

Global Partner Session

Latest Trends in Recruitment: China, India, and Emerging Markets



Tuesday, May 31, 2016 1:00 PM–2:00 PM Mile High Ballroom 1EF



ELS International Pathways® a Berlitz Company

ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com



Global Partner Session

Latest Trends in Recruitment: China, India, and Emerging Markets

- Learn more about establishing a Global Recruitment Network for recruitment of International Students.
- Recruitment Channels – B to B and B to C explored.
- Gain a clearer understanding of the latest market trends in the field of international student recruitment in key markets, including China and India.
- Learn about the key elements of successful and cost-effective strategies to recruit qualified applicants in emerging markets.
- Learn about the most effective media, messaging, and ways to maximize your budget and diversity strategy for emerging markets.
- Explore how ELS Educational Services, the leader in international student recruitment, sources qualified applicants for their partner universities around the world.

Speakers

Dr. Mark W. Harris

President & CEO

ELS Educational Services, Inc.

Mr. Mallik Sundharam

Vice President

Business Development

ELS Educational Services, Inc.

Ms. Lisa Orr

Director

Global Recruitment Strategy &
Implementation

ELS Educational Services, Inc

Mr. Dan Erickson

Director of International Student
and Scholar Services

Louisiana Tech University



ELS Educational Services

Headquartered in Princeton,
New Jersey, with 80+ ELS
Centers worldwide



650+ Partner Institutions
worldwide



1.2 million students from
195 countries choose ELS



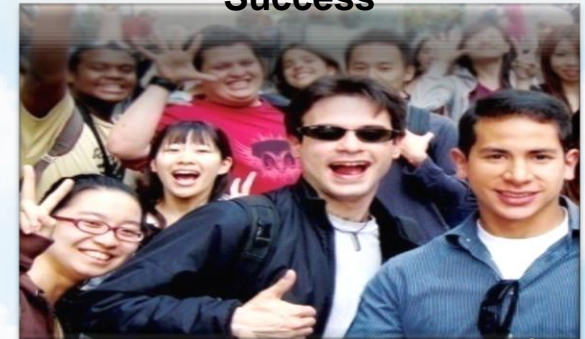
2,300 counseling offices in
102 countries



ELS
55
Years

LEADERS IN
GLOBAL EDUCATION

Quality Program caters to
Student Learning and
Success

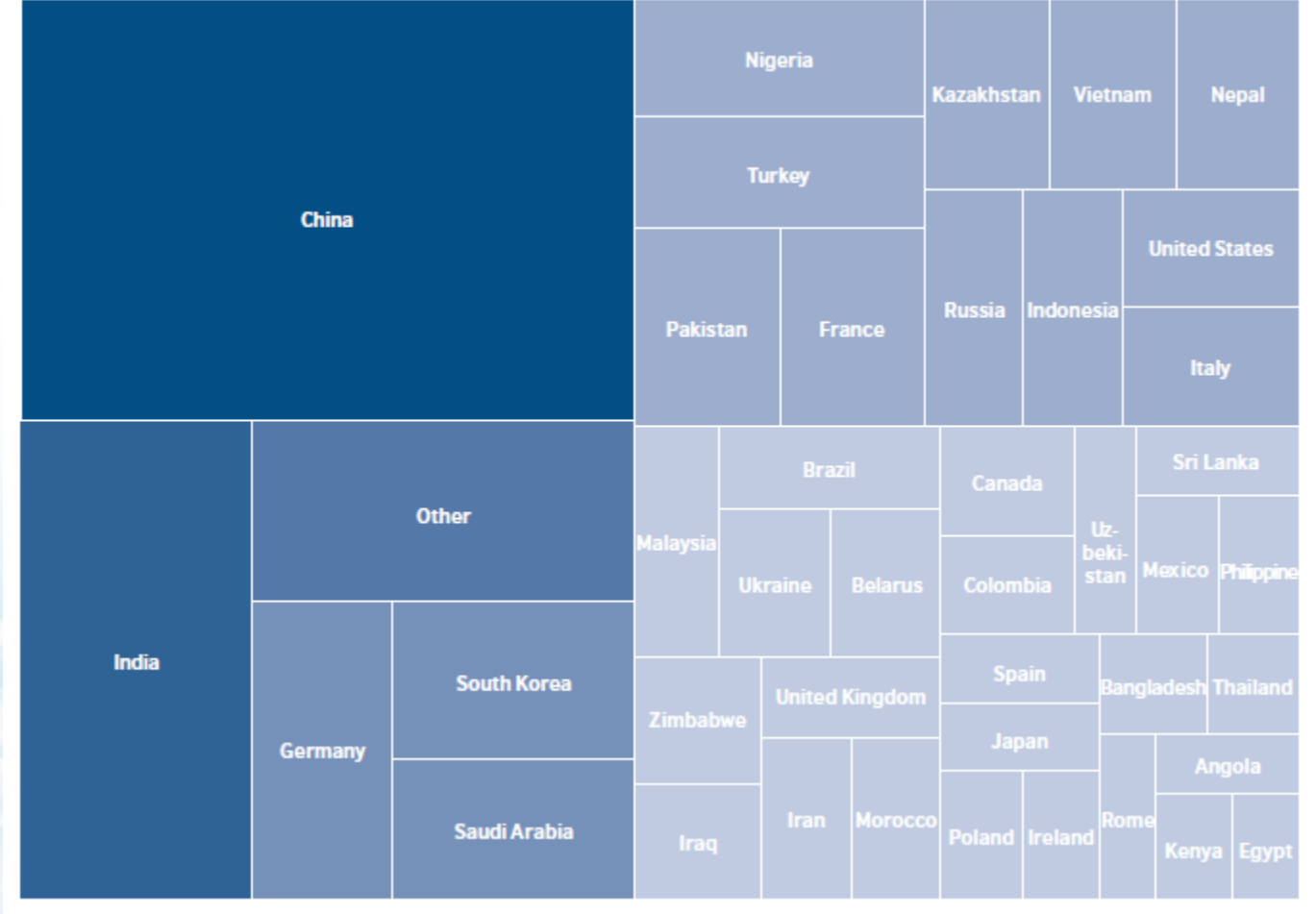


ELS International Pathways® a Berlitz Company

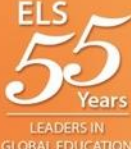
ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com



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

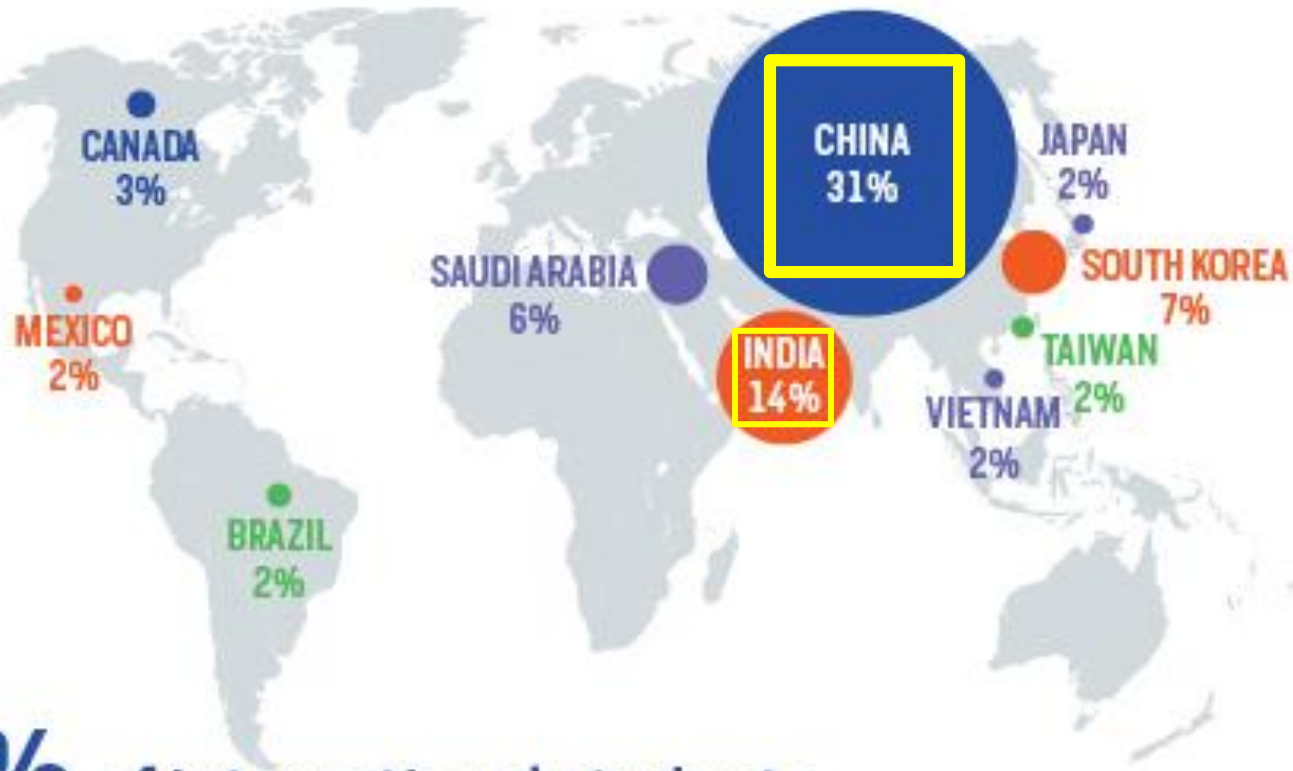


Source: British Council Student Mobility Report



Continued desire to study abroad

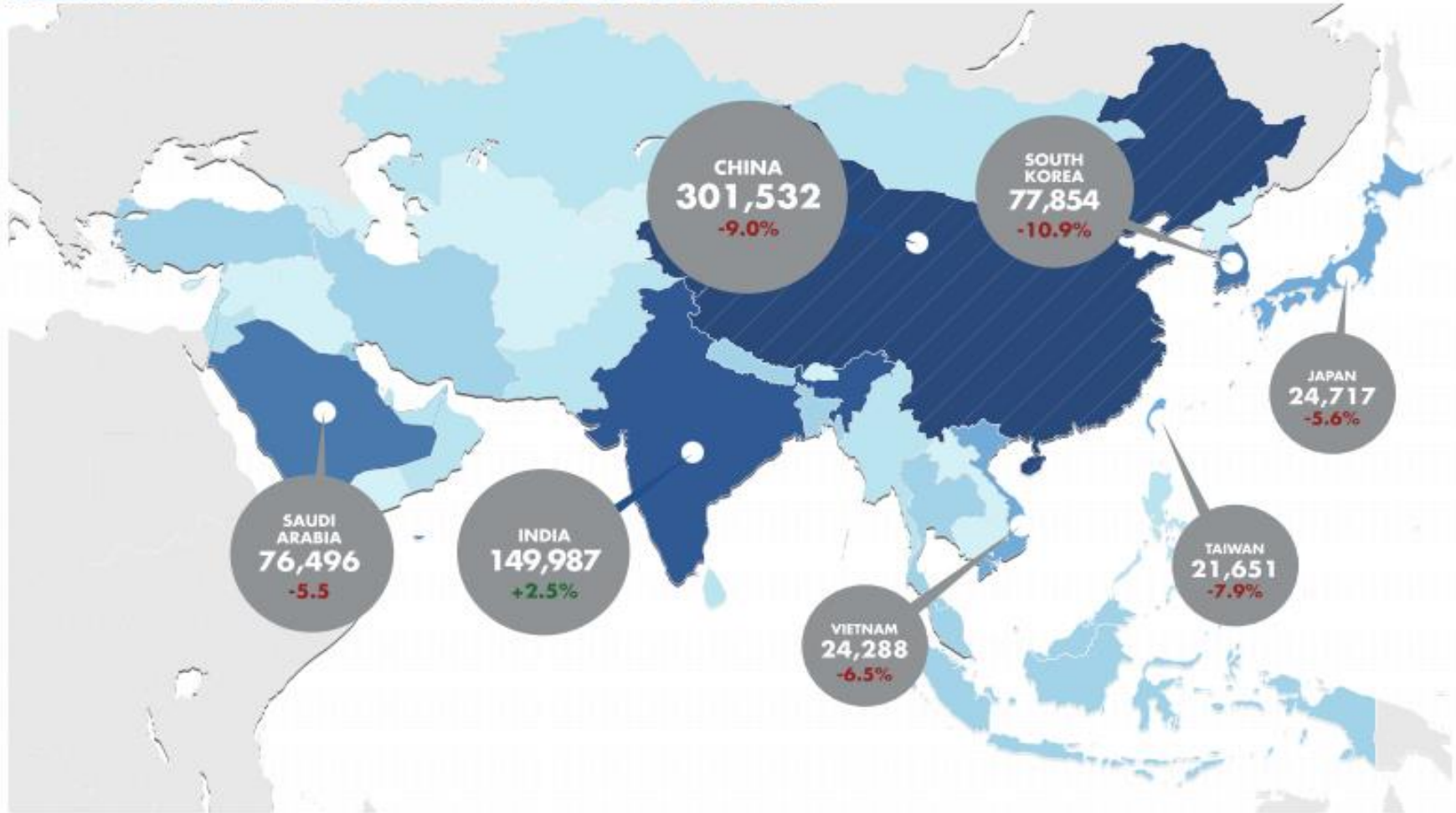
TOP TEN PLACES OF ORIGIN OF INTERNATIONAL STUDENTS



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

PLACES OF ORIGIN FOR USA

A CLOSER LOOK AT ASIA - JULY 2015 COMPARED TO FEBRUARY 2015



* Continent information was compiled using the United Nation's composition of macro geographical (continental) regions, geographical sub-regions, and selected economic and other groupings.

* Percentages compare August 2015 values to February 2015 values. No value indicates a less than 1 percent +/- change.

12 | Real-time SEVIS Data from July 7, 2015

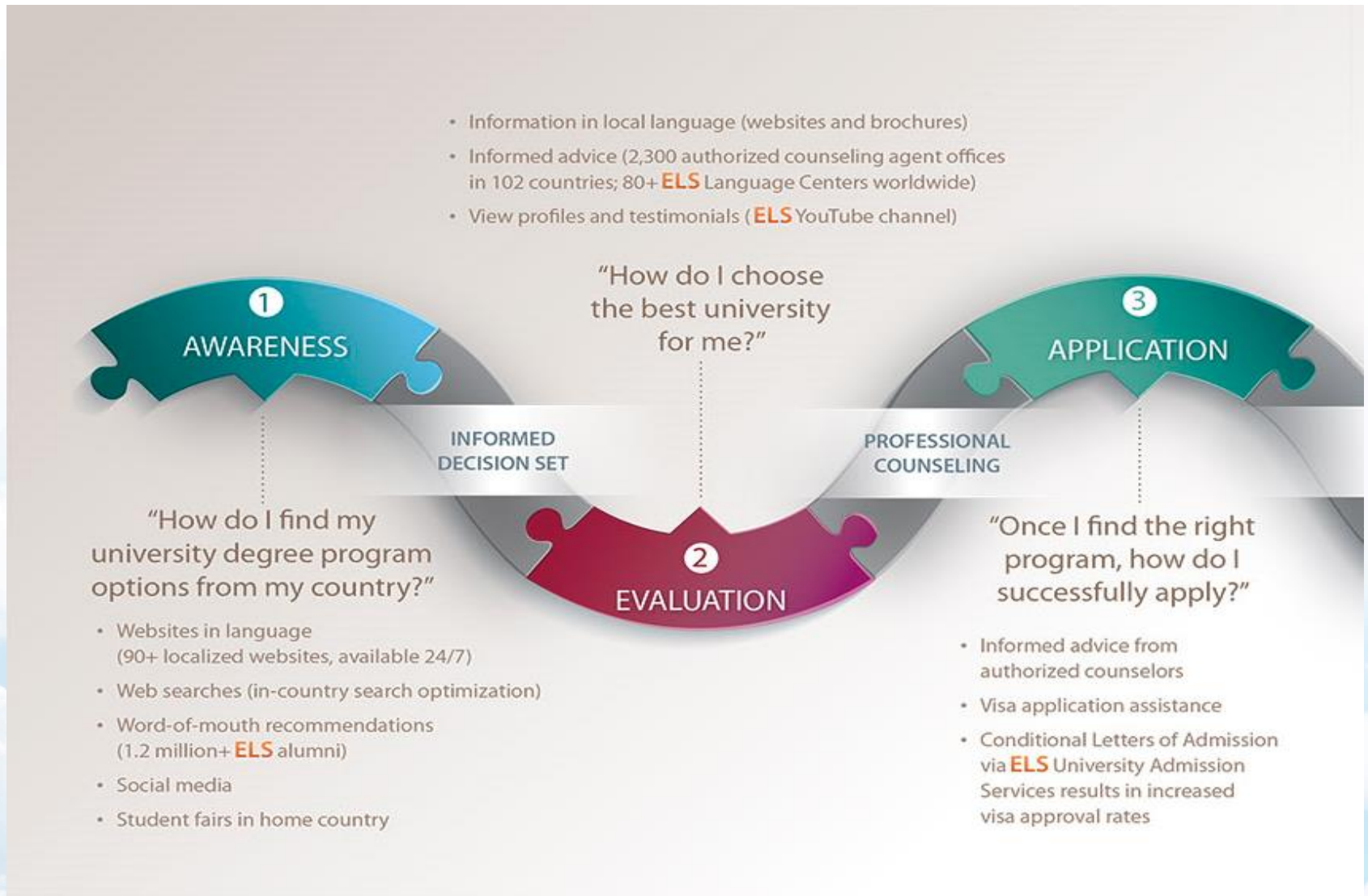


ELS International Pathways® a Berlitz Company

ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com



ELS Internationalization Infrastructure



- English language and academic skills at one of 80+ **ELS** Centers
- **ELS** English for Academic Purposes program – accepted as proof of English competency at 650+ universities worldwide
- **ELS** curriculum stresses writing and study skills
- Engagement, acculturation, friendship and support through **ELS** student and alumni networks

“How can I acquire the skills necessary to be successful at university?”

Through **ELS**'s linguistic, academic and cultural preparation, students are equipped for success.



“Will I be successful?”

“How do I start my university studies?”

ELS works closely with universities to ensure timely transfer of academically qualified students.

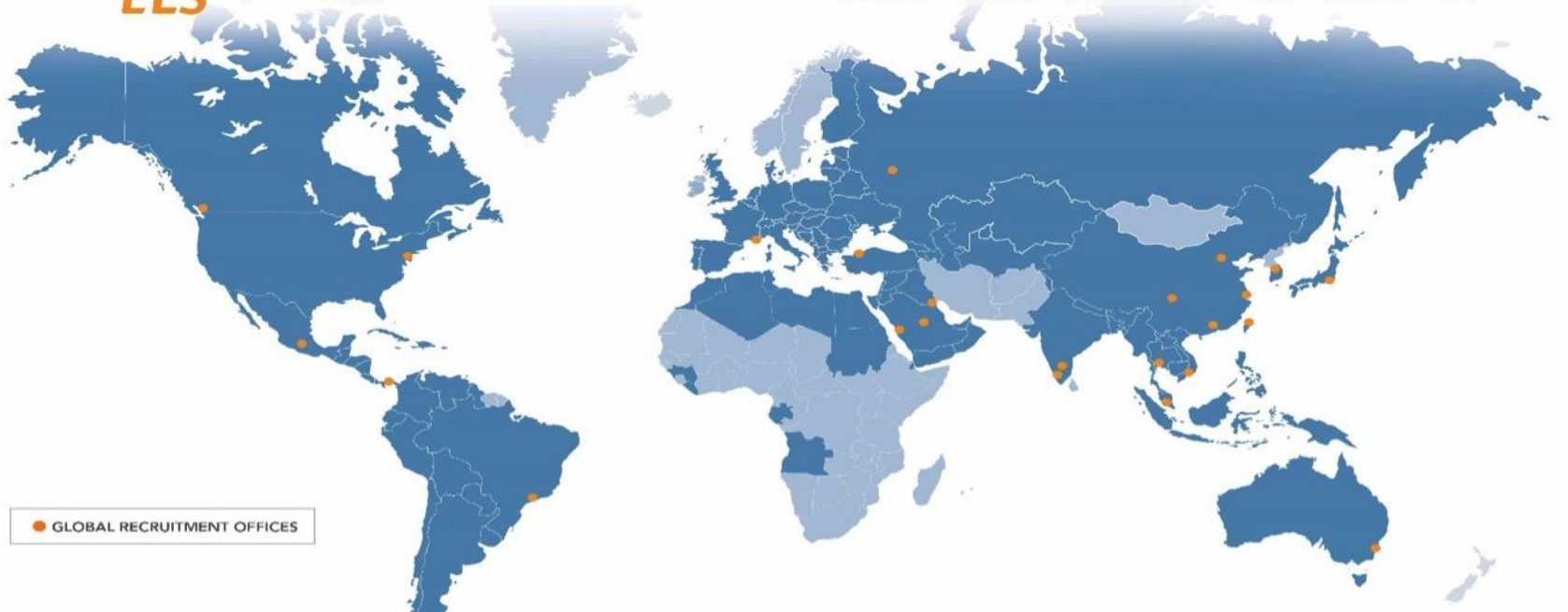
ELS Marketing and Recruitment – B to B

ELS has a global recruitment and partner support team dedicated to manage more than 2,300 counseling offices WW and train counselors to advise students towards university success.



ELS INTERNATIONAL PATHWAYS®

AUSTRALIA CANADA CHINA EUROPE INDIA MALAYSIA USA



ELS Recruitment Support offices in 18 countries worldwide: *Australia, Brazil, Canada, China, India, Japan, Kuwait, Malaysia, Mexico, Panama, Russia, Saudi Arabia, Taiwan, Thailand, Turkey, the United Kingdom, the USA and Vietnam*

10



ELS International Pathways *a Berlitz Company*

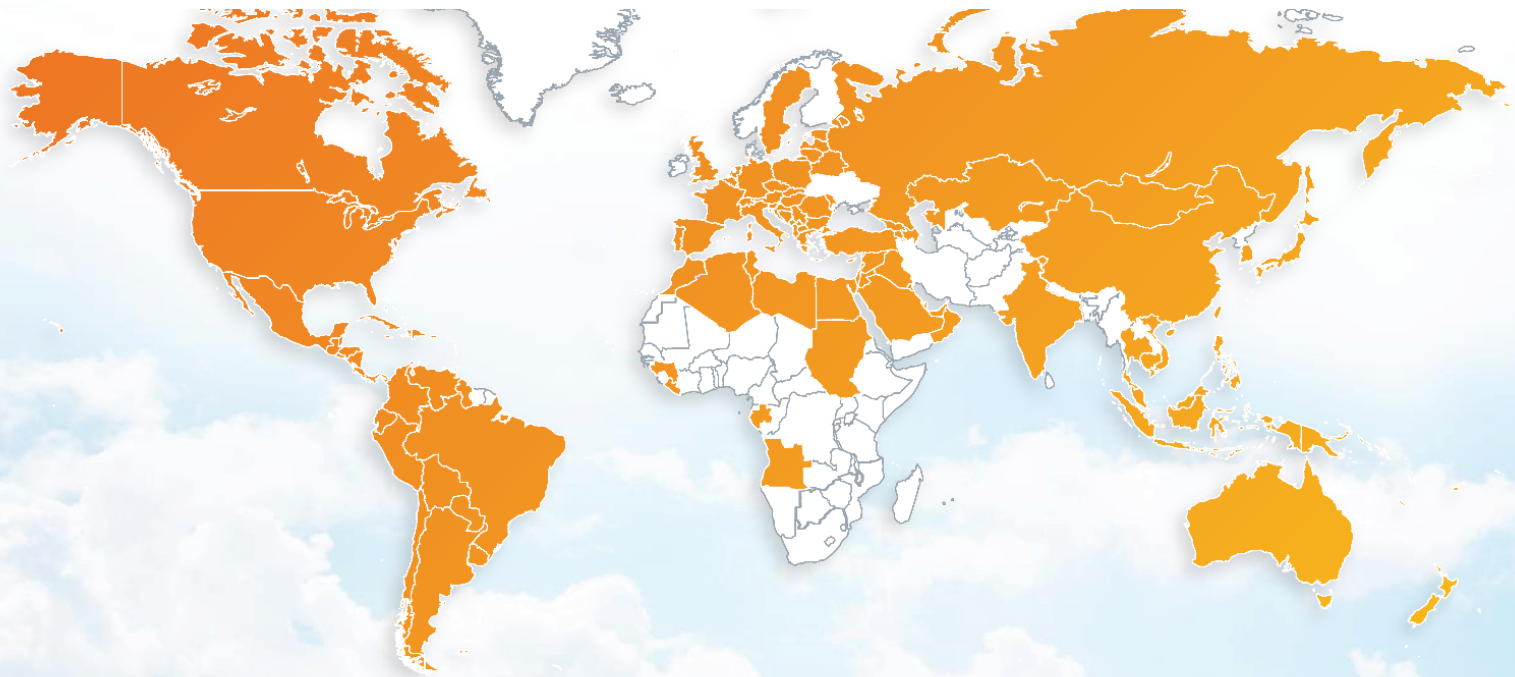
ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com



Increase Global Mindshare – B to C Channels

Longstanding In-Country Relationships and Marketing Channels

ELS has an extensive in-country and localized network of qualified **counselors in 102 countries**, **425+ fairs** reaching **over 280,000** students in **30 countries**, and a **web-ecosystem in 20 languages**. This coordinated multi-channel effort strengthens in-country awareness and allows for **country-specific messaging**.



ELS Marketing and Recruitment – B to C Channels

ELS representatives engage in over 425 student-focused education fairs around the globe.



ELS Marketing and Recruitment – B to C Channels

ELS engages in a multi-channel strategy to attract students

Social Media

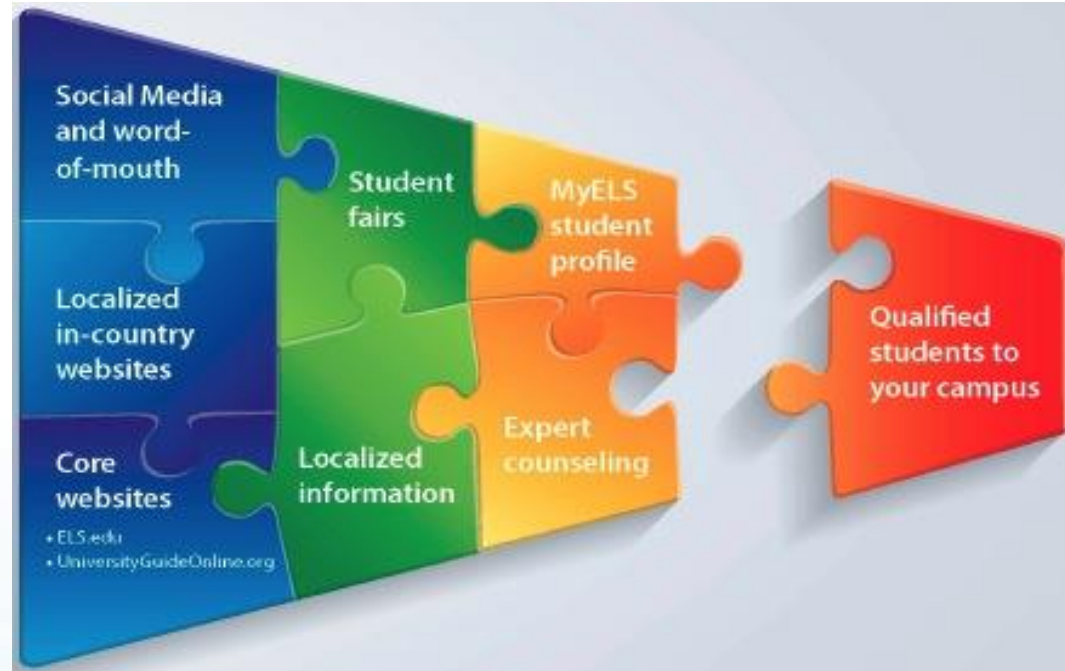
- 2.8 million likes on Facebook
- ELS Facebook page #13 on the SocialBakers list of top-performing pages in the educational category
- Significant global reach, country-specific messaging

Localized Microsites

- 91 in-country and in-language microsites to build awareness and promote ELS partner institutions

Web Presence – 4.2 million sessions in 2015

- ELS.edu – over 2.6 million visits per year, with ESL and university options in 16 languages
- UniversityGuideOnline.org – 1.1 million visits per year, assisting students, parents and counselors to evaluate university choices, in 20 languages, generating over 97,000 visits to university partners



Multi-channel strategy to attract students

Visibility – Print

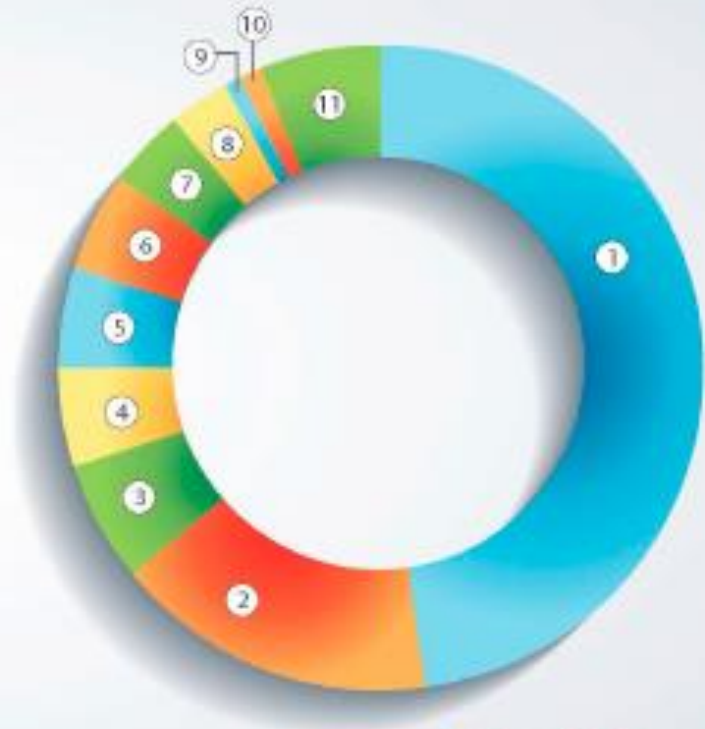
- ELS global resources provide your institution with international visibility, quality representation and localized communication.
- Annually, ELS distributes **over 800,000 copies of promotional materials** around the world in **20 languages** (*Arabic, Bahasa Indonesia, Bahasa Malaysia, Chinese Simplified, Chinese Traditional, English, French, German, Hindi, Italian, Japanese, Khmer, Korean, Nepalese, Portuguese, Russian, Spanish, Thai, Turkish and Vietnamese*).
- The ELS University Guide and global brochures are distributed worldwide to counseling offices, student fairs and other face-to-face venues.



UniversityGuideOnline.org

Global Reach and Impact

Over 1,100,000 visits in 2015



- 1 China – 48%
- 2 US International Students – 16%
- 3 Vietnam – 6%
- 4 Turkey – 5%
- 5 Taiwan – 5%
- 6 Japan – 5%
- 7 South Korea – 4%
- 8 Saudi Arabia – 3%
- 9 Colombia – 1%
- 10 Thailand – 1%
- 11 Other – 6%

Actively Engaged Counselors = Qualified University Students

ELS.edu (2.6 million visits in 2015):

USA 20%, Saudi Arabia 18%, Brazil 17%, Thailand 15%, Turkey 9%, Colombia 4% and Japan 2%.

China



Interest in study abroad will continue



More knowledgeable



Prestige matters



Employment



Economic future

China: Key Market Trends

- Slower economic growth
- More consumer-driven economy
- Tightening political environment
- Increase in capital outflows
- More returnees from study abroad
- Overseas education still seen as valuable

Opportunity & Challenge

China

Destinations

Diverse Cities

Expectations
Majors

Capabilities

2007/2008 2008/2009 2009/2010 2010/2011 2011/2012 2012/2013 2013/2014 2014/2015 20



ELS International Pathways[®] *a Berlitz Company*

ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com



Many are successful...

But increasing numbers of them are not.

Success = Uni Entry + Graduation + Employment

But more students encounter challenges...

↑ Failure rates

↑ Dismissal rates

↑ Dropout rates

● Low GPA

● Academic dishonesty

● Low attendance

● Violation of school policies



ELS International Pathways a Berlitz Company

ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com

21



The Problem

Ineffective preparation in academic English and acculturation are at the core of the problem.

The Solution

ELS Education Services:

- Academic English
- On-campus
- Critical thinking skills
- Writing & research skills
- Teach academic honesty
- Effective communication
- Understand school policies
- Make friends

ELS has the proven solution

ELS English for Academic Purposes provides:

- 520 hours of intensive training;
- Skills for classroom participation, research, expository writing, and attribution of sources;
- Language, study skills and intercultural preparation;
- Smoother integration into the university community.

Positive GPA Results*	
2.94	3.42
Undergraduate Average	Graduate Average

*Longitudinal study, more than 950 students in over 60 universities.

India

Mr. Mallik Sundharam

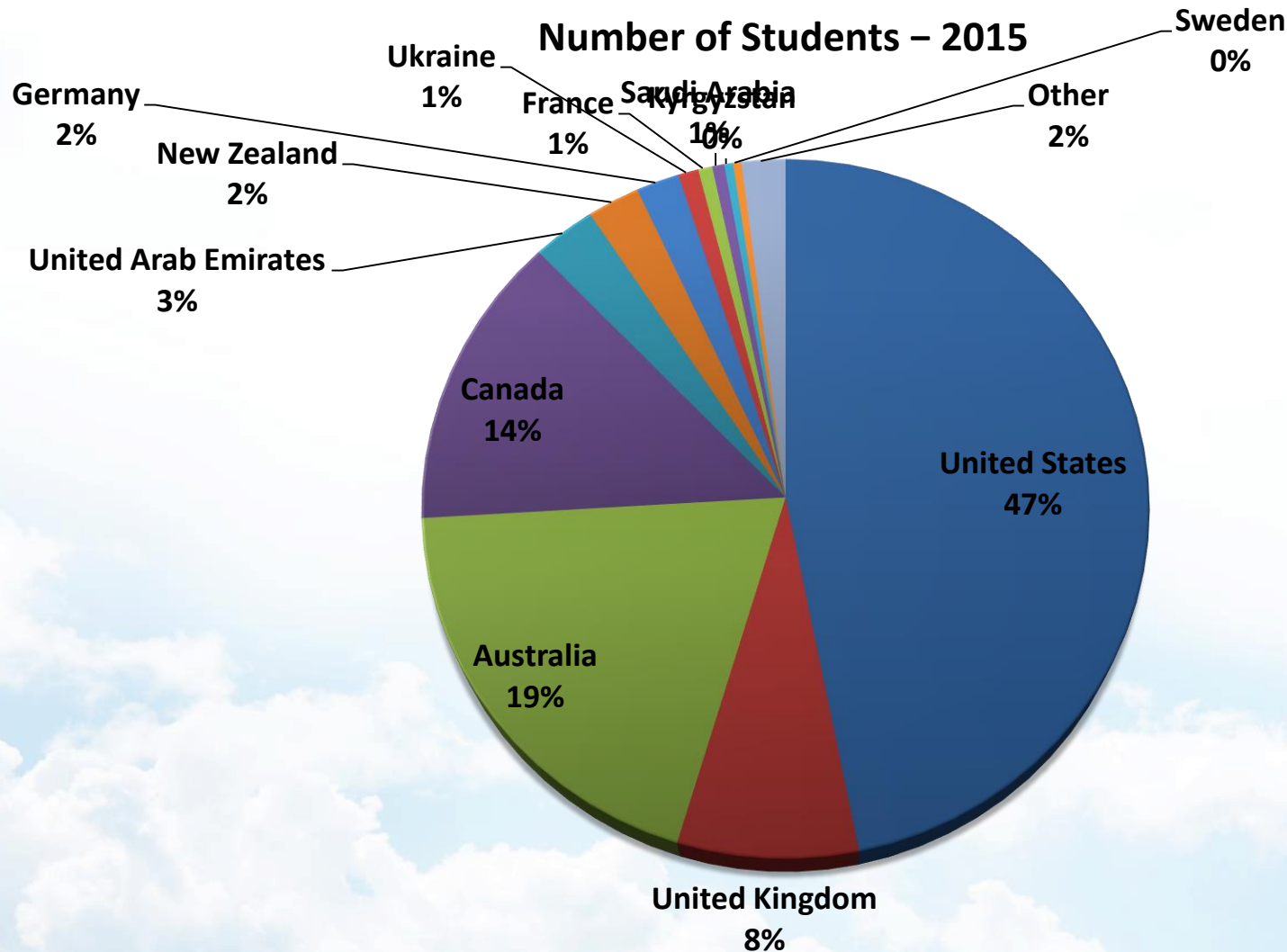
Vice President

Business Development

ELS Educational Services, Inc.

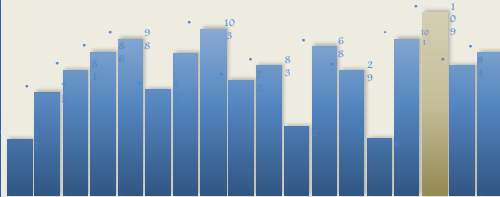


Indian Students Studying Abroad – 2015



Growth Drivers – India Study Aboard Market

2nd Largest – Students Studying Abroad & Growing



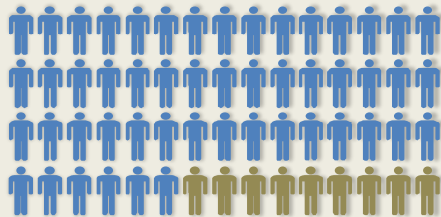
Ranked 9th in the world economy with a \$2 Trillion GDP



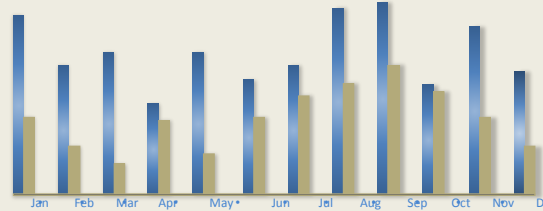
Indian Education System at Disadvantage

- Caste-based Admission Quotas
- Entrance Examination Based Admissions
- Growing Cost of Capitation Fees
- Outdated Curriculum

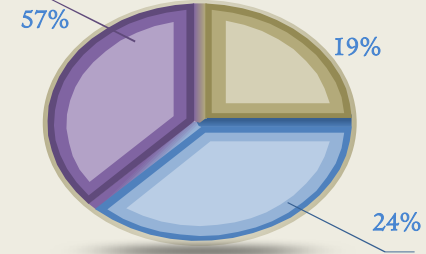
34.8% of Population < Age of 15



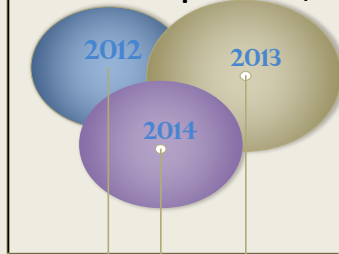
Raising Affordability of Household



12.7 M H. Ed Enrollments by 2024



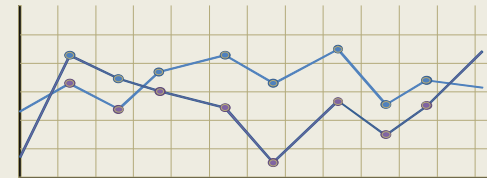
Indian Student Spend US \$113.5M



Increased by 73% in last 5 Years

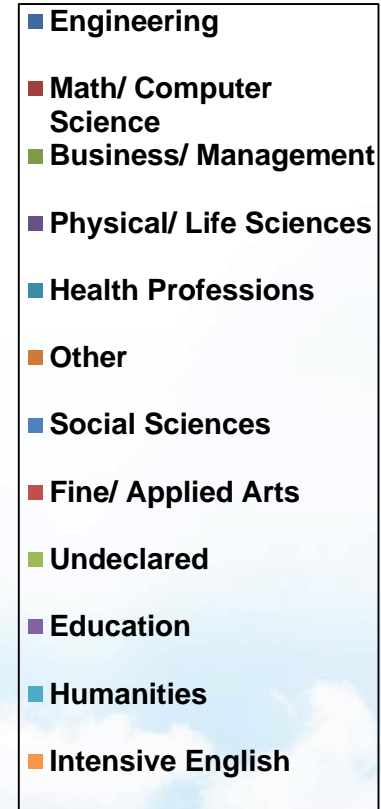
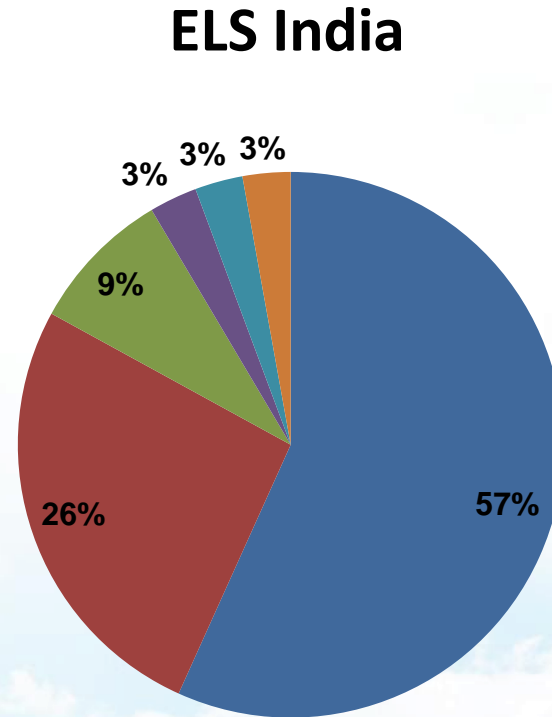
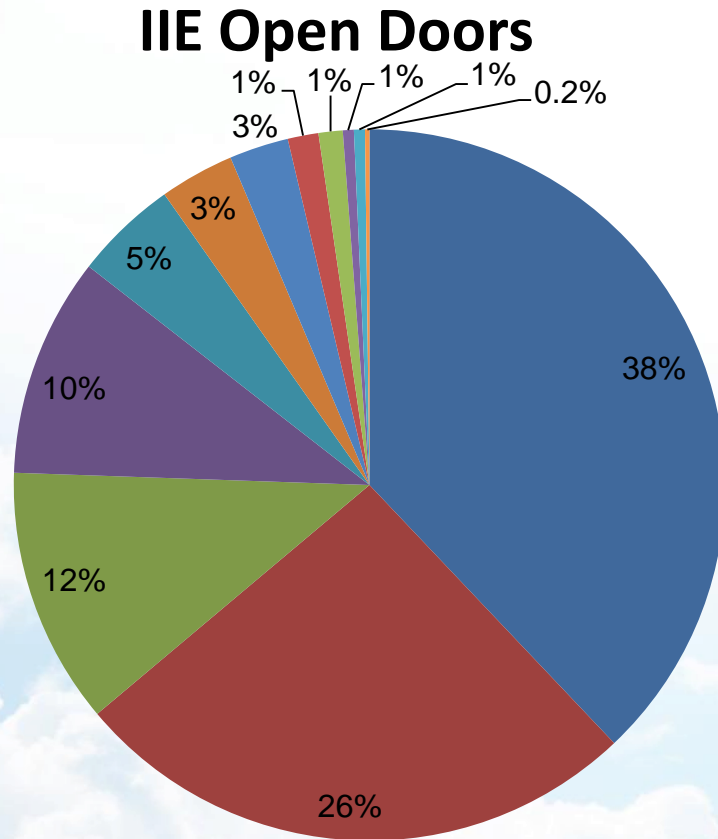


376K – Study Abroad in 2024



Indian Students in USA

Academic Majors



Source: Open Doors 2015

27



ELS International Pathways® a Berlitz Company

ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com



Indian Source City Demographics

MUMBAI

Students: 17,294

Degree Level: Bachelor's (16.7%);
master's (74.2%); doctorate (9%)

BANGALORE

Students: 8,835

Degree Level: Bachelor's (8.3%);
master's (80.4%); doctorate (11.3%)

CHENNAI

Students: 9,141

Degree Level: Bachelor's (4.4%);
master's (81.7%); doctorate (13.9%)

DELHI

Students: 8,728

Degree Level: Bachelor's (27.7%);
master's (58.6%); doctorate (13.7%)

HYDERABAD

Students: 26,220

Degree Level: Bachelor's (3.8%);
master's (90.8%); doctorate (5.4%)

PUNE

Students: 5,551

Degree Level: Bachelor's (7.8%);
master's (79.9%); doctorate (12.4%)

Source: Brookings Research Report 2014

28



ELS International Pathways® a Berlitz Company

ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com



Challenges in International Recruitment

- Marketing & recruitment channels selection
- Identifying the right partners or direct recruitment
- Budget availability for larger geographical distribution
- International travel bandwidth
- Optimal time frames to travel
- Increasing cost of international travel



Global Marketing Channels

Business to Customers
(B to C)

Business to Business
(B to B)

Above the Line

Below the Line

Agents

Test
Prep
Centers

Int'l
Scho
ols

Colle
ges &
Univ

Individual
Con
sultants

Traditional
Marketing

Digital Marketing

Std
Fairs

Recr
uitm
ent
Even
ts

Elit-
Mall
&
Club
Activ
ation
s

Bill
Boards/
Posters

News
paper

TV
Net
work

Radio
Netw
ork

SEO

Pay Per
Click
Google
Ad
Words

Social
Media
Mkt
(FB)

Text
Mes
sage
Mkt

Web
inars

3rd
Part
y Ed
Web
sites

School Boards

International Level

National Level

State Level

IB

(85)

*International
Baccalaureate*

IGCSE

(350)

*International
General
Certificate of
Secondary
Education*

AP

(3)

*American
Advanced
Placement*

CICSE

*Council for
the Indian
School
Certificate
Examination*

CBSE

(12,067)

*Central Board
of Secondary
Education*

NIOS

*National
Institute of
Open
Schools*

**Various-
named
after
state**

*- State,
Matriculation
or Anglo-
Indian stream*

31

Graduate – Recruitment Landscape

UG Degree Programs

693+ Universities
6,500+ Colleges

3-Year Degrees

- Bachelor of Arts (B.A.)
- Bachelor of Science (B.S.)
- Bachelor of Commerce (B.Com)
- Diploma (Non-University)
- *Students may specialize in one or more subjects*
- *Universities also offer honors degrees that have more rigorous academic requirements*

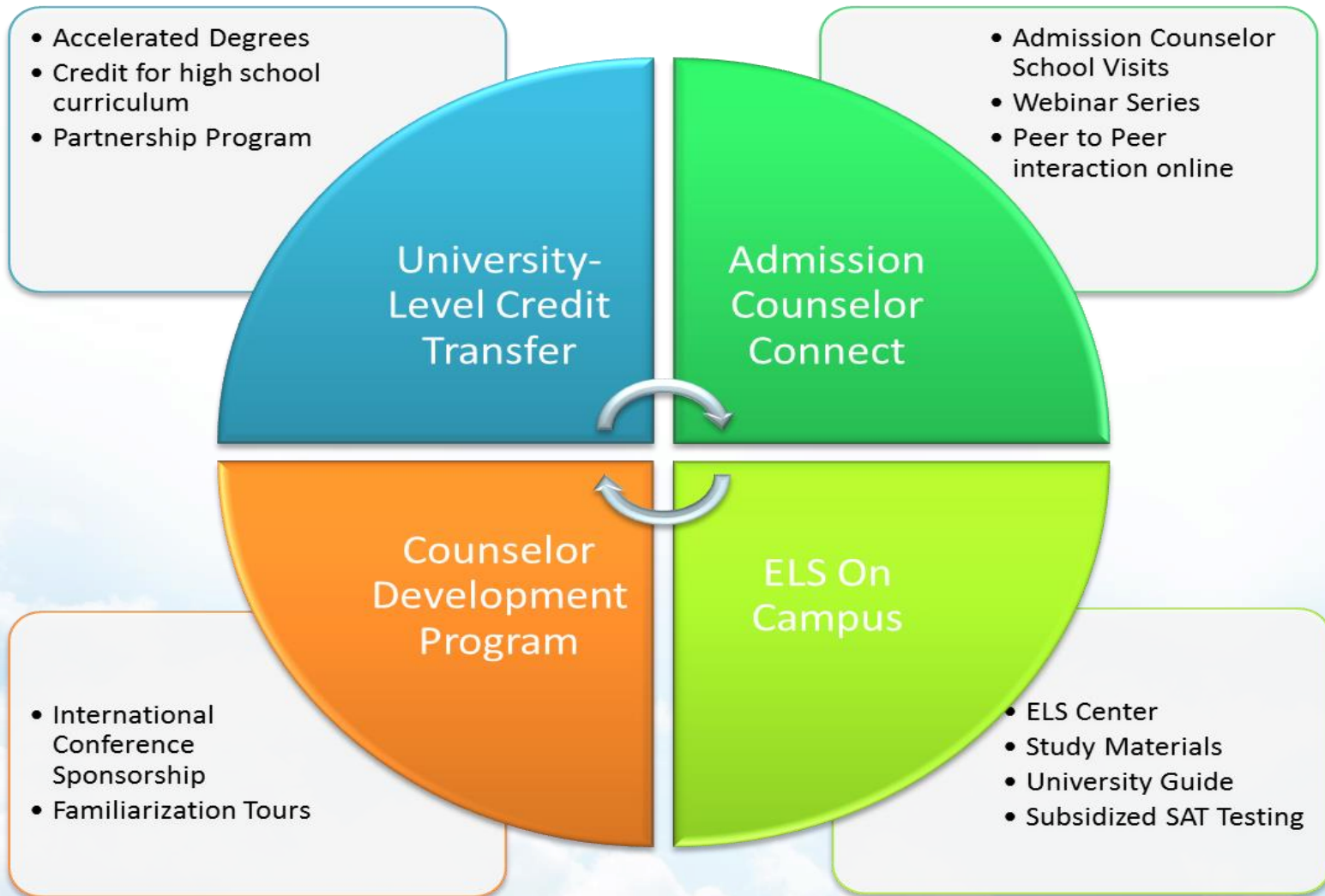
4-Year Degrees

- Bachelor of Agricultural Sciences
- Bachelor of Dentistry
- Bachelor of Engineering
- Bachelor of Pharmacy
- Bachelor of Forestry
- Bachelor of Architecture (B. Arch)

5-Year Degrees

- Bachelor of Medicine (MBBS)
- Bachelor of Veterinary Science
- Bachelor of Laws (LLB)

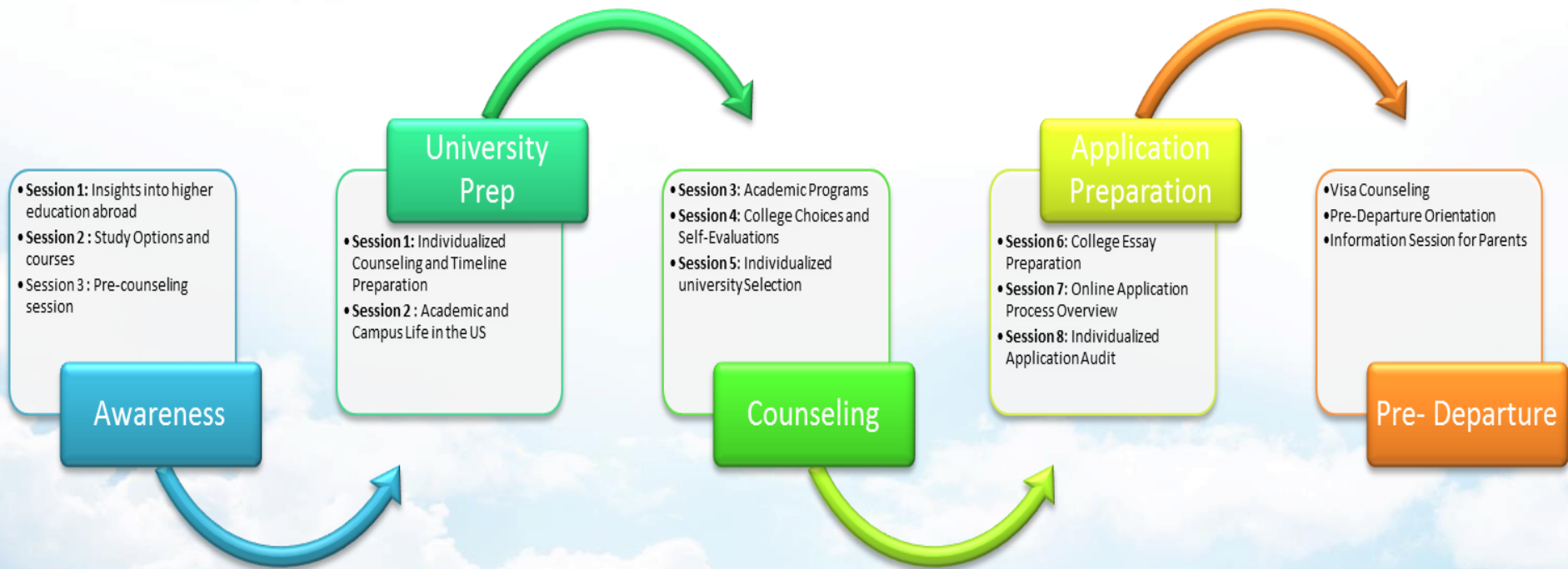
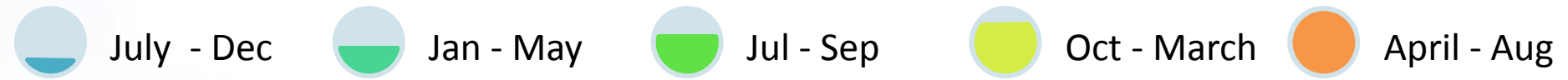
B to B Channel Establishment



B to C Channel Distributions



Recruitment Lifecycle in India



Strategic Recruitment Approach – Allocate your resources wisely



- Allocation of limited Recruitment Dollars to produce the right ROI
- Choosing the right Market Approach based on your reach in the market
 - Brand Building
 - Lead Generation
 - Application Conversions
 - Matriculations
- Target Marketing for best ROI
 - Promotional Media Vs. Target Audience
 - Colgate Tooth Brush (Product)
 - Study Abroad (Product/Service)
- Distribution of Marketing Dollars
- Progressive Spend Plan with larger acquisition of customers

Strategic Recruitment

Ms. Lisa Orr

Director

Global Recruitment Strategy
& Implementation

ELS Educational Services, Inc.



37



ELS International Pathways® a Berlitz Company

ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com



Emerging Markets

Building Greater Campus Diversity

Cambodia
Nepal
Indonesia

Malaysia
Vietnam

- Characterized by youthful populations
- 35% of the Vietnamese population will be under the age of 24 in 2020*
- 43% of the Indonesian population will be under the age of 24 in 2020*
- Growing commitment to funding tertiary education



*United Nations World Population Prospects 2015 Revision

Emerging Markets and Price Sensitivity



Make contact. Internally.

Review your institution's financial readiness for entrance into the market:

- International scholarships
- Tuition discounts

Develop 2 + 2 relationships

- Vietnam ranks 3rd, behind only China and South Korea, among countries of origin for international students attending community colleges.*
- More than half of all Vietnamese students studying on US campuses start at a community college.**



*Source: Open Doors 2015

**World Education News and Reviews

Emerging Markets – Build your message

Program Audit

- Review program offerings.
- Lead with a core selection of programs that resonate within the market.

Focus your message

- Don't let programs of interest get lost with an overburdened message.
- Begin with comprehensive information on key majors and then expand.
- Educating the market takes time!

Recruiting in the Emerging Markets

Alumni are proud ambassadors.

- 66% of prospective Indonesian student sought information about study abroad options from family and friends.*
- Further, 37% of Indonesian prospective students visited social networks to gain more information on study abroad options.*

Think long-term as you build your strategy. How will you capture in-country contact information?

*ELS International Student Decision Pathways



Alumni and Social Media

Encourage your alumni to share their experience on social media.

On-campus:

- Welcomed by campus community?
- Support programs available to international students?
- Participate in an internship or Co-Op experience?

Career Outcomes:

- Internship or Co-Op Participation
- Did they believe that institution prepared them for their chosen field?



© Can Stock Photo

A 2015 survey of postgraduate applicants around the world finds that prospective master's or PhD students are giving greater weight to future career prospects when choosing their program, institution and country for study abroad.*

*The QS World Grad School Tour Applicant Survey 2015

42

Emerging Markets – Building a Pipeline

First Applications

How your institution responds to first applications received can have a long-term effect on market perception of your institution as a whole.



- Timely responses to student inquiries are critical!
- Decision timeframes reinforce commitment to the market
- Stay in contact!

Emerging Markets

- Alignment with market need
- A multi-departmental approach is needed
- Engage departments of interest for international students.
- Boots on the ground
- Budget market maintenance
- Establish alumni contact database



Our University

Mr. Dan Erickson

Director

International Student and
Scholar Services

Louisiana Tech University



45



ELS International Pathways® a Berlitz Company

ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com



Our University, ELS, and Emerging Markets

Working with our ELS Partner

- Expanding our “Market Penetration” (Nepal, Vietnam)
- Gaining a “Foothold” (Indonesia, Cambodia)
- “On the Ground” Partner for Agent Maintenance
- Feedback on Materials and Methods
(The Value of a Constant Dialogue)
- Appreciation of Data Driven “Road Map”



LOUISIANA TECH
UNIVERSITY®

Thank you for your participation today.

Questions? Comments?

Join the conversation on Twitter:

@ELSRecruitment #ELSNAFSA



ELS International Pathways® a Berlitz Company

ELS.edu • UniversityGuideOnline.org • InternationalStudentRecruitment.org • ELS.com

