An E-Expectations Trend Report

Recruiting Abroad: Understanding the Expectations and Behaviors of Prospective International Students

A study of college-bound high school students from 146 countries

Read this report to learn about the attitudes, expectations, and behaviors of prospective international college students who intend to study in the United States. Topics covered include:

· Influences on where they apply;

· Ranking of resources for the search process;

· Communication preferences;

· Browsing of college sites on computers and mobile devices;

· Planned sources of funding;

· Likelihood of visiting campuses;

· Concerns about studying abroad; and

· Elements of the application process where they need assistance.

Introduction

International student enrollment in the United States has increased dramatically in recent years. Between the 2006-2007 and 2011-2012 school years, total enrollment of international college students rose from 582,984 to 764,495 students. International undergraduate enrollment increased from 238,050 to 309,342 during that period. In the 2011-12 academic year, the number of new international students enrolling for the first time jumped 6.5 percent over the previous year to 228,467 students.[1]

With domestic college enrollments expected to flatten for the remainder of the decade,[2] many campuses may be interested in increasing their recruitment efforts into this growing pool of potential students. What draws international students to enroll at colleges and universities in the United States? What resources do they use when researching college choices abroad? What do they expect during the enrollment process?

To answer those questions, Noel-Levitz and CollegeWeekLive conducted a survey of prospective international students in early 2013. The respondents revealed their expectations, attitudes, and intentions on a variety of recruitment topics. Among the findings:

· A student's desire to attend a specific university was the greatest factor driving their interest in studying outside of their home country.

· Campus Web sites were the most influential resource on the application decision.

· Students cited funding as their top concern with studying abroad and cited financial assistance from American institutions as their top source for paying for college.

· Students placed a high value on live conversations with college representatives and current students.

· International students rated e-mail as their top communication method, but are open to a wide variety of online communication channels, including live online chats and live Webcasts.

· Seventy-two percent said it was important to have conversations with campuses at all stages of the enrollment process.

· Nearly three-fourths used home computers as their main method for accessing the Internet; 74 percent had also viewed university Web sites on a mobile device.
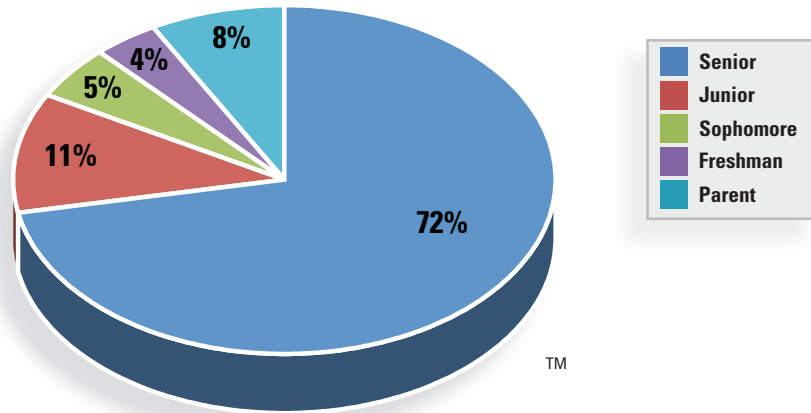

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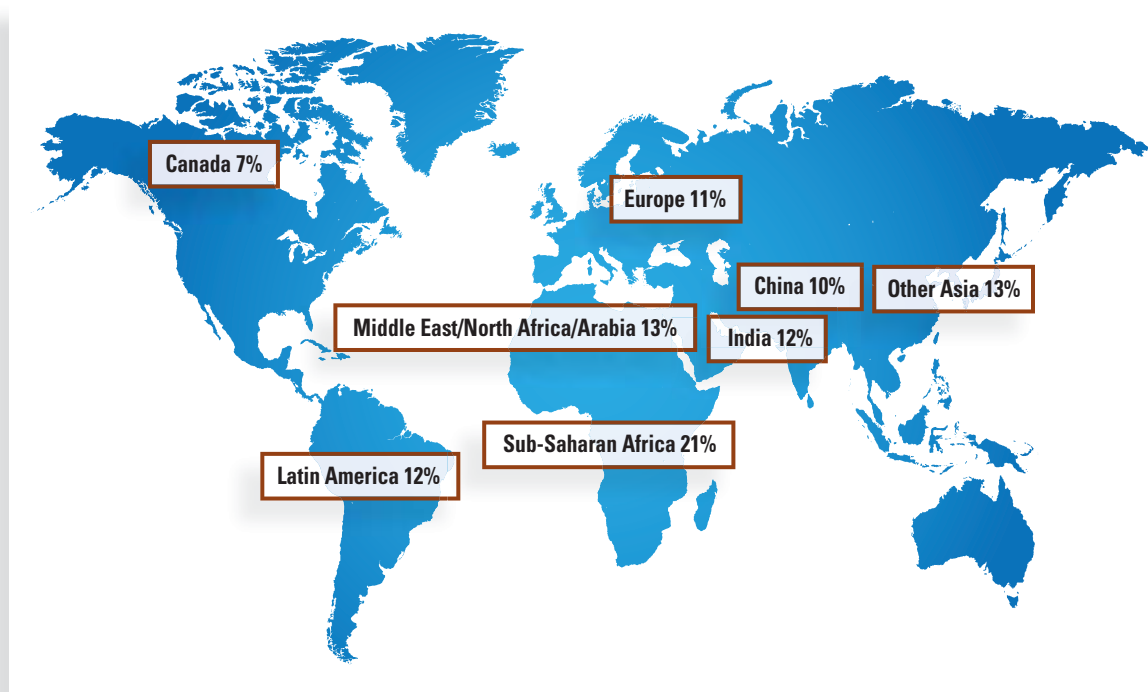[1] Institute of International Education, *Fast facts: 2012 Open Doors report on international educational exchange* (Washington DC, 2012), available at http://www.iie.org/en/Research-and-Publications/Open-Doors.

[2] The Department of Education sees enrollment increasing only 15 percent from 2010 to 2021, compared to the 46 percent increase from 1996-2010. *See Projections of education statistics to* 2021, p. 20, available at http://nces.ed.gov/pubsearch/pubsinfo.asp?pubid=2013008.

Survey results compiled from nearly 2,000 respondents in 146 countries

Noel-Levitz and CollegeWeekLive received 1,980 completed surveys from high school students, with a small number coming from parents of the students. Nearly three quarters of respondents were seniors.
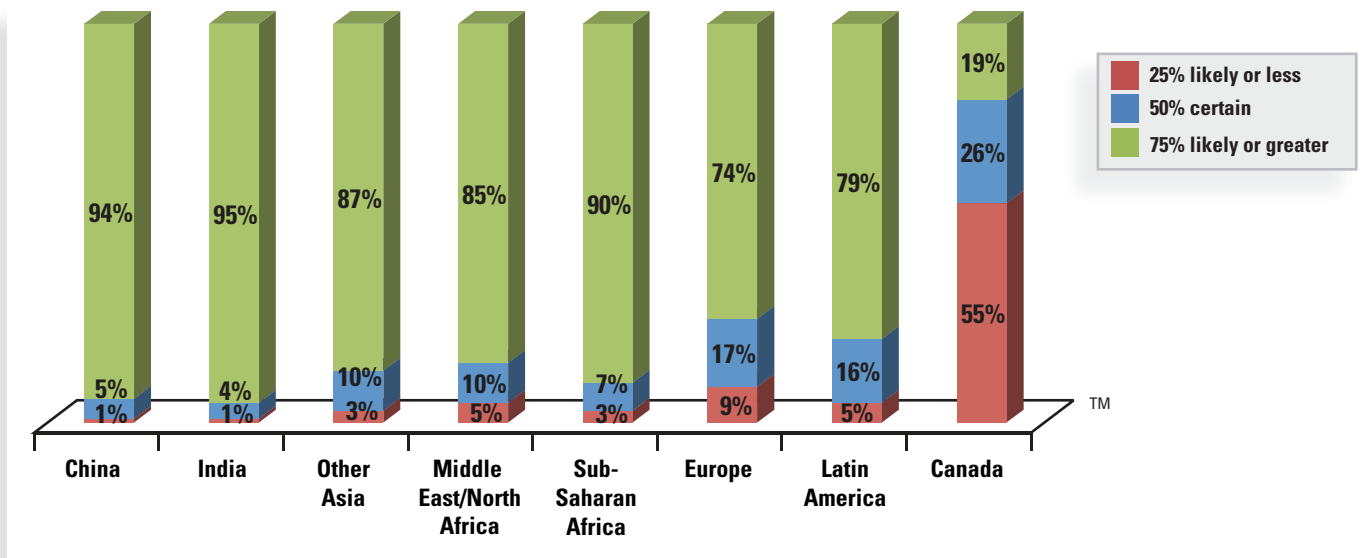
Pie chart legend:
- Senior
- Junior
- Sophomore
- Freshman
- Parent

Pie chart values: 72%, 11%, 5%, 4%, 8%

Participants came from 146 countries from the following regions:[3]

Map labels:
- Canada 7%
- Europe 11%
- China 10%
- Other Asia 13%
- Middle East/North Africa/Arabia 13%
- India 12%
- Sub-Saharan Africa 21%
- Latin America 12%

[3] Due to low responses from Australia (1 percent), that country has been excluded from analyses by regions, although their responses are included in the overall figures. Latin America included 3 percent from Central America and the Caribbean and 9 percent from South America.

Most participants in regions outside of Canada reported at least a 75 percent likelihood of attending college outside of their home country. In fact, 56 percent of all respondents said they had a 90 percent likelihood or greater of studying abroad.

How likely are students to study abroad?

Legend:
- 25% likely or less
- 50% certain
- 75% likely or greater

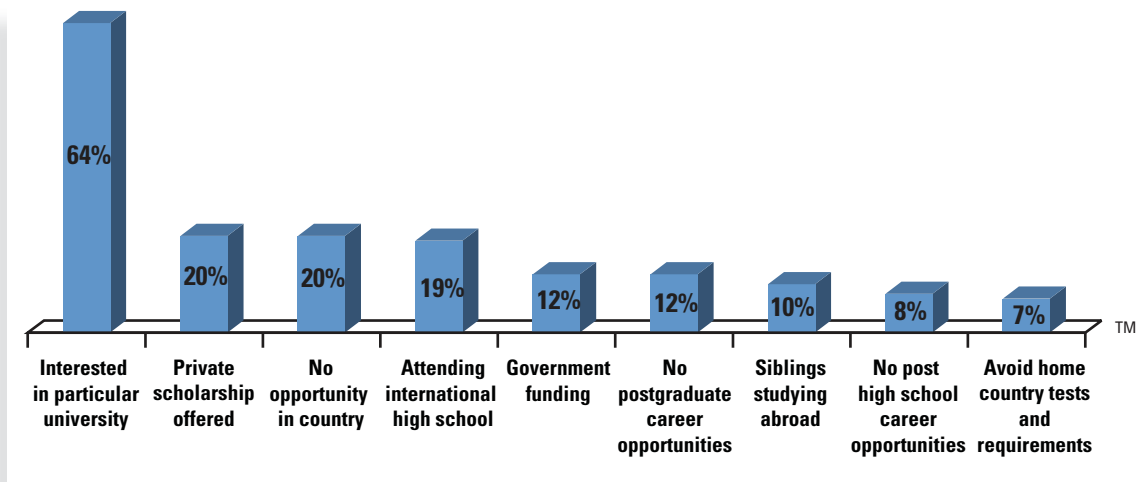| Region	25% likely or less	50% certain	75% likely or greater
China	1%	5%	94%
India	1%	4%	95%
Other Asia	3%	10%	87%
Middle East/North Africa	5%	10%	85%
Sub-Saharan Africa	3%	7%	90%
Europe	9%	17%	74%
Latin America	5%	16%	79%
Canada	55%	26%	19%

The remainder of this report will focus on the behaviors and attitudes of students who reported at least a 50 percent likelihood of studying abroad.

Institutional brand influences an international student's decision to study abroad far more than any other factor

Why do international students decide to leave their own countries to attend college? According to 64 percent of respondents, it is their interest in a particular university. This was far above the next two reasons given—receiving a private scholarship or lack of educational opportunities in their home country. Only 12 percent said that government funding persuaded them.

What factors influence the decision to attend college outside of the home country?

Factor	Percent
Interested in particular university	64%
Private scholarship offered	20%
No opportunity in country	20%
Attending international high school	19%
Government funding	12%
No postgraduate career opportunities	12%
Siblings studying abroad	10%
No post high school career opportunities	8%
Avoid home country tests and requirements	7%

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This finding means that campuses looking to recruit internationally need to have a solid brand in the countries or regions they are targeting, or will likely need to invest in increasing brand awareness and relationship building in order to achieve successful recruitment results.

At the same time, most international students do not appear to be locked onto one campus. The majority said they planned to apply to at least three campuses, and quite a few planned to apply to six or more, especially students from China, India, and other Asian countries.

How many colleges will international students apply to?
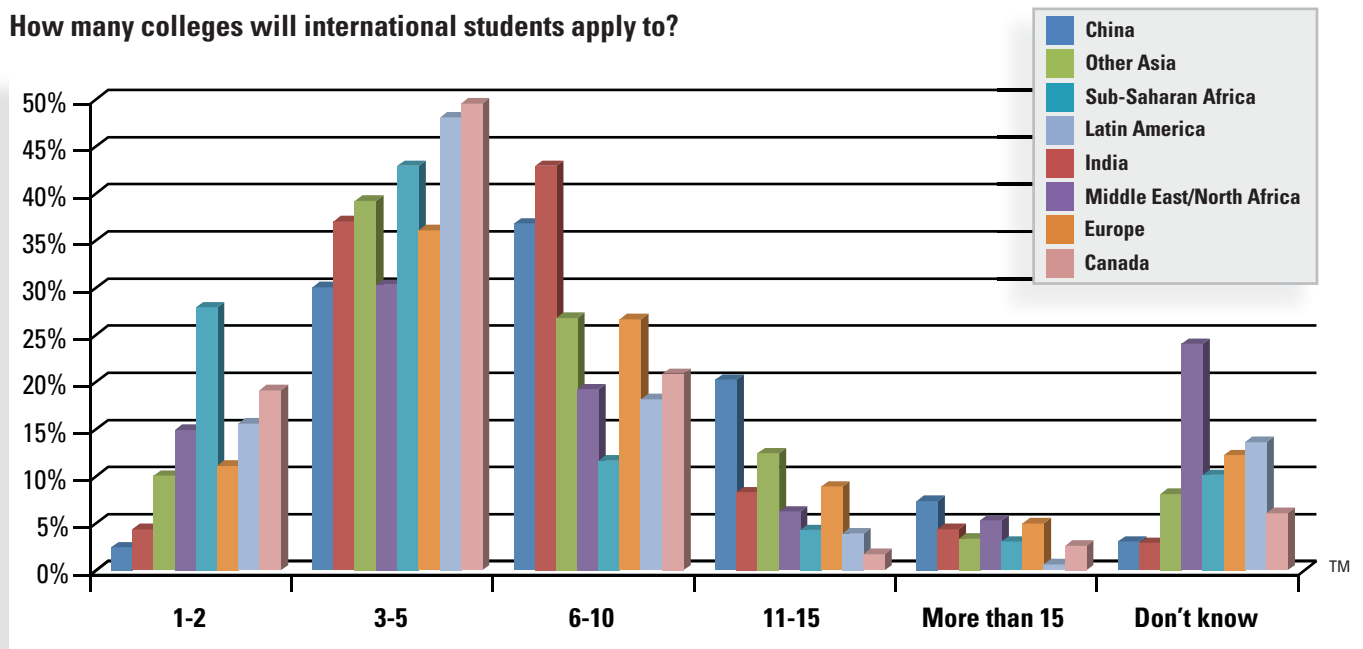
While individual institutional brand is a large factor in enrollment choice, these application numbers suggest that students have at least several campuses in mind when they are searching for and applying to colleges abroad.
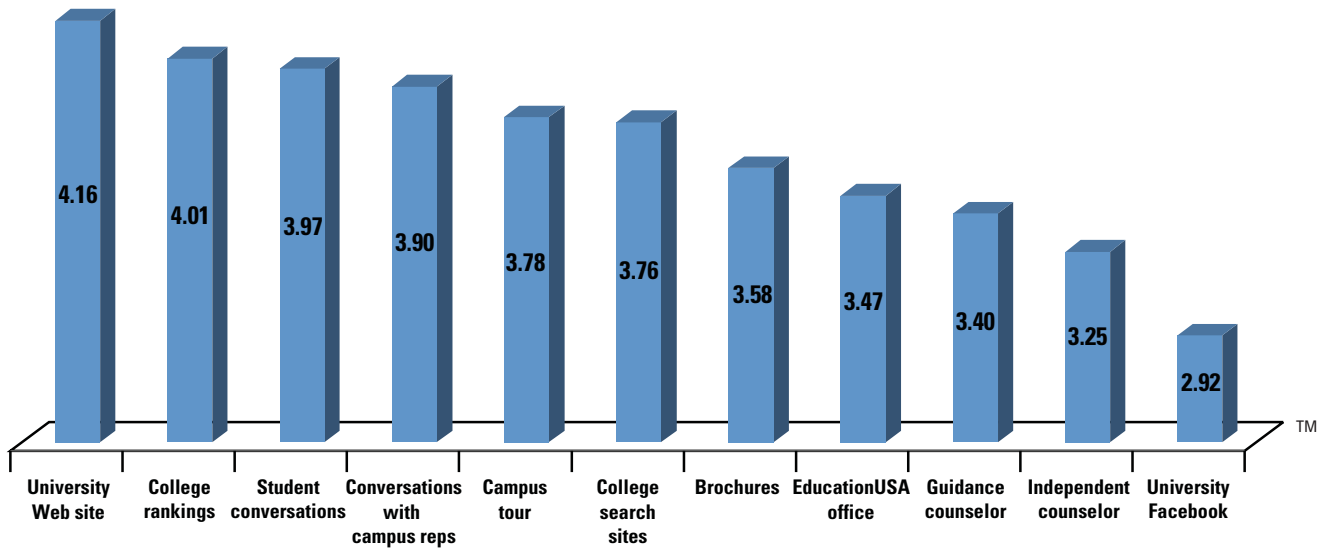
More than half of students report parents are involved in their enrollment decision

When asked who made the decision on which institution to attend, 56 percent of respondents said they made the decision jointly with their parents, while 42 percent said the student had sole responsibility for the decision (2 percent said their parents made the decision).
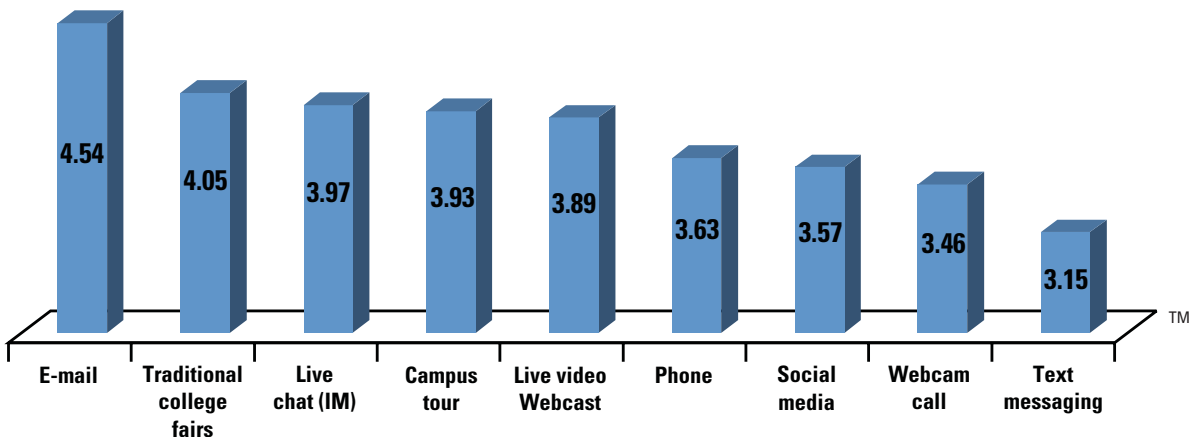
International students value in-person and online conversations and interactions during the admissions process

When participants rated the importance and value of resources and communication methods, their responses were multifaceted on both fronts.

How influential are the following experiences on their application decision?
(1-5, 5=most influential)

University Web site	College rankings	Student conversations	Conversations with campus reps	Campus tour	College search sites	Brochures	EducationUSA office	Guidance counselor	Independent counselor	University Facebook
4.16	4.01	3.97	3.90	3.78	3.76	3.58	3.47	3.40	3.25	2.92

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Interest in using these resources to communicate with college representatives?
(1-5, 5=most interested)

E-mail	Traditional college fairs	Live chat (IM)	Campus tour	Live video Webcast	Phone	Social media	Webcam call	Text messaging
4.54	4.05	3.97	3.93	3.89	3.63	3.57	3.46	3.15

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The desire to interact with campus members stands out in the previous two charts. The strong rankings for college fairs and campus tours, along with live chats and live Webcasts, show that prospective international students want to engage with campus personnel and current international students during their research and application process. They also valued live chats and live video Webcasts more than contact by phone, social media, Skype-style Webcam calls, and perhaps most surprisingly, text messaging. These communication methods still have value, and campuses should certainly ask prospective students if they wish to communicate by these means. However, if campuses are not currently using live chats and video Webcasts with international students, these results suggest they should add them to their communication mix.

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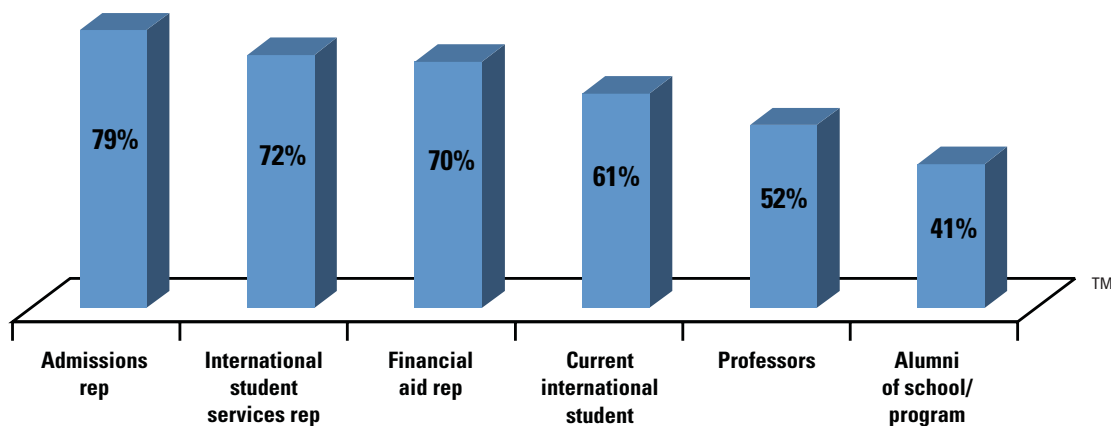
Communication preferences do vary by region

While e-mail was the most preferred method of communication in all regions, there were some notable variations in other preferences:

- **Live chat** was the second highest-rated method of communication for Chinese and Latin American students.
- **Phone calls** were only behind e-mail for students from Sub-Saharan Africa.
- **Text messaging** had a wide range in ratings. Students from Sub-Saharan Africa rated it a 3.82, higher than any other region, and students from China, the Middle East/North Africa, and other Asian countries outside of India rated it above 3.00. All other regions rated it below 3.00, with European students rating it the lowest at 2.54.

Respondents reiterated a strong desire to communicate with current students when asked about who they wanted to speak with during online video presentations.

If attending a live, online video presentation, which campus representative would students be interested in speaking with?

Admissions rep	International student services rep	Financial aid rep	Current international student	Professors	Alumni of school/ program
79%	72%	70%	61%	52%	41%

Notice that respondents showed quite a bit more interest in speaking with current international students than alumni. While it may be impractical to bring students on recruiting visits, these results show that campuses should provide opportunities for prospective international students to speak with current enrolled students.

International student service representatives also scored highly on this item. Involving those representatives early in the process could provide a great opportunity to strengthen engagement with students and put them in close contact with someone who can address their specific concerns.

There were two notable regional variations. Only 47 percent of Chinese respondents wanted to speak with financial aid representatives during live chats, while just 44 percent of Canadians listed international student services representatives.

Students want to communicate throughout the enrollment process

Participants were asked to rank when they wanted to communicate with university representatives—before applying, after acceptance, or after enrolling—ranking them on a scale of one to five, with five indicating greatest importance. Seventy-two percent of students said communicating was important at all three stages. In addition, in every region, students rated communicating in each stage at least a four in importance. Their responses reinforce the necessity of crafting a communication plan that reaches students at every stage of the search, application, and enrollment process.

International students access the Internet most often on their home computers

Nearly three out of every four respondents said they used home computers most frequently to go online. Fewer than one in five said they relied more on mobile devices for online browsing.

How do students access the Internet most often?
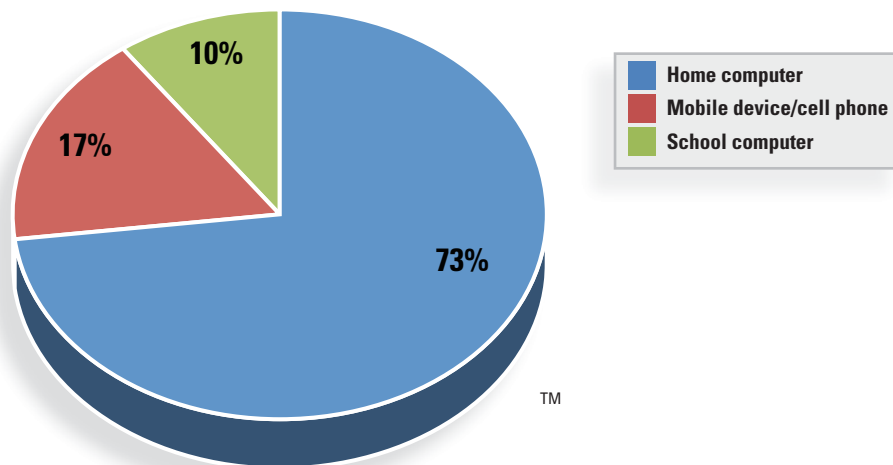
When examined by country, home computer use was even more frequent than the average except in Sub-Saharan Africa, which also had the greatest use of school computers and mobile devices to browse the Web.

**How do students access the Internet most often in different international regions?**
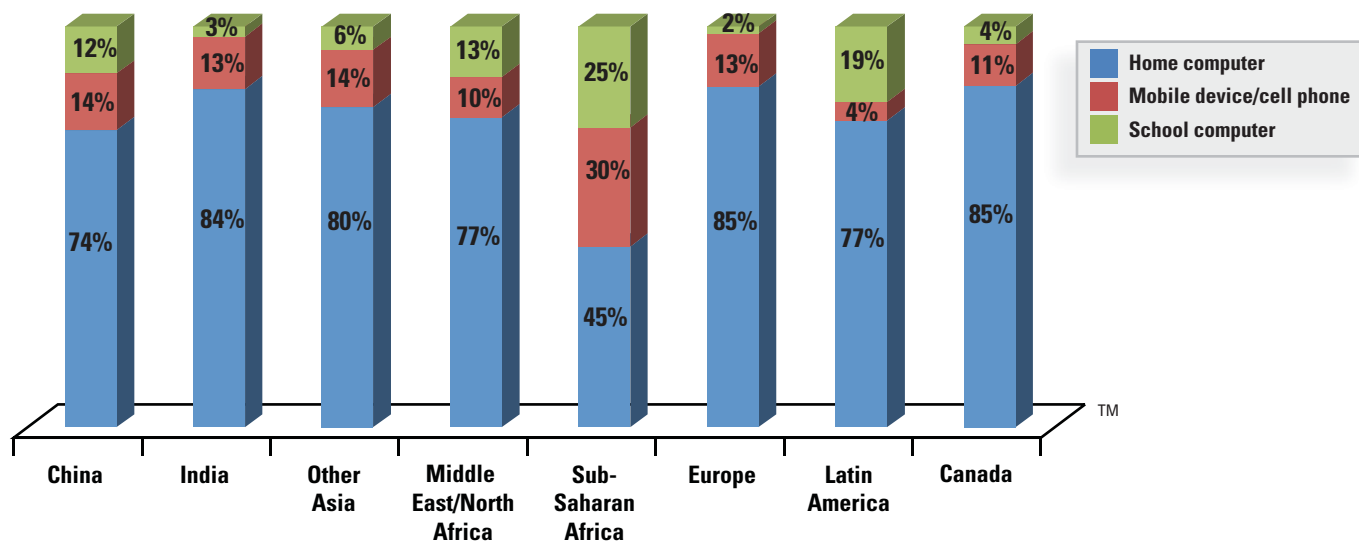
At the same time, most students have looked at campus Web sites on a mobile device.

Have students ever looked at a university Web site via a mobile device?

No, 26%

Yes, 74%

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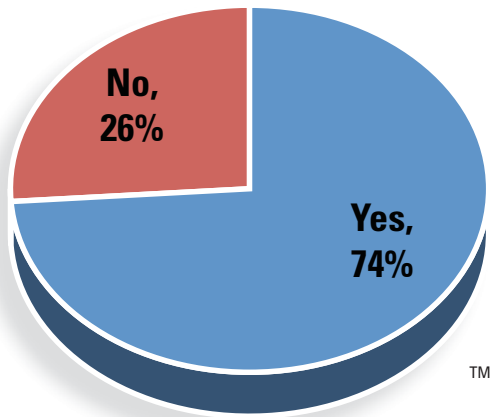
Latin America and the Middle East/North Africa regions were the least likely to have ever looked at a college Web site on a mobile device, with 37 and 38 percent of respondents respectively saying they had never done so.

For students who have visited college Web sites on mobile devices, what devices did they use?

| iPhone	Android phone	iPad/Tablet	E-Reader (Kindle, Nook)	Other mobile phone
29%	22%	12%	2%	35%

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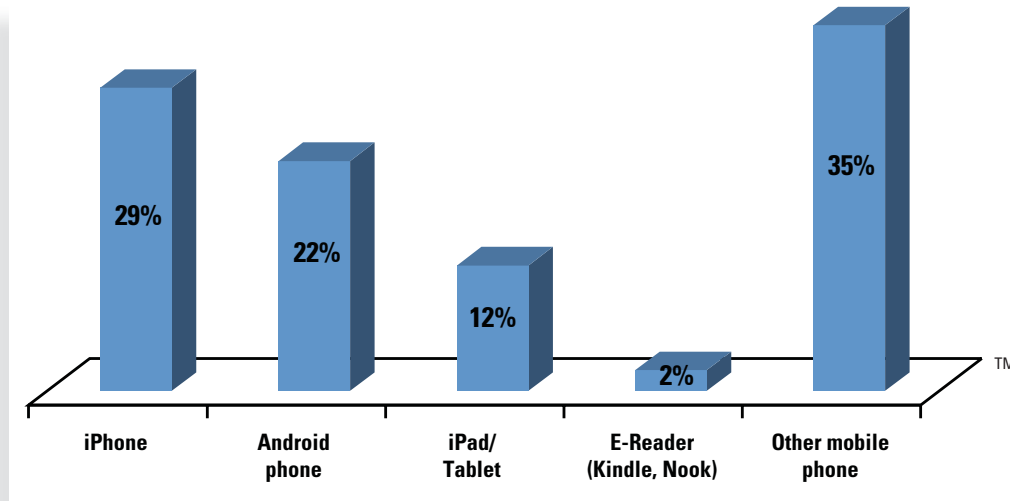
Given that so many students have visited university Web sites on mobile devices and that mobile device use will increase for the foreseeable future, campuses should be sure to they provide an optimal experience for international students browsing via mobile.

Many international students may not visit a campus before enrolling

Despite ranking campus visits as an influential resource, nearly half of international students are not sure if they will visit a campus. Only one quarter said they would visit all campuses they were interested in attending.

Likelihood of visiting campuses
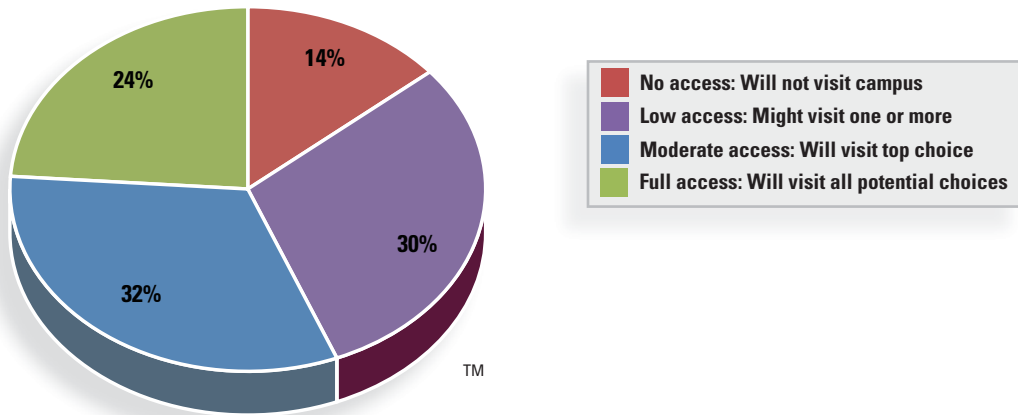
Canada had the highest likelihood of visiting campuses. However, when looking by region, nearly one in five European respondents said they would not visit any campuses, the highest ratio of any group. Students from Sub-Saharan Africa and China also had the fewest students in the "low visit" categories, with 39 percent and 40 percent respectively, and only 9 percent of students from Sub-Saharan Africa said they would not visit any campuses.

Funding and financial assistance are top concerns for international students

Which issue concerns international students the most? It's not safety or language or culture. It's money.

More than half (56 percent) of respondents cited funding as their greatest concern—far more than the 8 percent who cited safety in the surrounding area and the 6 percent concerned about safety on campus.

What is the main concern that might prevent students from studying outside their country?

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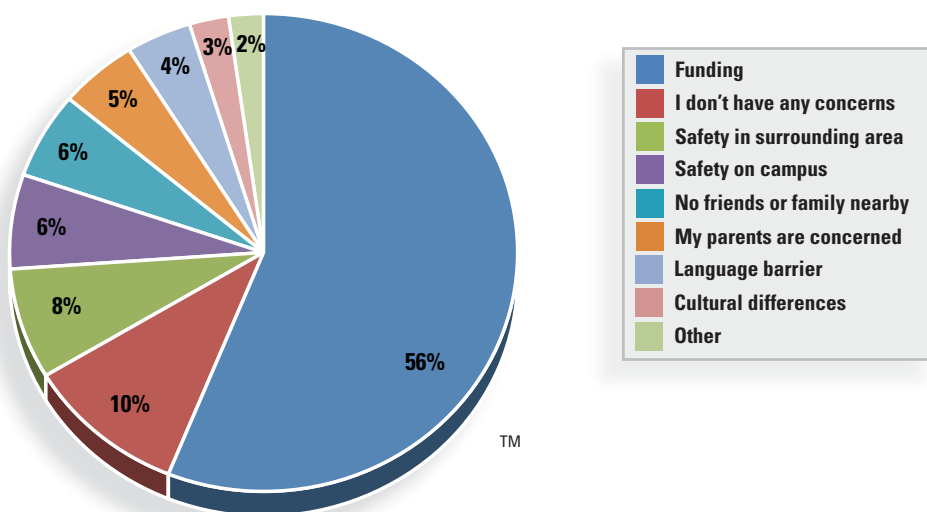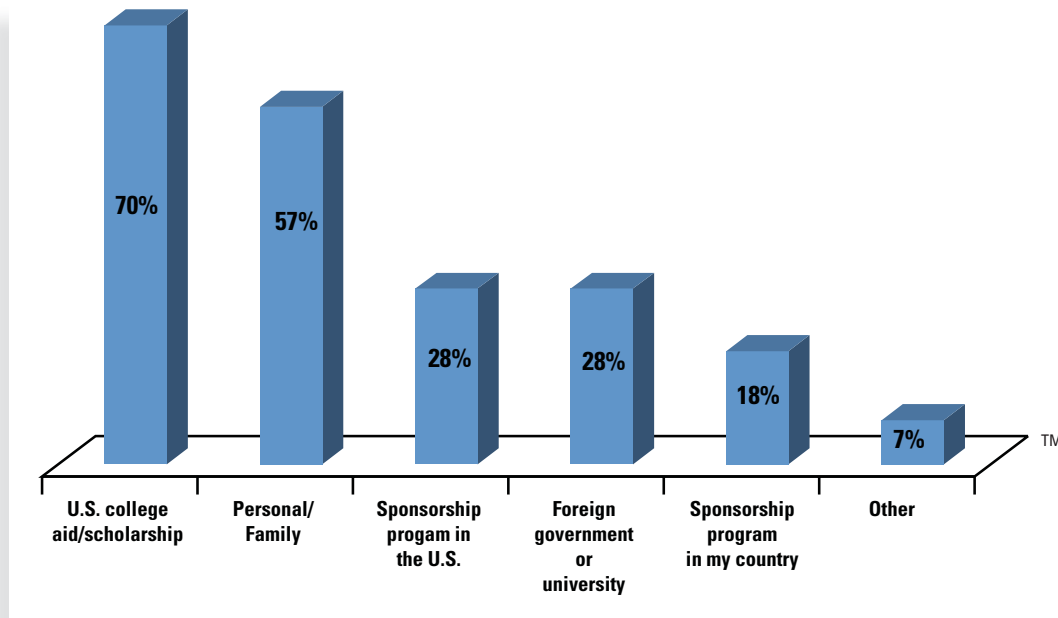
Notice that after funding, the next highest response came from students who had no concerns (10 percent).

Funding was the highest response across all regions by a large margin. China had the lowest number of respondents cite funding (40 percent), and yet it was far ahead of the next highest concern, safety in the surrounding area, cited by 19 percent. In fact, there were only four instances where other areas were listed as the top concern by more than 10 percent of respondents:

- No friends or family nearby was cited by 20 percent of Canadians.
- Safety in the surrounding area was cited by 19 percent of Chinese respondents and 10 percent of respondents from India.
- Safety on campus was the top concern for 15 percent of Chinese respondents.

Financial assistance and scholarships from American institutions were also ranked as the top funding source for foreign students overall, far more than sources from their home countries.

How do students plan to fund their educations?

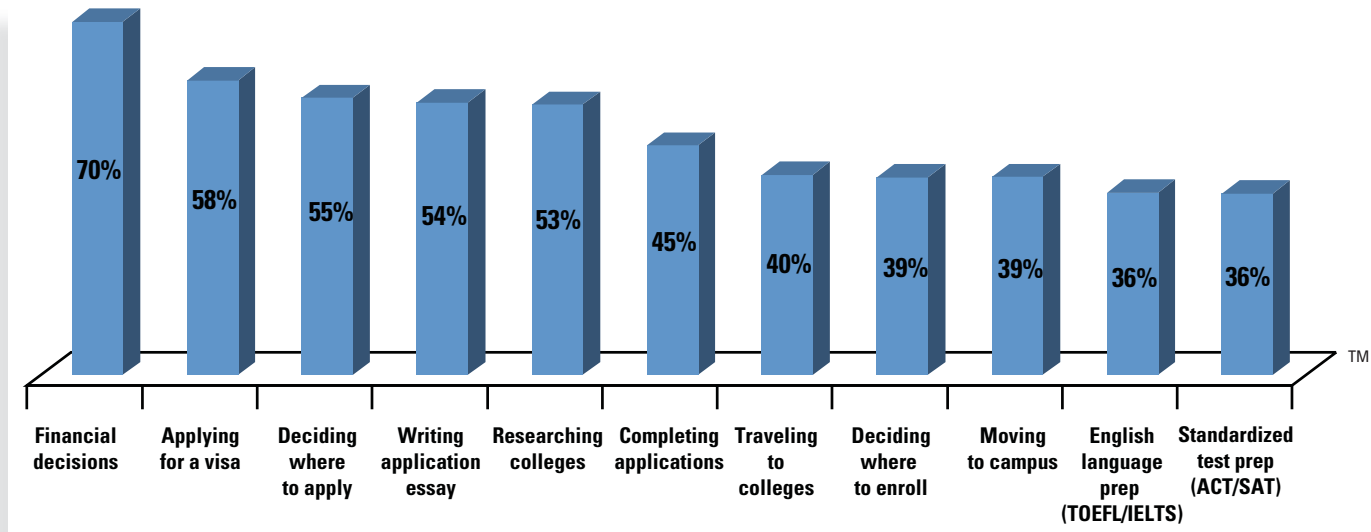| Source	Percent
U.S. college aid/scholarship	70%
Personal/Family	57%
Sponsorship progam in the U.S.	28%
Foreign government or university	28%
Sponsorship program in my country	18%
Other	7%

U.S. aid/scholarships and personal/family were the top two sources in all regions, although three regions listed personal/family first:

- Canada—84 percent personal/family, 47 percent U.S. aid/scholarships
- China—75 percent personal/family, 66 percent U.S. aid/scholarships
- India—73 percent personal/family, 67 percent U.S. aid/scholarships

Consequently, 70 percent of students cited financial assistance as the top item they need the most help with, significantly more than the next highest answer, applying for a visa (58 percent).

What aspects of the enrollment process do they need help with?

Financial decisions	Applying for a visa	Deciding where to apply	Writing application essay	Researching colleges	Completing applications	Traveling to colleges	Deciding where to enroll	Moving to campus	English language prep (TOEFL/IELTS)	Standardized test prep (ACT/SAT)
70%	58%	55%	54%	53%	45%	40%	39%	39%	36%	36%

At the same time, their responses to this question also revealed that students have a varied range of concerns. Five of the responses—financial decisions, applying for a visa, deciding where to apply, writing the application essay, and researching colleges—were cited by more than half of all respondents. Even the two lowest areas of concern, preparation for standardized tests and English language tests, were noted as areas for help by more than one-third of respondents.

Campuses should therefore not only be prepared to address funding questions from international students, but make it easy for them to receive assistance with any aspect of the application process.

Eight recommendations for strengthening international student recruitment

1. Analyze and optimize your brand presence in international markets before you invest in recruiting
International students are really drawn to particular universities in the United States. They also place high value on college rankings in making their enrollment decisions. If you want to expand into international markets, it is important to research your campus position and competition and build your brand with prospective students.

2. Develop a diverse communication plan tailored to the country or region
Prospective international students take a multifaceted approach to researching and applying to campuses. They value a variety of resources during the application process, use a range of communication options, and want to speak to a mix of campus staff and students. Establish multiple touch points throughout the funnel to form stronger relationships and keep students engaged.

When communicating with international students, keep in mind that they may need assistance with a range of issues. Make it easy for them to connect with the personnel and resources they need to complete their applications and enroll. Segment your communications by country or region so that students have information that is applicable to their specific enrollment situation.

3. Connect prospective international students with current international students and international student services representatives early in the recruitment process
Respondents in this study were much more interested in speaking with current students than with alumni, and their interest was almost as great as speaking with college representatives. Recruit your current international students for live chats, video Webcasts, and other key communication opportunities. If possible, try to connect prospective students with current students who are from the same country or region.

The survey participants also expressed great interest in speaking with international student services representatives. Getting these representatives involved early in the process can provide a great opportunity to conduct online events at local times and in the native language as well as a chance to deliver more segmented messages.

4. Invest in live chats and live video Webcasts for international students
International students show great interest in communicating with campus representatives via instant messages and in online video Webcasts. If your campus does not use these communication methods or does not use them for international recruitment, add them to your communication programs and make sure international students know they are available. Note that students expressed a preference for live video Webcasts over Skype-style video calls. In addition, live video Webcasts offer a more efficient way to communicate to a group of prospective students.

5. Make sure your Web site includes clear navigation to international student information
University Web sites were the number one resource for prospective international students. Set up a separate section for international students if you have not already, and make sure it has content that is relevant and up to date. Give students an opportunity (and reason) to complete an inquiry form so that you can begin building a relationship with them.

6. Make it very easy for international students to find funding information and communicate with campus representatives who can discuss this topic
Most international students will need financial assistance and scholarships from your institution in order to attend. They also will need assistance with understanding their eligibility and applying for aid. Put links to financial information on pages for international admissions and communications sent to international students, and invite them to connect with the appropriate staff members from your campus. A net price calculator customized for international students could also help engage them right away.

7. Consider offering assistance for campus visits for top prospects
Nearly half of international students are unable or unlikely to visit campuses where they enroll, depriving admissions representatives of an important opportunity to engage students and strengthen the recruiting relationship. It may be worth investing in a visit assistance program so that key prospects can make the journey to your campus. When students do come for tours, use students from their country or area of the world as tour guides, or invite those current students to join them on the tour.

8. Start building relationships the first time you make contact with international students, and keep nurturing that relationship until they arrive on campus
The yield process starts the first time a student makes contact with a campus, not after they have been accepted. That may be even more true for international students, who are not just enrolling in college, but committing to a new home far away from their native country. That requires a high level of trust in the institution they choose to attend, so it is imperative to build that trust as soon as possible.

In addition, given that international students tend to apply to a high number of campuses (especially those from China and India, the top two sources of international students in the United States) and the flattening of available students in the United States, the competition for international student enrollment will likely increase in the coming years. Connecting with prospects early and guiding them through the funnel can help you assure international students that your institution will be an ideal destination for them.

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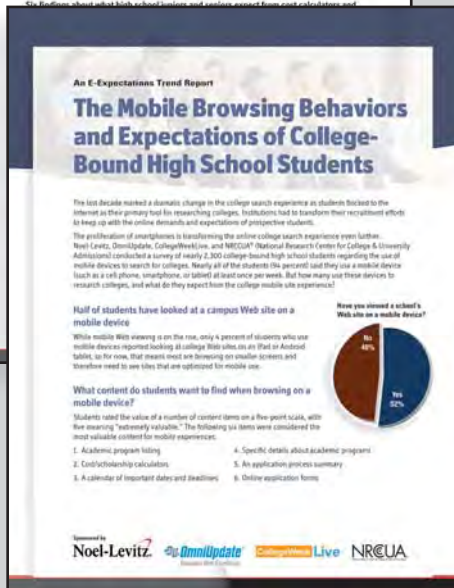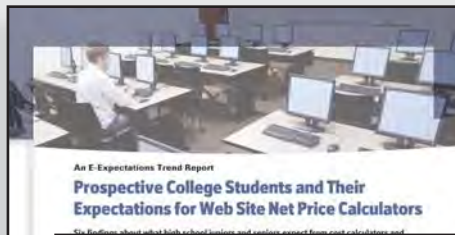
E-Expectations

This annual series examines the online behaviors and expectations of college-bound high school students. Additional E-Expectations reports have looked at parental expectations, mobile usage, and net price calculator usage.

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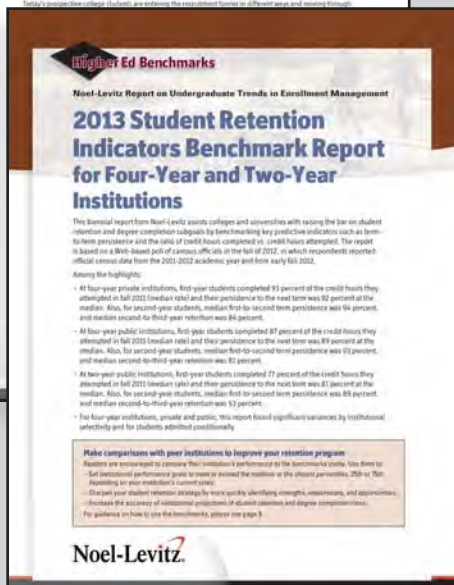
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Contact Noel-Levitz at **1-800-876-1117** or e-mail **ContactUs@noellevitz.com**. We can answer any questions you have about this report and also discuss how you can recruit international students more strategically. Contact us to start a discussion about how you can increase your institutional brand abroad, build a stronger international student funnel, and engage international students in your communications.

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Noel-Levitz is a recognized leader in higher education consulting and research. For nearly 40 years, they have partnered with more than 2,800 campuses to optimize enrollment management and student success through experienced consultation, advanced analytic tools, and campus assessments.

CollegeWeekLive is the leading channel for live conversations with prospective students. Colleges reach high schools they do not travel to, engage students in an online environment they prefer, and improve results at every stage of the enrollment process.

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