



 Adventus.io



How to take advantage of the international student rebound

A recruitment agent's insider guide to what students and institutions want right now, plus key data on destination countries.



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Introduction

It's been a disruptive few years for all of us in international student recruitment. But, when looking back at all that's unfolded since 2020, we've seen incredible resilience and innovation across the sector.

Education agents everywhere have had to adapt quickly to changing rules and border restrictions, and many have adopted new technology to provide a standout service to students. Education agents have also been crucial for institutions throughout the pandemic – and will continue to be during the recovery.

As we move to a more open phase of the pandemic, what's in store for the sector?

The leading destination countries of Australia, Canada, the UK and the US are now embracing a "post-pandemic" mindset, presuming that travel restrictions are a thing of the past.

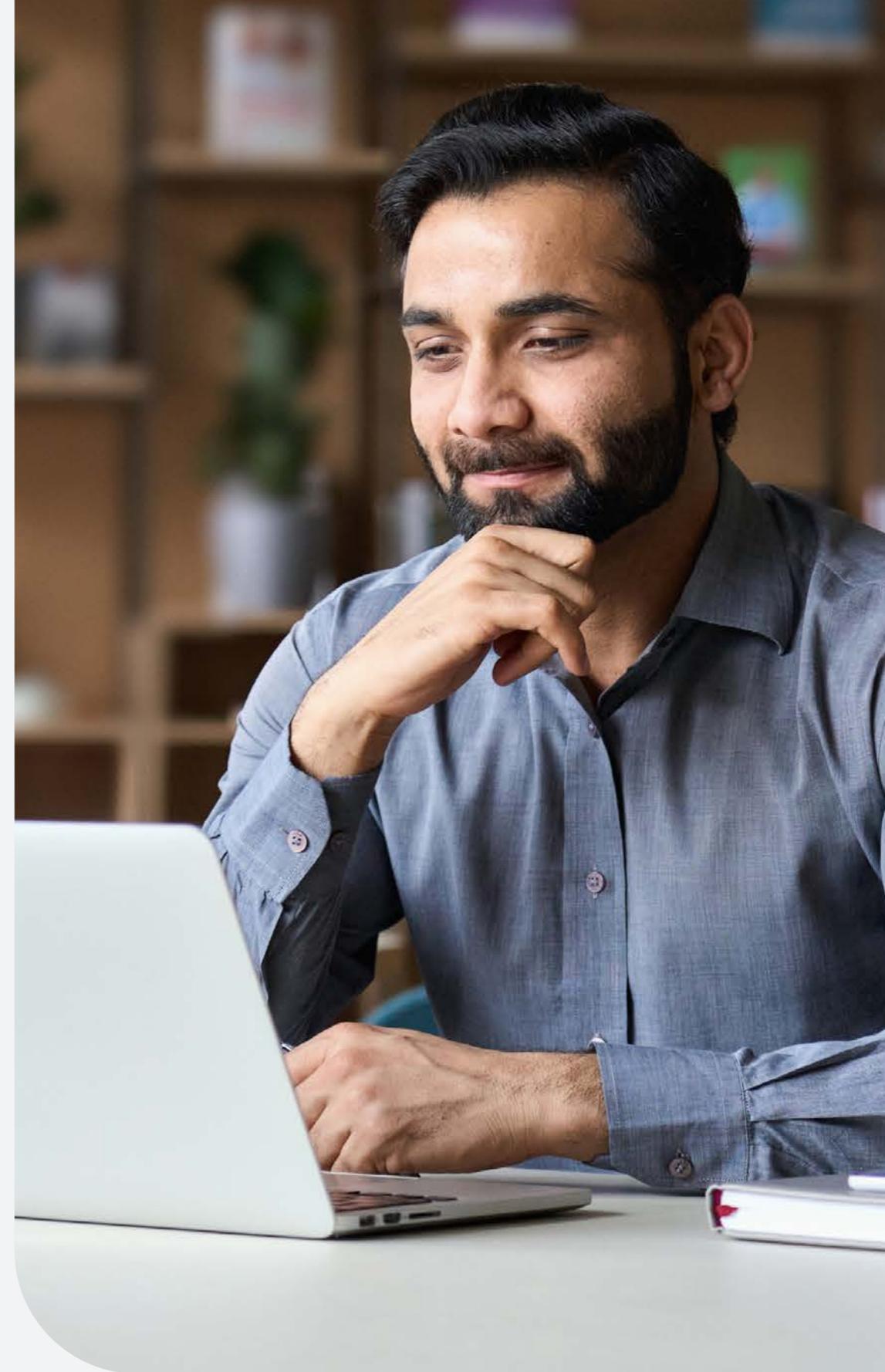
Projections show big growth in international student numbers: Holon IQ predicts around 8 million international students will enrol by 2030.

Diversification is also a major priority for institutions and they want to connect with recruiters in new source markets.

Despite the disruption, the outlook is optimistic. Are you ready to take advantage of the international recruitment rebound?

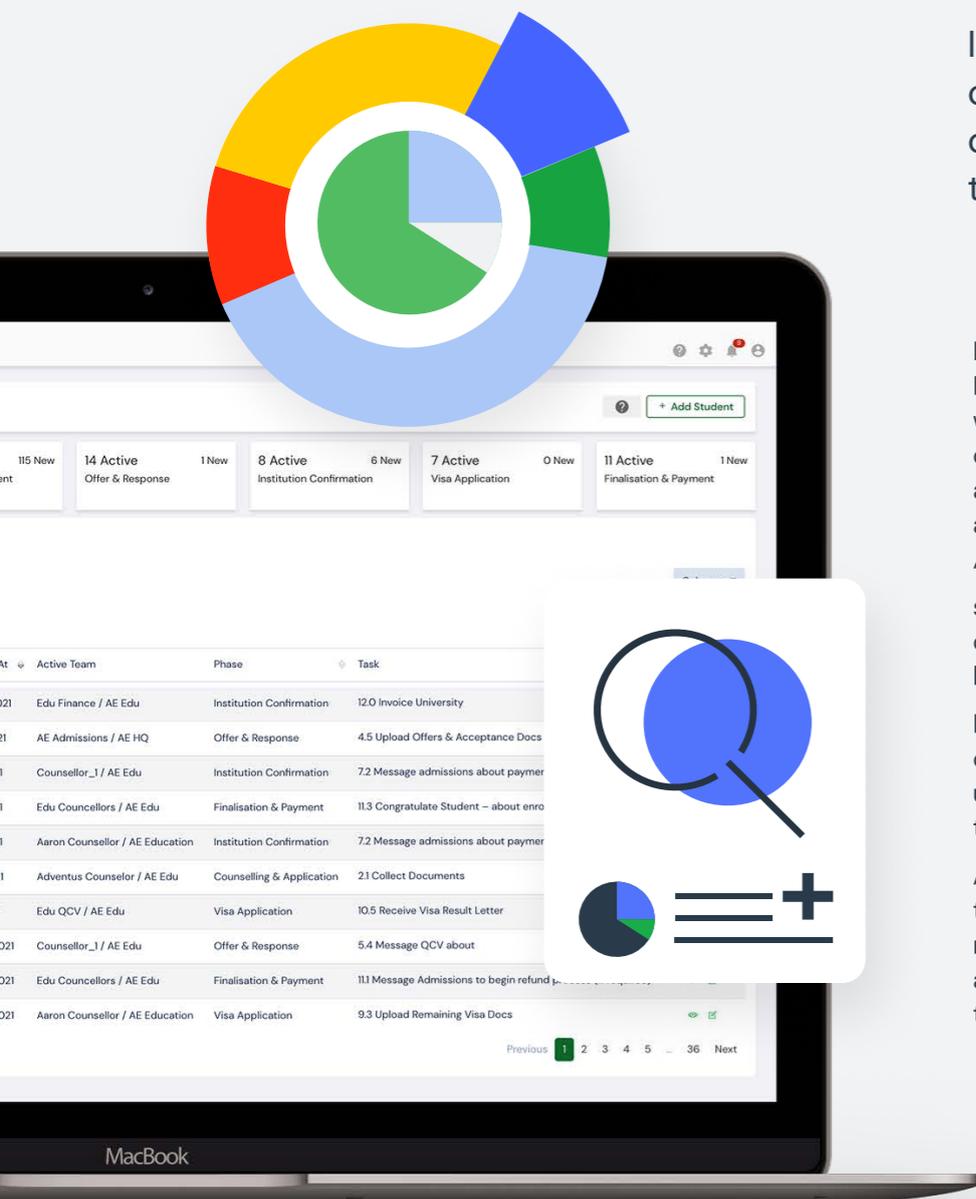
Whether you've recently got into student recruitment or you've got years of experience, this guide will help you understand key recruitment trends and data, and provide insider tips to let you know what students and institutions want.

Good luck reaching your recruitment goals.



3 key industry trends

Digital strategies are becoming more important in recruitment



In the future, it's expected that digital engagement will outperform traditional models of university guidance counselling. This makes perfect sense when catering for the next generation of digital-native students.

Rezwan Kawser, Adventus.io's Senior Regional Manager in Bangladesh, says the pandemic has accelerated trends that were already happening in our industry — like the shift to online learning and digital tools used in recruitment, from attracting students to finding new institution partnerships around the world.

"COVID has changed lots of things," he says. "Due to COVID, some small education recruiters have been struggling and some of them shut down their businesses. But the brave ones who have stood their ground, they're taking the opportunities."

Rezwan says more recruiters are seeking opportunities on digital platforms than ever before, and he's seen increased uptake and engagement in the Adventus.io marketplace throughout the pandemic.

Aakriti Gupta, User Experience Researcher at Adventus.io, agrees that industry attitudes towards tech are changing. She says more education recruiters are realising that digital platforms aren't a threat to their business but important tools to make their jobs easier.

"We're not competing against each other. We're serving the student together — it's a common goal," she says.

Social media is also becoming more important. Patricia Partida, Adventus.io's Regional Manager for Mexico says education recruiters who have increased their social media presence are reaping the benefits.

"Agencies with Millennial founders have seen their registration numbers explode via social media strategy," she says. "Education agents used to ask institutions for marketing support to deliver enrollments, but now, newer agents don't ask for anything — they turn to socials to find their students because Gen Z are online all the time."

Patricia says, when recruiting this new generation of students, "the information has to be delivered in the way they're looking for."

"We can't be blind to technology — I've seen how it has helped education agents have a more global reach, and those agents that adopt a 'technology-first' mindset are the ones who are succeeding today."

“Interestingly, the most popular social platform for recruitment may be changing. In a survey of 10,000 prospective international students, Educations.com found Instagram was the most popular social media platform in 2021, with 41% of the surveyed future students saying they’ve used it to find out information about an institution. In contrast, YouTube dropped to 9.2%, even though it was the most preferred in the same survey two years ago. This suggests it’s good to diversify your digital strategy.

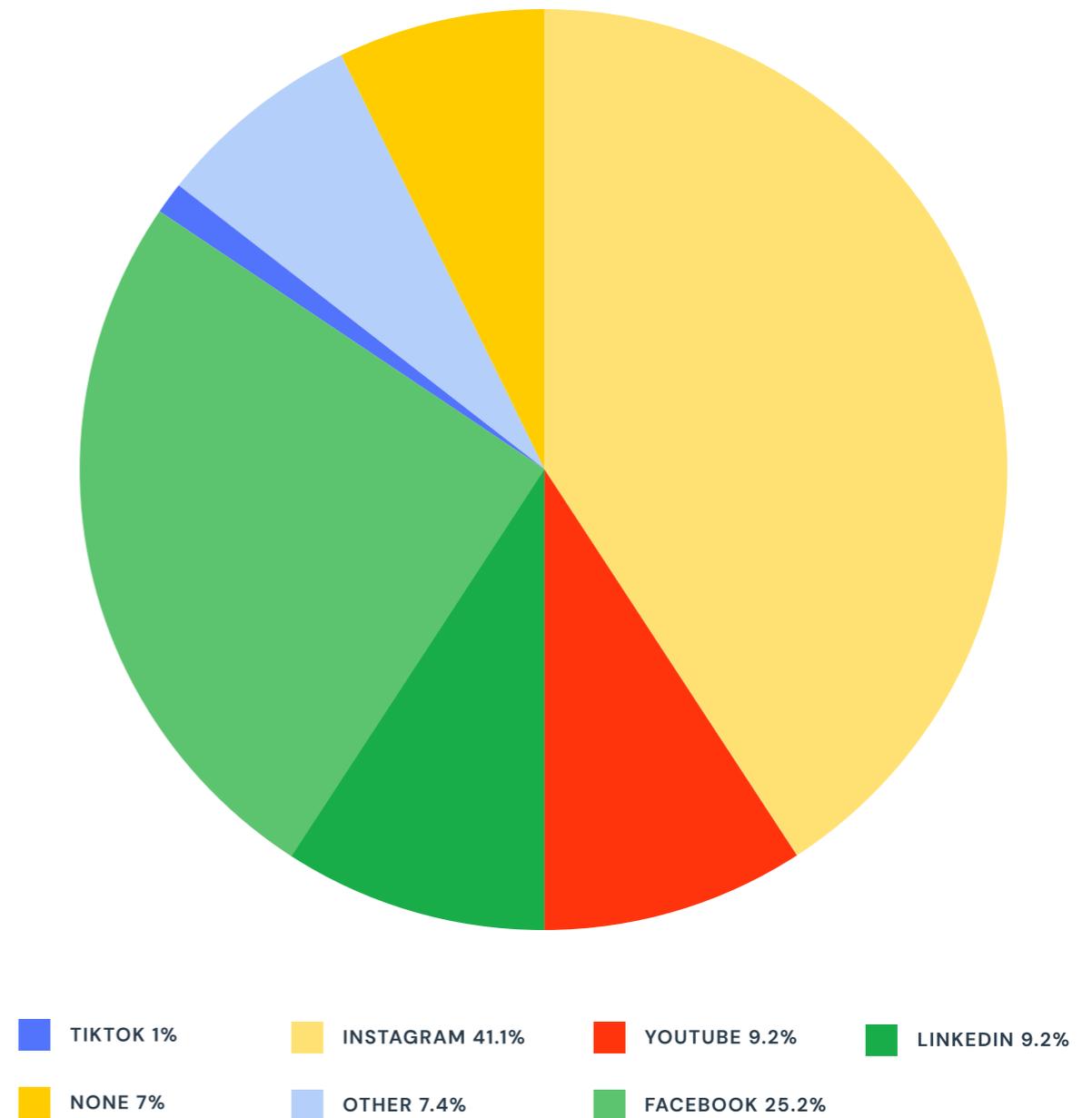
But, it’s important to tailor it to your region – as Educations.com found there can be different preferences. For example, their survey found Facebook is the preferred platform for only 10% of students in North America, but it still overtakes Instagram in Africa, with 31% of students selecting Facebook as their most preferred.

TikTok, a favourite platform for Gen Z, was only listed as the most preferred platform by 1% of students, but this is expected to rise in coming years.

It could be worth running a survey or collecting your own data on where your students spend most of their time online, so you can target your marketing strategy and attract more clients.”



Preferred social media platforms for prospective students to get more information about a university



Enrolments have declined in the Global North; the Global South continues to grow

Recent data from HESA shows that international education grew dramatically in the period from 2006 to 2018 – student numbers surpassed 200 million globally and institutions now total almost 90,000.

But, the growth has played out differently across the world. The HESA report suggests international enrolments in the Global North peaked in 2011 and have slightly declined since then. It's been a different story in the Global South, which accounted for nearly 75% of all enrolments by 2018.

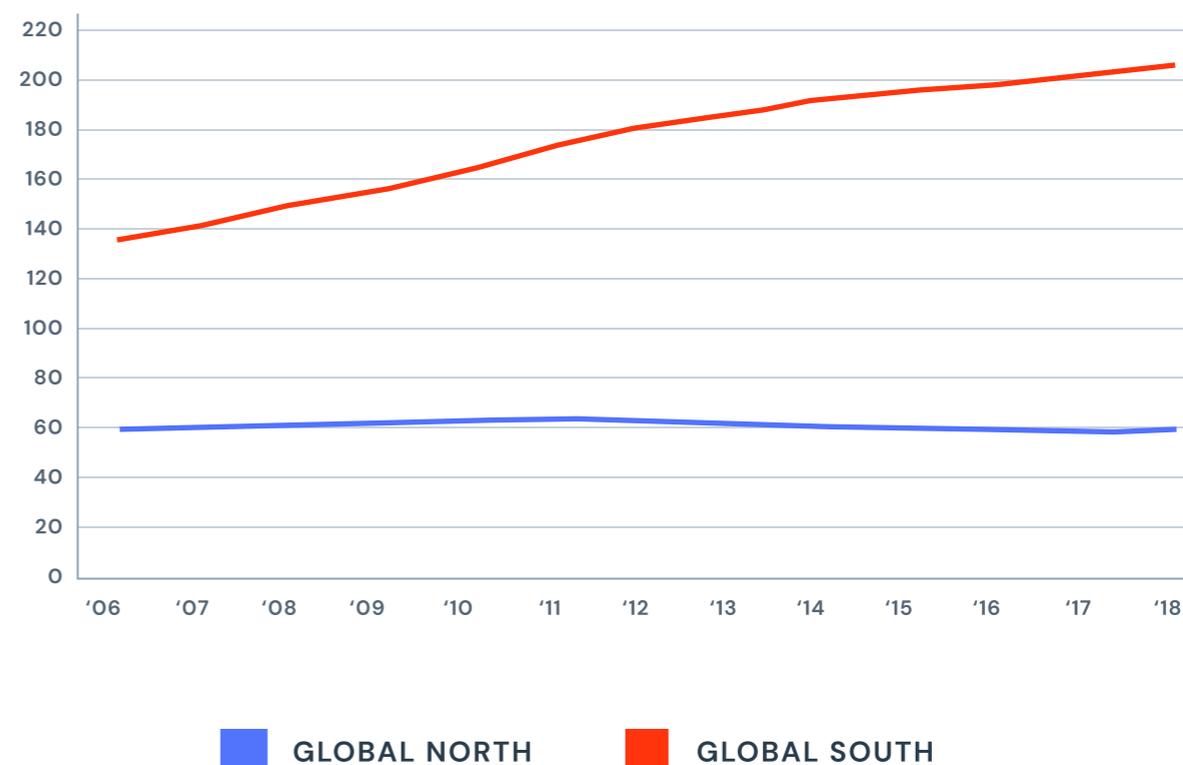
As the HESA report says, "In other words, global HE is no longer dominated by wealthy countries, and global academia's centre of gravity has decisively shifted toward Asia."

This trend is expected to continue. In a recent report, Western Union suggested that 79% of the growth in international students from 2019 to 2025 is projected to be from Asian countries.

Western Union has also predicted that by 2025:

- 1.34m students will leave China to study abroad, versus 1.1m in 2019.
- Indian student numbers will rise to 620k, up from 462k in 2019.
- Vietnam, Nepal and Kazakhstan will become "more influential outbound markets".
- Vietnamese outbound students will increase by a 4.6% CAGR from 2019 (thanks to a surge in the "number of households with >\$35k income and a rising outbound mobility rate").
- South Korean students expected to decline by -2.4% CAGR compared to 2019 (due in part to a rapidly aging population).

Total number of students by global region 2006–2018



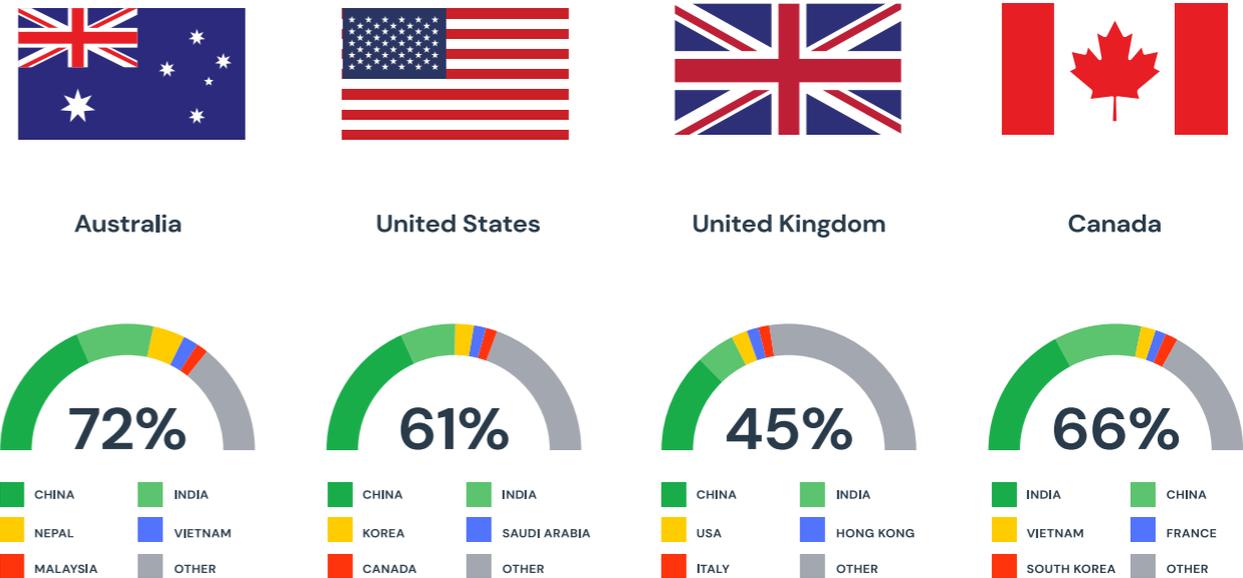
Institutions really want to diversify their source countries

The pandemic has shaken up the international education landscape and the race is on for institutions to diversify their student cohorts. Many institutions that have relied heavily on China or a small number of countries are keen to widen their pool of source markets.

Australia's International Education Strategy 2021 - 2030 reveals the current concentration of the markets in Australia, Canada, the US, and the UK.

For example, the top 5 source markets in Australia account for 72% of all university enrolments. In their post-pandemic recruiting, destinations are planning to expand. They are looking to countries in South and South East Asia, Africa, and Latin America. Education recruiters in those regions should be ready to meet this demand.

Percentage of university enrollments from Top 5 source markets by country



Destination profiles: Data you can use

Countries around the world have responded very differently to COVID-19. As we forge through a new, more open phase of the pandemic, it's worth taking a look at how different destinations are planning their recovery and how you can apply this data when counselling students.

United States

International student enrolments dropped sharply in the US through 2020. There was a massive 46% decline in new international student enrolments in 20/21 and an overall decline of 15% in international enrolments.

As well as the pandemic, the Trump era sentiment towards international students may have also played into the drop in numbers. But, recent visa data shows the decline has now slowed – and there’s been an uptick in US graduate programs.

Current top 5 source markets:

-  China
-  India
-  South Korea
-  Saudi Arabia
-  Canada

Why are students choosing the US?

- Increased post-study opportunities
- Prestigious, highly ranked institutions with strong brand recognition

Pandemic recovery plans:

Post-work rights

It was recently announced that, as of 2022, more students will be granted OPT rights and the ability to stay in the US for three years after study. There were 22 STEM fields added to the OPT list – many related to climate change and the environment, as well as data and analytics – meaning students may be increasingly interested in pursuing these types of courses in the US.

2025 Predictions

Despite the drop in US enrolments throughout the pandemic, Western Union predicts that the “United States will remain the dominant inbound market and will receive a further 165k international students by 2025 compared to 2019.”

They expect China and India will continue their dominance in the US and “Vietnam and Nepal will become increasingly more influential Asian markets.”

And, South Korea “is set to be the biggest declining market, with the US expected to lose over 9k students over the next 5 years,” in part due to an ageing population.

United Kingdom

Despite the chaos of the pandemic, the United Kingdom has remained a popular destination for students.

In fact, the UK granted a record number of study visas in 2021. And, as of January 2022, the country had just over 605,000 international students enrolled – meeting its 2030 target almost a whole decade ahead of schedule. Data show significant growth from markets outside the EU – including China, India, Pakistan, and especially Nigeria.

With its revered brand recognition combined with the 2021 reintroduction of a 2-year post-study work visa, the UK is poised to attract an additional 8,000 Indian students by 2025.

Rezwan Kawser, Adventus.io's Senior Regional Manager in Bangladesh says he's also seen huge demand for the UK. Before 2021, only 1900 visas were granted for Bangladesh students going to study in the UK. In 2021, it reached 10,090 students – a 410% growth!

Current top 5 source markets:

-  China
-  India
-  US
-  Hong Kong
-  Italy

Why are students choosing the UK?

- Increased post-study opportunities
- Prestigious, highly ranked institutions with strong brand recognition

Pandemic recovery plans:

Graduate route

The UK recently introduced a 'Graduate Visa' that gives international students the opportunity to stay in the country for two years (three if studying PhD level) to work or look for work after they've completed their degree. This could have a big impact – Western Union estimates it could attract an additional 8k Indian students to the UK by 2025.

Student immigration route

This streamlined visa application process aims to make it easier for international students to apply to UK education institutions and create easier pathways to immigration. Among other things, it removes time limits on study and gives prospective students more time to make immigration applications from outside the UK.

2025 Predictions

Western Union predicts that "an additional 85k international students are expected to study in the UK by 2025, taking the total from 557k in 2019 to 642k."

In this scenario, China will remain the biggest sender – with 62.5% of this growth is projected to come from China, compared to 9.7% from India.



Australia

Australia's choice to keep a hard border for most of 2020 and 2021 caused a huge drop in international student numbers – about 17%.

Thankfully, that's on the rebound now. Visas issued to international students were up by 34% in December 2021 versus the same time the year before.

Countries like the UK are hoping Australia's reopening won't draw too many students away from their upcoming intakes.

Current top 5 source markets:

-  China
-  India
-  Nepal
-  Vietnam
-  Malaysia

Why are students choosing Australia

- Pent-up demand after long border closure
- Student lifestyle remains attractive

Pandemic recovery plans:

Increased working rights

Australia relaxed working rights for international students in January 2021. Students will now be able to work more than 20 hours/week, which may be an attractive development for some prospective students.

Diversification of study areas

Australia's recently released international education strategy (2021-2030) highlights a push towards attracting international students to more diverse courses. At the moment, almost half of the country's international enrolments are within business and management. The government wants to shift areas including engineering, healthcare, and data and digital industries, so will be looking for students in those fields.

Attracting more students from India with scholarships and work rights

Australia wants to encourage more Indian students to stay in the country after they finish their degree. The length of stay for an Indian student with a bachelor's degree with first class honours in the STEM or IT fields is being extended from two to three years post study.

The recently announced Maitri Scholars initiatives also promises to attract high-achieving Indian graduate students to Australia's universities. The Maitri Scholarships Program aims to act like the Rhodes and Fulbright scholarships and will cover education tuition fees and provide a stipend to help with living costs.

Australia and India also recently announced they'll work towards making engineering qualifications mutually recognised, in a bid to encourage a two-way flow of engineering talent.

2025 Predictions

Border restrictions may have only had a temporary impact on Australian student numbers. The country is projected to record a 3.7% CAGR between 2019 and 2025, according to Western Union.

China and India will most likely remain the key source markets for Australia; Chinese students are expected to rise from 147k in 2019 to 196k by 2025.

Western Union expects "9 out of 10 of Australia's largest inbound markets to be from Asia" by 2025.

Canada

Canada has remained an enticing option for international students throughout the pandemic. In fact, recent data showed that 2021 numbers were almost as high as pre-pandemic levels in 2019 – down just 2.6%.

This may be due to its handling of the pandemic and welcoming attitude to international students, with borders that were open much earlier than some other countries.

Canada has long been considered a leader in post-study work rights but, with the other leading destination countries introducing new graduate work initiatives, this might change.

Current top 5 source markets:

-  India
-  China
-  Vietnam
-  France
-  South Korea

Why are students choosing Canada?

- Diversity of institutions
- Post-study work opportunities
- Expanded pathway to permanent residency

Pandemic recovery plans:

Expanded immigration program

In 2021, 405,000 people were welcomed as permanent residents in Canada, the highest ever in a single year. The country is further upping its targets – hoping to reach 451,000 in 2024.

Good news for international students is that a large percentage of Canada’s immigration target will be from the “Federal High Skilled” category, which covers the applications of international graduates.

Numbers in this category will increase from 55,900 in 2022 to 111,500 in 2024, presenting more opportunities for international students to secure permanent residency in the country after they finish studying.

2025 Predictions

Western Union predicts Canada will see a 3.4% CAGR by 2025.

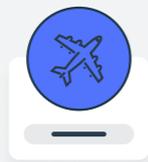
They suggest “favourable immigration conditions and post-study work opportunities for French speakers will continue to attract French students, bringing an additional 5.5k overseas students by 2025.”

They also predict that Asian students will account for “over 75% of the total inbound students studying in Canada by 2025 – up from 72% in 2019.”

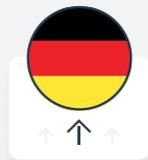
Emerging destinations

Thanks to the pandemic, some students are considering less-common study destinations. For example, Rezwan in Bangladesh says he's seen an uptick in interest in Scandinavian countries from Bangladeshi students.

Some other interesting trends:



UNESCO data show the UAE had an explosion of in-bound international students from 2014 to 2019 – jumping from 64,119 to 225,339!



According to UNESCO, Germany became the 4th largest inbound market by 2019 – driven in part by its reputation for research quality.



English-taught degrees in countries where English is not a first language are expanding. In fact, there's been 77% growth outside the Big Four (US, UK, Canada, Australia). It may be worth looking to countries like the Netherlands, Germany or South Korea for institutions that offer these kinds of courses.

Are students' needs changing?

There's no question that the pandemic has impacted how students are choosing where to study. Unsurprisingly, they are looking favourably on countries that have handled the pandemic well, but there are other changes too.

Studies show students might be drifting away from traditional factors like university rankings to make their decision. Here's what many will be weighing up in a post-covid world.



💰 Value for money:

A survey conducted by INTO University Partnerships in November 2021 found students and parents want a greater return on their investment in education.

The survey received responses from 1,126 agents worldwide, 65% of which said students and parents are increasingly looking for scholarships or bursaries; 61% said they're now much more focused on career outcomes; 49% said they encountered a demand for stronger return on investment.

Institutions that provide scholarships for international students will likely become increasingly popular. As an education recruiter, students will appreciate it if you can find suitable scholarships and funding opportunities for them.

🏠 Residency opportunities:

Thanks in part to the pandemic, students are also considering whether countries offer an easy path to residency and if they are welcoming to families — to avoid potentially long separations.

🧠 Health and wellbeing:

Another big ongoing concern for students is personal safety and wellbeing. In the pandemic, that need has increased and shifted from just physical safety towards mental health and wellbeing.

A survey of 1400 students by Educations.com found over 60% of students rate mental health services as highly important when choosing a university.

Universities are recognising this need and increasingly providing more wellbeing services and support. Those that do so will stand out to students.

📖 Course quality:

For many students, the institution they choose matters more than the country it's in. Academic quality still matters, so university rankings will likely still be considered by many students, alongside the other factors mentioned here. However, some students may also be more open to non-traditional courses, such as microcredentials.

📈 Career progression:

For many students, the most important factor of all is now employment opportunities after study.

In the INTO survey, 45% of agents said they've seen some change in the types of subjects that international students are interested in studying during the pandemic – linked to "in-demand" jobs. These included courses and subjects such as "computer science and specialisms (e.g. robotics, AI and cyber) and data science/data analytics."

27% of agents said job opportunities in destination countries would be the biggest decision driver for students over the next five years, which was the highest-ranking factor in the poll.

A separate survey from Educations.com found career opportunities are the number one reason students want to study abroad. In fact, the survey found 70% more European students consider graduate prospects their top factor compared to the previous year's survey. In South and Southeast Asia, that number shot up by 26%.

What do institutions want?

We hear a lot from institutions about the high volume of applications they have to process. As even more students come back onshore, there will be a huge backlog for them to get through.

Here's what institutions are looking for and how you can give your students the best shot at success.



Strong references:

Many institutions ask for references from recruiters before they start a relationship. They want to know that counsellors will be responsive, easy-to-work-with and professional.

Victoria Steele, Adventus.io's Partnership Director, Canada, says, for example, institutions in Canada "care deeply about references".

"For the institution, doing this due diligence ensures they're receiving quality applications and that there's trust on both sides of the relationship," she says.

Victoria says partnering with a platform like Adventus.io "helps in this area enormously" as you will go through a vetting process when you sign up as a recruiter partner, and won't have to repeat the process with each new institution you work with.

Conversion rate:

Institutions will likely also ask about a recruiter's past performance, including conversion rates.

Victoria says, in Canada, "previously performance clauses were common, now more often than not, institutions ask about conversion rate." He says this indicates that institutions want quality applications rather than just quantity.

"For institutions, it's a huge waste of time accessing applications for students who are likely to fail on other grounds. Most commonly, being unable to get a visa," she says.

At Adventus.io, rigorous application checks, including visa checks, result in 90% of applications being approved – meaning you'll be considered to have a great conversion rate as a recruitment partner.

Quality applications:

As Victoria says, institutions want only quality applications from students who have a genuine chance of being accepted. If you're sending applications from students who don't meet the entry requirements for a course, it's a nuisance for the institution.

So, make sure you spend time understanding the entry requirements for a particular course and institution, and complete all the necessary documents that are asked for.

Diverse students:

As previously mentioned, institutions want to diversify their student cohorts – especially after the pandemic. This means they're actively looking to countries with emerging student markets – and it's something education recruiters in South and South East Asian, Latin American and African countries should be ready take advantage of.



If you would like a demo, so you can see how Adventus.io can help you access over 1500 institutions across 35 destinations, head to adventus.io to book a demo and meet your local Adventus.io expert

[WWW.INFO.ADVENTUS.IO/REQUEST-A-DEMO](https://www.info.adventus.io/request-a-demo)