



Diversifying Enrollment

A large, smooth, light-colored rock is partially submerged in turbulent, greenish-brown water. The water is swirling and splashing around the rock, creating white foam and spray. The background is a dark, moody sky.

The Shifting Balance of Influence



Data-Driven Perspective

- Part 1 Quick Historical Big Picture and Current Leadership Headaches
- Part 2 Global/Regional Perspectives Related to Immigration Policy
- Part 3 Perspectives on Global Partnerships (TNE & TNC)
- Part 4 Enrollment Growth Perspective: How We Innovate
- Part 5 Supportive Research Underway
- Part 6 A Parting Inspiration About Why We Do This



Ben Waxman
CEO, Intead



Historical Perspective



Part 1

Fears vs. Actual

1990s

Asian Financial Crisis

2001

9/11

2009–2010

The Great Recession

2014–2016

Oil Pricing Fall

2020–2022

COVID-19

Today

Global Policy & Economic Shifts

Helpful Links

OCTOBER 28, 2020: NAFSA, APLU & INTO Report Details Factors Influencing International Student Enrollments & Maps Out Ways for Universities to Reverse Recent Declines

<https://www.aplu.org/news-and-media/news/nafsa-aplu-into-report-details-factors-influencing-international-student-enrollments-maps-out-ways-for-universities-to-reverse-recent-declines/>



Raise Your Hand If You've Seen Fear in

C Suite Level

Administrative Leadership Level

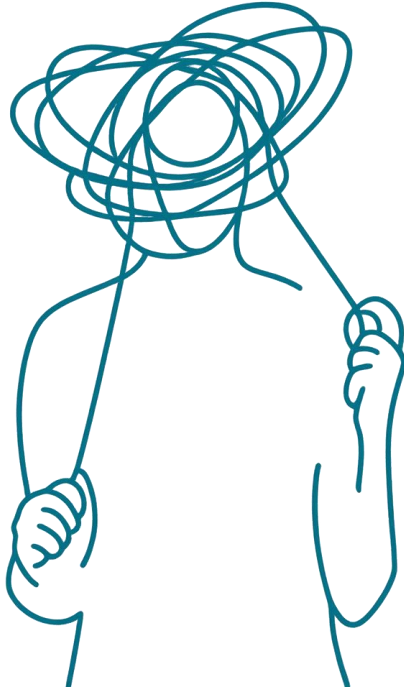
Staff Level

New Staff Level





Current Realities – Keeping Leadership Up At Night



Policy Shifts
Leadership Facing Polycrisis
Enrollment Crisis
Research Funding – RI's
Campus Social/Political Issues
State Funding – Publics (decline since 1980's)
Budget Shortfalls
Repeated Re-Prioritization

HELPFUL LINKS

CHIEF BUSINESS OFFICER VIEWS

[HTTPS://WWW.INSIDEHIGHERED.COM/REPORTS/2025/07/17/2025-SURVEY-COLLEGE-AND-UNIVERSITY-CHIEF-BUSINESS-OFFICERS](https://www.insidehighered.com/reports/2025/07/17/2025-survey-college-and-university-chief-business-officers)

INTERNAL STAFF CHALLENGES

[HTTPS://WWW.INSIDEHIGHERED.COM/NEWS/WORKPLACE/STAFF-ISSUES/2024/09/26/BURNOUT-ADMINISTRATIVE-STAFF-RISKS-DESTABILIZING-COLLEGES](https://www.insidehighered.com/news/workplace/staff-issues/2024/09/26/burnout-administrative-staff-risks-destabilizing-colleges)

KEEPING PROVOSTS UP AT NIGHT

[HTTPS://WWW.INSIDEHIGHERED.COM/NEWS/FACULTY-ISSUES/ACADEMIC-FREEDOM/2025/09/16/SURVEY-PROVOSTS-FOCUSED-FUNDING-CUTS-ACADEMIC](https://www.insidehighered.com/news/faculty-issues/academic-freedom/2025/09/16/survey-provosts-focused-funding-cuts-academic)

PRESIDENT'S VIEWS

[HTTPS://WWW.INSIDEHIGHERED.COM/REPORTS/2025/02/25/2025-SURVEY-COLLEGE-AND-UNIVERSITY-PRESIDENTS](https://www.insidehighered.com/reports/2025/02/25/2025-survey-college-and-university-presidents)

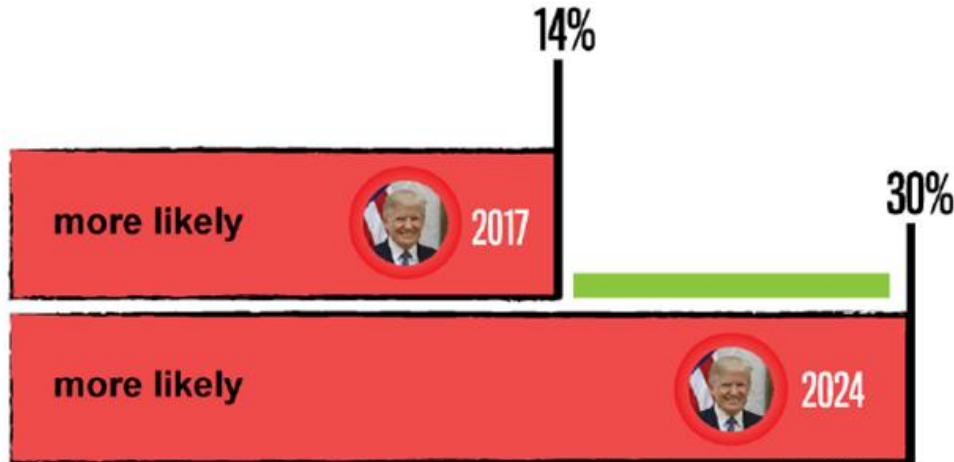
REGULATORY CHALLENGES

[HTTPS://WWW.NAFSA.ORG/EXECUTIVE-AND-REGULATORY-ACTIONS-TRUMP2ADMIN](https://www.nafsa.org/executive-and-regulatory-actions-trump2admin)



Surprising changing reactions to Donald Trump 2016 vs. 2024

Those who responded that they would be "more likely" to study in the US if Trump were elected



- Respondents are 72% graduate and post-grad level
- 20% Business & Finance

In 2024, Roughly 43% of all respondents said the 2024 election results **would NOT make a difference** in their choice to study in the US

2024 numbers



What do we know from the Data?

Part 2 Global/Regional Perspectives & Immigration Policy



Rising anti-immigration

- New peak of 700,000 international students in country

Perspective: 50% of international students in Australia come from:

- China: 22%
- India: 17%
- Nepal: 8%
- Philippines: 5%
- Vietnam: 5%

Australia



- 50,000 rejected student visa applications from Nov 23-Feb 24
 - With increased IELTS requirements for grad (6.5) and undergrad (6.0) applicants
 - Goal is “Genuine Students”: increase quality and seriousness of incoming students who are there to study, not just get a job – 16 university chancellors signed a letter decrying these changes saying the new policies represent more than \$300M in lost revenue just this year.
 - Result is 8% drop in applications: Students are opting to apply to other countries.



More rising anti-immigration

- New peak of 460,000 international students in country

Perspective: international students in Germany come from:

- India: 9%
- China: 9%
- EU: 6%
- Syria: 3%
- Austria: 3%
- Turkey: 3%

- Skilled labor shortages prompt new student work policies
 - Allowing students to work more each year and defining a pathway to employment and permanent residency in key industries (tech, healthcare, education, construction (civil engineering))
- Far right party (AfD) gained significant ground in the last election cycle
 - **Roughly 20% support** according to in-country polls. Not dominant, but recent growth with a focus on anti-immigration and security issues.

Germany





Similar to Germany but stronger

- 415,000 international students in France with 17% growth over the past 5 yrs
 - This figure represents 14% of all French higher ed students

Perspective: Top source countries for international students in France:

- Morocco: 11%
- EU: 10%
- Algeria: 8%
- China: 6%
- Tunisia: 3%

- 31% of population supporting far-right anti-immigration stance
 - Rising national identity politics
 - Stronger policies around international students learning French language as requirement to move along the employment path





Similar to Germany and France

- 115,000 international students in the Netherlands
 - This figure represents 23% of all dutch higher ed students

Perspective: Top source countries for international students in Netherlands:

- Other EU (excluding Germany): 52%
- Germany: 21%
- China: 4%
- India: 3%

Netherlands

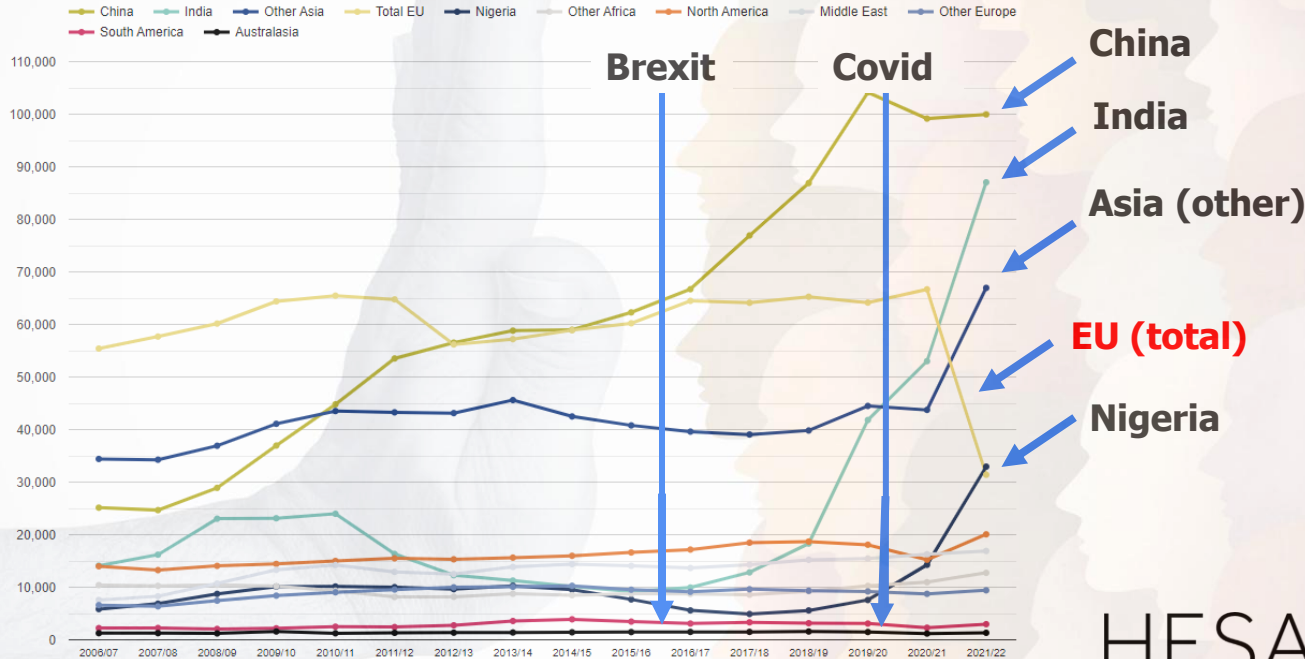


- 23% of population support the PVV far right group with anti-immigration positions.
 - Stronger policies around learning Dutch language as student requirement



What did Brexit do to UK Enrollment?

First year non-UK domiciled students by domicile
Academic years 2006/07 to 2021/22



HESA

Source: Higher Education Statistics Agency (HESA), January 2023. <https://www.hesa.ac.uk/data-and-analysis/students/where-from>



Agent Oversight and housing woes

- New peak of 1M+ international students in Canada

Perspective: Top source countries for international students in Canada:

- India: 41%
- China: 10%
- Philippines: 5%
- Nigeria: 4%
- France: 3%

Canada



- 2 year cap on undergrad enrollment in public institutions
 - Not applicable to grad level/PhD level
 - Not applicable to private institutions
 - PR blow to Canada: Indian applications to Canadian institutions have taken a serious hit
 - There are 436 higher ed institutions in Canada nearly evenly split between public and private



TNE & TNC Perspectives (Transnational Education & Transnational Campuses)

Southeast Asia has become the world's largest regional hub for UK higher education overseas – accounting for 100,000+ enrolments annually and generating income of USD \$500 million each year.

Andrew Millar

VP at Australian Centre for Education
(ACE, IDP Education)

[Source](#)

1. De Montfort University Cambodia
2. Teesside University
3. Brunel University London
4. University of Warwick
5. University of Nottingham
6. University of Reading
7. Heriot-Watt University
8. University of Nottingham
9. Coventry University
10. King's College London (KCL)
11. London School of Economics (LSE)
12. Newcastle University in Singapore
13. University of Glasgow Singapore
14. University of Manchester (UoMSEA)
15. University of Warwick
16. Newcastle University Malaysia
17. University of Reading
18. University of Southampton
19. Manchester Metropolitan University
20. Lancaster University



**Top 20 British
Universities in
SE Asia 2025**

Part 3 Global Partnerships



TNE & TNC Perspectives

(Transnational Education & Transnational Campuses)

Universities recently confirming plans to open branch campuses in India

- 9 UK universities
- 7 from Australia
- 1 from US
- 1 from Italy

A range of companies are assisting/providing counsel on market entry aspects of this cross-border activity.

Beth Kenedy

PIE News 12/24/25

[Source](#)

India





TNE & TNC Perspectives

(Transnational Education & Transnational Campuses)

- 4 Universities recently approved to open campuses in country following 2024 change to local laws
- 3 UK universities
- 1 from Cyprus

Beth Kenedy

PIE News 1/12/26

[Source](#)

Greece





TNE & TNC Perspectives

(Transnational Education & Transnational Campuses)

- 122 TNE partnerships announced in December 2025
- 23 of them are with UK Universities
- 21 from Russia
- 8 from US
- 8 from Australia
- 8 from Italy

British Council 1/7/26

[Source](#)

China





TNE & TNC Perspectives

(Transnational Education & Transnational Campuses)

Why TNE ventures fail:

- Misaligned programmes
- Pricing that collapses under scrutiny
- Unclear academic ownership
- No one quite responsible for outcomes

India is not seeking validation from foreign institutions.

It is seeking capacity, quality, and relevance at scale.

Institutions that understand this are designing delivery models backwards from student outcomes and labour market needs, rather than exporting legacy structures.

Those that do not will struggle.



Siddharth Iyer
COO at OneStep Global

[Source](#)



TNE & TNC Perspectives

(Transnational Education & Transnational Campuses)

Success Focus (it's about careers)

- Google just invested \$10B investment in India to build its AI infrastructure
- Microsoft invested \$17.5B
- Amazon invested \$35B

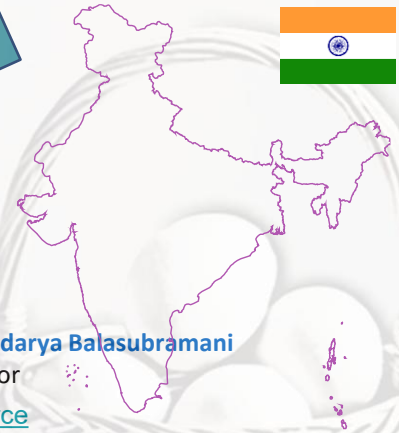
→ A mid-level AI engineer in India makes \$30K-\$55K

→ The same person in the U.S. makes around \$180K-\$250K

→ India graduates 850,000+ engineers every year

→ The U.S. graduates ~140,000

70% Less





TNE & TNC Perspectives

(Transnational Education & Transnational Campuses)



Pricing Challenge

(Localizing the cost/value of a degree)



Will our train be coming?

Part 4 How We Innovate

intead®





2024 Predicted Global Growth Rate

Rationale



11.20%

Other countries have run out of room and the US has plenty (plus US reputation for quality).
~670,000 new students/year



4.20%

Tied to country GDP analysis.
~250,000 new students/year



20-25%

New restrictive immigration policies in Canada, Australia, and UK (per 6/6/24 regulatory disclosure)



All of this matters and...

- None of this matters
- Data guides your decisions about how to grow
- Growth comes from innovation – making changes

Here's
what we're
gonna do
to get our
train to arrive...



Consider What We Control AND Plan for Adversity



The Entrepreneur Challenge within Academia

*A 2021 survey of chief academic officers
at institutions of all kinds...*

*69% believe any new funds for academic programs
will need to come from reallocation
rather than new revenues.*

~ 2021 survey conducted by Hanover Research and Inside Higher Ed



Why do we try to innovate?

- To improve (anything)
- To develop market opportunity (revenue growth, market share)
- To differentiate –
essential in a market suffering from the sea of sameness
- To feel like we are making a difference –
demonstrating our value as leaders



What stops us from innovating?

- Don't know where to start
- Leadership doesn't see the opportunity
- No funds available to invest in growth
- Don't have a team available to do the work
- Past efforts have failed (and folks have long memories)



Let's Apply What We Know

- **Competition in the Marketplace prompts: Differentiation**
 - Academic Program Options
 - Programs available
 - Delivery (on campus, online, or hybrid)
 - Messaging/Content
 - Dissemination channels
 - Pricing

Incremental

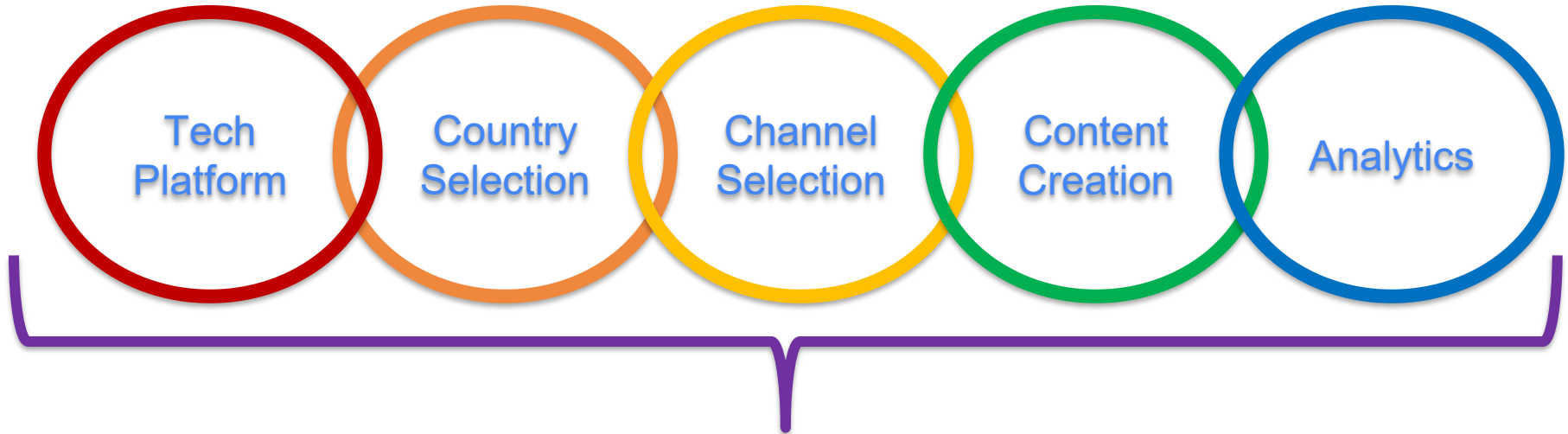
← YOU

far less exciting, less respected,
more practical, AND higher rate of success (over time)

intead



Enrollment: Build a Reliable Enrollment Marketing System



Staff Skills To Perform Well In Each Area



Use data to help you plan

External Sources (basic starting points)

- IIE
- IMF and World Bank
- CIA
- IPEDS
- British Council
- UNESCO
- Ministry of Education (per country)
- Linked In (global partnership contacts, global alumni)



Use data to help you plan

Internal Sources

- Admitted Not Enrolled Survey – helps identify target messaging
- International Student Focus Groups – helps identify messaging and channels
- Tracking Incomplete Applications – helps convert previously engaged leads
- Inquiry/Lead Engagements (international fair leads and email campaign open rates and click rates) – helps identify best engagement marketing
- Social Media/CRM Analytics – helps identify best engagement marketing
- Enrollment data (where your current enrolled students are coming from by country and lead source, what they are studying, whether they are a good fit)



Use data to help you plan

- Website design
- Travel decisions
- Global partnership network (universities, agents, other allies)
- Messaging per country
 - Social media/digital advertising
 - Email content
 - Website content/landing pages
- Alumni participation

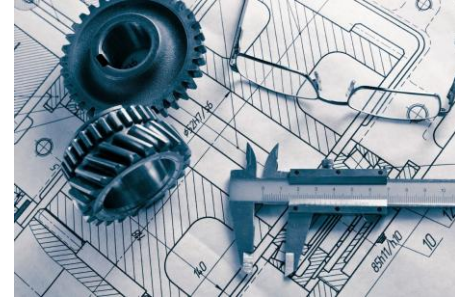


Considerations: Economic Opportunities/Challenges






Considerations: Economic Opportunities/Challenges



Students As Messengers

A photograph of three young women standing on a campus path, taking a selfie. They are seen from behind, with their arms around each other. The woman on the right is holding a smartphone up to take the picture. They are all wearing backpacks. The background is a blurred outdoor setting with trees and a person walking in the distance.

User-generated content can generate 6.9x higher engagement than brand generated content on Facebook

Source: Mavrk 2/17

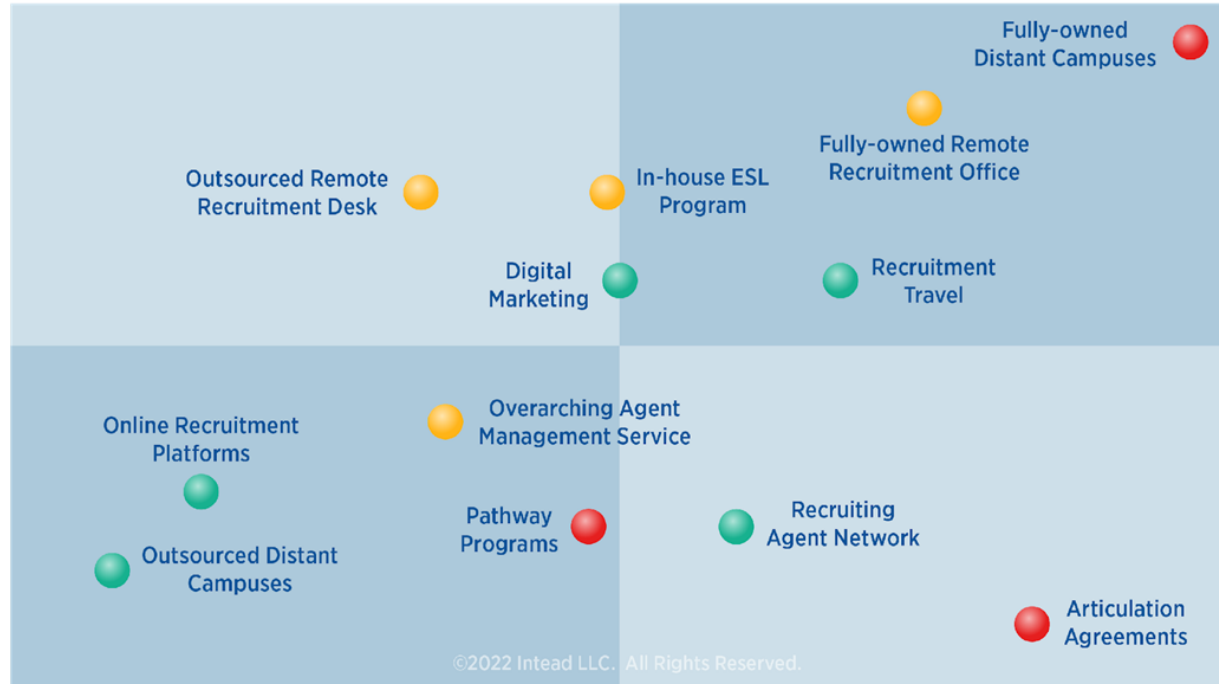
© 2024 Intead. All rights reserved.



Considering 12 Recruitment Options and Flexibility

More \$

- Highly flexible option
- Somewhat flexible option
- Inflexible option



Access the blog post for more perspective (click or scan)

©2022 Intead LLC. All Rights Reserved.

Less \$



Success means you won't/can't be all things to all people



Strategy requires tradeoffs

Most institutions are so worried about whom they won't attract that they never ask whom they are best situated to attract.

~ Brian Rosenberg, former president Macalester College



G-STIC Framework



Source: Alexander Cherney, Professor,
Kellogg School of Management, Northwestern University



Internationalization areas ripe for innovative change

Lower Resource Demands

- **Alumni** – engagement in international student recruitment
- **Career services** – employer relationships and real student connections
- **Lead nurture** communications/processes that lead to conversions
- **Leverage tech** more effectively (could include use of AI, but be careful here)

Higher Resource Demands

- **Market access** – strategic approach to different regions globally (recruitment & partnerships)
- **Scholarship models** – funding targeted growth (recruitment & study abroad)

Not this...



An aerial photograph of a large container ship and a tugboat on the ocean. The container ship is the central focus, moving from the top left towards the bottom right. It is heavily loaded with multi-colored shipping containers (red, blue, green, white, and orange) stacked on its deck. A white superstructure is visible at the top left of the ship. A smaller tugboat is positioned to the left of the container ship, connected to it by a thick rope, likely assisting with its movement. The water is a deep blue with white foam from the ship's wake. The word "Incremental" is overlaid in large white text in the upper right quadrant.

Incremental



Turning Challenges Into Opportunities

- 1. Challenge:** Lack of financial resources to pursue internationalization
✓ **Opportunity:** Success here can support other areas that are financially challenged
- 2. Challenge:** We are supposed to support our local community, e.g., California
✓ **Opportunity:** Bringing international to campus (including COIL) expands local community capabilities. Workforce increasingly interacts globally.
- 3. Challenge:** Leadership has too many other distractions/priorities, e.g., the physical plant is a mess, domestic enrollment is falling
✓ **Opportunity:** How do we solve someone else's problem? SIO's need the authority to drive forward with leadership buy-in support. SIO's can take on the responsibilities and the heat.
- 4. Challenge:** Core mission is not being served by bringing international students in or internationalizing the curricula. It is about sending our students abroad.
✓ **Opportunity:** Bringing international to campus impacts a much larger domestic student cohort on campus as well as the larger community. Most Americans do not have passports.
- 5. Challenge:** Lack of awareness or no global mindset, e.g., campus leadership does not have a passport / has never left the country
✓ **Opportunity:** Find your partners who ARE aware. Align your allies. Build a grassroots movement of champions.
- 6. Challenge:** Campus structure is decentralized, so no one has the power to prioritize anything. People who are in charge of international are not committed to international.
✓ **Opportunity:** Take ownership. Ask for forgiveness rather than permission.

Ideal State

Technology:

**you are automating contact,
capturing and nurturing leads**

Audience Segmentation:

**you are segmenting your lists and content by
ESL, UG, Grad, Certificates, Post Grad**

Processes & Staffing:

**you have the right tasks in the right departments
and in the right hands**

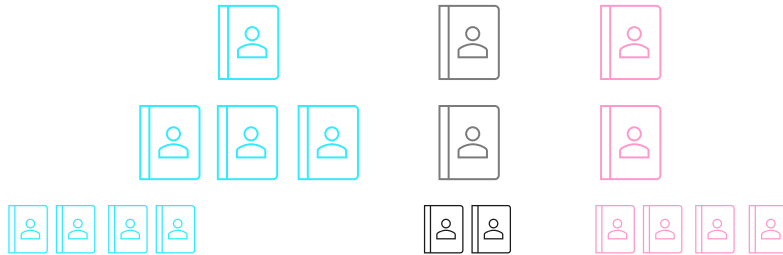


Keep being that durable, powerful tug



**Our field lacks
organizational models and
related outcomes data
that support investment decisions.**

Part 5 Supportive Research



**What if you could benchmark
your structure and outcomes
against peer institutions?**



Register to Receive Details



2-year research initiative



**gather internationalization process
and outcomes data
from 100 US institutions** (at a minimum)

**Our data will provide comparative perspective
within institutional categories**



Register to Receive Details




The information we will gather

1. Relationship of internationalization efforts to strategic plan, if any
2. Staff that directly impact international student enrollment & internationalization
3. Aggregated investments (recruitment budget, salary budget)
4. Net revenue of international student enrollment numbers
5. # of students studying abroad
6. International partnerships (research and other alignments)
7. # of exchange students/scholar students
8. Branch campuses outside the US
9. COIL Participation

9 Inquiry Areas fall into 4 Buckets

1. Strategy Definition
2. Enrollment
3. Study Abroad
4. Partnerships





“You helped bring us to this moment, because when channels between governments have narrowed, it is often business leaders, leaders in the educational sector, and broader leadership who continue to build new possibilities and partnerships.”

Canadian PM Mark Carney
Canada-China Business Council Dinner
in Beijing on January 16, 2026