



International Recruiting: Fishing in a Flat World

College Board New England Regional Forum
Boston, MA
31 January 2012

Objectives of this 75-minute Session

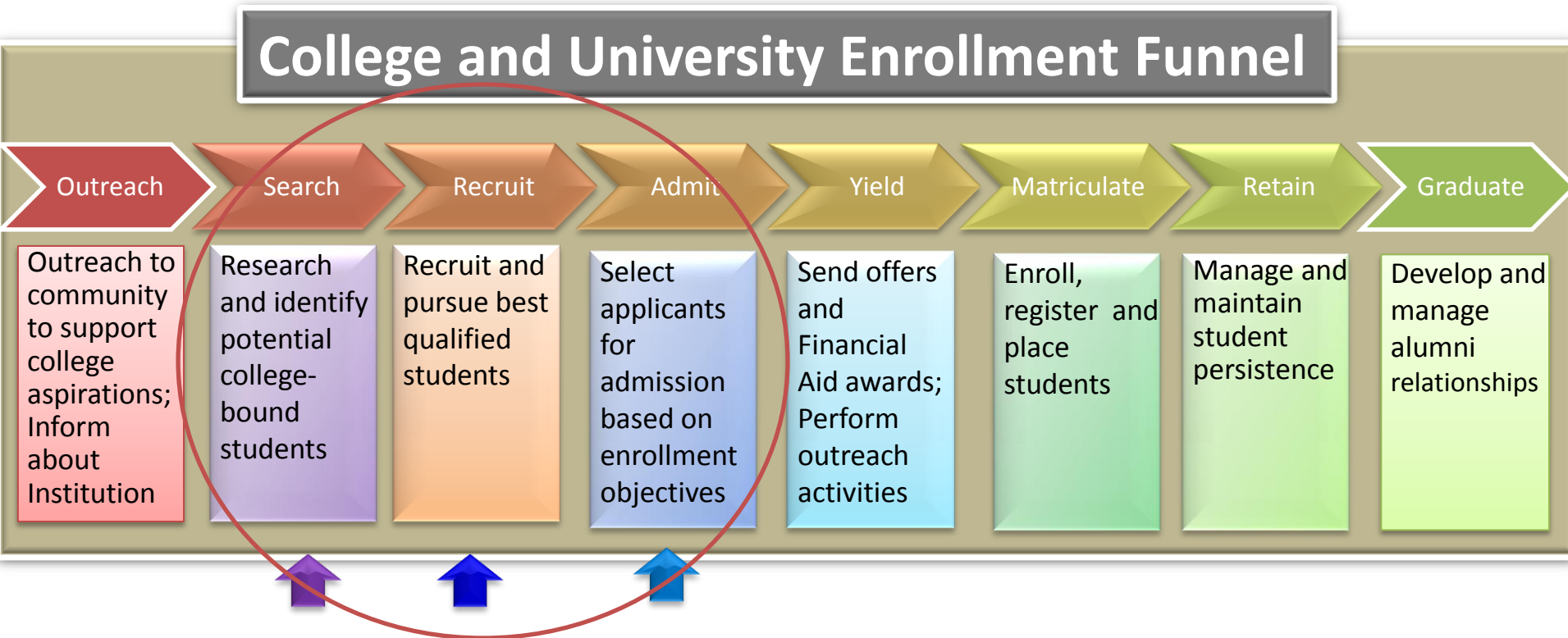
- Understand **major trends** impacting student mobility to U.S. and international universities, particularly within the NERO
- Flesh out **perspectives, insights, strategies, and skills** that will help your institution reach and attract more matched/ best-fit students from outside the U.S.
- Build **awareness** about topics impacting international recruiting efforts to make the process more transparent and effective for both students and admission professionals

Structure of Session

- Pose a series of **4 key topics** to our experts for engaged, interactive **discussion**
 - **Karen Kristof**, Senior Associate Director of Admission, Smith College
 - **Matt McGann**, Associate Director of Admissions/Director of Recruitment, Massachusetts Institute of Technology
 - **Ian Mortimer**, Vice President for Enrollment Management, Champlain College
- Provide recent data depicting **trends** on each topic
 - Audience questions and feedback encouraged following each topic

The ultimate goal: Fitting International Recruitment into an Integrated Institutional Strategy

An integrated international strategy should support your institution's goals at many steps along the enrollment funnel.

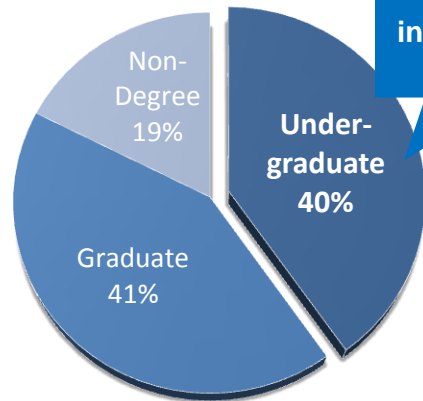


**However, in this session, we will focus on only three key areas:
Search, Recruit, and Admit**

Enrollment of International Students at U.S. Universities Is at an All-Time High

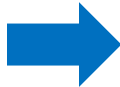
- International student mobility continues to be high despite economic challenges.
- In academic year 2010-2011, more than 723,000 students from other countries were enrolled at U.S. universities.
- **The number of Chinese students enrolled in U.S. undergraduate programs grew 43% last year.**
- **South Korea, Vietnam, and Saudi Arabia also experienced impressive gains.**

Top 10 Places of Origin of International Undergraduate Students Studying in the U.S. (2011)



Breakdown of International Students Coming to US

>291,000, a 6% increase over 2010 driven by Asia



Undergraduate Students Coming to U.S.

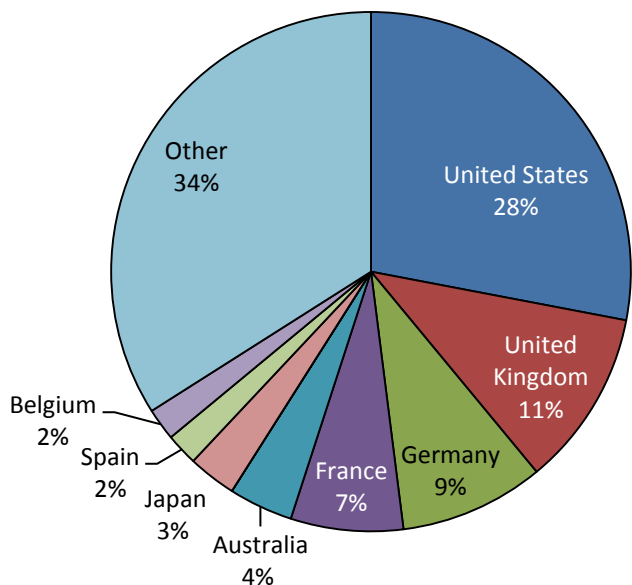
	COUNTRY	2009/10	2010/11
1	CHINA	40,000	57,000
2	SOUTH KOREA	36,000	38,000
3	INDIA	15,000	14,000
4	CANADA	14,000	13,000
5	VIETNAM	9,000	11,000
6	SAUDI ARABIA	9,000	11,000
7	JAPAN	13,000	11,000
8	MEXICO	8,000	8,000
9	NEPAL	7,000	6,000
10	TAIWAN	7,000	6,000

Student Mobility Globally Is on the Rise, Especially Toward Countries with Universities Offering English-Medium Academic Programs

Global Destinations for International Students at All Academic Levels, 2001 and 2010

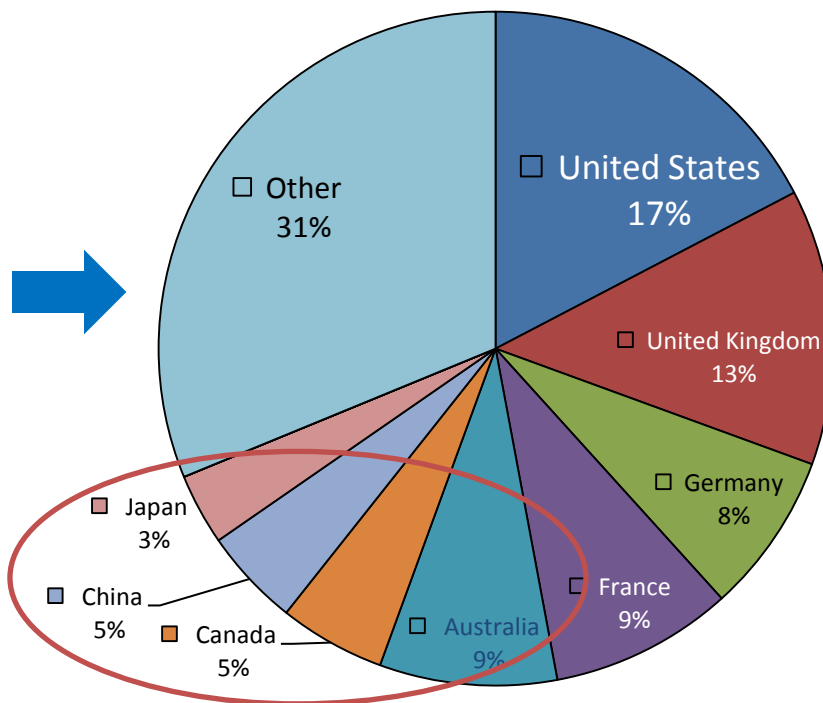
2001

Worldwide: 2 million int'l students
(U.S. = 550,000)



2010

Worldwide: 3.7 million int'l students
(U.S. = 740,000)



In 2010, English-speaking countries (U.S. + UK + Commonwealth Countries) hosted more than 1.6 million int'l students.

Source: College Board Internal Analysis based on data from the Institute of International Education (IIE)'s Project Atlas and Organization for Economic Co-operation and Development (2010). *Education at a Glance 2010*. Paris: OECD

International students contribute >1.8 billion \$ to New England

	Total Number of Foreign Students	Net Contribution to State Economy by Foreign Students and their families
Connecticut	9,268	\$288,068,000
Massachusetts	35,313	\$1,253,259,000
Maine	1,233	\$37,020,000
New Hampshire	2,332	\$80,626,000
Rhode Island	4,318	\$151,299,000
Vermont	1,017	\$34,119,000
TOTAL	53,481	\$1,844,391,000

Topic 1: Why Recruit International Students? And Why Now Among Universities within the New England Region?

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The New York Times **Asia Pacific**

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AFRICA AMERICAS ASIA PACIFIC EUROPE MIDDLE EAST

Squeezed Out in India, Students Turn to U.S.

By NIDA NAJAR
Published: October 13, 2011

NEW DELHI — Moulshri Mohan was the top private high schools in New De colleges, she received scholarship offer and \$15,000 from Smith. Her pile of a made any ambitious teenager smile: C Wesleyan, Barnard and the University

The New York Times **Education**

WORLD U.S. N.Y. / REGION BUSINESS TECHNOLOGY SCIENCE HEALTH SPORTS OPINION

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Graham Crouch for The New York Times

Moulshri Mohan, a top New Delhi student, enrolled at Dartmouth with a scholarship after elite Indian colleges rejected her.

India Ink
Notes on the world's largest democracy.

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The China Boom



Fred R. Conrad/The New York Times

AMERICANIZED Li Wanrong, a Drew University freshman from southern China, says her New Yorker roommate is helping her adjust to Western ways.

By DAN LEVIN
Published: November 5, 2010

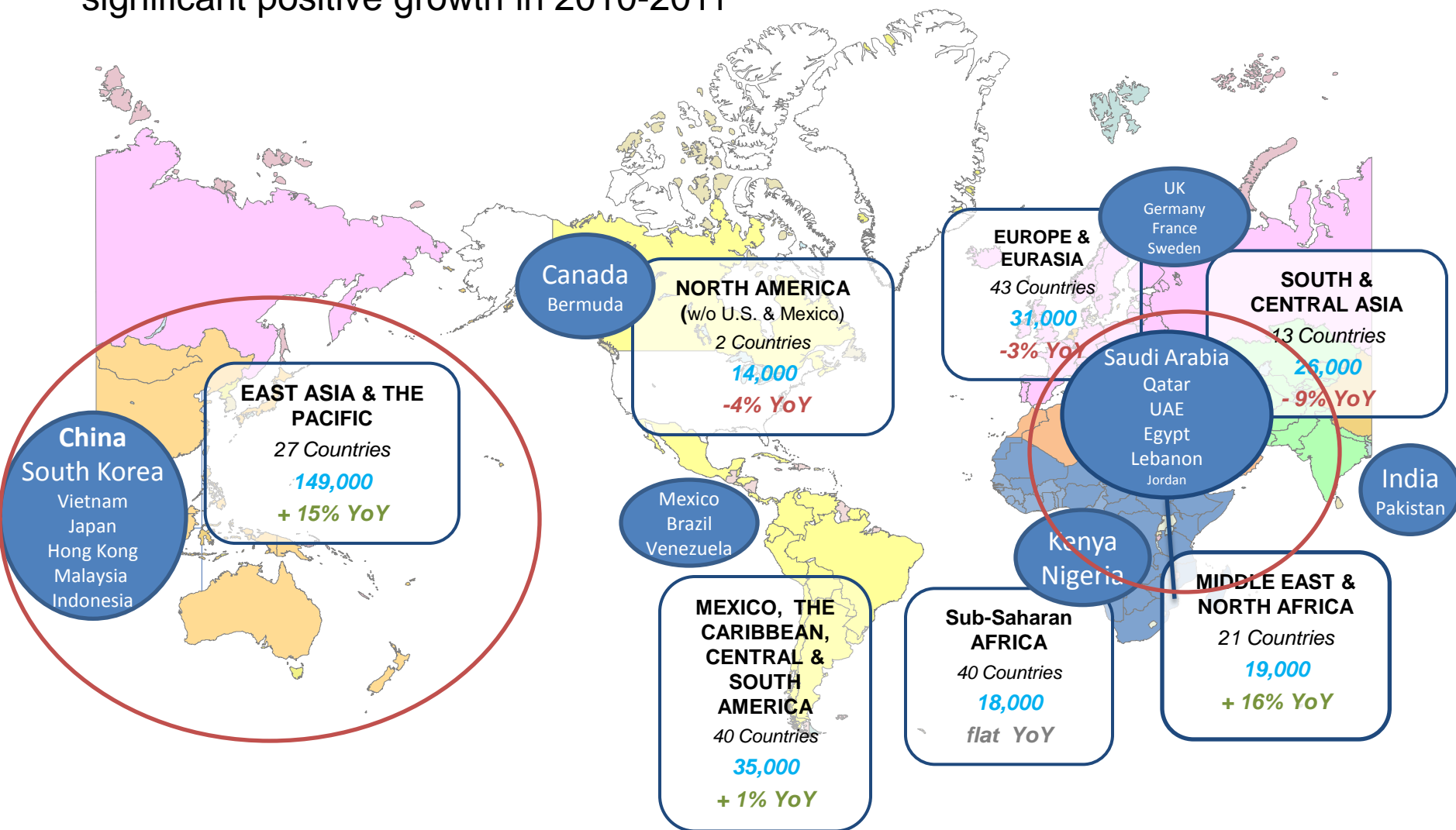
IN her ballroom dance class, Li Wanrong has learned to tango and cha-cha. At lunch one day, she tried a strange mix of flavors — pepperoni pizza, the spicy sausage and oozing cheese nearly burning

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Topic 2: What are the Major Trends Impacting our Work to Attract International Students to the New England Region?

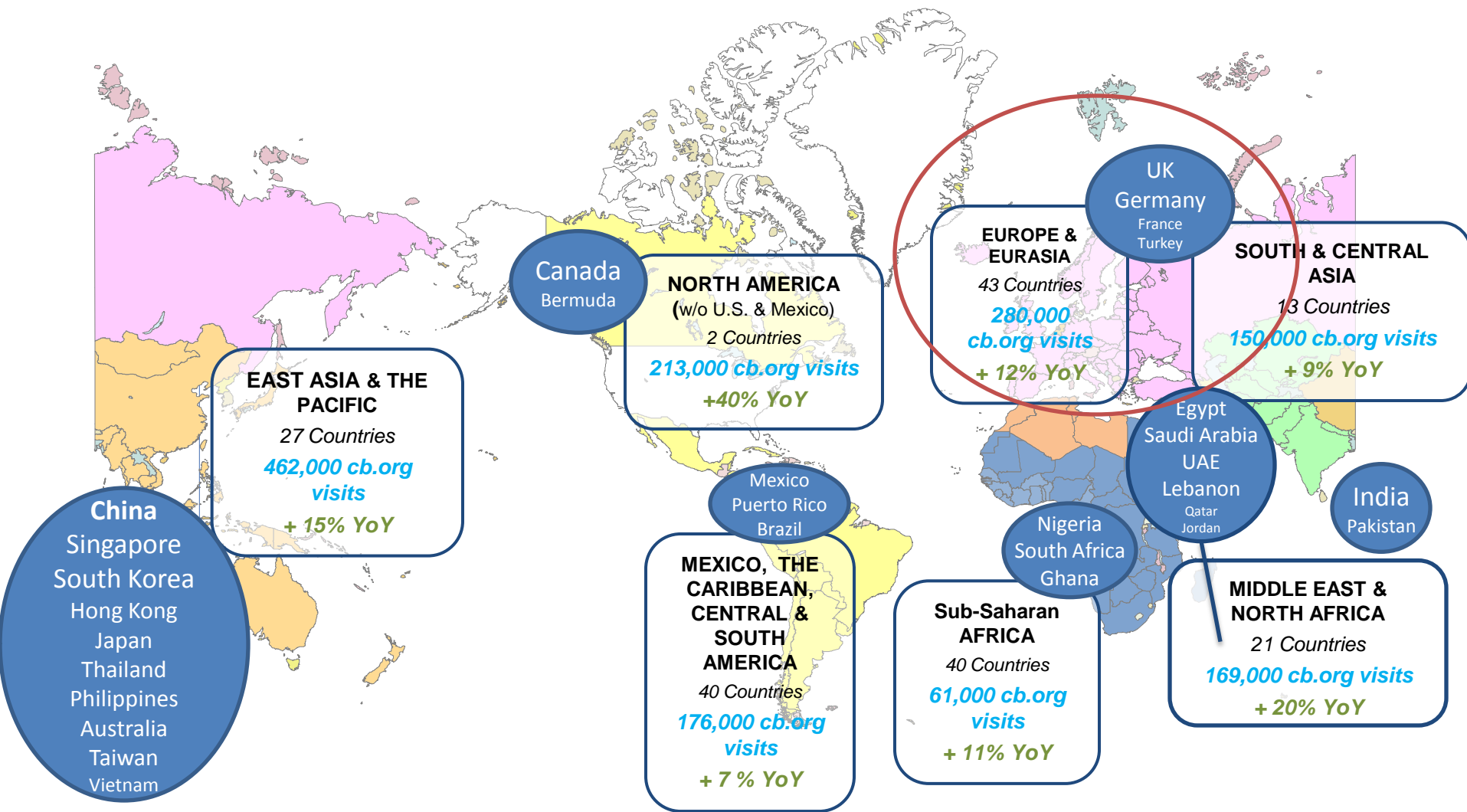


East Asia and the Middle East & North Africa were the two regions displaying significant positive growth in 2010-2011



Source: Open Doors 2011 Report on International Educational Exchange.

However, the aspiration to go to the U.S. (evidenced by college searches online and SAT registrations) extends well beyond Asia.



Source: College Board internal analysis: average monthly traffic by IP Address, July 2010- June 27, 2011

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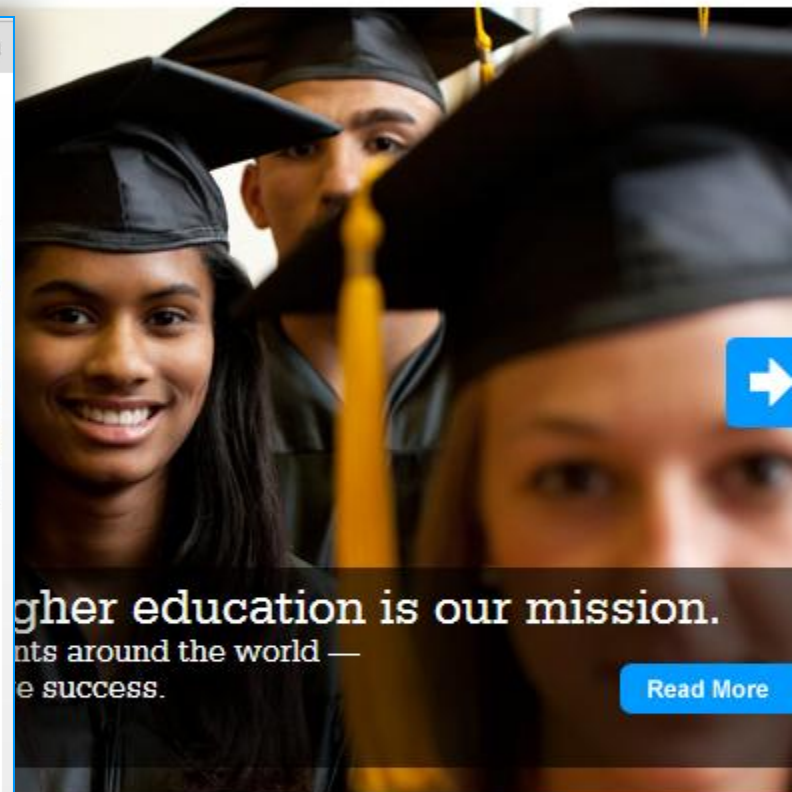
Email
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Resources

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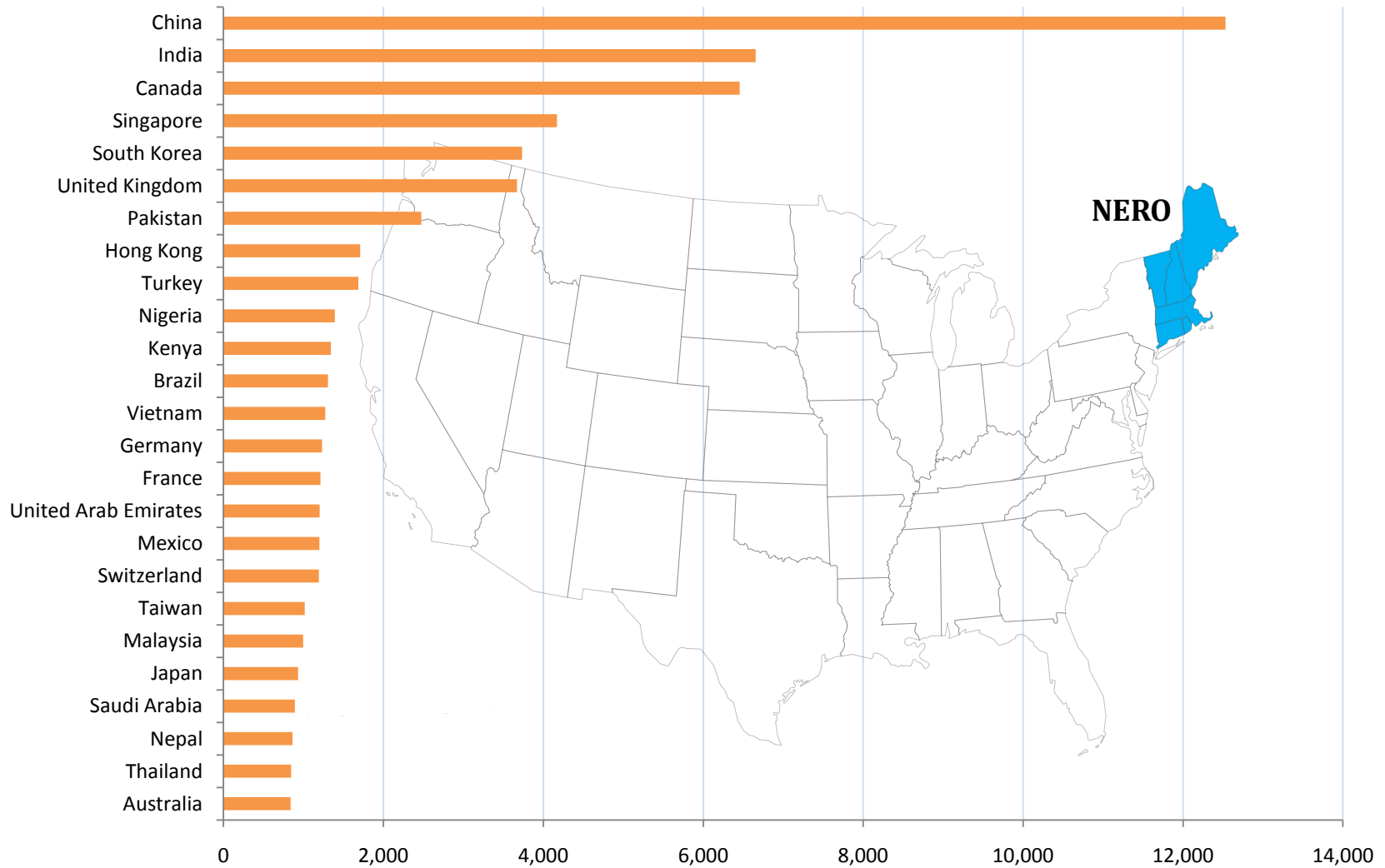
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Rankings and Major Preferences Drive Search Patterns

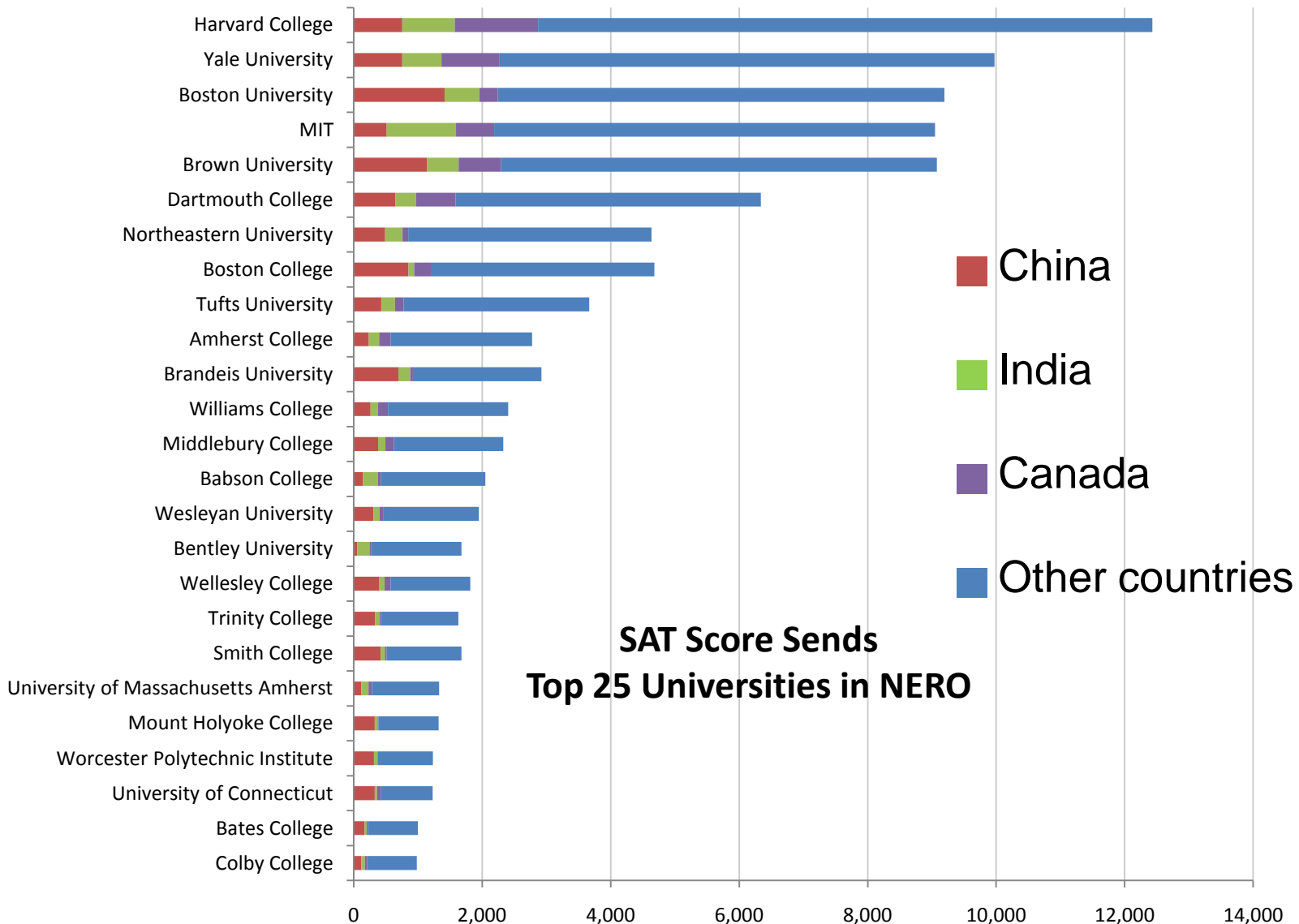
Top Searches by Universities within collegeboard.org

#	All International Students	#	All China	#	All India
1	Harvard College	1	New York University	1	Massachusetts Institute of Technology
2	New York University	2	Cornell University	2	Harvard College
3	Cornell University	3	University of California: Berkeley	3	Stanford University
4	Boston University	4	University of Illinois at Urbana-Champaign	4	Cornell University
5	Columbia University	5	University of California: Los Angeles	5	University of California: Berkeley
6	Stanford University	6	University of Michigan	6	Purdue University
7	Yale University	7	Boston University	7	New York University
8	Massachusetts Institute of Technology	8	Harvard College	8	Boston University
9	Brown University	9	University of Washington	9	Princeton University
10	University of California: Los Angeles	10	Brown University	10	Georgia Institute of Technology
11	University of California: Berkeley	11	Columbia University	11	Yale University
12	University of Pennsylvania	12	University of Southern California	12	University of California: Los Angeles
13	Princeton University	13	Stanford University	13	California Institute of Technology
14	University of Southern California	14	Yale University	14	Columbia University
15	University of Michigan	15	University of Pennsylvania	15	University of Illinois at Urbana-Champaign
16	Duke University	16	University of Wisconsin-Madison	16	University of Michigan
17	Boston College	17	Purdue University	17	University of Pennsylvania
18	Northeastern University	18	Penn State University Park	18	Carnegie Mellon University
19	University of Texas at Austin	19	University of Virginia	19	Brown University
20	University of Illinois at Urbana-Champaign	20	Carnegie Mellon University	20	University of Texas at Austin

Top countries sending scores to New England institutions reflect national trends, with China leading



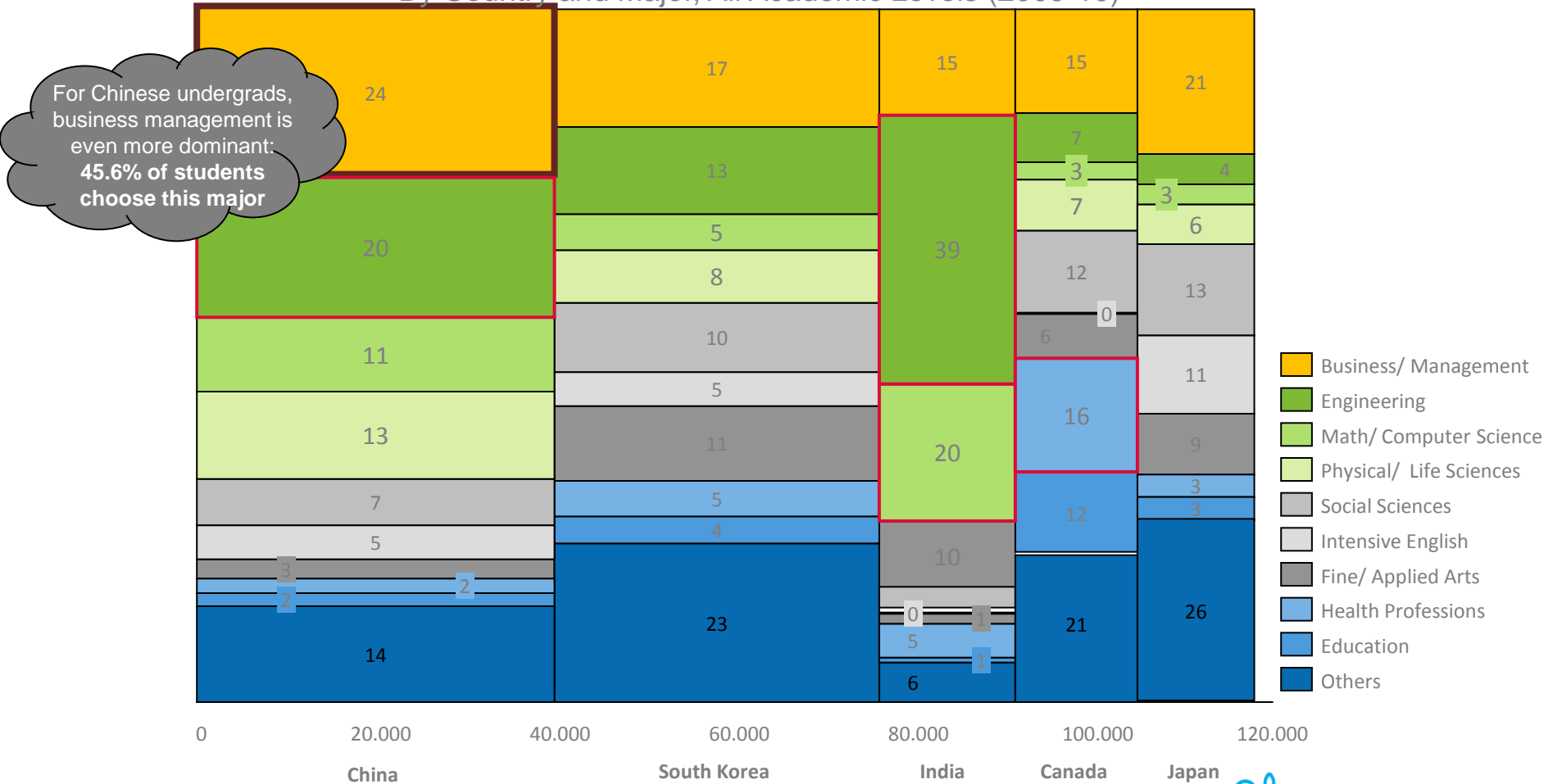
However, among most New England institutions, no one country is dominant




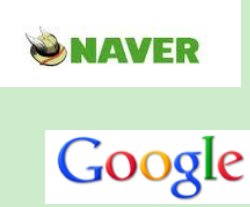


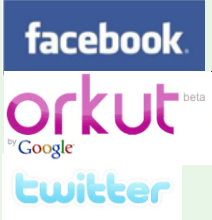
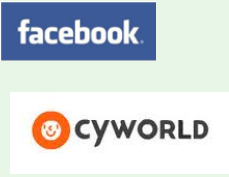






Topic 3:
What Strategies &
Resources Can
Universities Within the
New England Region
Employ to Distinguish
Themselves?

Choice of major plays an outsized role in international student decisions

International students in the US
- By Country and Major, All Academic Levels (2009-10)⁽¹⁾

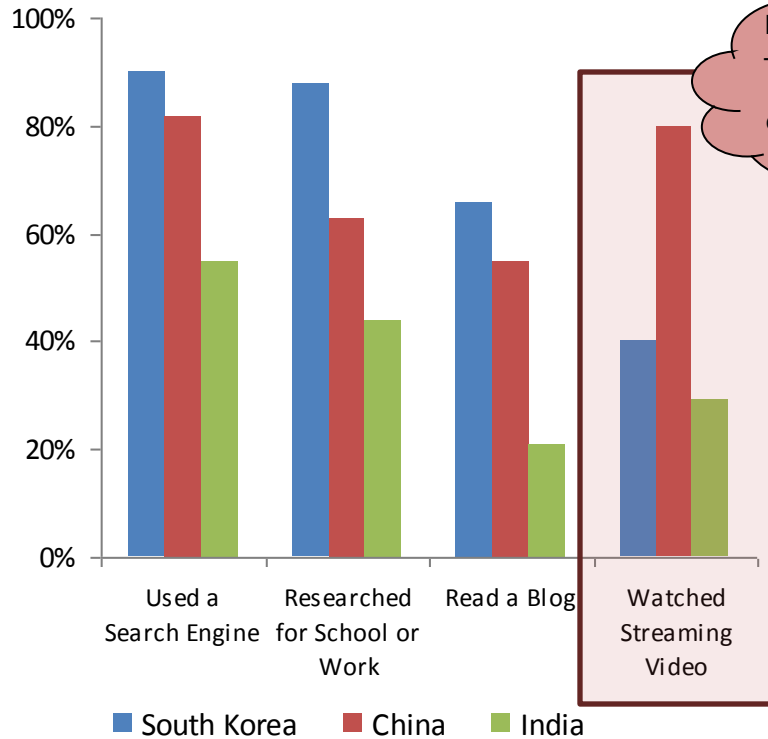


Where they go: Different platforms rule in different countries

India	South Korea	China	Japan
			
			
			
	Local social networking & video sites dominate	Local search engines and SM networks dominate space	Not very social; Mobile dominates

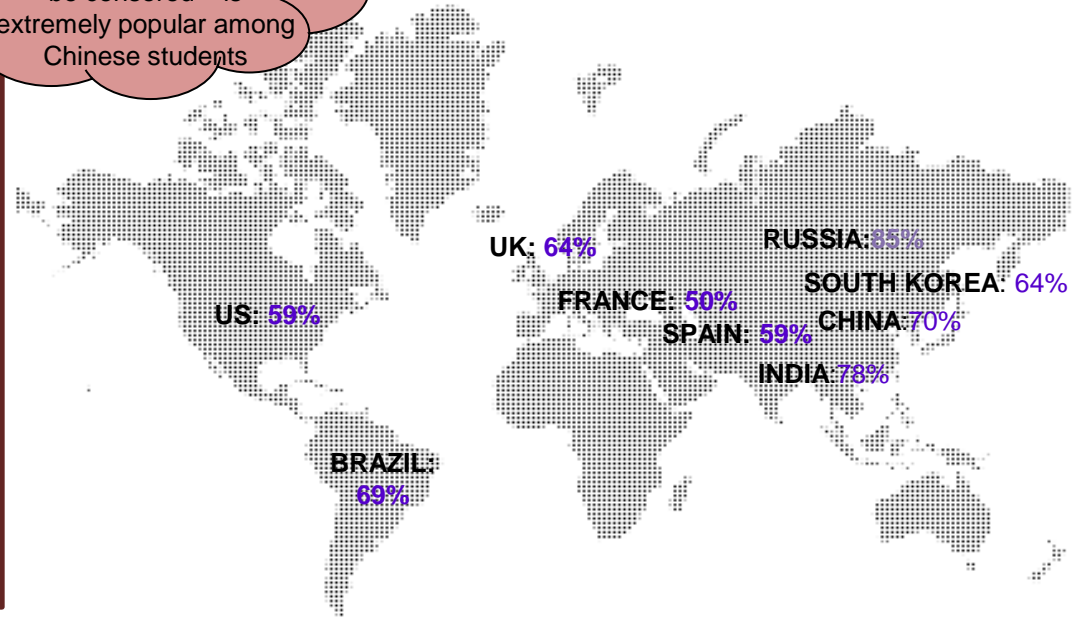
While the web is where the international youth are, a digital strategy will need to be more than just a website...

% of teenagers with online access that have engaged in following activities- 2010⁽¹⁾



Note that video streaming – which is more difficult to be censored – is extremely popular among Chinese students

% Of Internet Users in Select Countries with a Social Network Profile - 2009 ⁽²⁾



Among Programs & Resources Restricted in China...

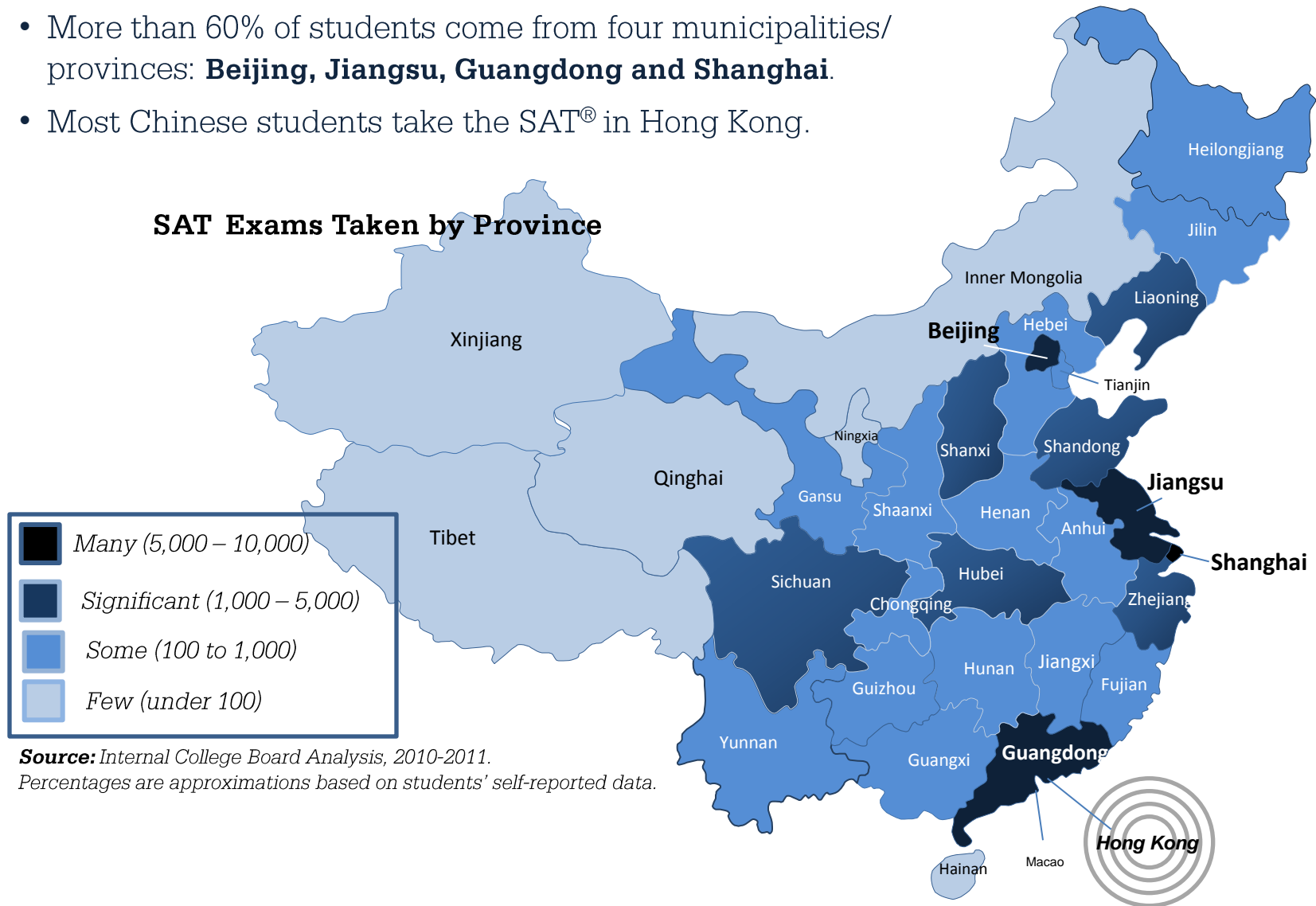


- SAT, nor any foreign undergraduate admission test, is allowed to be administered in mainland China within a test center open to the public*
- SAT is administered within more than 60 schools that have approval from China's Ministry of Education to enroll international students
- In addition, tens of thousands of students travel to Hong Kong and elsewhere to take the SAT
- The College Board has established additional capacity in key locations to accommodate these students

Chinese SAT[®] Takers Come from Every Province

- More than 60% of students come from four municipalities/provinces: **Beijing, Jiangsu, Guangdong and Shanghai.**
- Most Chinese students take the SAT[®] in Hong Kong.

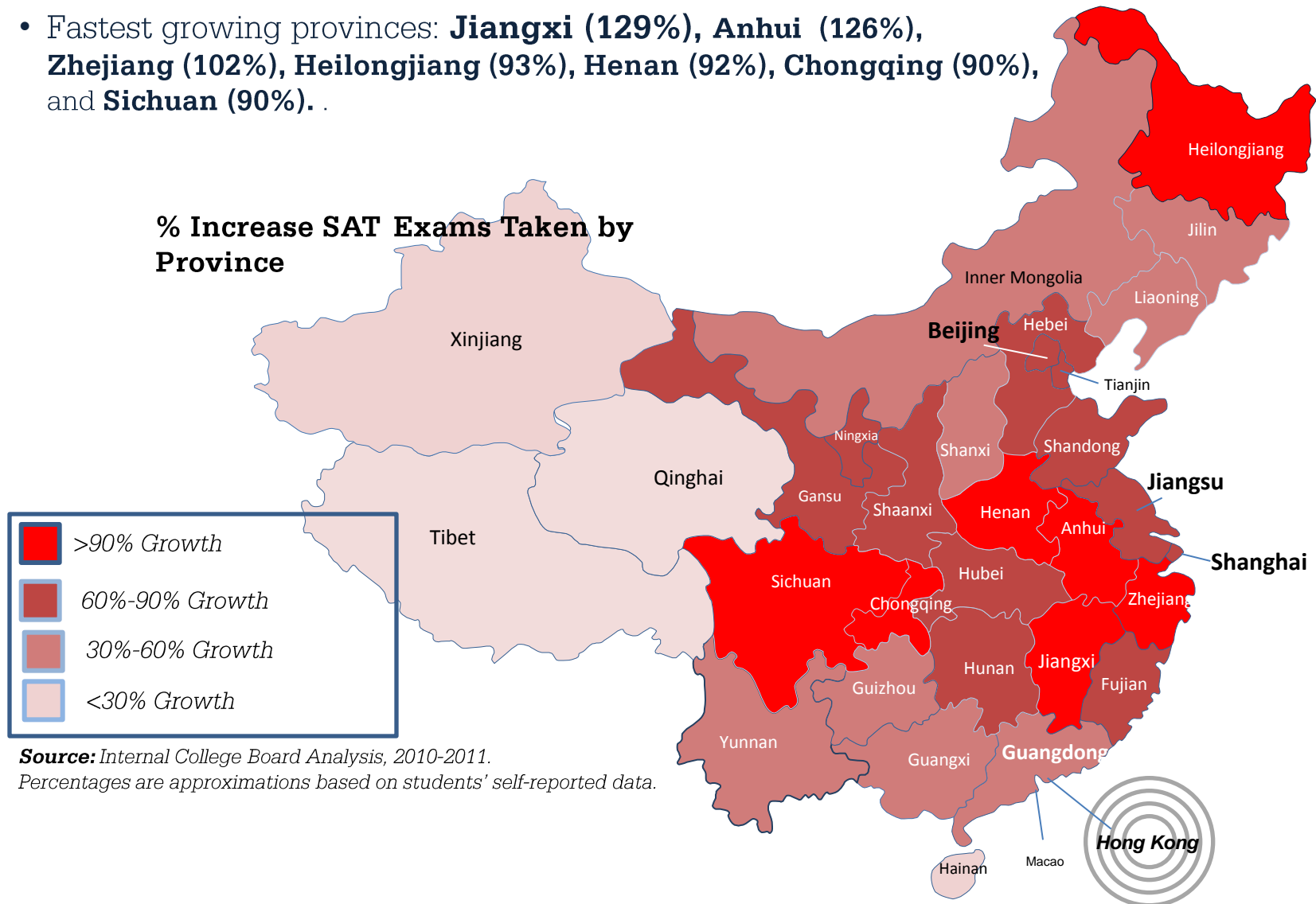
SAT Exams Taken by Province



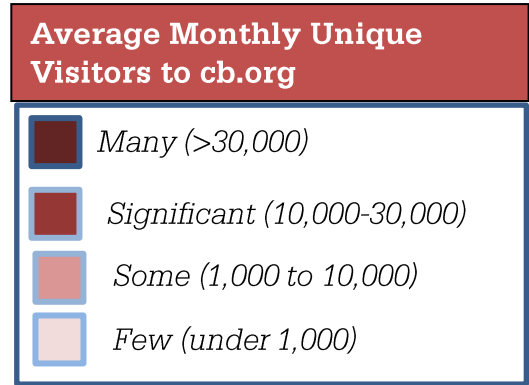
Source: Internal College Board Analysis, 2010-2011.
Percentages are approximations based on students' self-reported data.

All Provinces in China Are Showing Increases

- Fastest growing provinces: **Jiangxi (129%)**, **Anhui (126%)**, **Zhejiang (102%)**, **Heilongjiang (93%)**, **Henan (92%)**, **Chongqing (90%)**, and **Sichuan (90%)**.

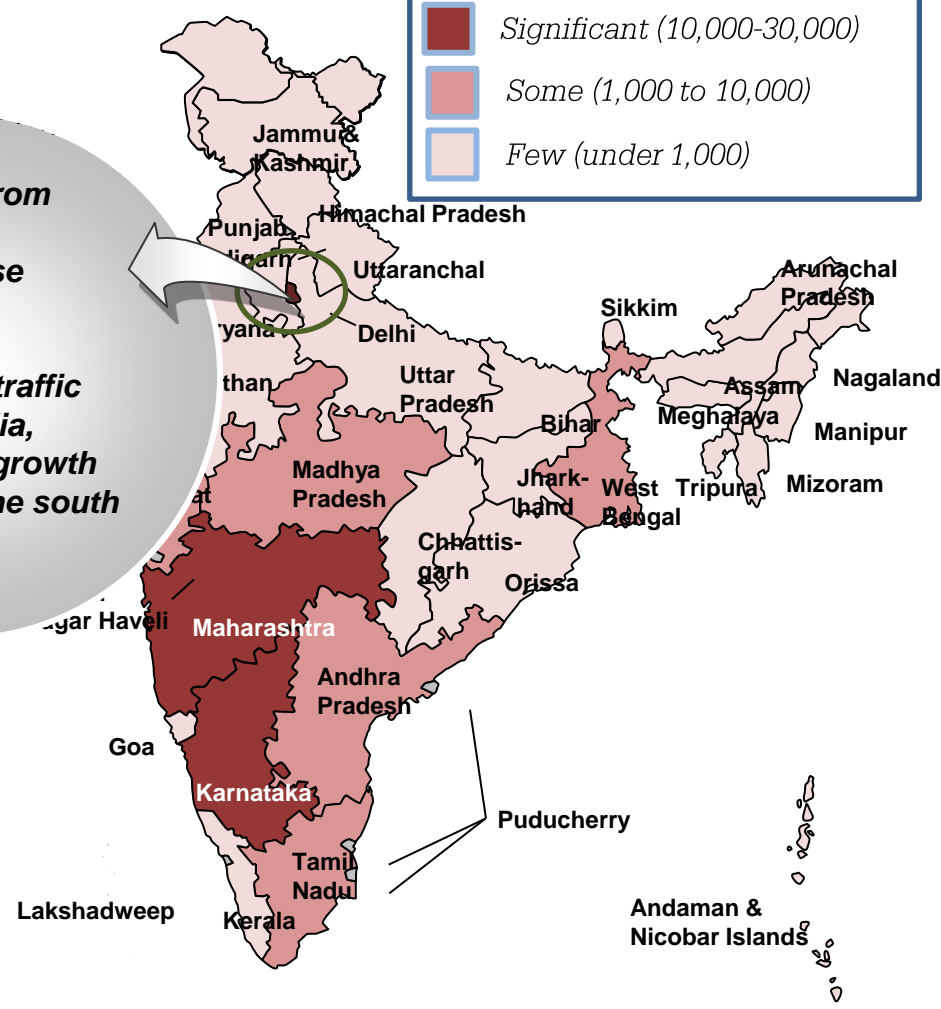


More than 100,000 unique visitors from India search collegeboard.org for American universities each month



Top 15 States	%
Delhi	42%
Maharashtra	26%
Karnataka	16%
Andhra Pradesh	5%
Tamil Nadu	4%
Gujarat	2%
Madhya Pradesh	1%
West Bengal	1%
Uttar Pradesh	1%
Haryana	1%
Chandigarh	1%
Kerala	<1%
Orissa	<1%
Bihar	<1%
Jammu and Kashmir	<1%

Visitors from Delhi compose more than 40% of the traffic from India, but highest growth comes from the south



Topic 4:

Where is the Future of International Recruiting Going? Where Are Opportunities to Find & Attract Beyond East & South Asia?

“If I were America’s immigration czar, I would issue (student) visas to (international) applicants as fast as I could, recognizing that they will create more jobs, opportunities, and friends for America than the United States could produce any other way for such modest cost.”

James Fallows, *The Atlantic*

