

JOURNAL OF

INTERNATIONAL STUDENT RECRUITMENT

Trends Update from ELS Educational Services



Special Report:

THE NEW REALITY IN INTERNATIONAL RECRUITMENT

Also in this issue:

ELS Launches at Rutgers-Camden

**Many Languages, One World Celebrated
at United Nations**



ELS® Educational
Services
INTERNATIONAL PATHWAYS

WELCOME

Dear International Educator,

It is with great pleasure that we offer the latest issue of ELS International Pathways' *Journal of International Student Recruitment*, presenting pertinent and useful news, information and statistics relating to trends in international student recruitment.

In this issue, we offer a special report on the new reality in international recruiting, which offers a variety of insights into the changing landscape of our business.

We profile our newest International Pathway Center at Rutgers–Camden, located near Philadelphia in Camden, New Jersey. We are pleased to present the results of important sponsored research in several areas. There is a report on the second annual Many Languages, One World essay competition, sponsored by ELS and the United Nations Academic Impact; winners assembled and were celebrated by the UN General Assembly in New York City. There are also up-to-date reports from our representatives in the world's emerging markets.

As in every issue, we strive to offer relevant information that keeps readers informed about news and trends in international student recruitment. Please take a moment to subscribe, if you haven't done so already, at InternationalStudentRecruitment.org/SubscribeJournal.

ELS International Pathways helps your institution to increase international student enrollment in a variety of ways. Visit InternationalStudentRecruitment.org to see the many ways we can assist you in recruiting qualified international students.

Our *Journal of International Student Recruitment* shares the results of our collaborations and offers relevant information on how you too can become more efficient and successful in your international recruitment.



Yours sincerely,

Mark W. Harris
President & CEO

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RUTGERS UNIVERSITY–CAMDEN

Camden, New Jersey

ELS is opening its newest International Pathway Center at Rutgers–Camden on October 12, 2015. Rutgers, The State University of New Jersey, is one of the nation’s oldest and most prestigious public research universities.

Elizabeth Atkins, Associate Dean for the Office of International Students, initiates international student recruitment programs and fosters those relationships across the university community.

“I have been with Rutgers–Camden for the past five years. Part of my charge is to increase international enrollments and, to that end, we have worked with embassies and missions in Washington, D.C., and New York City,” said Ms. Atkins, who initially partnered with ELS via an American Education Center (AEC) membership and attended FAM tours of China, Korea, Thailand, Japan and Turkey in recent years.

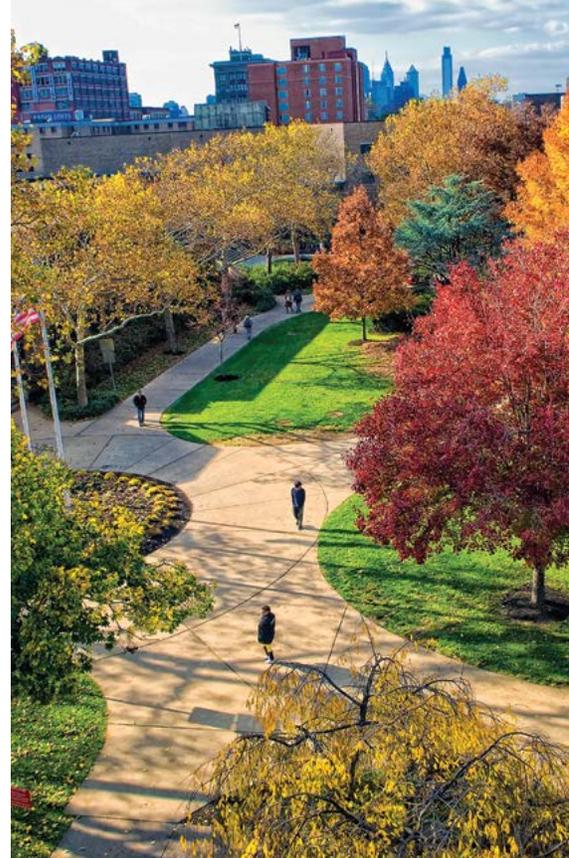
A NEW LEVEL OF PARTNERSHIP

Ms. Atkins has been the prime mover in bringing the partnership between Rutgers–Camden and ELS to fruition. “We had been

sending international students with English language needs to other area institutions,” said Ms. Atkins, “and ultimately we had an issue with not having a language program of our own. ELS provides the missing link for us.”

At one point, Ms. Atkins met with the university’s English department about creating an in-house program, but logistical challenges led them to ELS. “In the process, we were approached by other organizations, but ELS stood out because of their great reputation. We are impressed with their worldwide network and the high quality of the programs. We are thrilled to be working together.”

The process took approximately two and a half years. “There were many meetings, committees to approach and so forth. ELS was very helpful in providing data that helped to make the choice clear for our finance professionals,” said Ms. Atkins.



A SUPPORTIVE CAMPUS COMMUNITY WITH VARIED OPPORTUNITIES

“The community is incredibly supportive of ELS coming to campus,” said Ms. Atkins. Rutgers–Camden is investing more than one million dollars to renovate and build a custom space for ELS, which will be located in a dormitory where ELS students will be able to live. “Our departmental office will also be located there, which will facilitate our interaction with ELS students as they acclimate, attend class and ultimately matriculate into degree programs.” Rutgers–Camden is participating in a conditional admission program with ELS Level 112 as prerequisite.

Curricular Practical Training (CPT) internships and scientific research opportunities abound at the Rutgers–Camden campus. “The dean of our business school has made this a priority for both undergraduate and graduate students,” said Mrs. Dean, “and our faculty does a great deal of research. We have had students obtain research publication credits while working toward undergraduate degrees.”

The university currently hosts approximately 100 international students; its total enrollment is 6,500 students, and of that number, 5,000 are undergraduates. Rutgers–Camden offers a teacher:student ratio of 1:20 and relatively small lecture classes that foster a personalized experience, while the intimacy and safety of the Rutgers–Camden campus offers a great sense of community.

ELS students will have access to all university’s facilities, including its world-famous libraries, the recreation center and other facilities. Ms. Akins added, “We are working with our food service professionals to offer a greater variety of meal choices.” The university’s proximity to nearby Philadelphia (five minutes away by bus, or an easy

twenty-minute walk across the bridge) as well as New York City, Washington, D.C., and the New Jersey shore’s beach communities offer getaway possibilities galore.

There are more than 40 student organizations. “The university has multiple relationships with the city of Camden and this synergy provides volunteer opportunities. Community service is an integral part of the student experience,” said Ms. Atkins. “They make an impact in the community because civic engagement is a university priority.”

THE CAMDEN WATERFRONT AND PHILADELPHIA

The Camden Waterfront is a visitor’s paradise located on the banks of the Delaware River. Visit the the Adventure Aquarium, walk or bike the Camden Greenway, take in a concert at the Susquehanna Bank Center or experience a Camden Riversharks minor league baseball game.

Beyond the waterfront lies the great city of Philadelphia, where visitors shop at Reading Terminal Market; linger at the Philadelphia Zoo; marvel at the Philadelphia Museum of Art and The Franklin Institute; take in historic sites, including Independence Hall, the National Constitution Center and the Liberty Bell; or simply choose from among the many cultural events that the city has to offer. Its diverse restaurants, arts, sports, cultural attractions and many festivals make Philadelphia a marvel.



AT THE UNITED NATIONS, A CELEBRATION OF MANY LANGUAGES, ONE WORLD CONTEST WINNERS 2015

The second annual Many Languages, One World (MLOW) international essay contest and Global Youth Forum winners were welcomed and celebrated at the United Nations on July 24, 2015. This year's contest produced more than 1,200 entrants, with 70 winners representing 43 countries.

The essay topic related to the United Nations Academic Impact (UNAI) post-2015 global development agenda. The contest was conceived, created and is jointly managed by the UNAI and ELS Educational Services.

Student teams worked in specific languages to prepare action plans that focused on UNAI principles. They made impressive presentations before the UN General Assembly during a special meeting at the UN Headquarters in New York City.

Universities represented included MIT, Yonsei University (South Korea) and University Paris 1 Pantheon-Sorbonne. Student fields of study included art, business, communications, human rights, international studies, law, linguistics and medicine.

Contest winners attended the MLOW Global Youth Forum at Adelphi University in Garden City, New York, which was held from July 20–26.

The 2015 MLOW essay contest challenged full-time university students (graduate and undergraduate) from around the world to

write about the United Nations's post-2015 global development agenda. Essays had to be submitted in an official language of the UN (Arabic, Chinese, English, French, Russian and Spanish) and were required to be written in a language other than the student's first language or his/her primary language of instruction. In many cases students submitted essays in their third or fourth language.

Launched in 2010 by the UN Secretary-General, UNAI is a global initiative that aligns institutions of higher learning and research with the UN in actively supporting ten universally accepted principles, including peace and security, human rights and sustainable development. The UNAI has more than 1,000 members in more than 120 countries.

In the Secretary-General's address, delivered by Ms. Cristina Gallach, Under-Secretary-General for Communications and Public Information, the young writers were acclaimed: "You are here today as part of this moment. In your essays, you have addressed a range of themes relevant to the post-2015 development agenda. You have written about inclusive and equitable education for all, healthy lives and well-being for all ages, full and productive employment and decent work for all, and the importance of human rights and holding institutions accountable."

Mr. Mark Harris, President and CEO of ELS, who chaired the proceedings, noted in his opening remarks: “Here at the UN, it is not every day that we are able to listen to the voices of young people and it’s even less frequently that they are listened to and talked with. ... Multilingualism is the prerequisite for global citizenship. It is essential for dialogue, debate, argumentation, compromise, agreement and commitment, as these are the fundamentals of peace on earth. ... Languages are the common denominator for respect, compromise and commitment ... we rejoice in the commonality of humankind.”



The celebratory proceedings at the UN received coverage via the UN’s Web TV site, were covered by numerous international media outlets, and were a trending subject on social media platforms, including Facebook and Twitter. Robert A. Scott, President Emeritus of Adelphi University, offered compelling thoughts on the special day in an essay: <http://bit.ly/1FIdnNC>.

For more information, visit ManyLanguagesOneWorld.els.edu.

Video available on the UN website: <http://bit.ly/1iJZLae>.





ELS AGENT SURVEY RESULTS AND REPORT

When parents consider sending their child across the globe, they must evaluate many choices – how to identify the best programs, ideal living and social situations and safety concerns – all in a language they may not speak. They must have someone who speaks their language, in their own time zone, to assist in the process. That person must also be available to assist if an issue arises during the child’s course of study. This is the role of the qualified education counselor.

In the spirit of collaboration that ELS and the NAFSA conference meetings embody, the following is a summary of the third annual ELS Global Agent Counselor Survey (GACS). The survey was conducted by the independent consultancy B2B, which reported results in May 2015.

The Wave 3 GACS yielded 217 respondents from 35 countries, which represents a decline from the prior year (234 respondents from 42 countries).

HIGH COUNSELOR LOYALTY AND OVERALL SATISFACTION

Most telling is ELS’s high rate of loyalty among counselors, with a Wave 3 Net Promoter Score (NPS) of 75, which is both consistent with previous waves (W2 = 76, W1 = 78) and significantly higher than its competition, where the average NPS is 45.

ELS has a high Net Value Score (NVS) at 96, significantly higher than all competitors, which average NVS = 64.

Overall fulfillment among counselors remains high, with 2 in 3 agents rating ELS with a 9–10 satisfaction score. Areas of delight include ELS’s honesty and integrity, ability to build relationships and easy business rapport. ELS also garnered top marks for being a strong brand, its useful agent portal and its high regard for the English for Academic Purposes program.

Of the 15 areas queried, the 13 that showed improvement (from Wave 2) relate to communication and financial aspects, with the highest priority being an improvement in refund accuracy. Ease of use and usefulness of marketing materials, including brochures, flyers, e-bulletins and counseling guides also earned improved scores.





ELS CONDUCTS RESEARCH ON INTERNATIONAL STUDENT DECISION PATHWAYS

ELS has invested in a custom-designed research study to explore the fine points of the student decision-making process. Learning key decision points helps to better assist all stakeholders across the many challenges of this journey.

ELS is researching the International Student Decision Pathways (ISDP) process, exploring the consumer decision journey. The research is meant to identify the moments of truth that influence and affect consumer choice among four groups: prospective students, non-converted students, current students and former students, each of whom has a unique perspective on a multifaceted decision-making process.

The research is being conducted by the international global market research firm Radius. Research is being conducted in Brazil, China, Colombia, Indonesia, Japan, Korea and Turkey. It commenced in the first half of 2015. Preliminary results are being compiled and analyzed.

ORIENTATION

The research has been designed to identify key considerations in the consumer decision journey within the key markets, including essential moments of truth. What are the motivators and what group of potential influencers must be considered during these moments?

ELS has designed the research to explore how brand affinity factors into prospect, student and alumni choices. By characterizing the multitude of decision pathways and illustrating these pathway dynamics and intersections, ELS hopes to identify and define

clear metrics that will allow for enhanced evaluation of individual pathways in order to better understand and respond to the key drivers behind the moments of truth for each market.



When research is complete, ELS hopes to fine-tune growth-focused communications strategies that can be targeted by country and to high-potential pathways, and understand the best time, channel and message by which to interject itself into the consideration and decision process.



THE NEW REALITY IN INTERNATIONAL RECRUITMENT

New Challenges Require New Solutions

There's a new reality in international recruitment. A strong US dollar is meeting up with a changing and challenging global financial landscape. The scorching summer of 2015 has brought a loss of assets across emerging markets and worries of yet another global recession—on the heels of a sluggish recovery from the global financial crisis that began in 2008, a crisis from which many economies are just beginning to recover.

I. WHAT TO MAKE OF THE SITUATION IN CHINA

Headlines declare significant fluctuations in China's economy: A stock market on the verge of collapse stokes repercussions and fears around the globe.

Paul Krugman, writing in the *New York Times*, believes that China's economy has hit a fundamental turning point.¹ To begin with, Mr. Krugman believes that China's economic data is unreliable, a sentiment echoed by the *Wall Street Journal*, which reported that 2014 data is still being revised downward. Mr. Krugman writes: "The country's whole way of doing business, the economic system that has driven three decades of incredible growth, has reached its limits ... the only question now is just how bad the crash will be."¹

In a *Wall Street Journal* piece titled "Echoes of 1997,"² author Greg Ip opined:

For emerging markets, there are unsettling similarities between 1997, when Thailand's devaluation touched off a crisis that engulfed Asia and eventually Russia and Latin America, and the present, when China's devaluation has triggered selloffs in currencies, stocks and bonds.

The good news is that a lot has changed since then. Today, falling currencies aren't a sign of a brewing crisis, but a welcome shock absorber. The bad news is that China's slowdown and the accompanying slump in commodity prices are exposing structural weaknesses that emerging economies have neglected for too long.

Winners and losers in the Chinese economy³ have already begun to emerge, as parts of the multinational corporate sector, including

1 <http://www.nytimes.com/2013/07/19/opinion/krugman-hitting-chinas-wall.html>

2 <http://www.wsj.com/articles/for-emerging-markets-2015-isnt-1997-1440608539>

3 <http://www.wsj.com/articles/winners-losers-in-chinas-upheaval-1440630969>

mining, manufacturing, and certain luxury goods brands, have taken hits. A dual economy is taking shape across the nation as debt reaches record levels (see chart at right).

The global reach of China's crisis has also reached South America: Currencies in Latin American countries⁴ are already being affected by the drop in the Chinese yuan. US markets have been roiled as well.

Commodities exchanges—crude oil and precious metals in particular—have been hard hit. Markets rebound one day only to fall again the next; the roller coaster isn't set to stop any time soon.

II. FALLING PETROLEUM PRICES CAUSE GLOBAL JITTERS

The impact of falling crude oil and petroleum prices affects international recruiters, as a majority of large governmental sponsorship programs are from petro-based economies.

The delicate balance of supply versus demand affects each oil-producing nation. Across the Middle East and Africa, for example, each country has its own price set point⁵ with a nearly \$100/barrel fluctuation. With oil at historic lows, no country is immune to changes in the global economy.

Political upheaval and conflict in several Middle Eastern nations are further cause for unease as oil production—and the decision to cut production—is sometimes tied to governmental decision making and maneuvering,⁶ which is a complex set of issues that resonate both within the region and across the globe.

Policy makers may have few options⁷ this time around. As reported by *The Guardian*, beyond the current slump in global petroleum prices, the International Monetary Fund (IMF) cautions that the Chinese financial situation may continue to keep interest rates low: "Fears that higher interest rates in the US will send the dollar soaring, raising the costs to emerging economies of financing their massive dollar debts, have dogged financial markets all year."⁸

III. IN THE USA, INTERNATIONAL STUDENT QUOTA ISSUES HINDER RECRUITING

The new reality may not be apparent until well into the 2015–16 recruitment season. As recently as March 2015, the *Wall Street Journal* reported an upward trend,⁹ with a nearly 50 percent increase in international student enrollment over 2010:

There are 1.13 million foreign students in the U.S., the vast majority in college-degree programs, according to a report

4 <http://www.wsj.com/articles/latin-american-currencies-are-hit-by-rate-fears-and-chinas-yuan-move-1439855771>

5 <http://www.bbc.com/news/business-29643612>

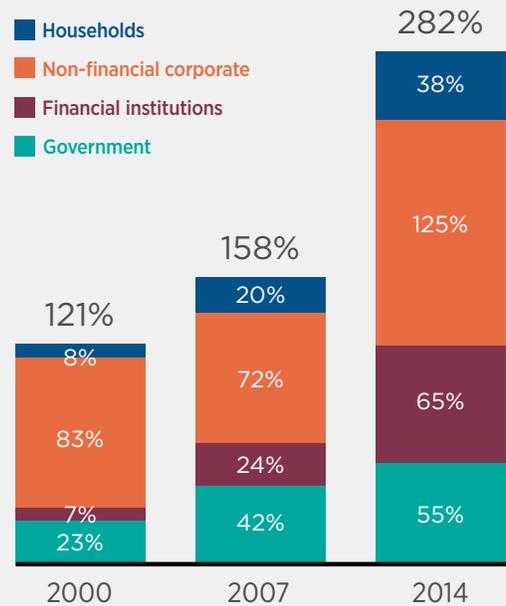
6 <http://www.theguardian.com/business/2015/jan/13/falling-oil-price-global-shockwaves-mixed-blessings>

7 <http://www.theguardian.com/business/2015/aug/24/china-stock-market-fall-effects-global-economy-shares-interest-rates-inflation>

8 <http://www.theguardian.com/business/2015/sep/02/imf-china-slowdown-could-keep-global-interest-rates-low>

THE LONG DEBT MARCH

China debt as a share of GDP, 2000–2014



Sources: BlackRock Investment Institute and McKinsey Global Institute, February 2015. Note: 2014 data are as of the second quarter.

See the original McKinsey Global Institute whitepaper at <http://www.blackrock.com/corporate/en-us/literature/whitepaper/bii-china-wall-of-worry-international.pdf>.

to be released Wednesday by the Department of Homeland Security. That represents a 14% increase over last year, nearly 50% more than in 2010 and 85% more than in 2005.

In 2015, however, some public universities are facing restrictions imposed by state legislatures. At the University of Colorado, major mandatory cost-cutting efforts were implemented, compelling university administrators to appeal to the legislature to repeal international student quotas. Their efforts were successful, as described by university president Bruce D. Benson in a recent *Wall Street Journal* commentary¹⁰: "We convinced state legislators to remove the cap on international students ... and doubled enrollment from abroad to 2,140 in 2014 [and] from 1,005 in 2010, which has increased revenue by more than \$30 million to date at the Boulder campus alone."

Similarly, in the California state university system, international student quotas have affected recruitment; at the University of Iowa, regents tied state funds to in-state student enrollment, creating a de facto quota structure.¹¹

9 <http://www.wsj.com/articles/international-students-stream-into-u-s-colleges-1427248801>

10 <http://www.wsj.com/articles/giving-college-administrators-a-business-education-1440628508>

11 <http://www.wsj.com/articles/giving-college-administrators-a-business-education-1440628508>



Although there is no historic precedent, the near-term reality may be a pullback in the number of international enrollments at US universities, as discussed at length in a recent Sinica Advisors article,¹² which says: “The bottom line is that declining local currencies against the US dollar will have an immediate impact on international study in the US particularly since higher tuition and related expenses are usually paid in cash by foreign students rather than financed over the long term.”

Many university administrators agree that international students bring more than revenue to campus: Sharing cultures brings the world to students who may never have the opportunity to live or travel abroad. Schools and international student programs need creative solutions.

For more, listen to the BBC *Newshour Extra* podcast, August, 2015: “Crash, Contagion or Correction?”: A global panel of experts weighs in as to whether “the global financial system is fundamentally flawed, or whether it’s performing exactly as it should, self-correcting inflated markets to reflect fundamental economic realities.” Listen at: <http://www.bbc.co.uk/programmes/p030csrr>.

ELS OFFERS ADVICE TO INTERNATIONAL RECRUITERS

When recruiting international students, Drew Taylor, Director of Client Relations for ELS Vietnam, offers some keys to success for university representatives who are looking to strengthen their efforts.

- Demonstrate commitment to the market by making in-country visits and being an active participant when there by attending college fairs and events and meeting prospective students and their parents

- Offer scholarships based upon recognition rather than cost considerations, otherwise students shop for schools based on scholarship amounts; lower the application to actual enrollment ratio
- Target recruitment markets based on programs of interest—don’t presume that, because a school is well-known in the USA, it is well-known elsewhere
- Focus on diversity as much as possible; take advantage of existing alumni networks as well as your school’s current international student population for in-country assistance
- Offer individual attention to each market’s academic schedule; remain flexible regarding application deadlines and processing; each market is unique
- Tailor your school’s approach to each market rather than use a blanket approach; promote conditional admission—English is not widely spoken in all markets; keep in mind that transcript evaluation by a third party is increasingly dreaded by students, as are standardized test scores
- Identify and promote CPT and internship opportunities associated with all programs at your institution, especially those for major programs
- Maintain prompt application response; slow turnaround results in loss of student interest and becomes expensive; consider waiving or reimbursing fees
- Keep close tabs on students in the period between acceptance and arrival; promote all aspects of their move and transition; provide visa assistance, travel-planning help and a welcome at the airport if needed; offer extensive orientation not only to the language-training program, but also to the university so that students begin to acclimate immediately upon arrival.

¹² <http://www.sinicaadvisors.com/edunomics/2015/8/21/sinking-emerging-market-currencies-and-international-student-flows>

FROM THE STUDENT'S PERSPECTIVE: COSTS

A year of higher education costs may look very different when converting from a local currency. The recent currency slide is discussed in an article in *University World News*.¹³

CURRENCY	\$30,000 USD LOCAL CURRENCY ON 8.31.15	ON 8.28.15 VS. USD	ON 8.28.14 VS. USD	PERCENT CHANGE %
Brazil (Real)	109,164.00	3.5819	2.2403	59.88%
Canada (Dollar)	39,651.00	1.3202	1.0861	21.55%
China (Renminbi/ Yuan)	191,130.00	6.3872	6.143	3.98%
Egypt (Pound)	235,026.00	7.8357	7.1506	9.58%
Euro	26,776.15	0.8941	0.7586	17.86%
Japan (Yen)	3,636,690.00	121.699	103.7245	17.33%
Mexico (Peso)	502,263.00	16.7516	13.0855	28.02%
UK (Pound)	19,542.70	0.6497	0.6029	7.76%
Hong Kong (Dollar)	232,497.00	7.7496	7.7501	-0.01%
India (Rupee)	1,991,643.00	66.15	60.61995	9.12%
Indonesia (Rupiah)	422,790,000.00	14000	11731	19.34%
Malaysia (Ringgit)	125,844.00	4.172	3.1473	32.56%
Saudi Arabia (Riyal)	112,536.00	3.7513	3.7504	0.02%
S. Korea (Won)	35,479,200.00	1179.87	1015.05	16.24%
Taiwan (Dollar)	974,610.00	32.357	29.961	8.00%
Thai (Baht)	1,074,900.00	35.84	31.942	12.20%
Vietnam (Dong)	673,530,000.00	22462	21174	6.08%

Source: *The Wall Street Journal, MoneyWatch*

Did you know? The words *yuan* and *renminbi* are different, but the meaning is the same: It's like calling a *dollar* a *buck*. For insightful reading, see DifferenceBetween.net: <http://www.differencebetween.net/business/difference-between-yuan-and-renminbi-currencies/>.

¹³ <http://www.universityworldnews.com/article.php?story=20150828052637971>



India Dispatch

ELS India plans to expand counseling and admissions services to more than 500 locations by 2016.

In the next five to ten years, the greatest opportunities for international student growth will come from India, according to a recent British Council report, *The Future of the World's Mobile Students to 2024*. In this increasingly competitive globalized landscape of international student recruitment, India represents significant potential with its recent increase in student mobility, surpassing China in 2014. The USA continues to be the leading destination for Indian students. India is the second-largest source country for international graduate students, and is a growing market for undergraduate international students. More than half of its 1.2 billion population is under the age of 25, and its burgeoning middle class wields increasing spending power and is eager to invest in higher education for their children. India has become one of the most significant recruitment markets for international students.

There were 102,673 Indian students on US university campuses in 2013–14, with a total growth of 6% as compared to 2012–13 as per the Institute of International Education (IIE) *Open Doors* 2014 report. Traditionally, India has been a graduate-bound study-abroad market with more than 60% of students pursuing graduate studies, principally in STEM programs. With more than 5,672 engineering institutions throughout India, it is no surprise that 80% of students that we counsel are seeking STEM programs, and more than 79% of Indian students in the USA are enrolled in such programs.

Most of these students meet their admission requirements through standardized tests for English proficiency (TOEFL/IELTS) and

GMAT/GRE tests. Indian students have an average TOEFL score of 91 iBT, 591 GMAT and 301 GRE, so most prospective students applying for graduate programs are successful in securing admissions satisfying the admissions requirements presented by US universities.

The graduate recruitment landscape in India is spread across a large number of institutions as shown in the accompanying chart.

India has been—and will continue to be—a leading source of international students aspiring to study abroad, as outbound mobility is primarily driven by the gap between supply and demand for quality education. Underlying factors that drive demand include India's caste-based admissions system; outdated, rigid curricula and pedagogy; and students' employability upon graduation. Trends in Indian students' outbound mobility always directly correlate to the economy, job opportunities after graduation from Indian undergraduate programs and changes in the destination country's immigration policies.

Recent enhancements to India's educational system, including the Choice-Based Credit System (CBCS), will continue to create new opportunities for exchange programs that will continue to increase outbound student mobility. With a growing number of graduates every year, the number of Indian students aspiring to study abroad will continue to trend upward. Starting in 2014, there has been enormous growth in outbound Indian student mobility. Educational Testing Service (ETS) reported a record 30% growth in GRE test administrations in India as compared to 2012. For Indian students matriculating to US graduate schools, the Council of Graduate Schools (CGS) showed 25%+ growth for the second year in a row.



In order to support US institutions in their quest to recruit Indian students, ELS Educational Services has worked to establish recruitment and unbiased counseling bases since October 2010. That year, ELS India launched the “We are here because we care” campaign, which has since extended its free, quality counseling service to more than 500 students. Internationally educated counselors have provided more than 250 “Free Study-Abroad Awareness Webinars” including advice on financial aspects of study abroad at schools and colleges throughout India.

More recently, a valuable strategic partnership with CADD Centre Training–India has enabled an expansion to more than 500 study-abroad counseling centers across 240 major districts. CADD Centre is the largest design-skill development provider in Asia and has access to more than 100,000 engineering students annually. ELS India plans to strategically expand, offering its quality services in all developed and developing cities through this strategic agreement with CADD Centre.

ELS-trained counselors, together with the CADD Centre advisors, work closely with prospective students and their parents through an advanced online counseling portal to educate them about the overseas education system, higher educational institutions, courses offered, admissions requirements and processes, the cost of education abroad, visa procedures and scholarships, etc., guiding them through this important decision-making process. Through the Internet, websites, local seminars and presentations, online counseling and face-to-face advisory services, ELS brings unbiased counseling to students, thus helping them to choose those institutions that most closely match their academic qualifications, career ambitions and financial means.

GRADUATE-RECRUITMENT LANDSCAPE

Universities	Total Number
State Universities	325
Deemed to be Universities	128
Central Universities	45
Private Universities	195
Total	693

Further Segmentation of Institutions

Colleges:

- 5,449 colleges have been declared eligible to receive central assistance
- 565 colleges are recognized under Section 2(1) of UGC Act 1956
- 420 Autonomous Colleges



Southeast Asia Overview

INDONESIA

Although the US government launched a drive to recruit Indonesian students, it still lags behind Australia as the top destination, but above Malaysia, with Germany and Japan rounding out the top five destinations. (Australia's geographic proximity is responsible for its success in this market.) In general, Indonesia is still considered a minor contributor to international student populations, with just 1 percent of its students studying abroad.

It is predicted that Indonesian students will be targeted by regional education providers, which accounts for the large number of Indonesian students at the Malaysian outposts of Curtin University and Swinburne University.

Undergraduate business or STEM fields of study are most popular for undergraduates, although specialty programs such as aviation, aerospace engineering, music and visual arts are also considered.

There is an issue with students and English language ability. Most students (and parents) believe that a TOEFL score or IELTS score is more than adequate for university study, but academic English and high-level study skills are lacking. The country's test-prep companies have fostered this belief, but ELS is working on increasing the academic language capabilities of Indonesian students.

As for the community college market, Washington state community colleges have been successful in this market, with a few California

colleges represented as well. ELS is moving forward with initiatives to campaign for four-year university recruitment as well as a complement for the community college pathway. It is important to note that Indonesia's recent rapid economic growth will reinforce the demand for middle- and upper-management employees who hold advanced degrees.

VIETNAM

Vietnamese students' interest in university study has increased dramatically as the community-college-to-four-year-institution pathway gains traction, especially in California, Texas and Washington state.

Vietnamese students depend on counseling agents to make transfer recommendations—even after two years in the USA, they maintain contact with their initial counseling agent for advice.

Parents are active in the school selection process and are eager to meet with a university representative who is introduced through a trusted counselor. Schools with in-country representation have a great advantage over those that do not: out of sight, out of mind ...

For recruiters, the keys to success in Vietnam are simple: rapid application processing, flexible admissions and the availability of scholarships. In addition, it is important to note that Vietnamese students usually prefer schools that do not require standardized tests, such as GMAT and SAT, as well as a language pathway that avoids



TOEFL. English is still not widely spoken in Vietnam, and most students from there require additional English study before entering a US university; therefore, conditional admission programs are a huge plus for this market.

THAILAND

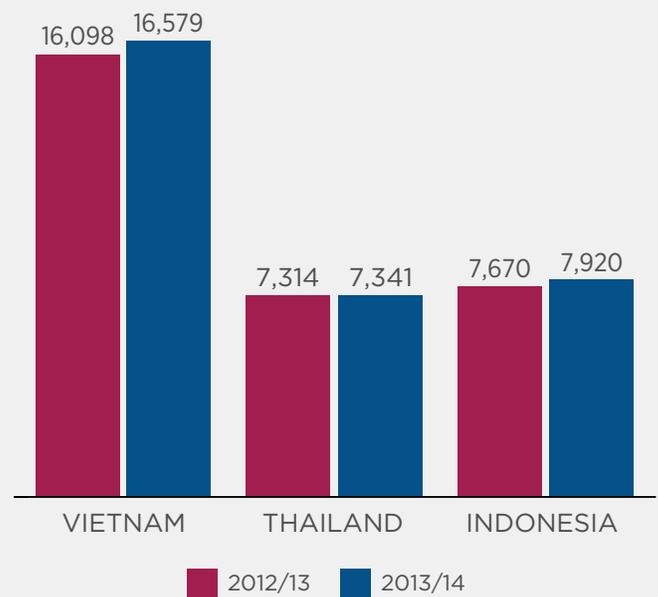
There is an active market for Thai graduate students as borne out by the statistics. However, competition for these students is tight.

One-year master's programs are the most attractive to this market segment: Identifying qualified students and expanding the market in a new direction are keys to success. Institutions that offer unique opportunities have the advantage.

In addition, Thai students are very interested in work opportunities. Co-op programs, internships or graduate assistantships are the most popular choices: Those with available Optional Practical Training (OPT), flexible admission requirements, no GMAT requirements (especially important) and competitive tuition are considered attractive.

Recruiters should also consider Thailand's still emergent undergraduate market, which has a community college following for reasons similar to neighboring Southeast Asian countries, including competitive cost, achievable academic requirements, and timely application processing. However, four-year universities that also meet these standards can compete and improve undergraduate enrollments.

INTERNATIONAL STUDENTS STUDYING IN THE US



Source: *Open Doors*



The View from China

China is very much in the global news, from stories on the economic slowdown and currency issues to the growing mismatch of local university graduates with employment opportunities, among other events. Though the challenges are real, the demand for study abroad continues. At ELS we see strong growth for our programs and those of our university partners through conditional and direct admission.

Overseas study, in particular in the USA, remains a top choice among students and parents of means. An international study experience provides a lifelong depth and breadth of understanding that enhances students' overall communication skills, employability and maturity. These students stand out in a crowded job market.

Students and parents look to ever-diversifying channels in order to glean comprehensive information and make decisions. As an example, the use of mobile technology in China exceeds its use in the USA: this drives competition for students. A growing number of educational institutions continue to enter or expand into the Chinese market.

ELS is introducing new communication channels that promote the assets and value of our institutional partners. Our expanded reach provides direct customer services to students and parents (engaging them directly, as well as through counseling partners) and creates an all-inclusive network that is more responsive to their needs. This direct customer-service capability also offers significant benefits to our partner universities.

ELS is more active and engaged in China than at any point in our history and is committed to offering full support to all stakeholders. Students, parents and university partners benefit from positive student outcomes, direct services and robust counseling-partner management infrastructure. This combination provides our university partners with peerless quality control, reach and positive outcomes.

ELS HISTORY *and* MISSION

The mission of ELS is to enable international student mobility by creating pathway universities to help talented international students study in the best schools and universities throughout the world, thereby multiplying the knowledge and creativity that will improve the quality of life for all humankind.

As an integral part of this mission, ELS partners with American higher education institutions to provide unparalleled access. Its comprehensive services raise awareness about the wealth of US colleges and universities, while providing a variety of options to partner institutions, some of which are available at little or no cost.

Students pursue a wide range of English and test-preparation programs, as well as conditional acceptance to US universities and colleges via ELS University Admission Services. Programs blend academic, practical and cultural language skills.

ELS CAN ASSIST YOU:

- Establish an ELS Direct Entry Pathway Center on your campus
- Become a member of an ELS Recruitment Partnership Plan, with solutions customized to your needs

With more than 80+ locations on four continents, ELS is the largest on-campus ESL provider in the world, teaching ESL and university study skills to more than 17 percent of all international students entering the USA each year. ELS offers a superior learning environment and tools that include an all-inclusive instruction system, which features a unique curriculum and customized, up-to-date texts and branded language-learning software. The detailed course of study is based upon accomplishment within established core competencies that are integral to all levels. Students may also pursue skills-enhancement courses once they have completed core study within a given level.

Promoting university partners, ELS reaches students through a multitude of platforms, including:

- ELS's extensive Web ecosystem, comprising 91 country- and language-specific micro-sites, which strengthens in-country awareness and allows country-specific messaging in 20 languages, including Arabic, Chinese Traditional, Chinese Simplified, Korean, Japanese, Portuguese and Spanish;
- Advertising and social media;

- A worldwide network of language Centers, including 65 ELS Language Centers in Australia, Canada, China, Europe, India, Malaysia and the USA, plus 15 additional locations worldwide;
- Qualified study-abroad student counselors in 102 countries;
- Offices located in Australia, Brazil, Canada, China, France, India, Japan, Kuwait, Malaysia, Mexico, Panama, Russia, Saudi Arabia, Taiwan, Thailand, Turkey, the USA and Vietnam;
- Student fairs reaching more than 280,000 students in 30 countries;
- Recommendations of family and friends.

In an effort to create international visibility, ELS offers the highest-quality arrangements with its university partners. Working in conjunction with the university on the creation and approval of all promotional materials, ELS distributes more than 800,000 promotional catalogues each year in 20 languages, highlighting partner universities.

Each year, ELS also publishes a print *University Guide* (for the USA and Canada), with detailed information on more than 60 partner universities. Distributed in 20 languages, the *University Guide* is represented at more than 425 student recruitment fairs annually in 30 countries.

ELS's University Partner Services provide a range of assistance, including recruitment of international students for university acceptance; promotion via ELS's 1,900 international recruitment offices, with more than 1,000 ELS-authorized Counseling Agents in 102 countries; promotion via ELS's core marketing avenues, including websites, brochures and bulletins; organized recruitment tours and agent meetings for partner universities and distribution of university partner catalogs throughout agent offices, ELS Centers worldwide and student fairs.

Being an ELS University Partner will open up the pool of qualified students; since they will receive ELS training on-campus, students can be accepted into degree programs without sufficient English language skills. ELS University Partners also receive invitations to participate in ELS-organized student fairs and agent meetings. There are ELS Sales and Counseling support offices in China, Taiwan, Russia, Turkey and Vietnam. Organized recruitment tours and agent meetings are also available for partner universities.

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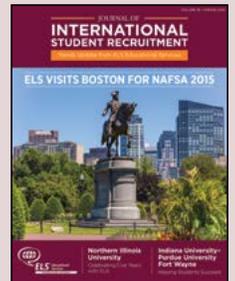
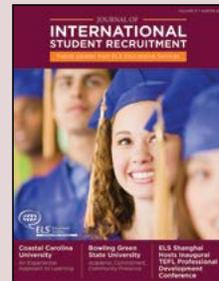
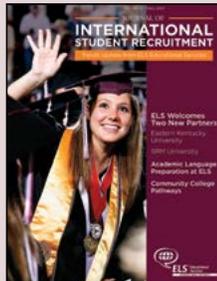
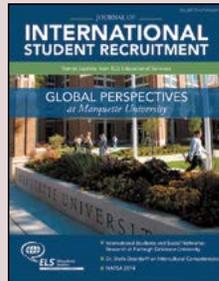
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