

# Sector based approaches to marketing and recruitment in a globally competitive landscape

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# Overview



- Why
- Global Landscape
- A Look at Data
- Sector based approaches
- Case Study: China
- Discussion

# Why?



- Competition is increasing
- Synthesize information
- Strategic approaches
- Increase understanding
- Opportunities

# Global Landscape – Demographics\*



- 4.5M students moving around globe
- India, China, Indonesia and US home to over 50% of 18-22 year olds by 2024
- China's tertiary aged population projected to fall by 40M by the next decade

# Global Landscape – Demographics\*



- 25% of 18-22 year olds from Pakistan, Nigeria, Brazil, Bangladesh, Ethiopia, Philippines, Mexico, Egypt and Vietnam
- Russia predicted to begin falling (18-22 year olds) in population
- Nigeria, India, Ethiopia, Philippines and Pakistan grow
- India will overtake China in population in 2026

# Global Landscape - Economic



- Declining growth from China, Brazil and Saudi Arabia
- Financial crises, political crises and plummeting oil prices
- Chinese debt is about 250% of GDP – could be fatal to economy
- India fastest growing economy in world

# Global Landscape - Economic



- **US-Canada**
  - With Canadian \$ devalued 30% to US \$, expect more US students to choose Canada for study
- **Russia**
  - Ruble declined 30% against US \$, 24% against pound, 14% against Euro
  - Hosted 212,000 int'l students in 2015 (up 20% from 2014)
  - Projecting 30-35% increase for 2016
  - Increases from EU and China and South Korea

\*ICEF: Shifting currencies expected to drive growth for more affordable destinations (Feb. 2016)

# Global Landscape – Emerging Markets



- Vietnam
- Colombia
- Indonesia
- India
- Nigeria
- Iran

\*ICEF: Five Emerging Markets to Watch (Sept. 2016)

\*World Education Services, Recruitment beyond China, [wenr.wes.org](http://wenr.wes.org)



# Global Landscape – Other Trends



## In Education

- Academic programming
- Pathway programs
- Learning models

\* ICEF: Beyond the Horizon, *The Near Future of International Education*, 2016

# Global Landscape – Other Trends



## In Marketing and Recruitment

- Digital Tools
- Must be mobile friendly
- Use the student voice
- Online messaging
  - By 2018, 75% of all mobile messaging will be instant messaging
  - 6 of the 10 most popular apps in 2015 were chat messaging apps
  - By 2018, # of chat app users worldwide will represent 80% of smart phone users

\*ICEF: *Is online messaging the next big thing for student recruitment?*, 2016

\*NAFSA: International Educator, *Going Social*, Sept/Oct 2016

# Data for Canada



354,000 study permits in December 2015

- 182,000 University
- 90,000 College or other post-secondary
- 60,000 Secondary or less
- 22,000 Other studies

Top 10 Source Countries (2013 & 2014)										
Canada	China	India	S. Korea	France	Saudi Arabia	US	Brazil	Nigeria	Japan	Mexico
K-12 (BC)	China	S. Korea	Japan	Mexico	Germany	Brazil	Taiwan	HK	Vietnam	US
K-12 (ON)	China	S. Korea	Mexico	Saudi Arabia	US	Nigeria	India	Brazil	Vietnam	Japan

\*Sources: 2016 *Canada international Education Intelligence Report*. ICG, June 2016.  
 CBIE: A World of Learning, *Canada's performance and potential in International Education*, 2015.  
 BCCIE: Infographic: Economic Impact of International Education in BC (K-12 sector), 2016  
 Ontario Ministry of Education: Ontario's strategy for K-12 International Education, 2015

# Now what?



- How do we use this information?
- What are our respective approaches?
- How are we developing our recruitment tools?
- How are we collaborating?
- How are we supporting students through their education career in BC? Canada?

# Sector Based Approaches - UBC



## Mandate: Quality, Diversity, Scale

- 2015 international enrolment target was 2,889
- students from 150 countries
- meet admission requirements, ELAS and competitive GPAs

## Key Regions

- Direct Recruitment (In Market)
- Indirect Recruitment (Web, Print, Digital, On Campus, Awards)
- Canada Focus – digital, outcomes, alumni

# Case Study: China - UBC



- 37% int'l undergrads from China
- Largest applicant pool but growth slowing
- Recruit int'l curriculum and top Chinese schools
- Admissions
- Risk
  - Reliance on China as a source of 1/3 of int'l students
  - Projected population declines
  - Slowing economy
- Mitigation
  - Diversify recruitment
  - New technology
  - Awards

# Sector Based Approaches - Langara



## Mandate:

UT Pathways, Applied programming, ESL, CS  
Programming

- University Transfer Programs
- Applied Bachelors Degree
- Career Studies Program
- Post Degree Certificates/Diplomas
- ESL Classes
- Continuing Studies (e.g. CPA,RMT etc.)

## For 2015-16

- 3,101 international RS students (13,991 total)
- 952 international CS students (8,806 total)

# Sector Based Approaches - Langara



## Recruitment Activities

- Overseas
- Local

## Approaches

- Direct (staff and overseas)
- Indirect
- Evolving our digital approaches
- Awards

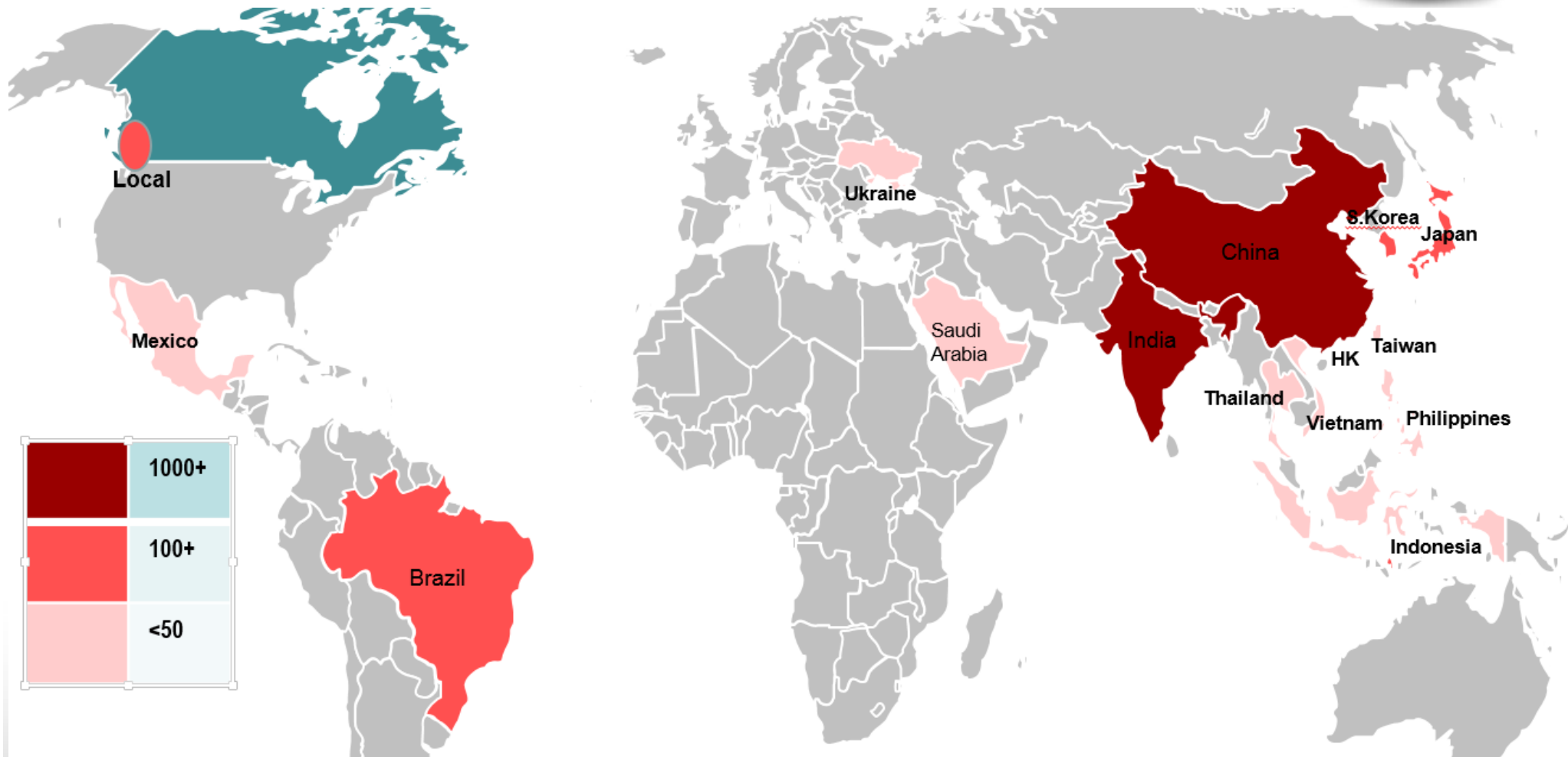


# Enrolment by Country (2011/12)



# Enrolment by Country (2015/16)





# Case Study: China - Langara



- 33% of our international students are from China (incl. ESL)
- Applicant pool declining gradually, but numbers holding steady
- Trend towards increasing numbers in K-12 sector
- Langara – pathways value proposition (both incoming & outgoing)

## Risk

- Reliance on China as a major source of students
- Trends indicating a decrease in the number of students going abroad

## Mitigation

- Diversify recruitment
- Local partnerships (i.e. K-12)
- Expand ESL

# Sector Based Approaches – Coquitlam SD



## Opportunity, Diversity, Academic Excellence

The International Education Program aligns with the Board's goal:

*“To achieve respect for diversity”, and the strategies: “to foster international perspectives and build linkages with the community and around the world; to increase intercultural communication and understanding within our community and around the world; to achieve inclusive learning environments.”*

This is achieved by placing international students in different schools and classrooms.

# Sector Based Approaches – Coquitlam SD



- Canada is now the Best Study Destination for K – 12
  - \*2016 ICEF igraduate Barometer report
- 1800 international students from over 45 countries
- Recruitment strategies
  - Direct Recruitment
  - Indirect Recruitment
  - Alumni
- Trends
  - Younger Chinese and Korean students
  - Brazil is strong
  - Spain and Italy duration of study
  - Vietnam increase
  - Mexico choosing Canada
  - India challenge

# Case Study: China – Coquitlam SD



- Largest student population
- Confucius Institute
- Recruitment in 2<sup>nd</sup> tier cities
- Pathway programs
- Teacher training
- Internationalization
- Risks
  - China market growth
  - Ban of international curriculum

# Discussion



What resources are you using?

How are these informing your practices?

What tools are you using?

How are you measuring success?

What opportunities do you see?

How can we collaborate more in Canada?



# Resources to consider



- British Council
- ICEF
- Illuminate Consulting Group (ICG)
- CBIE, BCCIE, NAFSA, CAPS-I, OECD, IIE, WES
- Languages Canada
- Ministries of Education
- Education USA
- AIE (Australia)

# Thank you



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