Evolution of Your International Roadmap

Importance of Market Diversification & Development

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ELS Educational Services, Inc.

Session Outline

1. Challenges in following the "Latest" trends in the recruitment industry.

2. It is important for you to establish your unique strategy that fits your institutional recruitment needs for a building sustainable, international enrollment plan from mature, well-established and emerging markets.

3. Understand the unique student profile and decision drivers for each of these unique markets including evolving markets like West Africa and Southeast Asia while learning more about the vast changes within the mature markets of China and India.

4. Many universities find the complex educational system and recruitment infrastructure difficult to navigate.

5. ELS International Pathways has developed a unique approach to recruitment in mature markets and emerging markets

6. ELS in-country representatives promote our partner universities year-round in more than 500 students fairs and through 1700 agent offices around the globe.

7. ELS Promotes partner universities through B to B and B to C channels on ground to very targeted audience.

8. Help students choose those institutions which most closely match their academic qualifications, career ambitions and financial means.

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ELS Educational Services

Headquartered in New Jersey, with 90 ELS Centers worldwide

650+ Partner Institutions in USA, Canada, Australia, Malaysia, China and India

1.25 million student patronage from 195 countries

1,700 counseling Offices in 103 countries

More than 55 years of empowering leadership in international education

Quality Program catered to Student Learning and Success

ELS
55
Years
LEADERS IN
GLOBAL EDUCATION

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ELS by the Numbers

ELS is the most experienced and successful international education partner for U.S. higher education.

ELS Expertise

- **55+ years** of experience
- **80 Language Centers worldwide** (54 on university campuses)
- More than **650 U.S. university partners**
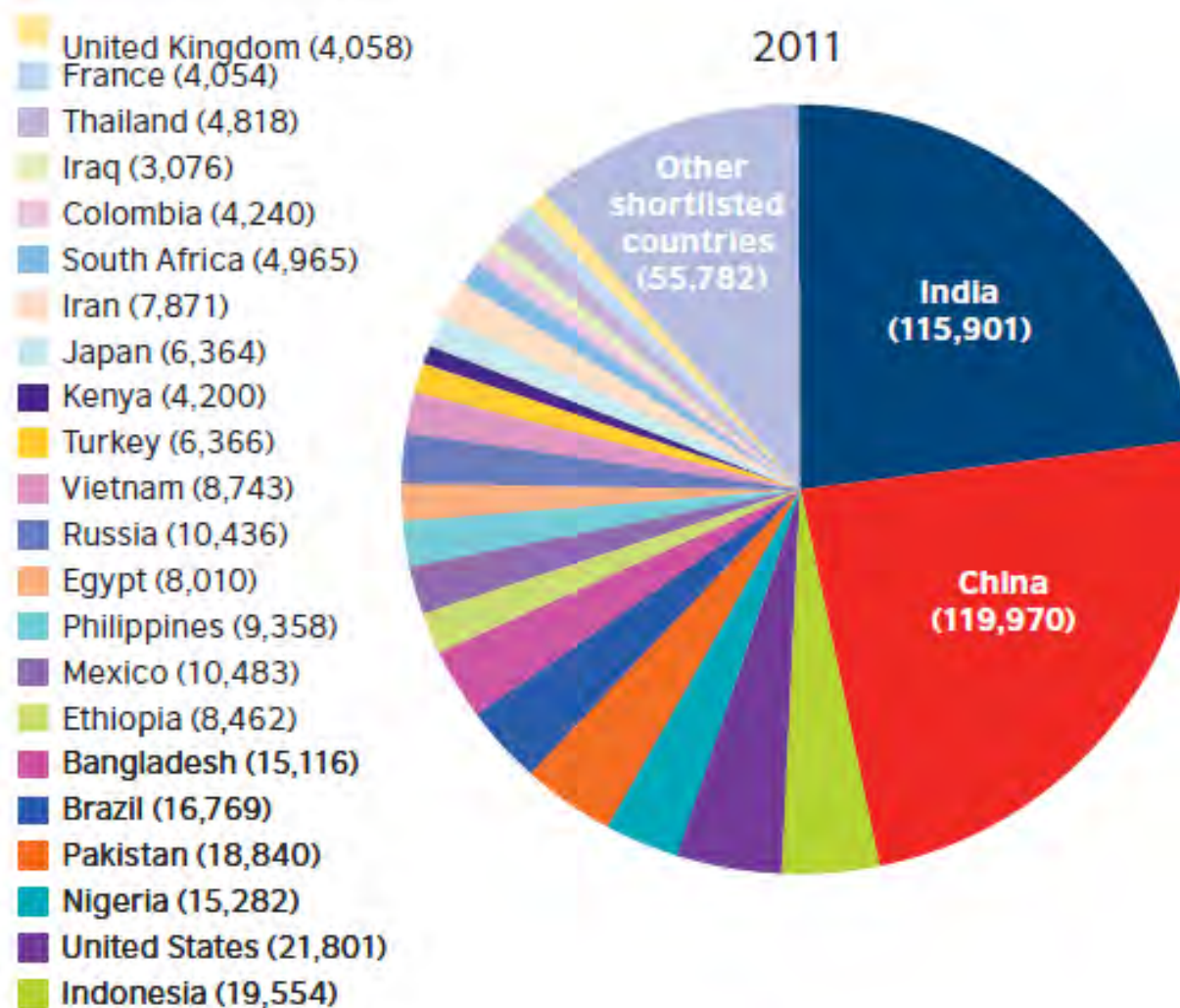- **37 concurrent enrollment universities**

ELS Marketing & Recruiting

- Students from **143+ countries**
- **Large** Global Recruiting network (2,300)
- Process **27,000 ELS applications** per year
- Process **10,000 university applications** per year
- **Recruiting 20,000 students** per year
- **4 million web visitors** from **177+ countries** speaking **30+ languages**
- Over **1 million social media impressions per week**
- **90+ country and language-specific websites**
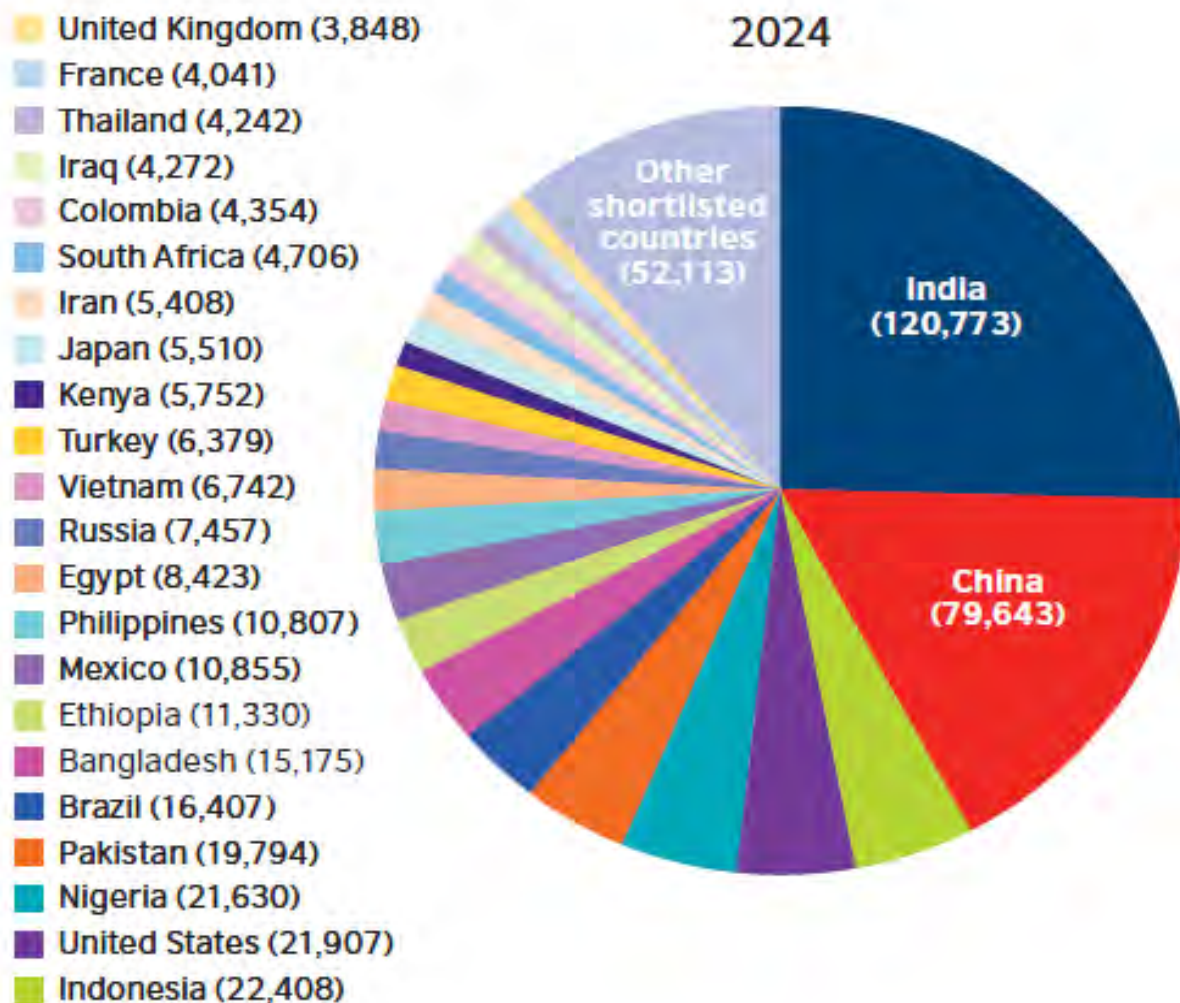- **3.2 million** Facebook likes

ELS Results

- Over **1.2 million students** educated
- Over **100,000 students** sent to higher education
- ELS has generated over **U.S. $5 billion** in incremental revenue for U.S. higher education

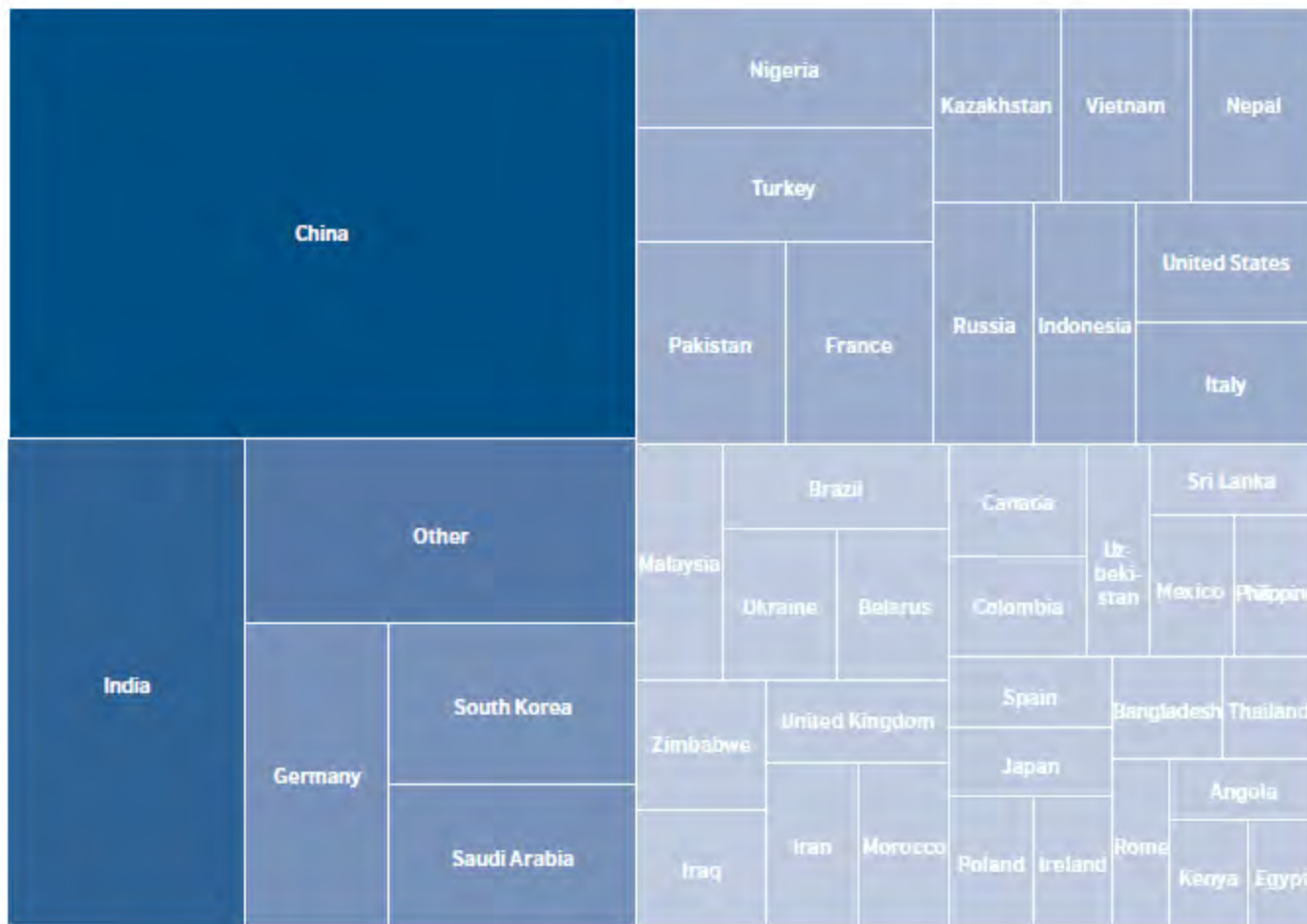# Global Tertiary Age (18-22) Population (000s) - <u>2016</u>

Legend:
- United Kingdom (4,058)
- France (4,054)
- Thailand (4,818)
- Iraq (3,076)
- Colombia (4,240)
- South Africa (4,965)
- Iran (7,871)
- Japan (6,364)
- Kenya (4,200)
- Turkey (6,366)
- Vietnam (8,743)
- Russia (10,436)
- Egypt (8,010)
- Philippines (9,358)
- Mexico (10,483)
- Ethiopia (8,462)
- Bangladesh (15,116)
- Brazil (16,769)
- Pakistan (18,840)
- Nigeria (15,282)
- United States (21,801)
- Indonesia (19,554)

Pie chart (2011):
- India (115,901)
- China (119,970)
- Other shortlisted countries (55,782)

<u>Source:</u> **UN Population Division, Oxford Economics**

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Global Tertiary Age (18-22) Population (000s) - <u>2024</u>

Legend:
- United Kingdom (3,848)
- France (4,041)
- Thailand (4,242)
- Iraq (4,272)
- Colombia (4,354)
- South Africa (4,706)
- Iran (5,408)
- Japan (5,510)
- Kenya (5,752)
- Turkey (6,379)
- Vietnam (6,742)
- Russia (7,457)
- Egypt (8,423)
- Philippines (10,807)
- Mexico (10,855)
- Ethiopia (11,330)
- Bangladesh (15,175)
- Brazil (16,407)
- Pakistan (19,794)
- Nigeria (21,630)
- United States (21,907)
- Indonesia (22,408)

Pie chart labels: 2024 — India (120,773), China (79,643), Other shortlisted countries (52,113)

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Global outbound mobile higher education students outlook by origin market — 2024

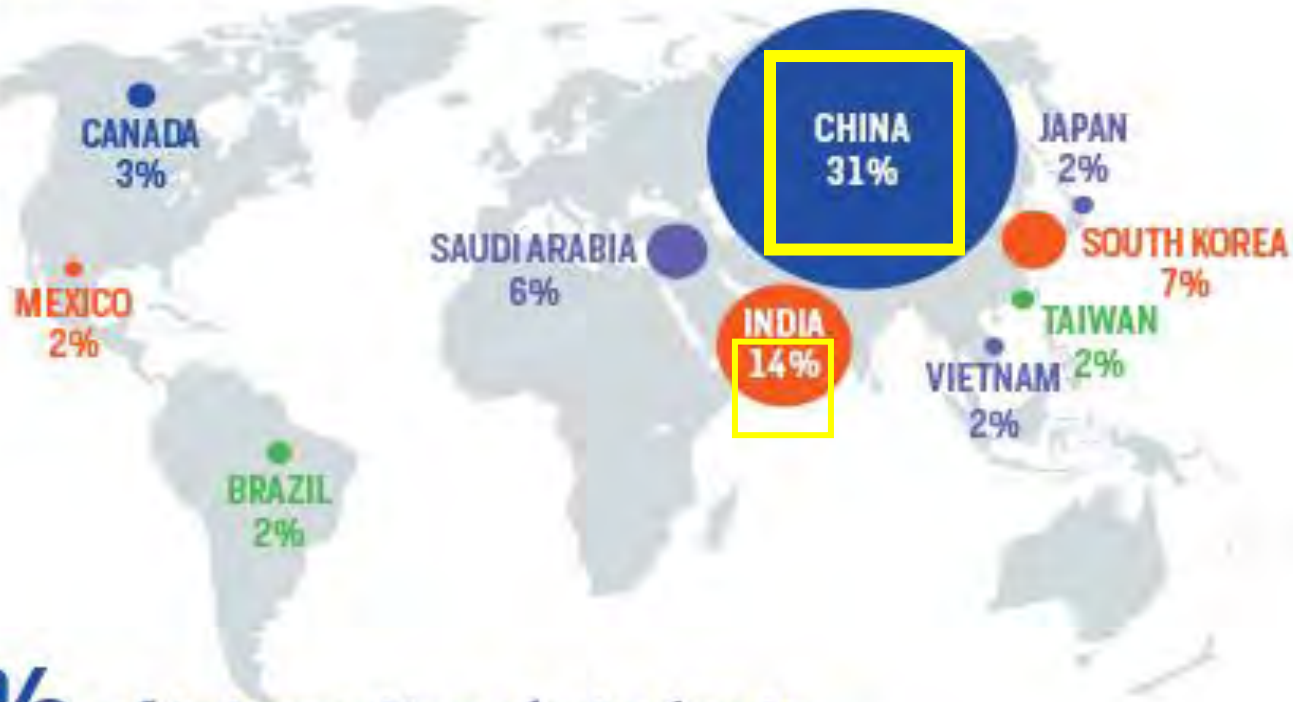# International Market Growth
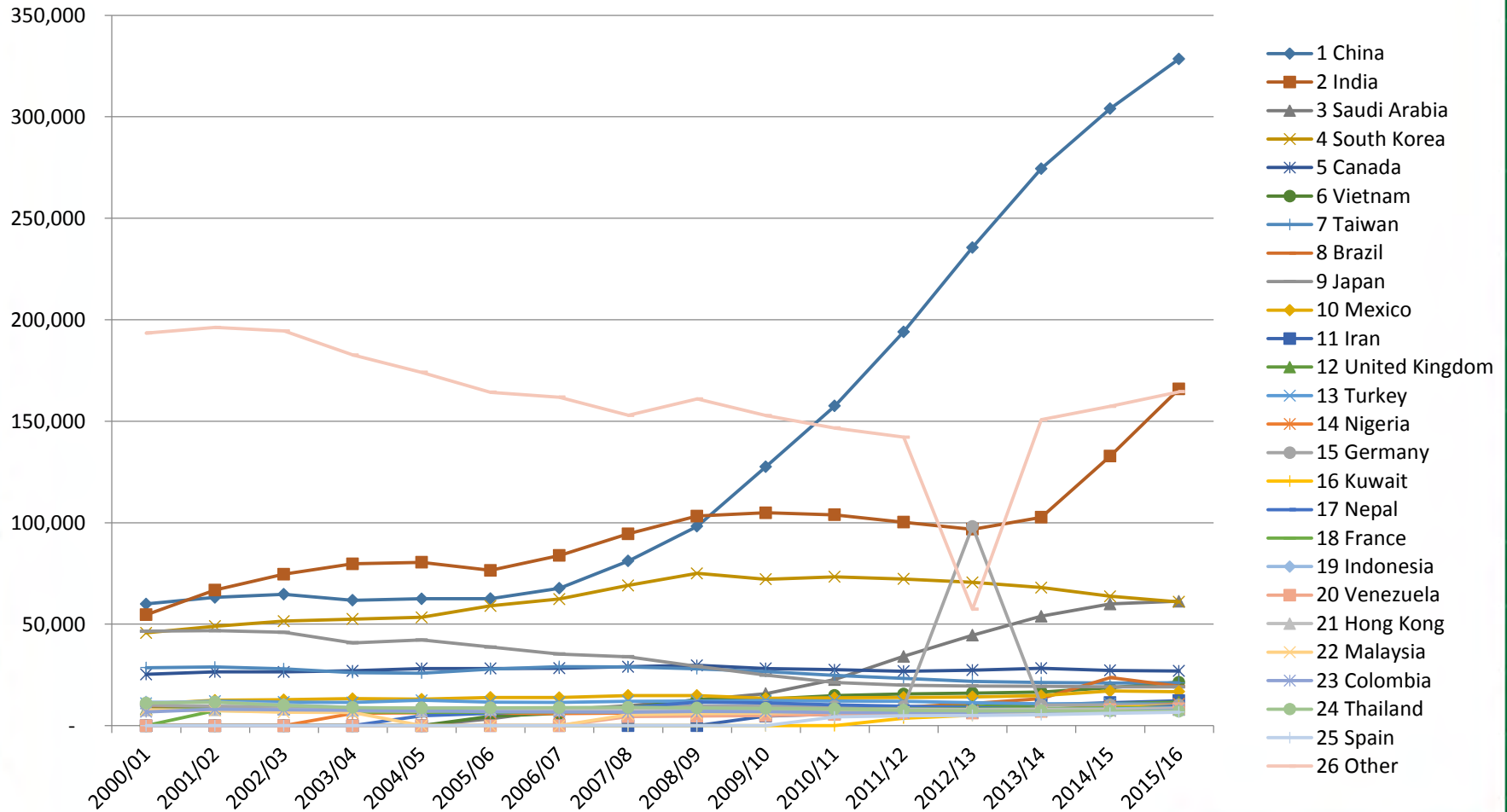
Source: ÌIE Open Doors 2016

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Continued desire to study abroad

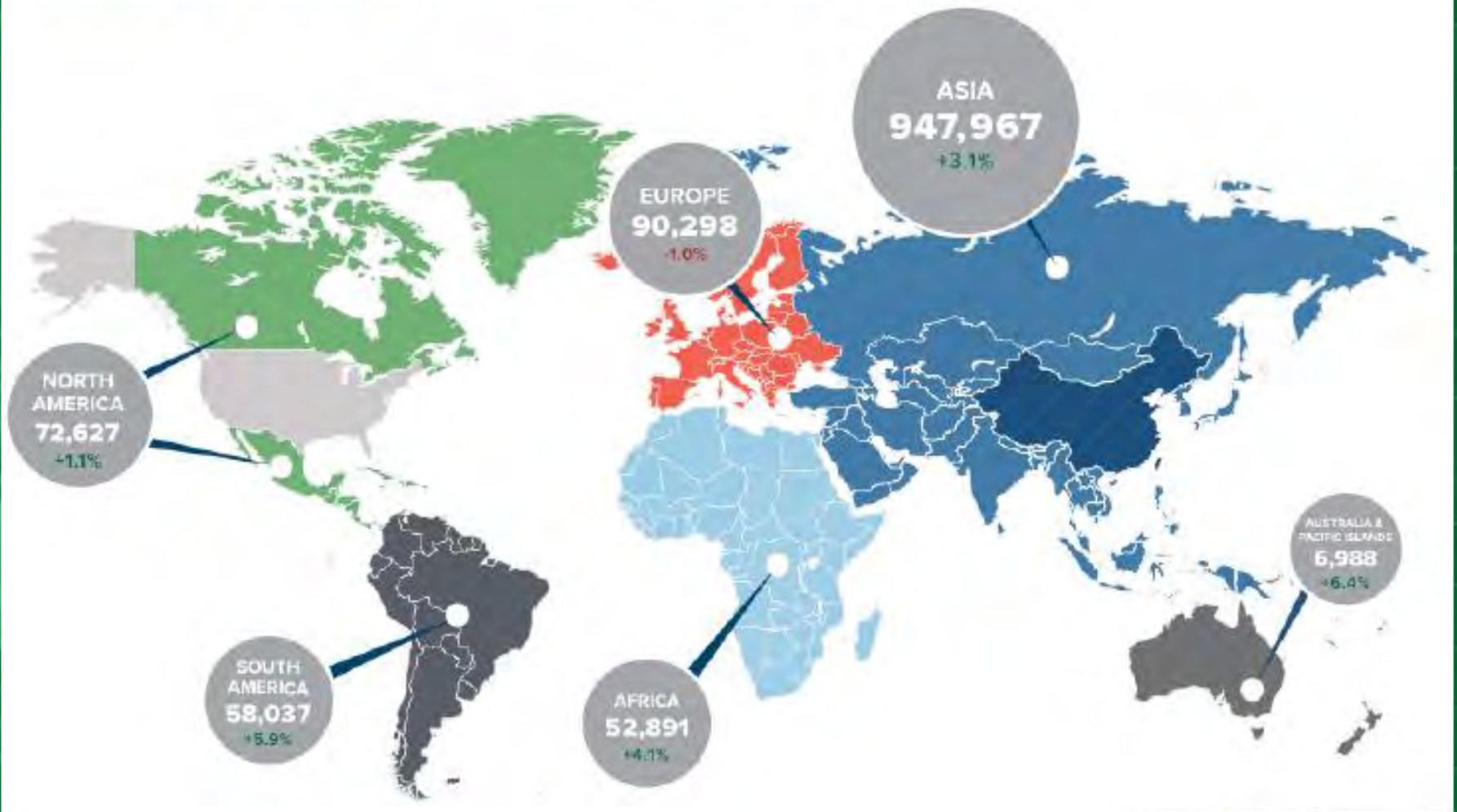TOP TEN PLACES OF ORIGIN OF INTERNATIONAL STUDENTS

CANADA 3%
MEXICO 2%
BRAZIL 2%
SAUDI ARABIA 6%
CHINA 31%
INDIA 14%
JAPAN 2%
SOUTH KOREA 7%
TAIWAN 2%
VIETNAM 2%

58% of international students come from China, India, South Korea, and Saudi Arabia.

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PLACES OF ORIGIN
A CLOSER LOOK AT ASIA — NOVEMBER 2016 COMPARED TO NOVEMBER 2015

CHINA
378,986
+5.2%

SOUTH KOREA
74,817
-8.3%

JAPAN
26,498
-2.5%

SAUDI ARABIA
62,077
-19.9%

INDIA
206,582
+14.1%

VIETNAM
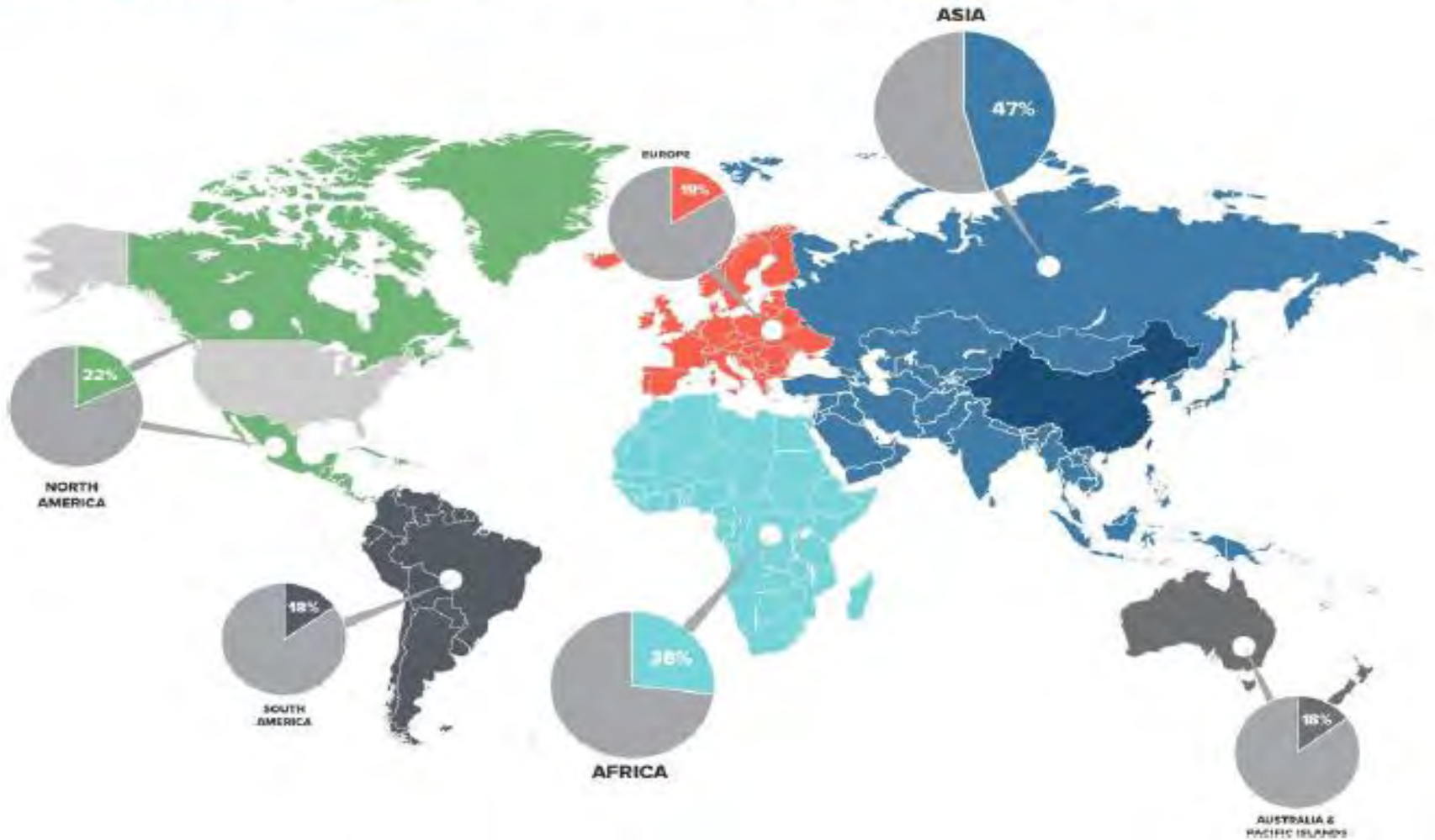30,182
+4.5%

TAIWAN
24,097
-0.1%
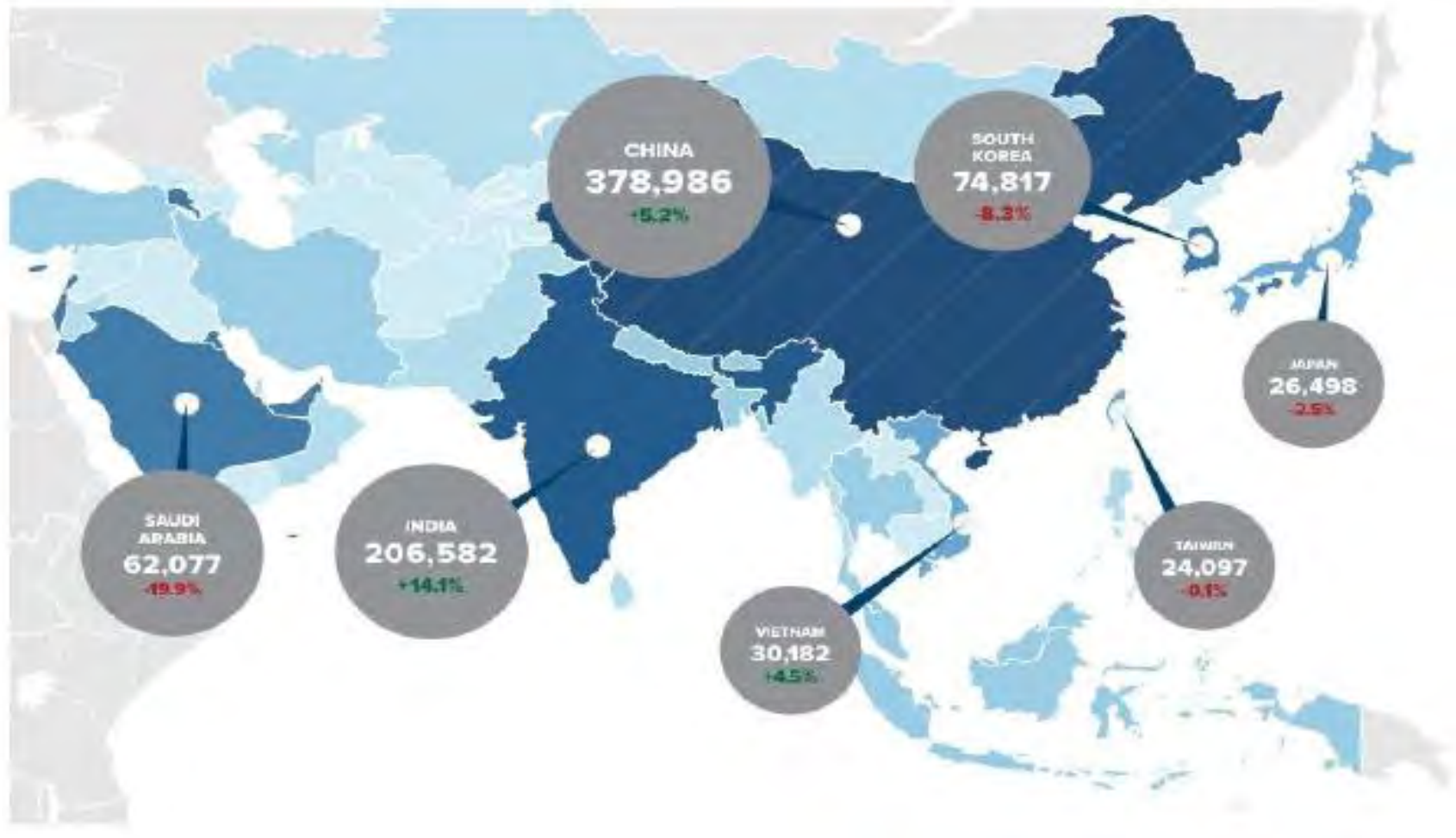
Source: SEVIS by Numbers Dec 2016

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PLACES OF ORIGIN
A GLOBAL VIEW OF EACH CONTINENT'S F & M STUDENTS THAT ARE IN STEM FIELDS

ASIA — 47%

EUROPE — 19%

NORTH AMERICA — 22%

SOUTH AMERICA — 18%

AFRICA — 38%

AUSTRALIA & PACIFIC ISLANDS — 18%

PLACES OF ORIGIN
A CLOSER LOOK AT ASIAN F & M STEM STUDENTS

% OTHER STUDENTS
% STEM STUDENTS

IRAN 78%
CHINA 40%
SOUTH KOREA 22%
SAUDI ARABIA 43%
INDIA 83%
NEPAL 58%
TAIWAN 34%
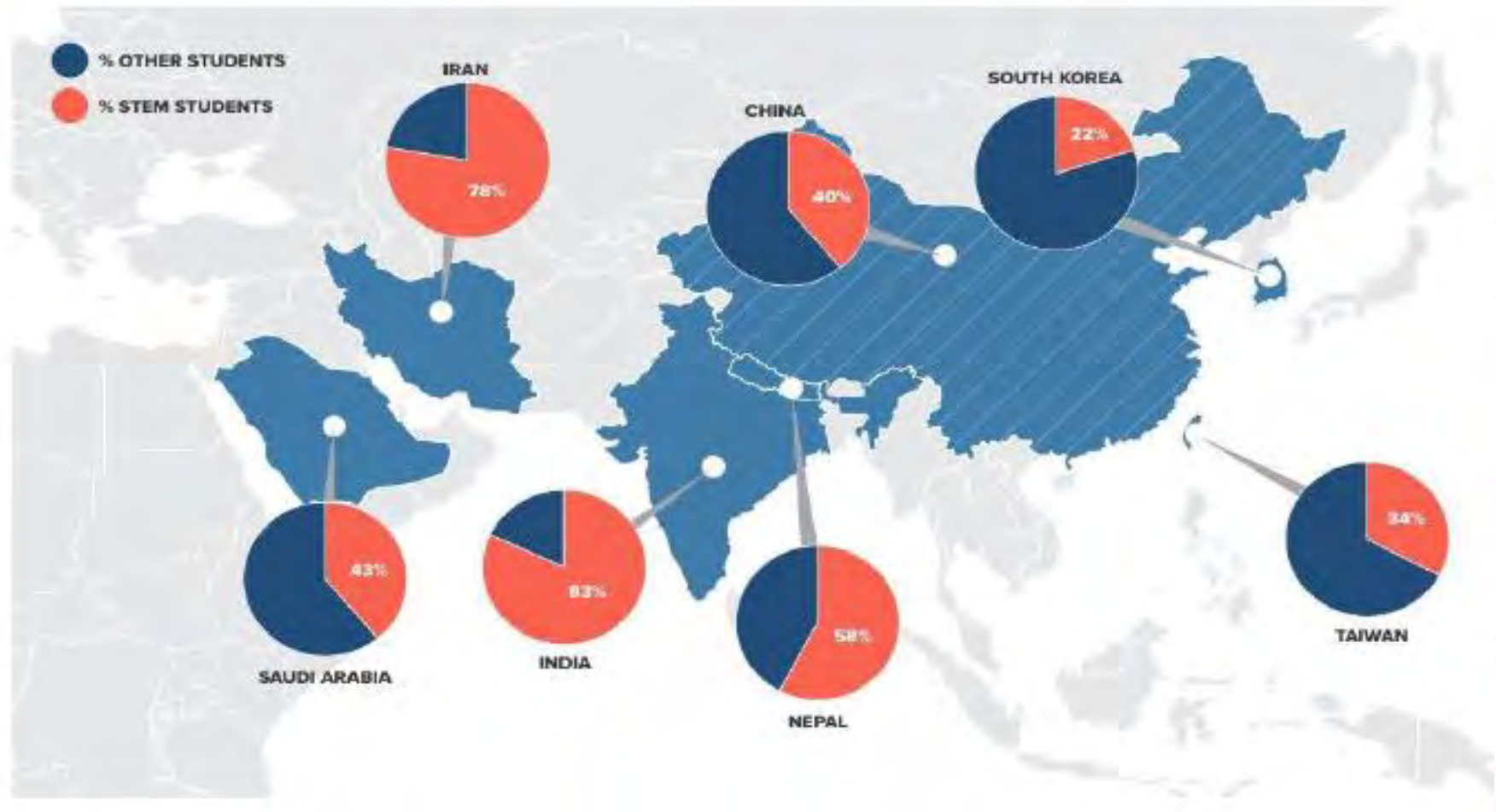
USA as a Destination - Student Mobility Overview in Percent - 2016

Legend:
- China
- India
- Saudi Arabia
- South Korea
- Canada
- Vietnam
- Taiwan
- Brazil
- Japan
- Mexico
- Iran
- United Kingdom
- Turkey
- Nigeria
- Germany
- Kuwait
- Nepal
- France
- Indonesia
- Venezuela
- Hong Kong
- Malaysia
- Colombia
- Thailand
- Spain
- Other

Pie values: 31%, 16%, 6%, 6%, 3%, 2%, 2%, 2%, 2%, 1%, 1%, 1%, 1%, 1%, 1%, 1%, 1%, 1%, 1%, 1%, 16%

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5 Year

Place of Origin	5 Year CAGR
Kuwait	27%
Brazil	21%
Saudi Arabia	16%
Iran	15%
China	14%
India	13%
Nigeria	11%
Vietnam	8%
Spain	8%
Venezuela	7%
United Kingdom	6%
Colombia	6%
Indonesia	5%
Mexico	5%
Malaysia	4%
Other	4%
Germany	2%
France	2%
Canada	0.14%
Nepal	0.11%
Hong Kong	-0.3%
Japan	-1%
Thailand	-2%
Taiwan	-2%
Turkey	-3%
South Korea	-4%

10 Year

Place of Origin	10 Year CAGR
Saudi Arabia	26%
China	19%
Vietnam	15%
Brazil	12%
India	8%
Nigeria	7%
United Kingdom	4%
France	3%
Nepal	2%
Mexico	2%
Indonesia	2%
Germany	2%
Colombia	2%
Hong Kong	0.3%
Other	0%
South Korea	-0.2%
Canada	-1%
Turkey	-1%
Thailand	-2%
Taiwan	-3%
Japan	-7%

15 Year

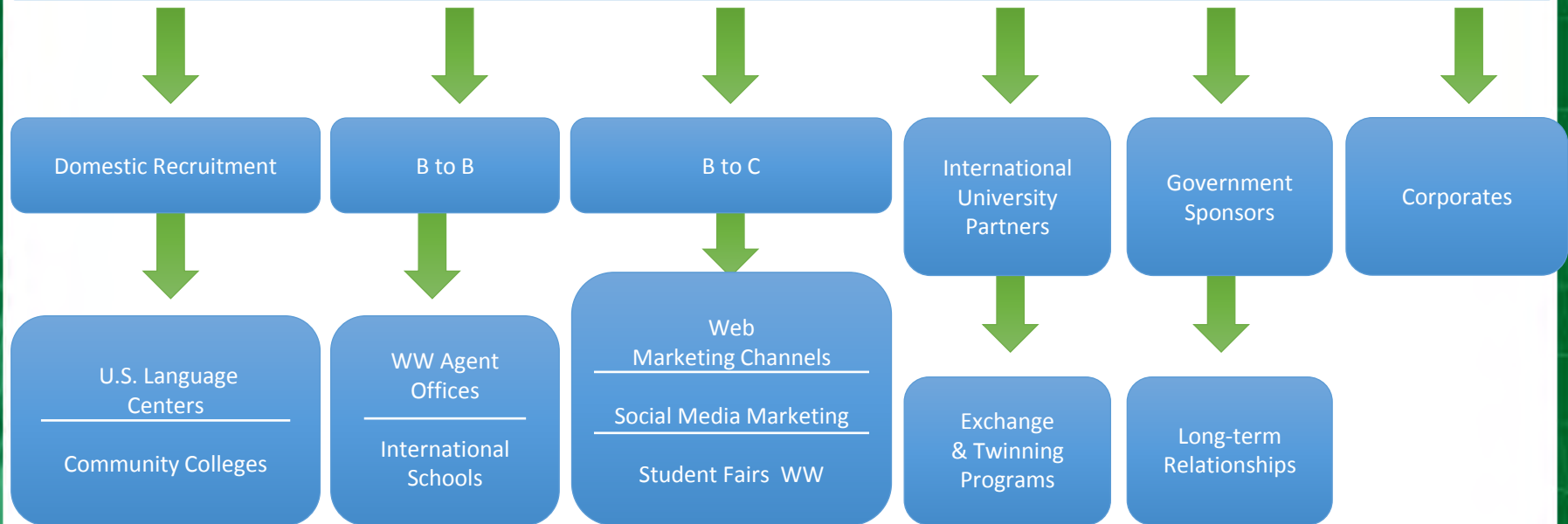| Place of Origin	15 Year CAGR
China	12%
India	8%
Brazil	5%
Mexico	3%
United Kingdom	2%
South Korea	2%
Colombia	1%
Canada	0.4%
Hong Kong	0.3%
Malaysia	0.0%
Germany	0.01%
Turkey	-0.2%
Other	-1%
Indonesia	-2%
Taiwan	-2%
Thailand	-3%
Japan	-6%

Compound Annual Growth Rate (CAGR)

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Place of Origin	CAGR 5 Year	TOTAL STUDENTS	Business/ Management	Education	Engineering*	Fine/ Applied Arts	Health Professions*	Humanities	Intensive English	Math/ Computer Science*	Physical/ Life Sciences*	Social Sciences	Other	Undeclared
Emerging Markets														
Kuwait	**27%**	9,772	18.8	2.3	14.1	9.5	3.4	3.4	4.5	4.5	8	9.6	16	6
Brazil	**21%**	19,370	25.8	1.4	7.3	4.3	1.6	6.2	0.4	3.8	7.6	12.8	23	5.4
Iran	**15%**	12,269	31.1	1.9	17.1	9.2	1.9	1.4	0.3	5.6	7	8.9	14	2
Nigeria	**11%**	10,674	13.2	0.8	50.4	1.7	1.7	0.9	19.5	1.4	2.6	2.6	4.2	0.9
Vietnam	**8%**	21,403	24.8	1	12.6	6.7	1.3	5.5	1.4	4.6	5.6	9.3	23	4.2
Spain	**8%**	6,640	29.8	1.2	9.6	3.9	3.8	1.1	9.8	8.8	7.7	5.1	11	8.4
Venezuela	**7%**	8,267	22.8	2.1	16.1	6.5	2	10.2	1.6	4.1	5.3	8	18	3.6
United Kingdom	**6%**	11,599	4.6	1.3	54.4	5.1	2	1	0.9	11.7	11.6	3.5	3.4	0.5
Colombia	**6%**	7,815	28.6	2.2	15.8	8.9	3.6	1.3	6.9	3.9	5.2	6.1	14	3.8
Indonesia	**5%**	8,727	17.2	3.6	25.7	2.3	6.3	1.3	18.6	8.2	4.5	3	7.3	2.1
Mexico	**5%**	16,733	10.3	0.3	36	1.6	2.9	0.3	0.3	34.9	6.3	2.2	3.9	0.8
Malaysia	**4%**	7,834	17.8	3.1	4.2	8.4	3.2	5.9	0.1	3.1	7	16	25	5.9
Germany	**2%**	10,145	19.7	1.5	28.9	4.8	2.3	1.1	0.2	6.8	10.9	11.4	9.7	2.6
France	**2%**	8,764	15.3	1.6	22.1	2.6	12.6	1.8	0.4	8.9	13.1	7.3	11	3.5
Saudi Arabia	**16%**	61,287	24.3	1.7	18.6	6.5	1.3	1	2.2	14.1	8.7	8.7	10	2.8
Mature Markets:														
China	**14%**	328,547	16.1	1.2	19	8.5	2.4	2.4	3.1	4.2	7.8	6.5	22	7.3
India	**13%**	165,918	16.2	3.3	8.1	9.4	14.9	4	0.1	3.4	9.7	12.3	15	3.5

Diversified Recruitment Channels

Global Recruitment

Domestic Recruitment	B to B	B to C	International University Partners	Government Sponsors	Corporates

| U.S. Language Centers

Community Colleges | WW Agent Offices

International Schools | Web Marketing Channels

Social Media Marketing

Student Fairs WW | Exchange & Twinning Programs | Long-term Relationships | |

Undergraduate and Graduate – Traditional and On-line Programs

Regular Admitted Students

Conditionally Admitted Students

Language Centers

Pathway

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Institutional Analysis

- UG/Grad/Doctorate
- Engineering/Business/Arts
- Ranking
- Departmental
  - Accreditation
  - GPA
  - Transcript Evaluation
  - Standardized Test Requirements
  - Application Turn around time
  - Internships/Co-ops

Market Analysis

- Ranking
- Location
- Scholarships
- Promotional Allowance
- Accreditations
- Majors
- Tuition Cost
- Living cost
- Work- Study Opportunities

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Your International Recruitment Road Map

International Recruitment
A Historical Perspective

Leading Places of Origin 2005 - 2016

During the years 2005 and 2016 the number of Chinese students studying abroad grew from 62,523 to 328,547

Saudi enrollment did not crack the Top Ten Places of Origin until 2008, but did so with a 25.2% YOY increase. In 2016, Saudi enrollment showed only a 2.2% YOY increase.

An additional 61,021 Indian students studied abroad between 2010 and 2016

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International Recruitment
The 2017 Landscape

**Stop chasing after
the next big market**

Focus on your institution's unique appeal to international students.

Create a recruitment strategy that builds upon your strengths and is **sustainable.**

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International Recruitment
The Program Audit

- Resonance with an international audience

- Receptive academic departments

- Admission requirements

- Affordability for target market

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Building a Sustainable Strategy

Program Interest

Affordability for Target Markets

Meets Market Need
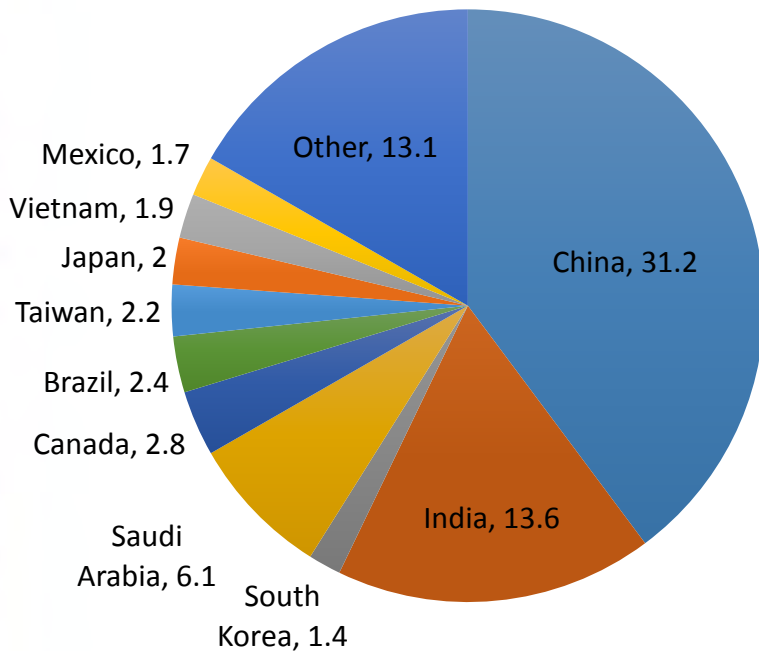
Support from academic departments

Admission Policy

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ELS Delivers Market & Student Diversity

In 2015-16, students from 143 countries attended ELS in the United States.

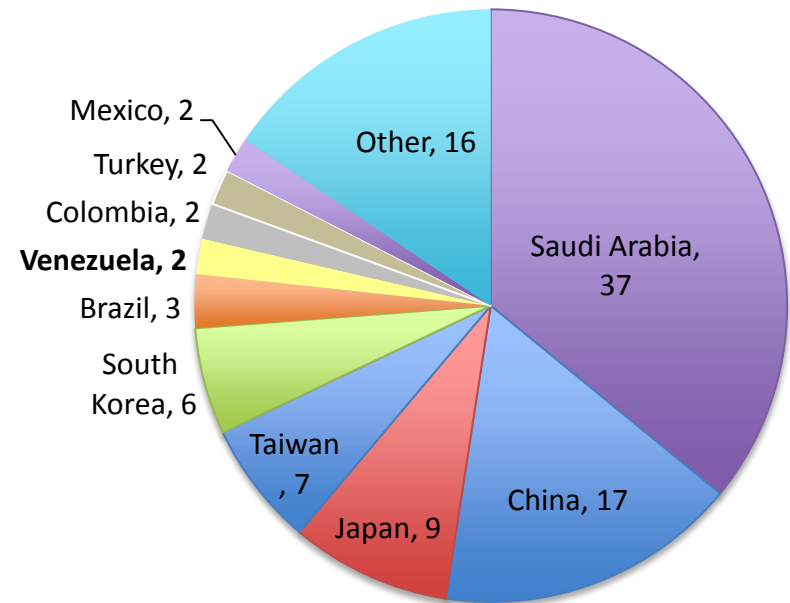**Percentages of U.S. – International Students by Source Country**

Other, 13.1
China, 31.2
Mexico, 1.7
Vietnam, 1.9
Japan, 2
Taiwan, 2.2
Brazil, 2.4
Canada, 2.8
India, 13.6
Saudi Arabia, 6.1
South Korea, 1.4

<u>Source</u>: **Open Doors 2015**

*Other encompasses a wide representation of international students from countries including: Iran, the United Kingdom, Turkey, Germany, Nigeria, Kuwait, France, Indonesia, Nepal, Hong Kong, Venezuela, Malaysia, Thailand, Colombia, and Spain.

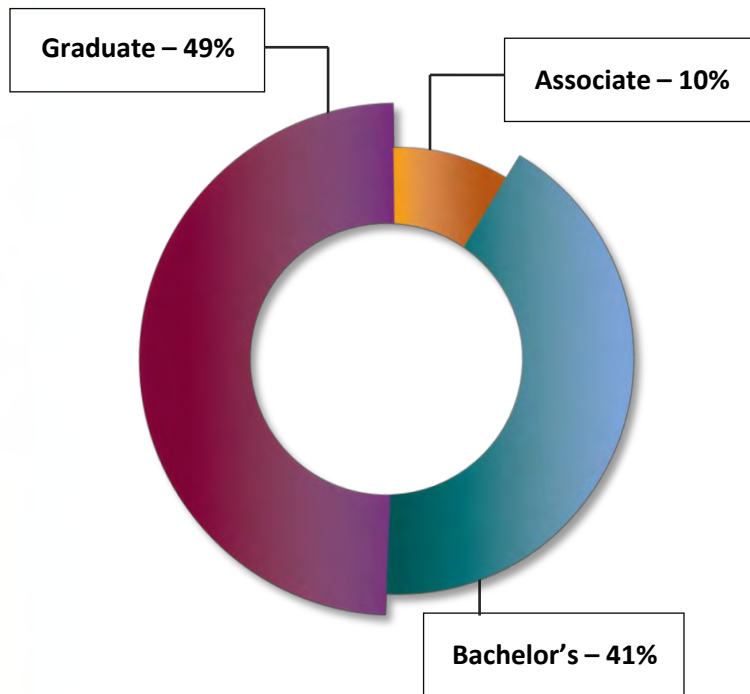**Percentages of ELS – International Students by Source Country**

Mexico, 2
Turkey, 2
Colombia, 2
Venezuela, 2
Brazil, 3
South Korea, 6
Taiwan, 7
Japan, 9
China, 17
Saudi Arabia, 37
Other, 16

<u>Source</u>: **ELS Internal Data 2015**

*Other encompasses a wide representation of international students from countries including: Thailand, **Libya**, Vietnam, **Angola**, **United Arab Emirates**, **United States**, **Russia**, **Kuwait**, and others.

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ELS Delivers Student Diversity

2015 -16 Total University Applications through ELS - Percentage by Level of Study

Graduate – 49%

Associate – 10%

Bachelor's – 41%

2015-16 Total University Offers of Admission to ELS Students - Percentage by Level of Study

Graduate – 42%

Associate – 13%

Bachelor's – 45%
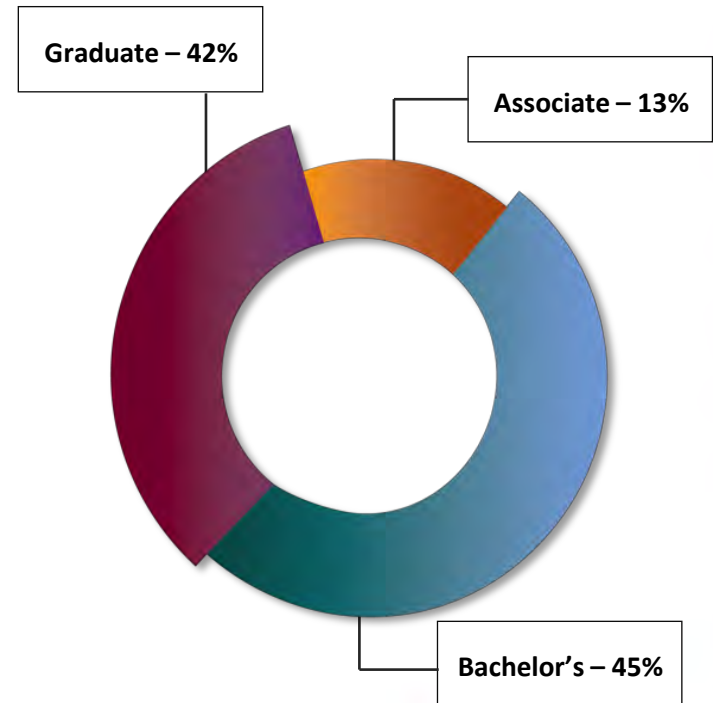
Recruiting and Preparing International Students

Identify	Reach	Recruit	Prepare	Matriculate/ Retain	Alumni/ Employ

ELS Global Recruitment and Marketing

- Leverage global marketing and recruitment resources

ELS University Conditional Admission Network

- 650 universities
- Conditional admission/study at ELS Language Center
- Direct admit students

ELS Language Centers

- On-campus, conditional admission to year 1 of undergraduate or graduate program

ELS International Gateway Centers

- On-campus pathway to year 2 undergraduate or graduate program

ELS Custom Programs/ Alumni Employment

- Develop specialized programs (e.g. ITA, English for Engineering)
- Alumni network development
- Job counseling
- Job placement

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How to Address the Opportunity

ELS Portfolio of International Services

- **Recruitment –** Enhance university's existing recruitment initiatives

- **On-Campus Language Centers**

- **Gateway Programs**

ELS Recruitment Services

- International Communication Plan Development
- Lead Generation and inquiry follow-up
- In-country support
- Ongoing counselor training
- PeerPoint Student Ambassador online platform
- International marketing design service
- Microsite development

ELS English for Academic Purposes

- Pre-matriculation academic English preparation
- Promotion through ELS networks
- Internationally recognized curriculum
- Student services
- Center based recruitment
- In-country contact

ELS Gateway Programs

- Capital resources
- Comprehensive marketing and recruitment
- Counselor relationship management
- Admissions Services
- Joint oversight
- Customized curriculum
- Wrap-around student success services

Thank You

InternationalStudentRecruitment.org

For more information, contact:
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jschrott@els.edu