

Global Student Mobility

**DRIVING INTERNATIONAL STUDENT INTEREST
BACK TO THE U.S.**



TERRADOTTA



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Preface



As we adjust to the ‘new normal’ in international education and as travel restrictions are lifted, it’s time to get serious about re-engaging students in global opportunities, particularly international students. Environmental, political, social and economic factors can play a large role in where students decide to study and as countries grow more robust international programs, U.S. higher education institutions must keep up.

Throughout this eBook, we analyze the setbacks U.S. universities face when trying to attract international students along with the best ways to scale your programs, diversify, and build a welcoming environment for your international students.

Ultimate destination no longer

U.S. HIGHER EDUCATION GRAPPLES WITH INTERNATIONAL MOBILITY

For decades, international education leaders had one job when recruiting new students to their U.S. campuses: Tell them why their school is the best place for them in the United States.

It's a different conversation today. Now those same leaders must first convince international students that the United States is where they should study. Only then can they tout why their institution is the place to go and try to attract them there.

The strength of the dollar, competition from other countries, worries about getting a visa or being turned away with one at the airport and anxiety about whether they'll feel welcome once they get to the United States all are keeping international students away.

"Students are starting to weigh those factors," says Kerry Geffert, Terra Dotta's product evangelist who has worked in international education for more than 35 years. "Whereas when we recruited overseas for many years, we were recruiting against our fellow peers from the United States."

Now, U.S. institutions face a bevy of strong competitors—top universities from around the world who have bolstered not just their academic programs, but also their marketing. But there are ways to stem the tide.

"The biggest reason you're seeing a downturn is the fact that the United States didn't have to work particularly hard to attract students because of quality of programs, quality of locations and also being the No. 1 destination for students," says Mark Callaghan, Terra Dotta's UK-based international sales director, who works regularly with colleges and universities around the world. "What happened was other countries upped their game,"



Declining Numbers

International student numbers are declining in the United States in recent years as other countries set new enrollment targets. However, it's not all bad news for U.S. institutions. The Institute of International Education's Open Doors report found that, overall, the total number of international students went up by 0.05% in 2018-19, hitting an all-time high of nearly 1.1 million students, thanks to Optional Practical Training programs.

New International Students in the United States

2017-18:
DOWN

3.3%

2018-19:
DOWN

6.6%

2019-20:
DOWN

0.9%

International Student Enrollment Targets

CANADA:

450,000 BY 2022

GERMANY:

350,000 BY 2020

CHINA:

500,000 BY 2020

JAPAN:

300,000 BY 2020

Total Number of International

1.1 million students

2018-19:
UP

.05%

Source: Open Doors report, A World on the Move: Trends in Global Student Mobility

What's keeping them away



Everyone is really keen to maintain and strengthen their U.S. options. But, equally, what they're doing at the same time is they are being pushed by these other countries who are saying, 'We offer a fantastic program also,' and they open that up to different choices for students as well.

—MARK CALLAGHAN

Obstacles for U.S. Institutions



Strong U.S. dollar

The continued strength of the dollar means that a U.S. education is more expensive for students from countries where the currency is weaker, making it cheaper for them to travel to Australia, Canada and most other destinations around the world. Meanwhile, the European Union's Erasmus program makes it easy and inexpensive for EU students to travel and study in other EU countries. Program participants aren't required to pay extra tuition and can get some support with housing.



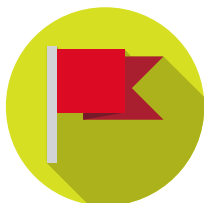
Second language instruction

Today's students are interested in honing their language skills and are looking for international programs where they can bolster their abilities to speak languages that are common in the business world, including Chinese, Arabic, Spanish, French and German. That interest makes schools in countries where those languages are spoken more attractive.



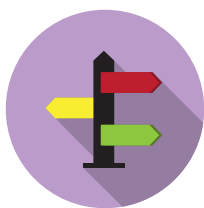
Competition from other countries

The United States has no federal policy to encourage international students, but other countries do. The United Kingdom, China, Germany and Australia all have national programs aimed at attracting more international students to their colleges and universities.



Socio-political issues

Worries about visa obstacles in the United States, nationalist rhetoric from government leaders and whether they'll feel welcome on campus are all reasons that international students are picking other destinations to continue their studies.



Location, location, location

Programs in big U.S. cities and at leading universities typically fill up quickly. In the past, that meant that international students might look beyond those popular destinations and venture into other locations in the United States. But now, as other countries strengthen their own offerings, students can choose top destinations almost anywhere in the world.

"Instead of saying, I'll go there because I want an American experience, they're switching countries completely," Callaghan says.

NUMBER TO NOTE:

According to *The New York Times*, in February 2019, administrative processing for visas went from 60 days to 180 days.





What's Lost

There are plenty of downsides for both higher education institutions and the country when international students choose another location to continue their academic work.

Innovation

Through their academic work and Optional Practical Training programs, international students are responsible for new discoveries and innovations in the United States. A 2019 report from the Niskanen Center finds that higher levels of OPT participants in a region lead to increased innovation, which is measured by the number of patents and higher average earnings among the college educated.

Nearly one-quarter of the 87 \$1 billion startup companies had a founder who first came to America as an international student.

National Foundation for American Policy, 2016 Report

Connections

With an increasingly global workforce and economy, it's never been more important for the United States to build personal and professional connections with future leaders from around the world.

“We’re helping them get an education,” says Geffert. “But the subtext of that is that they are learning about American culture, hopefully learning to appreciate American culture and developing a network within the United States so when they return home and become leaders, they turn to us when they need guidance. We have benefitted from those connections for many, many years. And we will start to lose out because we don’t have as big of a piece of the pie anymore.”

Money

International students at U.S. colleges and universities contributed \$41 billion and supported 458,290 jobs to the U.S. economy during the 2018-19 academic year, according to NAFSA: Association of International Educators.

But higher education institutions also are losing out on tuition when international students, who often pay full freight, opt to study elsewhere. According to a 2018 MarketWatch report, the University of Illinois at Urbana-Champaign agreed to pay \$425,000 per year to insure itself against a decline in Chinese enrollment in its business and engineering programs. At the time, Chinese students covered about 20% of the business college’s revenue. The policy provided up to \$60 million in coverage.

\$41 billion 458,290 jobs



What to Do

It's not all bad news for U.S. institutions. There are measures they can take to shore up their international student numbers—and even build them to record levels. **Here are four ways to boost enrollment:**

1

Diversify

Don't have all your eggs in one basket. If the majority of your students are coming from one specific country or region, you open your institution up to big problems if disaster strikes there. It could be financial turmoil, a government coup or a massive weather event. Geffert remembers an issue in the 1980s when one country stopped paying its students' bills. The lack of payment led to a variety of questions.

"What do we do with the students? Kick them out? Let them continue to enroll? It's their government's issue. They're merely pawns in this," he says. "It happens."

Yet, still, many institutions have a pipeline of students coming from a single country, especially as word-of-mouth grows as alumni tell their friends and family about their great experience on your campus. While word-of-mouth is vital, it's also critical that international education leaders always look for new countries and regions to pull students from.

2

Consider your programs

U.S. institutions already provide a strong academic experience for students, but there's always room to grow. And some countries, particularly Australia and New Zealand, have made big efforts to bolster their offerings, in fields such as



science, research, biology, agriculture and horticulture. At the same time, students are seeking out experiences where they can perfect their language skills to better compete in the global workforce. Look for ways that your own institution can better promote its opportunities—or create new ones—to meet the needs of today's international students.

3

Build a welcoming place

New U.S. policies and nationalist rhetoric from government leaders may make the United States seem like a less welcoming place for international students. But institutions can combat the headlines and demonstrate that they are eager for students from around the world to make their campuses home. Simply holding an annual international food festival and culture week, however, is not going to cut it.

Help them with any questions about visas and other requirements to ensure they maintain their status. Up front, make sure they know that you're a trusted and reliable source for accurate information, so when there are any questions, they know they can turn to you and not hope they land on the right answer during a Google search.

Consider the details. That might include ensuring there's food in the dining hall that students from China or Kenya will recognize or adjusting the dining hall schedule for students who are observing Ramadan.

Other items to consider include finding places for international students to worship and creating activities that foster relationships between U.S. and international students. One example might be building an intramural cricket program where students from India and the United States can play together.

Engaging strategically with student cultural organizations on campus—such as associations for Chinese or Pakistani students—also is critical to not just connect with prospective students whose friends or family members are involved in the groups, but to build events and programs that will ensure that all students feel welcome.

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#YouAreWelcomeHere

The social media hashtag and scholarship campaign aims to affirm that U.S. institutions are “diverse, friendly, safe and committed to student development.” More than 400 participating institutions and groups, according to the website, are communicating the message through statements, photos, videos and events. In 2019, more than 50 institutions offered #YouAreWelcomeHere scholarships for the first time to make it possible for high-achieving international students to study in the United States.

“The repetition of the statement, ‘You are welcome here,’ by a broad array of people from different backgrounds—from college presidents to football players—is powerful and demonstrates that we support internationalization across our campus communities and across the country,” according to the group.

4

Promote your success stories

Alumni pride is a big part of the U.S. college experience. Long after graduation, we wear our school colors and slap a bumper sticker on our car. But that's a uniquely American tradition. Often, when international students graduate and return to their home countries, they don't stay connected. That should change — especially because your overseas alumni are your very best ambassadors.

International alumni can talk up their experience in their home country with parents and students. They may be the source of potential scholarships and other development activities. They can even celebrate current students from their home countries when they return for breaks.

Jim Crawley, director of global recruitment at Hope College in Michigan, falls back on alumni when traveling, inviting them to sessions with prospective students and families so they can hear from graduates who have returned to their native country. Alumni also can follow up with applicants and, with the proper training, represent your institution at college fairs abroad.

“It adds credence to your reputation,” Crawley says. “Alumni can be very helpful.”

All of these efforts take work, but Geffert says it can be worth the time.

“

There are a lot of things that we can do. It's not all gloom and doom. Part of it is that we now have a healthy competition from other parts of the world that we didn't have before. We just have to step up our game.

—KERRY GEFFERT





HOW IT'S WORKING:

HOPE COLLEGE

Jim Crawley, director of global recruitment at the small private Christian liberal arts school in Michigan, came on board in June 2019 to assess what's working and what can be improved to boost future international student enrollment. The school of 3,100 students typically has about 15 to 20 international students from around the world, but primarily China, Honduras, Rwanda, South Korea and Kenya.

His work, Crawley says, comes with a critical boost: support from Hope's president.

"We are going to look at new connections and new locations," says Crawley, who has worked in international education for 25 years. "Sometimes you have to think outside the box. Where are other places and pockets that you haven't explored?"

Here's how Crawley is tackling international recruitment.

Build relationships

Christian high schools and missionary schools are obvious places for Hope to find prospective international students because a Christian atmosphere on campus may be critical for them during the college experience. But they aren't the only place.

For Hope, with its strong STEM programs, its relationship with the African Science Academy, an all-girls school in Ghana, also has been strategic. High-achieving, low-income students from the academy have attended Hope on scholarship.



Offer up your own expertise on general college application topics such as how to write the perfect college admissions essay or how students can decide what they're looking for in a college.

—JIM CRAWLEY, *DIRECTOR OF GLOBAL RECRUITMENT*

Crawley recommends building relationships with counselors at targeted schools, so they are more likely to send students your way. It can take time. “You have to commit to it for three to five years to make a determination whether it’s working or not,” he says. “You’re building that relationship with them and their school and eventually their kids and families.”

In the same way, cultivating connections with EducationUSA advisers can help bring more international students to your school. Advisers promote all accredited U.S. colleges and universities, but getting them to visit your campus can help them better elevate your programs, Crawley says. To encourage a visit, institutions can fly them in or reduce their travel expenses in other ways.

Share your expertise

To help out high school counselors or EducationUSA advisers, offer up your own expertise on general college application topics such as how to write the perfect college admissions essay or how students can decide what they’re looking for in a college.

Set up conversations or webinars via Zoom or Skype with schools. “What you’re really doing is reinforcing what the counselors are telling them and helping the counselors,” Crawley says. At the same time, students are learning a bit about your school too.

Be selective about agents

Agents will always be part of the strategy to attract international students, but not the be-all and end-all element, Crawley says. Training and management is critical to ensure they’re sending the right students your way, he says. Crawley plans to grow the number of agents that Hope works with from five to eight or ten, picking individuals who are strategically placed in different parts of the world where he wants to find more students.

Think deeply about what you offer

Self-evaluation is required, especially for institutions who are newer to the market or don't come with a brand name. It requires some reflection.

Says Crawley: "What is it you're really trying to do? What do you have to offer? What makes you different? What makes you stand out? How can you use this information to appeal to segments of the market globally and reach out to the counselors overseas?"

Seek out high school students in the United States

International students are probably in your backyard right now—attending local high schools as exchange students, going to a private school on an F-1 visa or living in the United States because a parent is working here.

To find them, reach out to human resources departments to see if there's a way to talk to international families or post information in a company newsletter. Search for SEVIS-approved schools in your state to find high schools that are hosting international students. Reach out to local public schools to connect with exchange students. In the past, Crawley has hosted international student visitation days, inviting international high school students to campus to learn more.

COVID-19 Response

"In times like today, I don't think we can spend a ton of time constantly talking about COVID-19," Crawley says. "It's important for them to be reassured that we continue to work, continue to do what we need to do, that we're watching the situation. For us, there are no active cases on Hope. It was a precautionary measure to close campus."

The message, Crawley says, is that Hope is taking it seriously, but also getting ready for next fall. That includes keeping students up-to-date on visa issues and when embassies will begin opening again for interviews. "We're keeping them aware and not overdoing it," he says.



HOW IT'S WORKING:

UNIVERSITY OF SOUTHERN INDIANA

Heidi Gregori-Gahan, associate provost for international programs at the public university in Evansville, has worked in international education for 40 years, 21 of those at Southern Indiana. Gregori-Gahan started the program from scratch when the university had just 30 international students. Today, about 200 international students from 50 countries attend Southern Indiana, which has a total student population of more than 10,700 students each year.

Until eight years ago, the school was mostly doing “armchair recruitment,” she says, working with EducationUSA, hosting advisers and placing a few targeted advertisements. Now, the school has an intensive English program, a model that’s “been a bit tricky,” Gregori-Gahan acknowledges. Some programs have closed because of dwindling enrollment.

“The challenge in the last few years has been intensive English recruitment,” she says. Southern Indiana’s focus has been on bringing in students who are interested in an intensive English program, but also majors that the school excels in, including engineering, computer science and business.

Here’s what they’re doing at Southern Indiana to boost enrollment.

Strategic travel

Southern Indiana has a budget for travel, but it’s not that large, so they’ve targeted their travel specifically to regions and countries where the government is seeking to increase the number of people who speak English or have undergraduate degrees and are providing funding for them to study.

Funded students

Southern Indiana also seeks out students who receive funding through the U.S. Department of State. “We’ve had nice success with that in diversifying our incoming student body,” Gregori-Gahan says. Students from Egypt and Tajikistan have attended Southern Indiana thanks to this connection.



It's not just dollars and cents. It's the quality of the experience for the entire community."

—HEIDI GREGORI-GAHAN

ASSOCIATE PROVOST FOR INTERNATIONAL PROGRAMS

Critical relationships

Selling a college or university to potential students that doesn't come with a brand name and isn't in a major metropolitan area can be tricky.

"Our challenge, of course, like every other regional public university in between New York and California, is we struggle with how do we make ourselves distinctive," Gregori-Gahan says. "We have to practice what I call relationship recruitment. It's built on relationships. We work really hard on those relationships. That's where we've seen success."

A key relationship for Southern Indiana is with the government of Panama. It is one of two universities in the United States with a contract with the country to host sponsored students for English instruction and degrees in STEM and health fields. The program identifies students from underserved communities. A third cohort of about 45 students is waiting to attend Southern Indiana in August.

Southern Indiana also is working to cultivate a new relationship with the government of Oman, so it can be added to the country's approved list for scholarship recipients.

Scholarships and in-state tuition waivers

The high cost to attend college is a major obstacle for international students, but Southern Indiana has found a way to make it more affordable for some. The school has extended as many as 15 full scholarships to students from the developing world through its Global Ambassador program. Gregori-Gahan regularly works with the U.S. Student Achievers Program in Africa to identify some of the candidates for the program.

"These are amazing people," she says. "They have done so much in terms of leadership and really serving as ambassadors in our community."

And through the Global Leaders Scholarship, Southern Indiana offers in-state tuition waivers to some international students, who then sign up to do presentations and volunteer work and provide other support on campus. Some have been allocated as #YouAreWelcomeHere scholarships.

Gregori-Gahan credits Southern Indiana's leadership for the tuition assistance.

"I feel fortunate because we don't have leadership who has only ever looked at these things in terms of dollars," Gregori-Gahan says. "It's not just dollars and cents. It's the quality of the experience for the entire community."

COVID-19 Response

The pandemic has upended everything at Southern Indiana — just as it has around the world. “The speed at which we had to pivot and literally drop things and collect what we could and leave our offices, we’ve never seen anything like this,” Gregori-Gahan says.

For now, Gregori-Gahan’s focus has been on the 50 international students who couldn’t safely travel home. She meets with them regularly via Zoom and, with Southern Indiana’s president, serves them meals on Saturdays. Gregori-Gahan says she’s been surprised by the questions she’s fielding from the students.

“They were asking some really basic questions about how the virus spread,” she says.

“They’re saying, ‘I’m scared, I don’t want to go out, I’m afraid of the virus in the apartment building. Can I do my laundry on campus?’ It’s just a good reminder that we should never assume that we know where the students are coming from. We’re trying to be very responsive.”

What’s next is unclear. “Everything is on the table,” says Gregori-Gahan, who retires in July. Scenarios include opening back up in August, a delayed start to the school year or another semester of online classes.

“Like everybody, we’re waiting to find out guidance from the government, the Centers for Disease Control and Prevention and the state of Indiana,” she says. “We’ve seen how quickly things have moved. I remain cautiously optimistic. But I’m an optimist at heart.”

Q&A with Katie Jabri

Katie Jabri is assistant director of international admissions and partnerships at Concordia University, St. Paul, and a member of the leadership team for NAFSA's International Enrollment Management Knowledge Community. We checked in with Jabri for insights into international enrollment and mobility.



Q: How has the competition for international students with other colleges and universities around the world changed for U.S. institutions in the last decade or so?

JABRI: Competition has continued to increase within the United States as more and more schools were sending recruiters abroad. The reach of schools also increased as the variety of sending countries or emerging markets increased. The focus for global presence vs. just focusing on a few countries has been a big shift. There is also more competition from other countries, like the United Kingdom, Canada and Australia. Although the United States has been the top destination for international students for many years, this may be changing in the future, especially as other countries offer more flexibility with immigration and work authorization.

Q: What has that meant for U.S. institutions, including Concordia? Have you seen a change in your international student numbers?

JABRI: Over the last decade, I think most schools had upward trends for enrollment, outside of the past two years. There may be some changes to student type, as undergraduate numbers may have dropped while graduate numbers increased. At Concordia, we have continued to see growing numbers each year. I believe that is due to our strong graduate programs.

Q: What are effective ways for U.S. institutions to engage with international students and persuade them to study abroad?

JABRI: I think it depends on the institution. Brand recognition alone works for many schools. Partnerships may be the best route for some. Working closely with EducationUSA or the U.S. Commercial Service is also beneficial to many institutions. Local recruitment from high schools and community colleges is also growing.

Ready to streamline your international student and scholar processes? Terra Dotta can help.
Visit www.terradata.com or email us today at info@terradata.com to learn more.

