



Grant Thornton

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Recruiting international students

Higher Education report 2016



Executive summary

Competition for students is increasing, as traditional countries targeted for students such as China and India grow their domestic capability and US HEIs ramp up their recruitment drive. Understanding the true decision making factors driving students' choices, and how to align recruitment activities, will be key for ambitious HEIs.

While Asia remains a crucial source of students for HEIs in Australia, the UK and the US, many Asian countries are growing their domestic capacity. In China, for example, a new university opens almost every week. And over the long term this could mean a significant reduction in the number of students choosing to study overseas.

The US is also proactively targeting international students, and new institutions are springing up in traditional recruitment markets – driving competition for international students even higher.

In response, forward-looking Higher Education Institutes (HEIs) are expanding the countries in their recruitment pool. They are targeting Africa and Latin America – and focusing more resources on Nigeria, Mexico and other growing economies.

But what is driving the decision making for students in these countries? And how can HEIs align their recruitment activities?

Reputation is a key factor, but perhaps not how you may think. Many international students are more focused on teaching quality of in their subject than an HEI's overall reputation, in fact, this is the biggest factor for international students.

So HEIs must look beyond overall league tables and focus on promoting a

few select disciplines where they excel. Institutions may also want to strengthen their programmes by developing partnerships with other HEIs overseas, hiring respected academics and connecting with leading businesses.

An HEI's reputation for employability also has a considerable influence on whether an international student chooses to study there. With many seeking a degree from an institution that can connect them to prospective employers. Especially in languages spoken widely around the world, like English. Students often want to stay and work in the country they graduate in too. So factors such as links with employers, personal safety and the cultural experience have an important role to play.

Changing recruitment channels are another trend we have seen in the market. Between a third and half of international students are now recruited through third-party agents. Young people looking to study overseas are more likely to trust a local agent who works for many different HEIs, over an unknown recruiter from one specific institution. This combines to make local agents particularly important for HEIs wanting to break into new regions.

But as ever, with opportunities come risks. Less scrupulous agents hit the headlines recently in Canada, the UK

and the US. This puts HEIs under pressure to be more careful about who they choose as partners. As the issue moves up the agenda for university boards, international recruitment methods must be transparent and stand up to scrutiny. Especially when it comes to financial motives behind recruitment.

This report recommends three ways to enhance your recruitment strategy and boost your reputation:

- **Put your best foot forward:** develop partnerships with other institutions in academic disciplines you excel.
- **Offer flexible admission routes** work with schools and colleges to provide alternative ways for students to get into university, and help international students assimilate with local culture.
- **Use only the best:** perform due diligence on agents. Focus your efforts on developing long-term relationships with a small pool of trusted partners.



It is vital that HEIs understand and tap into the decision making process of international students when developing recruitment strategies. Get this right and institutions can secure a larger slice of a growing pie. Get it wrong and there could be significant reputational and financial trouble ahead.

Carol Rudge

Partner and global leader on not for profit
Grant Thornton



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Important trends

What drives student decisions?

International students decide where to study based on degree, country, and institution. HEIs must put specific subjects front and centre of their recruitment activity, and highlight employment opportunities for students after graduation.

International reputation remains a core driver for international student recruitment. Institutional rankings in national and global league tables are a critical element. However, research shows that students are more focused on the quality of teaching in the specific subject they wish to study than the overall reputation of an HEI. Four in ten (39%) prospective international students looking to study in Australia or the UK say they will make their decision on where and what to study on the basis of subject, then country, then university.⁸

As Patrick Kelley, special adviser to the president of Concordia University in Montreal, Canada, says, “what is needed most to attract international students is a few very good disciplines, such as an excellent business school or a world renowned engineering faculty.” Robert Kotze, senior director of the postgraduate and international office at Stellenbosch University in South Africa, agrees that “the reputation of a particular professor or faculty will attract students more than the reputation of the university as a whole.” Richard Shaw, head of education at Grant Thornton UK, says this is an opportunity for aspiring institutions. He suggests they “consider how they can attract individual academics to boost particular disciplines.”

Employability also plays a significant role in where international students choose to study. Students want a degree from a respected institution in a subject that is well-regarded by employers. And they often want the opportunity to stay and work in the country after graduation. A third of international students plan to stay temporarily in their destination country on a post-study work visa, while one in seven want to migrate permanently to the country they plan to study in.⁹

By demonstrating the employment opportunities available to students following graduation, HEIs can boost their attractiveness. And so, institutions should work with their governments to identify the areas in which international students can most easily find employment. For example, Education New Zealand is considering how international students can help with the country’s future skills shortages.¹⁰ HEIs in New Zealand should use this insight to develop attractive programmes for international students.

In the UK, Stephen Avery, chief financial officer at Royal Holloway, says “international students are essential to College. They comprise nearly a quarter of our total student population, and help ensure we maintain a strong international identity complementing

39%

of prospective international students looking to study in Australia or the UK say they will make their decision on where and what to study on the basis of subject, then country, then university.

the international mix of our staff. We are very proud to be an international university, attracting students across a broad range of academic disciplines from the sciences, to the arts and social sciences, and into law, management and economics. Students come to Royal Holloway from more than one hundred countries.” Richard Shaw, head of education at Grant Thornton UK, encourages HEIs with particularly strong business schools and engineering departments to “highlight their expertise in these subjects in all promotional materials and their connection with employers to demonstrate the career opportunities available to international students after graduation.”

“After course, it’s the wider country reputation that draws international students in. New Zealand is very much the ‘clean and green’ country, which is particularly attractive to international students.”

Brent Kennerley
Partner
Grant Thornton New Zealand

Another key driver is language of instruction. Students want to study in a language that is widely spoken and read across the world. Scott Hartley, partner at Grant Thornton Australia, says “this helps English-speaking destinations like Australia, Canada, Ireland and the US most, but HEIs in countries that speak French and Spanish will also benefit.” He adds that more institutions in non-English speaking countries are now offering programmes taught in English.¹¹

Beyond employability, ‘softer’ reputational factors are becoming more important as international students consider where to study. Barry Lodewyk, partner at Grant Thornton South Africa, says “students think about intangible factors like cultural differences when considering where to study.” Similarly, Christine Regimbal, partner at Raymond

Chabot Grant Thornton in Canada, comments on the importance of opportunities to learn about a different culture, master a new language and understand different traditions for international students, who “want the whole experience, not just an education.”

Another aspect international students and their parents consider is safety and wellbeing. HEIs in countries or regions deemed to be dangerous struggle to remain attractive. Mark Oster, national managing partner of the not-for-profit and higher education practices at Grant Thornton US, adds that “whether it is the zika virus or high crime rates, health and safety pose a significant reputational challenge for institutions. Those looking to study abroad are understandably concerned about countries where they may be at risk.”

In other countries, natural disasters have affected HEIs’ ability to recruit international students. Brent Kennerley, partner at Grant Thornton New Zealand, says “HEIs in Christchurch really struggled following the 2011 earthquake, when students were amongst those who lost their lives. Since then there’s been a conscious effort by the universities, local and national government, to get the message out that Christchurch is still a great place to come and study.”





Important trends

Agents

In-country agents are used by many HEIs to recruit international students. But there are increasing concerns over commission payments, lowering of standards and the potential for immigration fraud. HEIs must demonstrate due diligence and be transparent about all their agent relationships.

In-country agents remain a major influence on international student mobility. They affect which countries and institutions receive the most students. In Australia 53% of international students are recruited through agents; in New Zealand 47%; in Canada 41% and in the UK 38%.¹²

Agents are particularly important for HEIs looking to break into new regions. They allow institutions to test new markets without committing significant amounts of resource. This is a priority for many, given increased competition in the international student market.

Regions like Africa and Latin America have the potential to become a valuable source of international students. In 2013, the UK's Ambassador to Mexico, Judith Anne Macgregor, estimated that the number of Mexican students studying abroad had grown by just under 10% a year between 2000 and 2010, and looked set to rise in the future.¹³ And in 2014 newspapers in the US

reported that the Mexican government was planning to send 319,500 students to the US over the next four years.¹⁴ Meanwhile there was a 71% increase in the number of Nigerian students at overseas institutions between 2007 and 2010.¹⁵ And reports suggest the number of postgraduate students from Nigeria studying abroad will jump from 15,000 in 2012 to 40,000 by 2024.¹⁶

Young people looking to study overseas are more likely to trust a local agent who works for a range of different HEIs over an unknown recruiter from a specific institution.¹⁷ They often believe that recruiters paid by one institution are biased. But agents are seen to be able to compare the relative benefits of a variety of HEIs. Agents' ability to speak the language and understand the local culture remains a big comfort to potential students. And parents appreciate agents as a conduit, people who "can be in touch with the university if anything goes wrong".¹⁸

"Agents are important. They can help institutions boost brand awareness overseas and recruit more international students from new markets. However, the system is not as transparent as it could be and some universities should increase the checks and balances on the agents they work with."

Elaine Daly
Partner
Grant Thornton Ireland



But over-reliance on in-country agents is a challenge for HEIs. Institutions that outsource international recruitment to a third party need to be careful in their choice of partner. They need to remain in control of the process and be confident their agents have the long-term interests of the institution as their primary focus.

There are also continued calls for more transparency in the sector. And critics say students are not always aware that agents are paid commission so have a financial motive for recommending certain institutions. In addition, some agents charge students extra fees as well as receiving commission from HEIs.

There have been a number of news articles highlighting concerns about overseas agents. In the UK, Times Higher Education magazine wrote in February 2016 that the UK government was reviewing universities' use of overseas agents due to concerns that "some agents could be accomplices in immigration offences".¹⁹

In the US, the New York Times recently ran a story investigating the use of agents by universities.²⁰ It highlighted that international agents are paid commission for every student who enrolls, a practice federal law prohibits institutions from applying to domestic students. And it noted that some agents promoted lower standards for international students.

University boards are becoming increasingly concerned about the risks associated with agents. Donna Diskos, partner at Grant Thornton Canada, says that HEI senior leaders "are always interested in updates on the wider overseas agents' system. They recognise the value of agents in international recruitment, but are also aware that stories about poor treatment of students can cause serious reputational damage to an institution's brand."

International students recruited through agencies

53%

Australia

41%

Canada

47%

New Zealand

38%

UK²¹

Source: all figures from The Observatory on Borderless Higher Education



Recommendations

Put your best foot forward

HEIs should develop strategic partnerships around subject excellence. This will boost attractiveness to international students, who consider course and faculty before wider institutional reputation when choosing where to study.²²

Potential international students consider course before institution when deciding where to study. So HEIs should focus their partnership efforts in disciplines where they excel. Many institutions already recognise that affiliations with other institutions can increase academic liaison, provide opportunities for domestic students to study overseas and boost rankings. But these are often promoted on an institution-wide basis, missing the opportunity to stand out

when potential international students are searching for universities with expertise in particular courses.

HEIs must understand which of their top subjects are most attractive to international students. Then they need to identify peers with similar areas of expertise to develop strategic partnerships. Highlighting these collaborations in international promotional materials will help increase attractiveness and boost international student numbers.

“HEIs that build meaningful strategic partnerships are more likely to attract the top students they are looking for and thrive.”

Barry Lodewyk
Partner
Grant Thornton South Africa

Case study: Engineering success at Loughborough

Engineering and Technology is the second most popular subject for international students studying in the UK.²³

In the 2017 Complete University Guide subject rankings for UK universities, Loughborough University is projected to be ranked sixth for both Aeronautical & Manufacturing Engineering and Mechanical Engineering, up from ninth and 14th respectively in 2016.²⁴ Loughborough has developed a number of partnerships with other institutions globally renowned for technology and engineering to demonstrate its expertise in this field.

The University has a number of links with the Massachusetts Institute of Technology (MIT), which is ranked number one in the world for Mechanical, Aeronautical & Manufacturing Engineering.²⁵ This includes MIT engineering students visiting Loughborough as part of their degree programmes and often returning to do holiday project work with academic staff. Loughborough also partnered with Nanyang Technology University in Singapore to create the Institute for Sports Research in 2011.

Loughborough is also a member of UNITECH International, an association of leading European engineering universities that aims to prepare top students for global business challenges. Engineering students from member institutions can spend at least one semester at a university abroad as well as undertaking placements with corporate partners.



Recommendations

Flexible routes to admission

HEIs should work with local schools and colleges to provide new routes into university for international students. These can help international students experience the culture, integrate with domestic students and improve their language skills while working towards a degree.

Some HEIs already recognise the benefits of creating pathways to university for international students. In Australia, almost half of all international students studying higher education courses in 2014 did so through a pathway from another sector.²⁶ In the UK, Universities UK reported that, 25,633 international students entered undergraduate or

postgraduate programmes via a formal pathway programme.²⁷

But there is a significant opportunity for HEIs to look beyond traditional pathway programmes to offer more flexible options for students wanting to study abroad. In particular, they should consider working with local schools and colleges catering for those aged 16+ to provide transition routes into university

for international students. This appeals to international students' focus on a country's reputation and allows them to experience the local culture - ultimately improving integration. HEIs, in turn, can benefit from an increased number of opportunities to reach their target audience and recruit diverse individuals.

Case study: Building community in the US

The US is the largest market for international students. The country is following the example of Australia and the UK in developing pathway programmes for international students. The number of international students enrolled at US community colleges has increased from 86,778 in 2012/13 to 91,648 in 2014/15,²⁸ and this figure is expected to rise. But its most innovative HEIs are also working with local community colleges to provide more flexible routes into university.

Many American HEIs have partnerships with local community colleges to deliver '2+2' programmes. These allow domestic students to spend two years at a community college before transferring to a four-year institution to complete their undergraduate degree. The programmes provide a gateway for students who aren't academically prepared to enter university via traditional application processes.

Now HEIs are working with these colleges to extend their 2+2 programmes to international students.²⁹ Like traditional pathway programmes delivered by private providers, the 2+2 model allows students to improve their English language skills while working towards a qualification.

Community colleges argue that the 2+2 programmes are more affordable than traditional pathways and offer international students a better deal. George Beers, dean of international and distance education at Foothill & De Anza Colleges in California, claims that while at most universities "the class sizes in the first year are huge... at a community college all the teaching happens by full professors in a limited class size".³⁰ And Andrew Chen, chief development officer at WholeRen Education, says that "community colleges are better than pathways" because they provide students with more transfer options.³¹

Mark Oster, national managing partner of the not-for-profit and higher education

practices at Grant Thornton US, says that HEI partnerships with community colleges also help international students better integrate into the campus community. He notes that international students at four-year institutions often spend the majority of time with peers from their native country, while "those who come through the 2+2 programmes with smaller international populations have been able to focus a bit more on spending time with American students and getting to know the local culture. They are more confident by the time they arrive at their four-year college or university and find it easier to make a diverse set of friends and get fully involved in campus life."



Recommendations

Only use the best

HEIs must perform due diligence on all agents they work with and be transparent about arrangements. They should focus efforts on developing long-term relationships with a small pool of trusted partners.

The in-country agent system is a vital route to the international student market for many HEIs – especially for those expanding into new regions. But there is significant reputational risk if HEIs use agents who are seen to treat students poorly or lower standards to boost numbers.

HEIs must perform due diligence on all agents. They should be transparent about the people and organisations

they work with and the nature of their arrangements, including commission payments.

And they should seek to develop long-term relationships with a small pool of trusted partners, rather than working with a large group of unknown agents. These relationships must be based on shared values and a commitment to putting students' wellbeing first.

“Agents are seen as an extension of an HEI, so institutions need to be careful about who they work with - otherwise they risk significant damage to their reputation.”

Donna Diskos
Partner at Grant Thornton
Canada

Case study: The use of agents in Canada

The majority of Canadian universities use agents to recruit international students.³² Christine Regimbal, partner at Raymond Chabot Grant Thornton in Canada, says HEIs “rely on in-country agents to boost brand awareness overseas.”

Agents are a cost-effective way for universities to have a presence in key recruitment markets. And they act as a conduit between the institution, the student and their family.

But concerns over agent misconduct, particularly relating to immigration, have led Canadian policymakers and HEIs alike to act. In 2011, the government introduced Bill C-35 to amend the Immigration and Refugee Protection Act. This made it an offence “for anyone other than an authorised representative to conduct business, for a fee or other consideration, at any stage of an application or proceeding”.³³ Citizenship and Immigration Canada confirmed

that this meant any agent who was paid for advice on immigration matters related to student recruitment, for instance applying for a study permit, would have to become authorised.³⁴

HEI's leadership teams want to demonstrate best practice when working with agents. Concordia University has developed new ways of working after Chinese students complained of substandard conditions in their home-stay arrangements, which were organised through an agent.³⁵ Following the reports, the University restructured its Chinese student recruitment policy and severed ties with the agent involved.³⁶ The institution's

leaders were praised by the president of the student union for taking charge of the situation and exploring how current students could be involved in recruitment.³⁷

Christine Regimbal notes that, while institutions vary, “the majority of universities in Canada are keenly aware of the need to work with reputable agents. Most have strict vetting procedures and will only use agents who have completed the Canada Course for Education Agents. They also build long-term relationships with agents, so they know them well and know they can trust them.”

Conclusion

In an increasingly competitive marketplace, it is more important than ever that HEIs understand and reflect the decision making process of international students in their recruitment strategy.

To remain attractive, they must demonstrate their subject-specific expertise and promote the employment opportunities in their country. Those who do this well will reap significant rewards. Those that don't may find it increasingly difficult to meet their international recruitment numbers.

Grant Thornton's team has broad experience in the higher education sector. We work with HEIs around the world to develop successful recruitment strategies and to perform due diligence on agent and partner relationships.

Our specialist teams work in over 130 countries so we're well placed to help you implement the recommendations outlined in this report.

To find out more and connect with a specialist in your country contact visit www.grantthornton.global



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