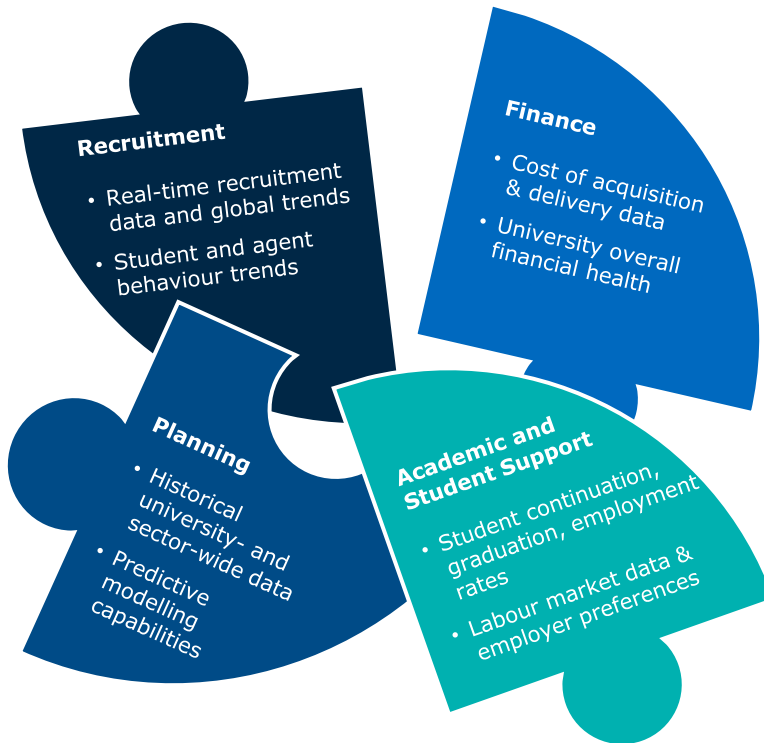


Diversification Strategy

# The Pieces Are Ready for You to Pick Up...



## Individual Units Have Wealth of Data and Expertise



## But Silos Cause Costly Gaps in Strategy

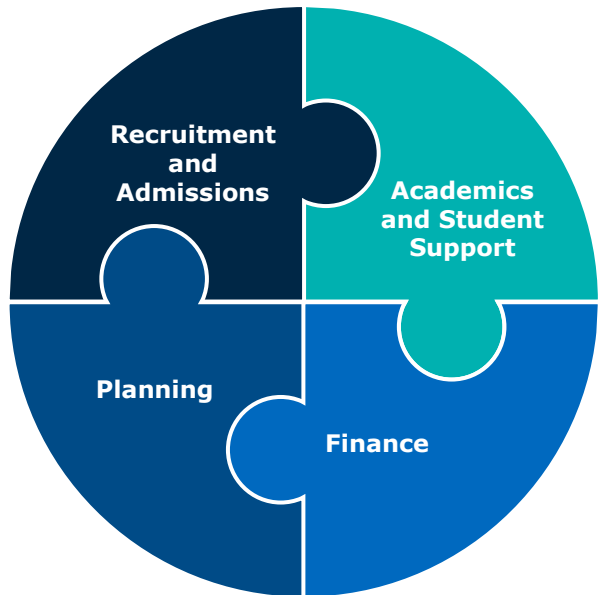
- ! **Inaccurate, often overly-ambitious**
  - student number targets
- ! Recruitment decisions that **fail to account for net financial impacts**
- ! **Disjointed processes** that make **in-cycle agility difficult**

*'Our functions are too disparate, and lacking integration...I'm not saying we have to be centralised, but **this is chaos...**'*

Head of Intl Student Recruitment  
Post-1992 University


# ...You Just Need to Bring Them Together

## University Executive Leadership Needed to Develop Data-Driven Strategy



 Executive encourages cross-unit collaboration to **fill process and knowledge gaps in planning and recruitment**

 Support from university executive emphasises **value of university-wide strategy** and **encourages buy-in**

 Collaboration across siloes enables the **data-driven decision-making** needed to **weather unpredictable recruitment headwinds**



# Rising Costs of Acquisition

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MARKET REALITY

1

# A Once Familiar Recruitment Journey



## Yesterday's Funnel Was Easier to Forecast and Fund

*Pre-Covid Recruitment Followed a More Predictable Path*

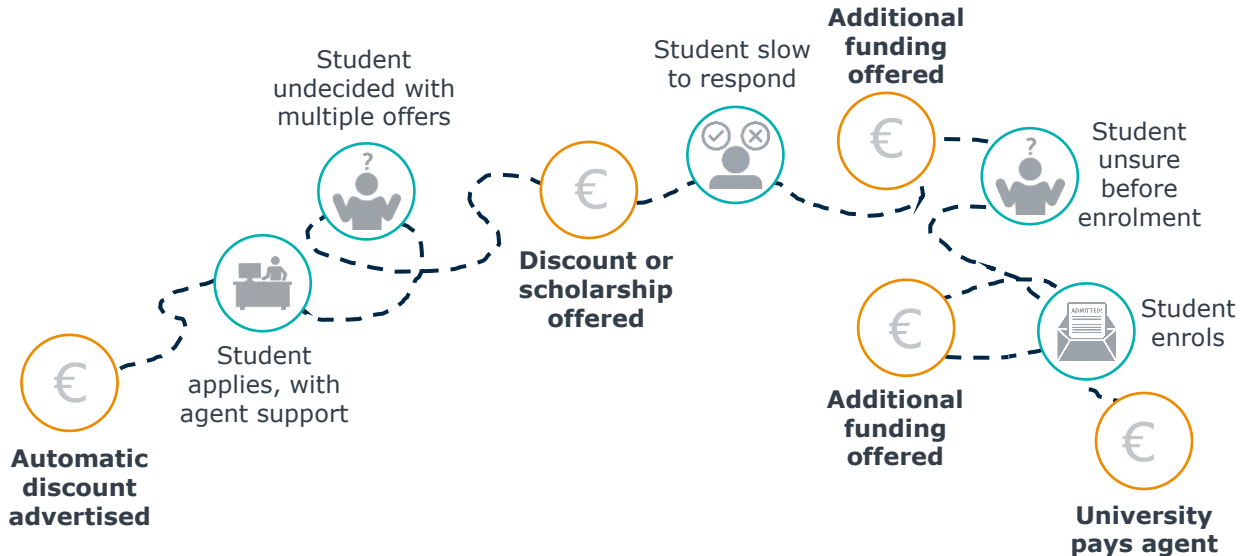


# The Costs of Student Recruitment Have Changed



## Now, Universities Pay More Often – and More Money – for the Same Student

*Post-Covid Convoluted Recruitment Journey*



Source: EAB interviews and analysis.

# Beyond Headcount Incentives



## Additional KPIs Protect Against Rising Recruitment Costs

### Current Headcount KPI

- ✓ Easy to track and report
  - ✓ Familiar to current teams
  - ✓ Useful for capacity planning
- 
- ✗ Imperfect proxy for growth
  - ✗ Blind to programme or market concentration risks
  - ✗ Ignores net revenue impact (e.g., discounts, agent fees)
  - ✗ Encourages short-term fixes (e.g. accepting lower grades)
  - ✗ Rewards volume over all other recruitment goals



### Sample *Additional* Frontier Metrics

Recruitment Metric	Familiar Foundation	Outcomes
Net tuition revenue (NTR) per student	Headcount but layers in discounts and agent fees	Promotes a financial mindset, aligning growth with revenue goals
Retention/ progression <sup>1</sup>	Headcount year- on-year	Incentivises enrolments that stay and succeed
Diversity (programme or region)	Headcount by subject area and/or market	Encourages balanced portfolio, reduces concentration risk



### Let's Discuss:

Which of these metrics do you actively use today? How might you implement others?

1) Only relevant if programmes are longer than 1 year



# Controlling Costs Starts With Tracking Them

100+ Interviews Reveal Staff Struggle Without Cost and Spend Data

## What Your Recruitment Staff Shared:

“

The cash flow [is] a big problem. We are in **[financial] survival mode** right now.”

“

[Spending on agents]...has **become an arms race.**”

“

...Everyone gets panicky in July [so] we pile in clearing...**panic-buying students**...but you don't really know your numbers until December.”

“

We can reach strategic enrolment goals, but we **still aren't meeting our financial goals.**”



## Savvy Questions Every Leader Must Ask

1

How do we **avoid over-spending** on recruitment?

2

Which **recruitment tactics** result in the **best ROI**?

3

What **markets make financial and strategic sense** for us to invest in?

# The Simple Math Behind Smarter Recruitment

First

$$\text{Cost of Acquisition} = \text{Scholarships} + \text{Agent Commission}$$

Then

$$\text{Net Tuition Revenue} = (\text{Tuition Fee} - \text{Cost of Acquisition}) \times \text{Number of Students}$$

# “We Couldn’t Possibly Calculate Cost of Acquisition”

## Lessons From Your Peers: Keeping It Simple Makes It Doable



**Don't conflate cost of delivery with acquisition.**

Leave complicated teaching and facilities costs out for now.



**Beware of false precision.**

Empower your staff to make educated guesses when necessary.



**Build on existing intel.**

Identify existing data sources from Finance, Recruitment, Planning.



*Reduce staff workload and improve efficiency by using EAB's **Cost of Acquisition Calculator***

# Blanket Discounting Drains Funds Without Results



## Recruitment Budget Structures Often Waste Resources, Overburden Staff



Not every student has the same financial needs



Blanket discounting approach **results in inefficient spend**



An increasingly competitive market begs for more spend



**Recruitment budgets swell each year**



Processing blanket discounts often mean increased admin work



**Admissions staff face high workloads, low morale**



### Uniting Past Experiences and Current Data to Drive Innovation

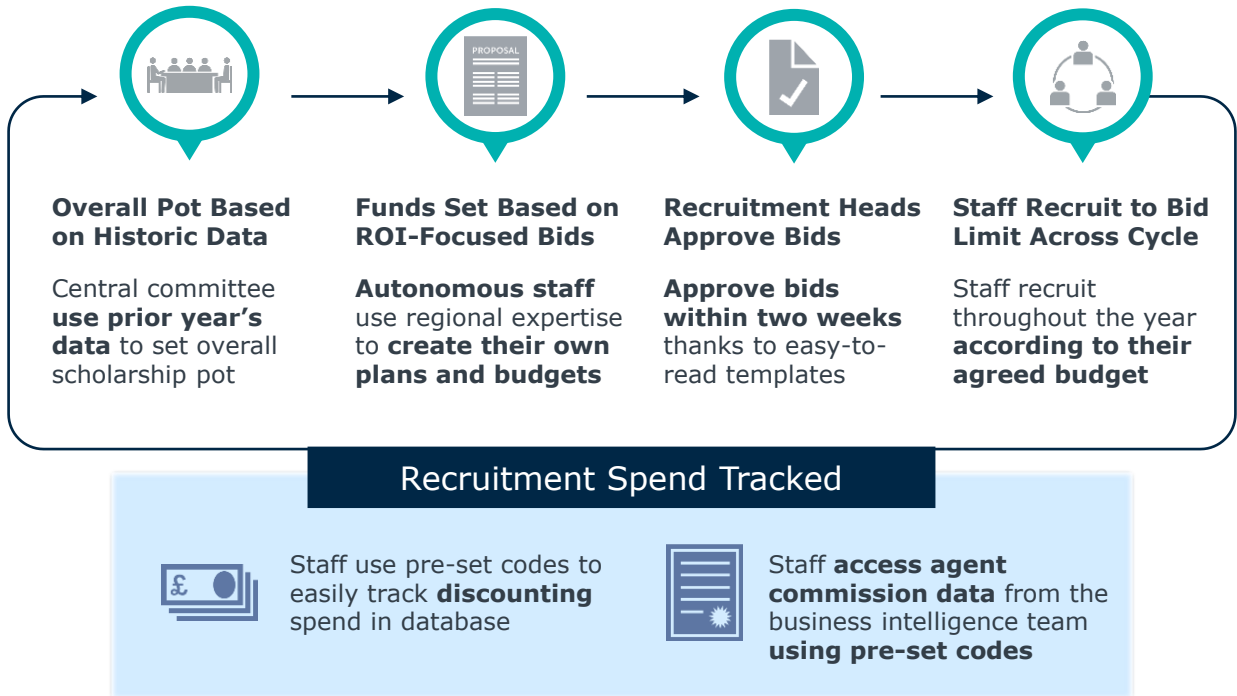
*Sophie Turnbull,  
Head of Recruitment*

- **Used out-of-sector experience** at INTO to develop concept
- **A-B testing** revealed one-size-fits-all scholarship failed to improve conversion
- **Sought sponsorship** from DVC of International **to make work possible**

'I believed that we were awarding scholarships to students who weren't even aware they existed and therefore had no impact on their decision to join. We were **giving money [away] with no strategic insight...**'

# Recruitment Staff Bid for Portion of Scholarship Pot

Process Optimises Staff Knowledge and Reduces 'Wasteful' Spending



# Bid Templates Accelerate and Simplify Process



## Sample Bid Excerpt

► ***[UWE's strategic priorities are listed here first as a guide before filling out template]***

*Summary of region-specific outlook and considerations for the year (incl. cost of acquisition):*

*Competitor and partner activity and considerations:*

*Recruitment plan (overview of planned activity, requests for marketing or academic support):*

*Summary of previous year's spend and ROI:*

*Proposed total recruitment spend bid:*

# Bid System Replaces Runaway Recruiting Spend



## Tactic Drives Enrolment Growth in Line with Diversification, Revenue Goals

↑ 22%

Growth in international UG students, 2024-25 to minimise reliance on PGT market

↑ 19%

Growth in all international student tuition revenue, 2024-2025

## Self-Ownership System Improves Staff Capabilities and Morale



Staff **never exceeded their budget targets**, showing accurate forecasting

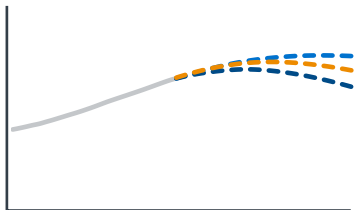


Staff autonomy drives **higher morale and reduces turnover**

“We’ve **absolutely seen growth**, and I think...changes to admissions, changes in the autonomy that regional managers have is part of it.”

*Sophie Turnbull, Head of Recruitment*

## Static Scenario Planning



Institutions are already engaging in scenario planning...but an ever-changing market means a **need for improved accuracy and flexibility.**

“

The only thing you can predict is that there are going to be unpredictable [outcomes].

”

*Rosa Scoble, Director of Planning  
Brunel University of London*

## Knee Jerk Reactions



Institutions are willing to make agile changes in a shifting market...but increasing recruitment costs **call for these plans to be backed by data.**

“

The biggest challenge universities are facing is a short-termism driven by panic around budgets...There needs to be resilience built into the system.

”

*Pro Vice Chancellor  
Post-1992 University*

# Setting Aspirational Targets Ignores Market Realities

## Common Pitfalls in Status-Quo Scenario Planning

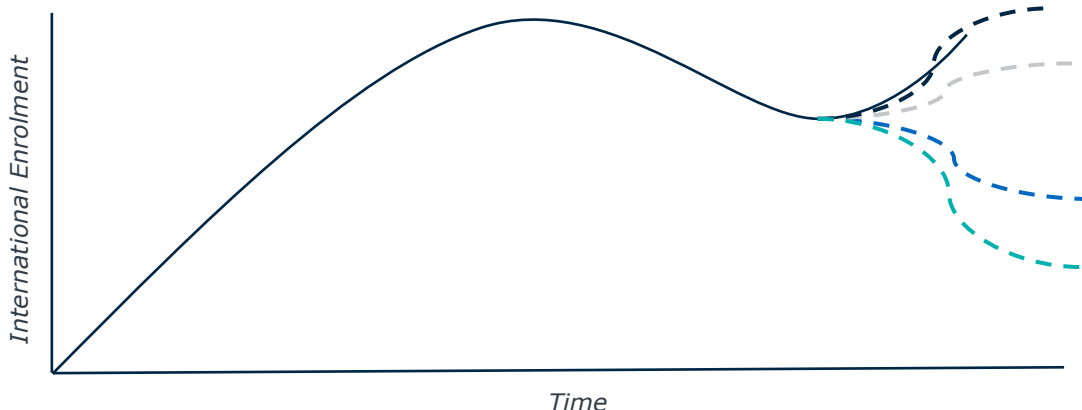
Often **set by academics**, who have **unrealistic perceptions of student demand**

Often **limited to 1-2 scenarios**, with **infrequent updates** as the recruitment cycle progresses



**Inadequate planning impacts** universities' ability to **accurately predict or budget for long-term future**

## Static Scenario Planning Leaves Universities Caught Off-Guard



# MMU Grounds Enrolment Targets in Multiple Realities

Planning Team Sought Additional Data Sources to Model Six Scenarios



Carolyn Price

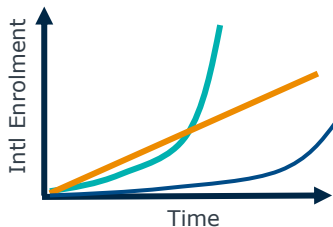
*Director of Planning  
and Insight*

## Key Ingredients for Best-Practice Scenario Planning



- 1 Led by **centralised, data-driven** planning team with input from academics, recruitment, and finance
- 2 Integrated **leading indicator data** (e.g., CAS application) with HESA data
- 3 Modelled **multiple institutional scenarios** based on sector and peer group

## MMU Team Modelled Six Scenarios To Reflect Market Volatility



▶ **Developed optimistic, conservative, and pessimistic models** using leading and lagging indicator data

▶ Benchmarked against sectorwide trends and peer data to build **six total scenarios tailored to MMU**



# Scenario Planning Better Aligns MMU to Market

Data-Backed, Multi-Target Approach Helped MMU Course-Correct



## Putting Scenario Planning into Practice

- 1 Planning team **shares scenarios with recruitment, finance, and SLT colleagues**
- 2 **Recruitment team narrows down scenarios** as cycle progresses and more data becomes available
- 3 Finance team converts most likely scenarios to **overall financial outcomes** using COA data

## Approach Drives Nuance and Accuracy

- ✓ Multi-scenario projections allow for institution to **better prepare for market shifts**
- ✓ Data-driven models ensure **enrolment targets grounded in market conditions**, not aspirations

**50%** Recalibration in targets to correct overly ambitious academic estimates

# Let's Discuss

1. What processes do you currently have in place to avoid “knee jerk reactions” that may do more harm than good? How do your teams let you know when something goes off track?
2. What is missing in your current approach? What could be improved?

# Ten Minute Break



# There Is No New China

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MARKET REALITY

2

# Let's Discuss

## **How do you feel about your current international recruitment strategy?**

- We're over-reliant on a few markets and need to diversify
- We're in too many markets and need to re-focus
- We're happy with our current strategy



# We Know We Need to Diversify Past “Usual Suspects”

“The goal is to **increase [international] students by almost 100%...**and have a 50/50 home/international split.”

COO  
UK University

“Our **target for international students is approximately 40%** of the total student body...we want to grow numbers, not just maintain share.”

DVC Education  
Australian University

40%

of universities worldwide are planning to **diversify markets for international student recruitment**

“We need to diversify away from **our three major volume markets...** we need to shore up smaller regions and have a more diverse base.”

Head of International  
European University

“**Diversification is central to our growth strategy...**diversification of markets, modalities, and programmes.”

Director of Recruitment  
UK University

# But, Institutions Struggle to Execute on Diversification

## Awareness is There, But Leaders Continue to Stall

“We either don’t have a strategy, or it’s outdated”

“Our diversification strategy was set 10 years ago, and we haven’t updated it yet”

- Head of Recruitment, Irish University

“We don’t have a unified diversification strategy, so it feels like we are playing catch-up”

-COO, Post-1992 UK University

“We’re ready to act, but unsure how to proceed”

“We are really cognisant of the need to diversify but it is easier said than done”

- COO, Post-1992, UK University

“We have too many ‘priority’ markets and need to focus our efforts more”

- Head of Intl Recruitment, Australian University

## Meanwhile, International Recruitment is More Volatile and Constrained



### **Financial Risk of Overreliance**

Market concentration heightens enrolment and revenue risk



### **Markets Increasingly Unpredictable**

Political and economic shifts derail recruitment plans



### **Worsening Demographic Decline**

Key markets face youth decline, constraining future growth



### **Pressure to ‘Balance’ Internationalisation**

Government policy and internal risk controls constrain recruitment

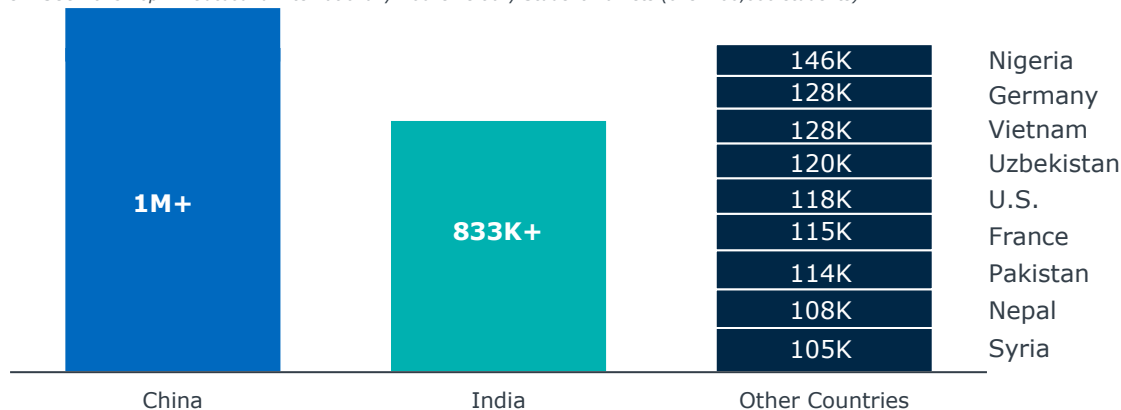
# Our Instinct is to Identify “The Next Big Market”



...Even combined, Top Markets do Not Match China’s Scale

## Laser-Focus on India & China Distorts How we Define ‘Market Opportunity’

UNESCO 2023 Top 11 Outbound Internationally Mobile Tertiary Student Markets (over 100,000 students)



### Sector Expectations:

“When somebody wants **the next India or next China**, they need to find which country has over 1B people. And that's their answer”  
-Head of Recruitment, Irish University

### Recruitment Behaviour:

“We worry about **numbers first** and then worry about diversification”  
-COO, UK University

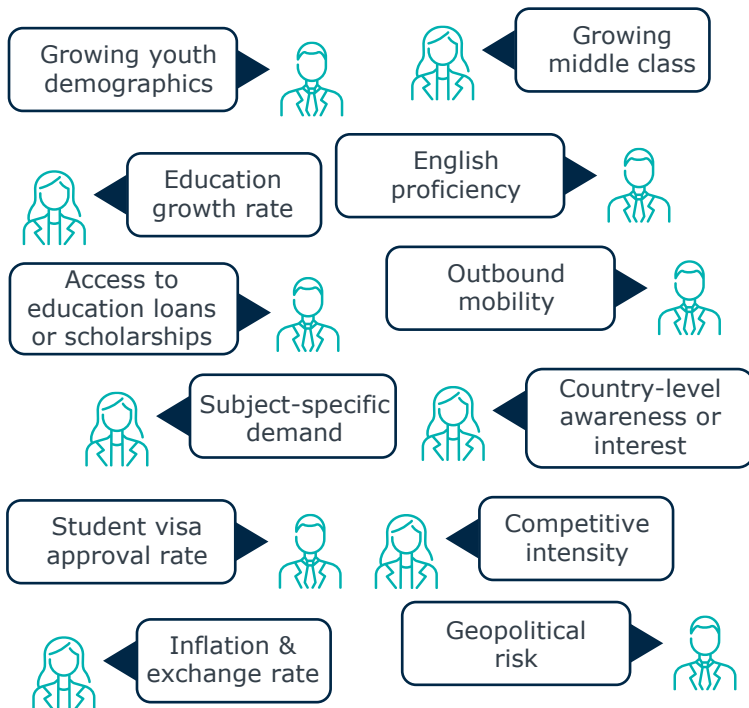
### Institutional Outcomes:

**Overreliance continues as no single market can replace volume**

# Search for New Markets Results in Data Overload



## A Flood of Market Data From Disparate Sources



## Why Decisions Still Stall

- ▶ **Data Access is Fragmented**  
Market intelligence sits across teams, finance, systems, and external vendors.
- ▶ **Data is Shaped by Source and Incentives**  
Market intelligence (e.g., provided by agents) is often used to promote a specific destination or partnership.
- ▶ **Data is Not Actionable**  
No framework translates indicators into sustain, scale, enter, or exit decisions.

# But the Data Never Feels like Enough

Often Misdiagnosed as a Data Problem, Not a Decision Problem

## What We Heard



*We need more market data*



## What We Found

Most indicators are publicly available via HESA, HEA, Studyportals, IDP Connect, or Austrade



*We don't know what to track*



Teams already track many indicators, e.g., outbound mobility flows, English proficiency & visa trends



*Data is too old to act on*



Teams over-index to short-term signals instead of evaluating long-term trends

## Trapped in Decision Paralysis

Reluctant to prioritise markets

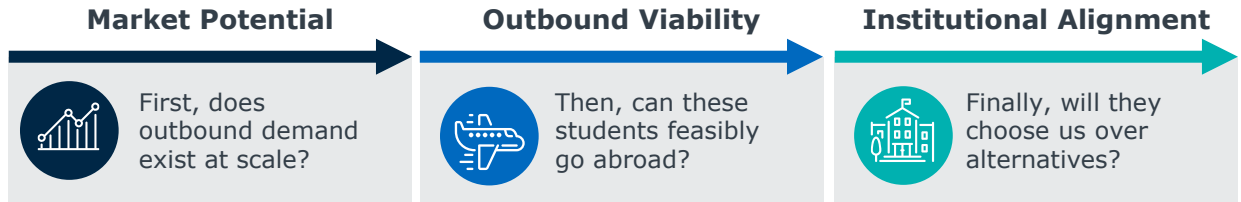
Waiting for certainty that never comes

## 'No Decision' Still a Decision

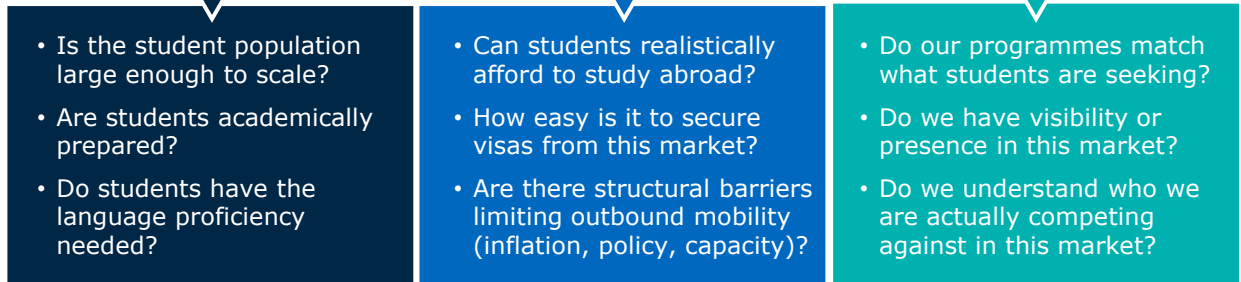
- Inaction is the default strategy and opportunities pass while we wait
- Market decisions outsourced to agents, sector trends or other external factors

# A Three-Step Decision Model for Market Selection

*Assess markets in sequence, move from demand to feasibility to fit*






*Do not rely on instinct, use data to answer these questions*



**Reminder:** Priorities and constraints vary by institution and region, weight indicators accordingly

# Sample: Building A Market Opportunity Scorecard

	Indicators	Country A	Country B	
<b>Market Potential</b> 	Population Aged 15-24	Yellow	Green	<b>Screen for viable demand</b> Prioritise markets with scale, growth, and academic readiness to sustain recruitment over time
	Degree Attainment	Green	Green	
	English Proficiency	Yellow	Yellow	
	Pre-Tertiary Education Spend	Green	Yellow	
	Intl School Attendance	Red	Green	
<b>Outbound Viability</b> 	5 YR Outbound Flow	Yellow	Green	<b>Filter for real mobility</b> Strong demand does not guarantee mobility if students struggle to secure visas or reliable access to funding
	Student Visa Approval Rate	Yellow	Green	
	Inflation Rate	Red	Green	
	Access to Loans or Scholarships	Red	Green	
	Tertiary Capacity	Green	Red	
<b>Institutional Alignment</b> 	Subject-Specific Demand	Green	Green	<b>The only lever we control</b> Unlike demand and mobility, you can shape outcomes by investing in brand, in-market presence or programmes
	In-Country Presence	Green	Red	
	Country-Level Awareness	Green	Red	
	Competitive intensity	Yellow	Yellow	

# Case Study: Philippines, An Emerging Market Validated?

## High English Fluency, Rising Middle Class, Expanding Outbound Demand

### Market Potential

#### Growing Youth Population

28% of Population (30M) is 10-24

#### Growing Middle Class

6-7% Annual Growth

#### Education Attainment Rate

Rising bachelor's attainment

#### English Proficiency

#20 EF English Proficiency Index, #2 in Asia

#### Pre-tertiary Education Spend

P1.044T budget for 2026, biggest in history

#### Intl School Attendance

US curriculum model and many offer IB and AP programmes

### Outbound Viability

#### Current Outbound Mobility

~13% Annual Outbound Growth

#### Geopolitical Risk

Stable democracy

#### Inflation & Exchange Rate

Peso volatility peaked in 2022 and has since stabilised

#### Tertiary Capacity

Majority-private system, but enrolment concentrated in public universities, straining capacity

#### Loans & Scholarships

Domestic subsidy but no loans available for intl study

#### Student Visa Approval Rate

72% in 2024, 93% in 2025 in NZ

### Institutional Alignment

#### Subject-Specific Demand

Top subjects include Business, IT, Health, Tourism, Engineering

#### In-Country Presence

Consider both staff (recruitment staff, agents, recruitment visits etc.) and alumni presence

#### Country-Level Interest

-11% decrease in Australia demand in 2025; demand for New Zealand rose 17%

#### Competitive Intensity

40+ destination countries but predominantly US, Australia, Canada, Japan, New Zealand

# New Intelligence to Power Your Next Market Move



## Introducing EAB's NEW Global Markets Scan

This report analyses **global labour market data**<sup>1</sup> to match existing programme strengths with **new market opportunities**. As one input for institutions evaluating new markets, it:

Determines **job positions aligned** to an **existing programme** (e.g. engineering)

Uncovers countries/regions/cities with **labour market skills gaps** that align with these programmes

**Recommends new geographic market(s)** for deeper investigation and possible investment



Turn programme strength into geographic growth with global markets scan

**Project Methodology**

EAB conducted an analysis to identify which regions have the highest demand for non-graduates. All worldwide demand data was collected from Lightcast, EAB's labor market intelligence partner.

**Labour Market Analysis**

Analysis was conducted to identify the most in-demand occupations in the United States and other countries. The analysis focused on an occupation that is in high demand in the United States and other countries. The analysis focused on the following criteria:

- High demand in the United States
- High demand in other countries
- High demand in the United States and other countries
- High demand in the United States and other countries

**Project Analysis**

High demand in the United States and other countries. Demand suggests Marketing Potential in Top-Performing Metropolitan Areas.

**Global Markets Scan for International Law Masters**

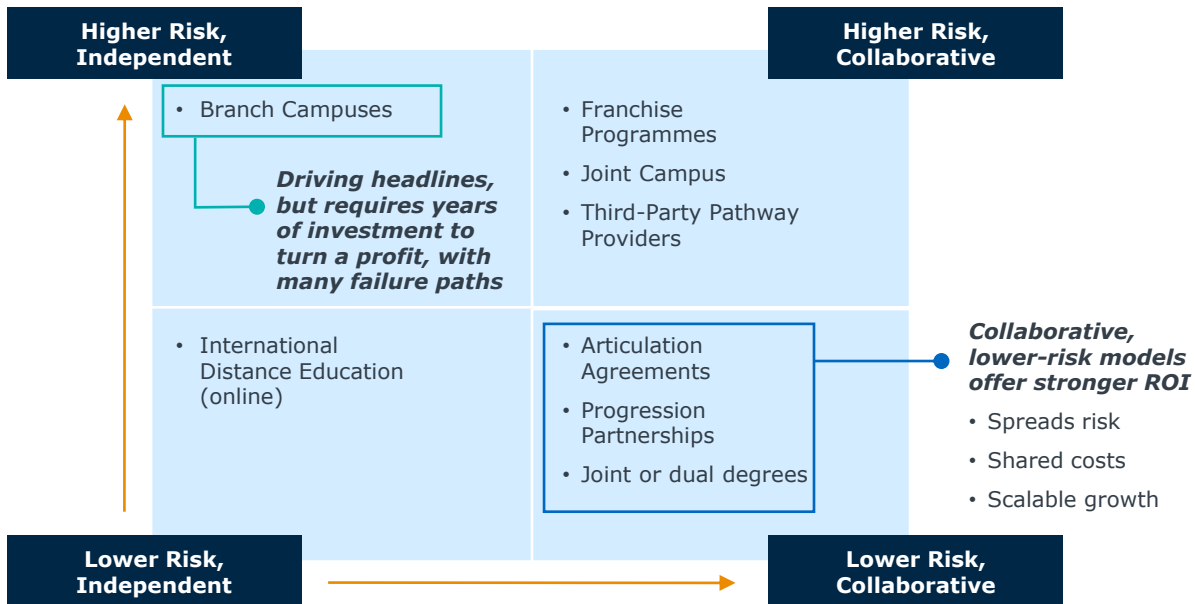
Completed for EAB University  
Sept 2025

<sup>1</sup>Includes countries available through Lightcast only

# TNE Is Not a Panacea for Intl Diversification



Despite Sector-wide Hype and Optimistic Headlines Suggesting Easy Cashflow, ROI Varies across the TNE Spectrum



# How Should We Think About the TNE Lifecycle?

## 1 Define Intent & Select Model

**Pitfall:** Model choice is driven by visibility and prestige, not always strategic fit

## 2 Validate Market & Choose Partner

**Pitfall:** Institutions struggle to evaluate where to go and which partners to prioritise

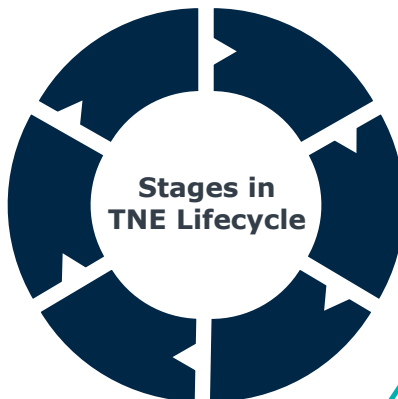
## 6 Scale, Reshape, or Exit

**Pitfall:** Scaling is easier to justify, but trade-offs between reshaping and exiting are difficult to navigate

## 5 Monitoring & Intervention

**Pitfall 1:** Success is not clearly defined upfront, limiting effective monitoring and intervention

**Pitfall 2:** Monitoring lacks clear triggers for when and how to intervene



## 3 Agree Deal & Sign Contract

**Pitfall:** Risk appetite and due diligence expectations vary across stakeholders

## 4 Build & Launch Programmes

**Pitfall:** Programmes are lifted and shifted rather than adapted to local context

Existing EAB research and services you can access today



# Testing Our Thinking: Where to Focus in TNE

## 6 Scale, Reshape, or Exit

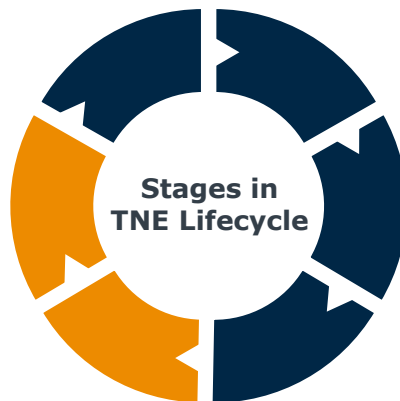
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- What is your current process for evaluating partnership success?
- Tell me about a time you exited or seriously considered exiting a TNE partnership. What triggered that process??

## 5 Monitoring & Intervention

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- Where do you feel most confident, and least confident, in maintaining consistency between TNE and home campus delivery?
- What's the earliest indicator you rely on that something isn't working?



Join a **short TNE research call** to shape our upcoming research on TNE and share how your team is approaching this now

## The Current Landscape Requires Change

- ▶ **Tight budgets** leave little room for guesswork
- ▶ **Scarce international student data** requires staff to get creative
- ▶ **New regulations** impact student visas and agent use

## And Your Existing Staff is Ready to Meet the Challenge



*E.g., Heads of Planning, Recruitment*

Use business- and data-based mindset

Closely attuned to real-time market shifts

Can bridge gaps between operational and senior staff

## But You Need to Empower Them

- ✗ *Data Experts Excluded From Decision-Making Meetings*
  - ▶ ✓ **Include** planning or recruitment leads in senior committees to include data expertise in major decisions
- ✗ *Time Constraints and 'Secretarial' Work Stifle Innovation*
  - ▶ ✓ **Encourage** staff to dedicate time to analysis and scenario modelling to build more agile, evidence-based planning
- ✗ *Staff Lack Collaboration and Support on Data Projects*
  - ▶ ✓ **Endorse** cross-unit projects to secure buy-in and signal that data-driven strategy is an institutional priority

# Regain Control in a Volatile Intl Recruitment Landscape

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## EAB Support Aligned to Your Core Recruitment Cycle Decisions

Winter	Spring	Summer	Autumn
<p><b>Get Visibility into Undisciplined Spend</b></p> <ul style="list-style-type: none"><li>Track and compare recruitment costs by course and market</li><li>Bring greater discipline to targets, scholarships, and agent spend by grounding choices in net tuition revenue</li></ul>	<p><b>Set Smarter, Sustainable Student Number Targets</b></p> <ul style="list-style-type: none"><li>Align student number ambitions with budget reality</li><li>Develop a recruitment plan and decision framework that can adjust to fast-shifting international markets</li></ul>	<p><b>Make Channel, Market, Programme Decisions</b></p> <ul style="list-style-type: none"><li>Analyse the ROI of your recruitment channels</li><li>Make principled decisions on where channel investments and marketing efforts will have the greatest impact</li></ul>	<p><b>Develop a Market-Responsive Programme Portfolio</b></p> <ul style="list-style-type: none"><li>Avoid costly missteps in programme review and new launch processes</li><li>Review your course portfolio to identify strengths, gaps, and realistic opportunities for growth</li></ul>
<p><b>EAB Services:</b></p> <ul style="list-style-type: none"><li>✓ <b>Cost of Acquisition and Net Tuition Revenue Calculator</b></li><li>✓ <b>Contextualise sector-wide trends</b> in competition and global volatility in international recruitment</li></ul>	<p><b>EAB Services:</b></p> <ul style="list-style-type: none"><li>✓ <b>Cost-Planning Net Tuition Revenue Models</b></li><li>✓ <b>Gut-check decisions and trade-offs</b> across numbers targets, net tuition revenue goals, and mission</li></ul>	<p><b>EAB Services:</b></p> <ul style="list-style-type: none"><li>✓ <b>Recruitment Channel Diversification Toolkit</b></li><li>✓ <b>Global Markets Scan</b> to map high-potential regions where your portfolio strengths match local skills gaps</li></ul>	<p><b>EAB Services:</b></p> <ul style="list-style-type: none"><li>✓ <b>Academic Programme Review &amp; New Launch</b></li><li>✓ <b>Market Opportunity Scan</b> to identify priority fields with potential for new course development based on labour market demand</li></ul>



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# Appendix





# Smarter Growth Decisions for a Volatile Market

## (Re)Introducing EAB's Market Insights



**EAB's Market Insights combine global labour market data** from leading data provider, Lightcast, with **competitor intelligence** to help universities:

- ▶ Revitalise underperforming programmes to unlock growth
- ▶ Diversify and prioritise new markets and programme offerings
- ▶ Defend high-performing programmes to sustain enrolment and relevance

Tailored reports deliver **clear next-step recommendations** and an **honest view of risks and unknowns**.

### Decision-Ready Data to Make Progress on Recruitment Diversification and Growth

*Questions Market Insights Can Answer:*

**What programmes 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 programme strengths?**

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

**Are programme webpages and institution websites optimised to attract and convert students?**