

Driving Enrollment Growth in the Third Wave of International Students

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New enrollment of international undergraduate and graduate students at American universities and colleges for 2017-18 declined by 6 percent, according to the recent [Open Doors](#) data released by the Institute of International Education. This means that 14,230 fewer students resulted in a potential revenue loss of \$355 million, at average tuition and fees of \$25,000, for the first year of studies alone—without factoring any tuition discounts/waivers.

This staggering loss comes at a time when the near-term outlook indicates continued challenges to international enrollment growth. The majority (92 percent) of 540 responding institutions in a Fall 2018 [International Student Enrollment Survey](#) accompanying the Open Doors report noted that “the current U.S. social and political climate impacted their campus either positively or negatively over the past year.”

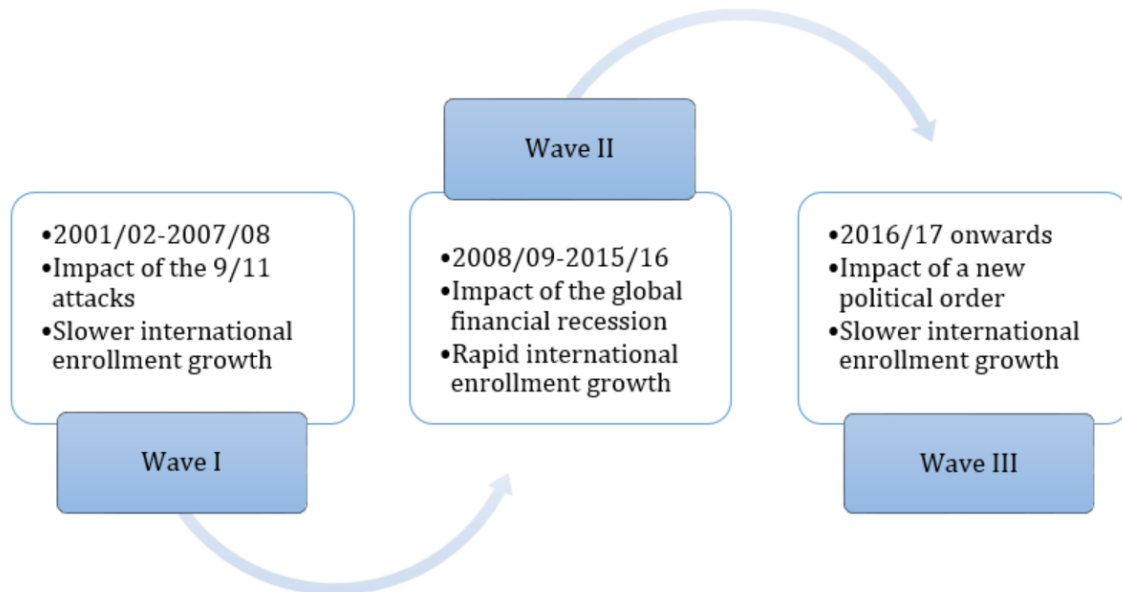
How can professional, continuing, and online education drive the growth and innovation agenda to attract international learners? The purpose of this article is to discover recent trends and identify proactive strategies for international student enrollment, first by looking into the recent evolution of international student mobility, followed by diverse perspectives and strategies that the sector can use to overcome international enrollment challenges.

Three Waves of International Students

The overall number of international students in the U.S. increased from nearly 583,000 students in 2001/02 to nearly 1,095,000 in 2017/18. This dramatic increase of 88 percent shows the potential and promise of U.S. as a destination for international students. However, in this period, we have seen variation in the nature and direction of growth.

Recent trends of international students can be analyzed from my framework of [Three Wave of International Student Mobility](#), published by the Center for Studies in Higher Education, University of California, Berkeley. Each of these waves is shaped by key events (see Figure 1).

Figure 1. Three Waves of International Student Mobility



Source: Adapted from [Choudaha, Rahul \(2017\)](#).

The First Wave is characterized by the September 11, 2001 terrorist attack, which resulted in stricter visa barriers for international students. In that wave, many competing destinations expanded enrollment at the expense of the U.S. During the wave from 2001/02 to 2007/08, the number of undergraduate students declined by 7 percent, while graduate and non-degree students increased by 5 percent and 36 percent (see Table 1). Much of this slowdown was due to a decline in students from the Middle East and Japan. At the same time, China and India were priming up for the growth.

Table 1. International Student Enrollment Change by Level of Education

	Wave I			Wave II		
	2001/02	2007/08	% Change	2008/09	2015/16	% Change
Undergraduate	261,079	243,360	-7%	269,874	427,313	58%
Graduate	264,749	276,842	5%	283,329	383,935	36%
Non-Degree	34,423	46,837	36%	51,812	85,093	64%
Total (excluding OPT)	560,251	567,039	1%	605,015	896,341	48%

Data Source: Open Doors. Institute of International Education.

The global financial crisis during Wave II resulted in severe budget cuts for the higher education sector and compelled many institutions to expand international enrollment to generate additional sources of revenue. During this wave from 2008/09 to 2015/16, the number of undergraduate students, graduate, and non-degree students increased at a swift rate (see Table 1). The enrollment growth momentum in this wave was driven by self-funded Chinese students and government-funded Saudi Arabian students.

Wave III is shaped by the uncertainties triggered by the new political order in the U.S., particularly the anti-immigrant rhetoric and policies that have raised barriers to attracting

international students. Also, increasing global competition and rising tuition costs are making it more difficult for higher education institutions to attract global learners. For example, a recent report by Studyportals, "[Megatrends Shaping the Future of Global Higher Education](#)," identified the dramatic increase in the number of English-taught programs in Continental Europe and Asia at lower tuition cost as a challenge to high-cost destinations like the U.S. and the U.K.

During both Wave I and Wave II, non-degree programs experienced a much higher growth rate as compared to undergraduate and graduate enrollment. While growing on a relatively smaller base, non-degree programs proactively responded to the emerging demand and served as a leading indicator of future degree enrollment. Yet in recent years, non-degree enrollment declined at a faster rate, too. For example, non-degree enrollment peaked at 93,587 in 2014/15 and since then has declined by 30 percent to reach 65,631 in 2017/18.

The conceptual framework of Three Waves of international student mobility indicate that the competitive landscape has evolved over the years, and that American higher education institutions face more volatility and uncertainty. To recover from the slowdown in the Third Wave, institutions must become more innovative and proactive in attracting international students and driving enrollment growth.

Strategies for International Enrollment Growth

The Fall 2018 [International Student Enrollment Survey](#) by IIE indicated that the top reasons colleges and universities cite for growth continue to be active recruitment efforts (58.1 percent), growing reputation and visibility of their institution (47.5 percent), and active outreach to admitted students (46.9 percent). Most of the professional, continuing, and online education units have a strong innovation and growth mindset to recognize the importance of investing in outreach. However, the unique contexts of international student enrollment present new challenges and opportunities to achieve desired outcomes. Here are six strategies that can support international enrollment growth to succeed in the Third Wave:

1. Promote the Destination

Until recently, American higher education institutions did not need to persuade international students about the attractiveness of the U.S. as a destination. However, in the current political climate, students are bombarded with information that often raises concerns ranging from safety to immigration policies. Jeet Joshee, Associate Vice President, International Education and Global Engagement and Dean, College of Professional and International Education at California State University, Long Beach, notes that he is pursuing a "public relations" approach to first clear apprehension and misinformation generated by rumor mills.

Joshee highlights that his focus is on aligning expectations of families and students with the realities in the U.S. and on campus. He asserts that universities cannot assume anymore that students and their families have the correct information about the quality of American higher education system and the school itself. Universities must become proactive in educating students about the attractiveness of the U.S. as a destination, Joshee explains.

2. Articulate Program Differentiation

International students currently have ample choices when it comes to attending a U.S. university or college, especially because of new models of learning, including online and lower-cost offerings in alternative destinations. This means that universities cannot be everything to

everyone and must identify and articulate what makes them unique to the target segment of students. This is the one of the strategies University of Washington, Continuum College is focusing on to differentiate itself in the minds of the prospective students it targets, primarily with its English language programming.

Sandra Janusch, Assistant Vice Provost, International & Academic Programs at University of Washington Continuum College says, “we are extensively reviewing our unique value proposition in a highly competitive market where international students are expecting more in terms of experiential learning opportunities.” She adds that the university’s expertise in the context of Seattle’s location “offers unique experiences for our students, and we intend to more actively leverage location advantage in our programs.” For example, UW’s [nine-month certificate program in global business](#) is designed for business professionals and international students to learn and apply skills in the Seattle area, as it allows for one-year of Optional Practical Training (OPT).

3. Enhance Program Relevance

Overcoming the external volatility is also about ensuring the program relevance. Kelly J. Otter, Dean, School of Continuing Studies at Georgetown University, says that her school takes a deeper view of their audience and labor market needs, matching them with the competencies that will be delivered by Georgetown program. The school uses market research, benchmarking studies, labor market trends, and job description reviews to drill down to the competencies in demand, complementing this data with the viewpoints of employers and alumni to ascertain curriculum relevancy. This allows Georgetown to have a stronger alignment of their programs with the local and global labor markets, she adds.

At the same time, gathering market intelligence is not so easy for global markets, and that’s where Georgetown’s presence in Qatar provided a deeper understanding of the region. For example, the [International Executive Master’s in Emergency & Disaster Management](#) program was specifically conceived as a global offering with international students as a core segment. Launched in Fall 2017, the program was designed based on deep insights and participation from the Middle East, and focuses on resources and systems that require global contexts. The one-year program blends online learning with five on-site residencies in Oman, Jordan, France, Qatar, and Washington, D.C. Future locations may include countries in Asia and Latin America.

4. Optimize Online Programs

While student journeys, decision-making processes, and expectations have evolved, institutional channels for recruiting and offering academic programs have lagged. Nelson Baker, Dean, Professional Education at Georgia Institute of Technology, asserts that “through online master’s degrees, we are optimizing the iron triangle of cost, accessibility, and excellence of our programs to reach qualified students worldwide.” Since its launch, Georgia [Tech’s Online Master of Science in Computer Science](#) (OMSCS) has experienced exponential growth, reaching an enrollment of 8,656 students (Spring 2019). Thirty-two percent of that total are international students from 104 countries.

Through that program, “Georgia Tech has expanded global engagement and provided a platform for students to earn a high quality, low-cost degree,” adds Baker. “The program offers flexibility and also gives students across the globe the opportunity to collaborate with and learn about diverse cultures and people.” The OMSCS program [costs about \\$6,600 over five terms](#)—

about a sixth of the cost of an on-campus degree. Following the success and approach of OMSCS, Georgia Tech launched two new low-cost programs—Online Master of Science in Analytics (OMS Analytics) and Online Master of Science in Cybersecurity (OMS Cybersecurity). Each program costs less than \$10,000.

5. Accelerate Digital Outreach

With the launch of new programs and adoption of new online and blended delivery models, the choices available for international students will continue to increase. This means that institutions must put more proactive efforts in increasing [brand awareness](#) for their programs. Among the institutions which reported growth in international enrollment in Fall 2018 in the IIE survey, the top reasons cited were 1) continue to be active with recruitment efforts (58.1 percent); 2) grow reputation and visibility of their institution (47.5 percent); and 3) active outreach to admitted students (46.9 percent).

Consider the case of [Harvard Extension School](#), which offers a wide portfolio of 900 online and on campus courses. The Extension School has the halo effect of the Harvard University, yet it does not take global outreach for granted. Huntington Lambert, Dean, Harvard Division of Continuing Education, says that the greatest minds and human potentials are distributed evenly around the world and for many international learners the only chance they will ever have to learn at Harvard is online. Harvard's efforts for strategic digital outreach in international markets is part of its mission to reach learners in many ways.

6. Partner with Stakeholders

In times of enrollment challenges, universities must also find innovative ways to expand their resource and expertise base. A good partner can facilitate the change management process to achieve common goals, says University of Washington Continuum College's Janusch. "We are becoming more active in partnering with a range of stakeholders, including vendors, employers, professional organizations, and universities, to boost expertise and become more strategic," she explains. "We often look outside academia for ideas and solutions that can help us adapt to and address our new landscape."

Likewise, Georgia Tech [partnered](#) with Udacity for the first MOOC-based degree, the OMSCS program, and it partnered with edX for the two additional degrees, OMS Analytics and OMS Cybersecurity. As Georgia Tech's Baker explains, "we collaborate with partners who have a common mission and yet bring complementary strengths. Our relationships for online programs expand the reach and impact of our mission to meet the needs of the global workforce through affordable, flexible, and accessible education."

Conclusion

Driving international enrollment growth in the Third Wave of intense competition and unfavorable political climate calls for a higher education's institution to develop innovation and proactive strategies that can address this wave's unique challenges and contexts. A set of institutional strategies that promote university destination, articulate program differentiation, enhance program relevance, optimize online channels, and partner with stakeholders can create pathways to recover from the current slow-down in international enrollment. The success of many institutions will depend on how quickly and effectively they innovate and adapt to the new environment of the Third Wave.

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