

# Sector Based Approaches to Marketing and Recruitment in a Globally Competitive Landscape

BCCIE Summer Conference  
Tuesday, June 20, 2017

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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

\*British Council: The Shape of Things to come: HE global trends and emerging opportunities to 2020 (2012)

# Global Landscape - Economic



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

\*British Council: Megatrends in Int'l Education: Understanding factors that will shape the future (2016)



# 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
- Philippines



# 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

# A look at numbers: Canada



Level of Study of international students in Canada (2015)\*

Level of Study	
Post Secondary	263,855
Secondary or less	56,090 (44,510 Secondary)
Other Studies	33,475
Study Level not stated	155
<b>Total Study Permit Holders</b>	<b>353,570</b>

\*A World of Learning: Canada's Performance and Potential in International Education 2016

# Top 10 source countries



	China	India	France	South Korea	US	Saudi Arabia	Nigeria	Brazil	Japan	Mexico
2015	118,915	48,705	20,135	19,760	12,215	11,685	9,990	7,325	7,105	5,120
2014	107,355	37,990	18,730	18,995	12,235	13,415	8,345	8,680	6,770	5,015
% change	11	28	8	5	0	-13	20	-16	5	2

\*A World of Learning: Canada's Performance and Potential in International Education 2016

# 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

- 2017 international enrolment target are 3,604
- 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 2016-17 (partial)

- 4,545 international RS students (14,000 total)
- 870 international CS students (6,726 total)

# Sector Based Approaches - Langara



## Recruitment Activities

- Overseas
- Local

## Approaches

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

# Enrolment by Country (2016/17)



# 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
  - Increase in local international schools

# 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)
- European Association for International Education (EAIE)
- Association of International Education Administrators (AIEA)

# 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?

# Thank you



Your feedback is important to us!

Please take a moment to submit the evaluation  
for this session.