



Association of Independent
School Admission Professionals

Webinar Series
September 28, 2022

Unpacking the International Student Landscape

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What's Ahead

Landscape

Becoming Futurists

Strategic Framing



Shifting Sands

Adaptable

Agile

Landscape

The Numbers: K12

- Enrolment
- Retention
- Support
- Strategies

Landscape

Chat box reflection

How would you describe your international student (F1) enrolment for this year? Great, ok, disappointing.

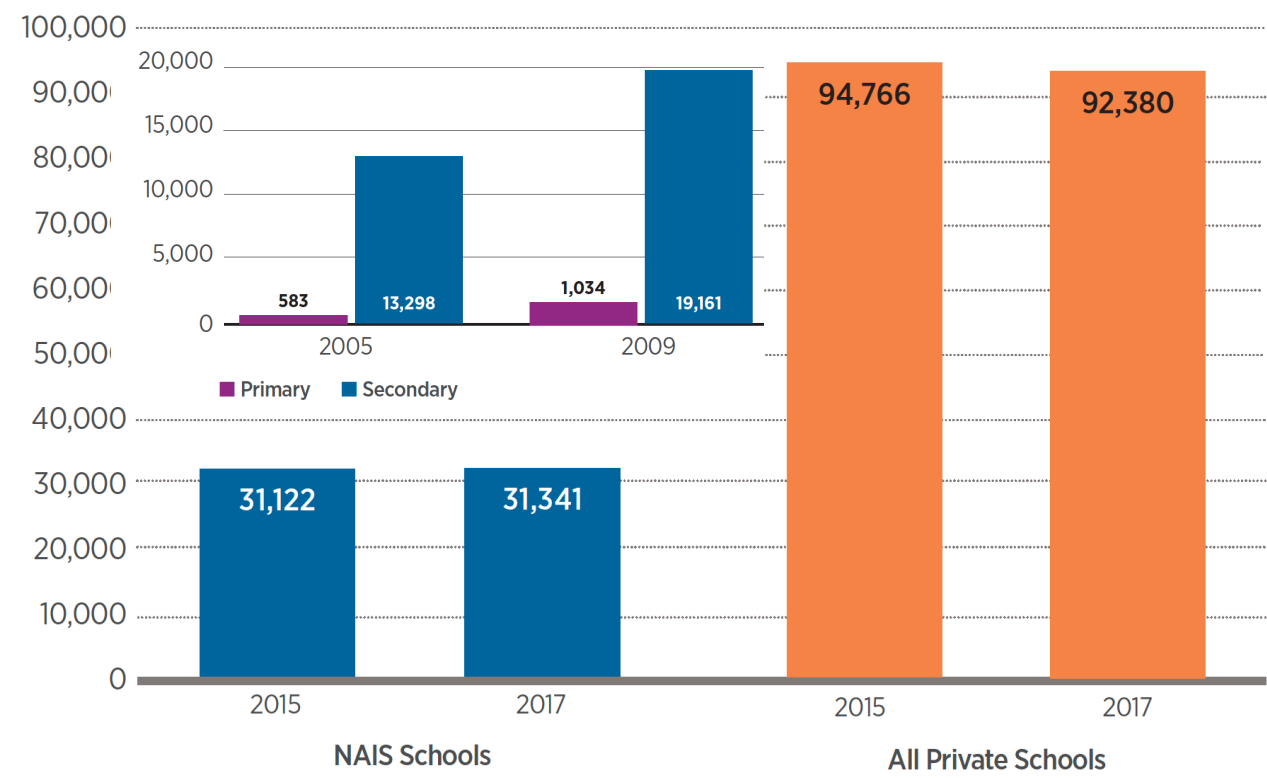


“The truth is good, but interesting is better.” (As told to Christopher Walken | NYT 2-4-22)

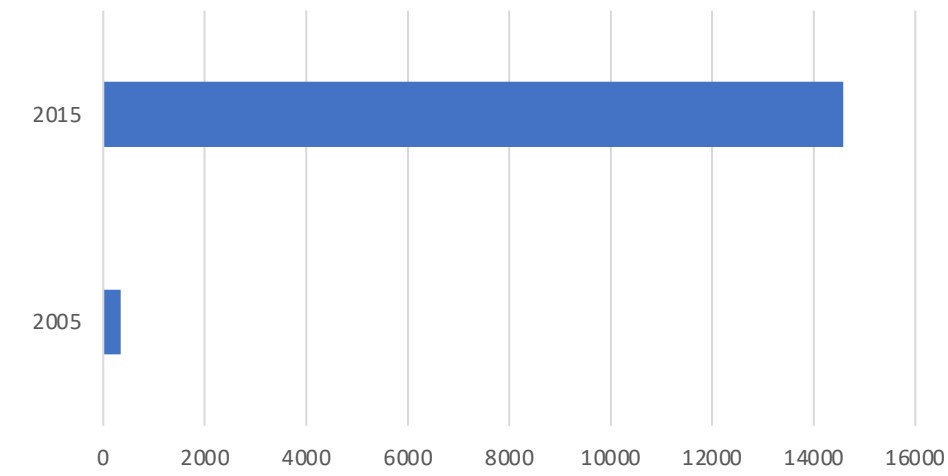
Enrolment



FIGURE 1: International Students With F-1 Visas at NAIS and All Private Schools



Chinese Students@NAIS Schools



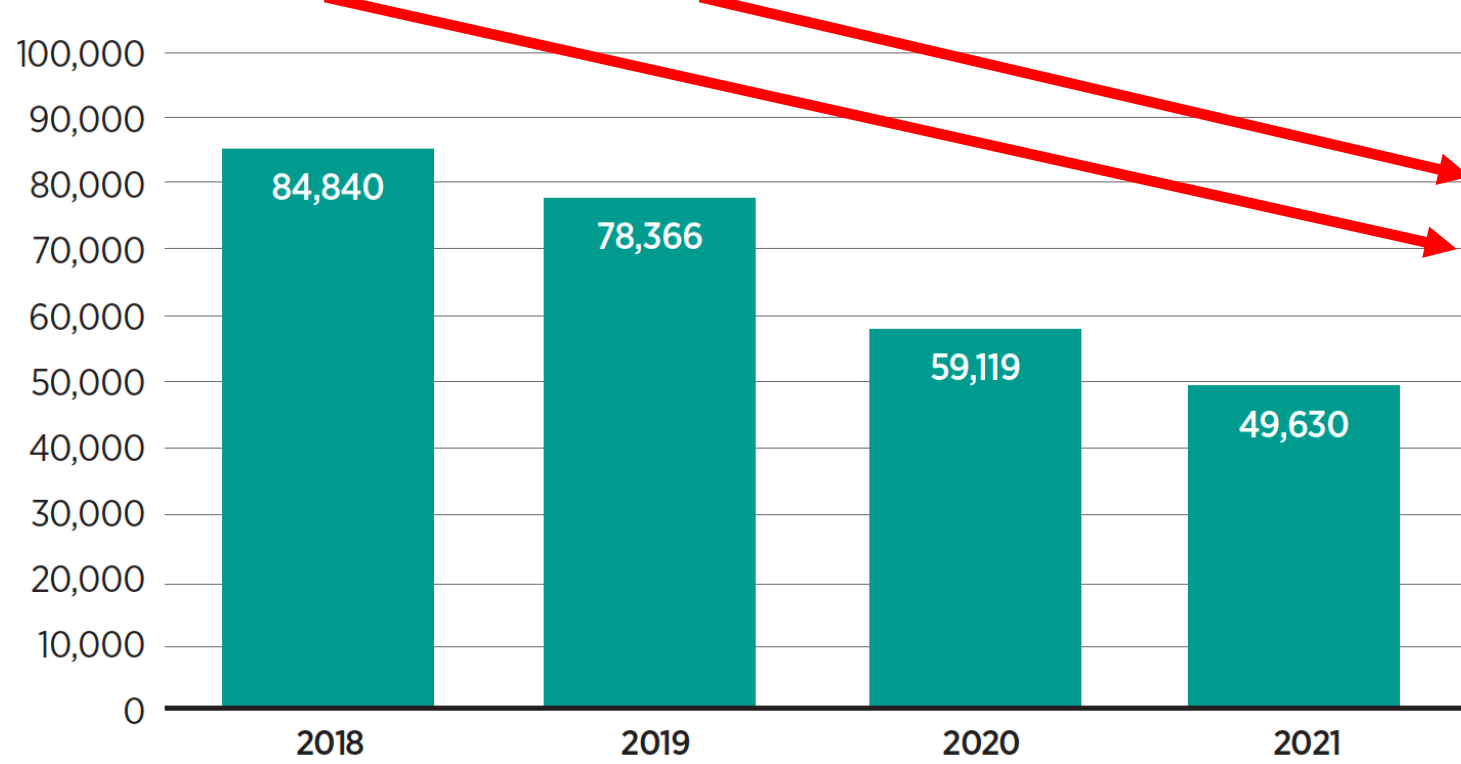
Source: Student Exchange and Visitor Program (SEVP), "Special Report for NAIS on F-1 International Students in Private Schools 2015-2017"

Enrolment



FIGURE 1

INTERNATIONAL (F-1 VISA) STUDENTS IN K-12 SCHOOLS IN THE UNITED STATES, 2018-2021



Chinese Students 66% decline
Total 41.5% decline

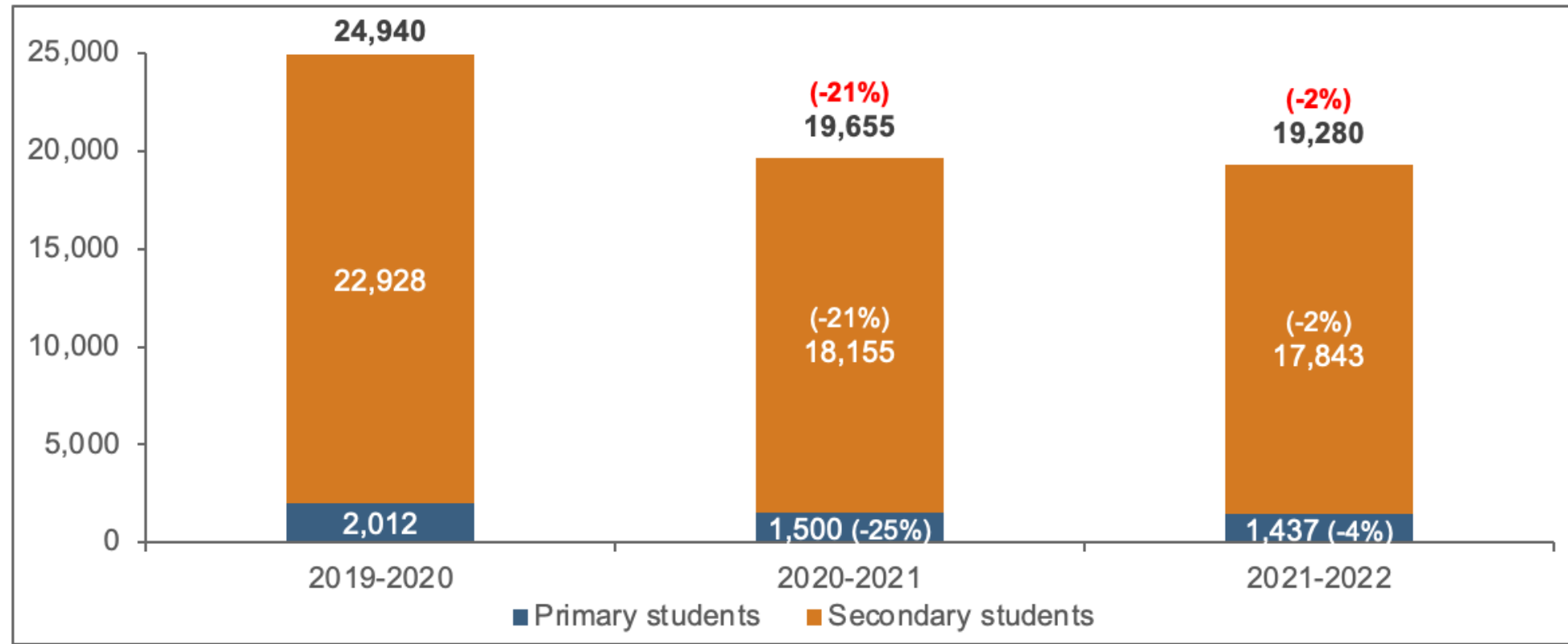
	'18	'21
CN	50%	37%
SK	8.6%	8.7%
MX	3.3%	7%
VT	7.1%	6.7%

Source: NAIS, based on Student and Exchange Visitor Program (SEVP), "SEVIS by the Numbers Reports," 2018, 2019, 2020, and 2021



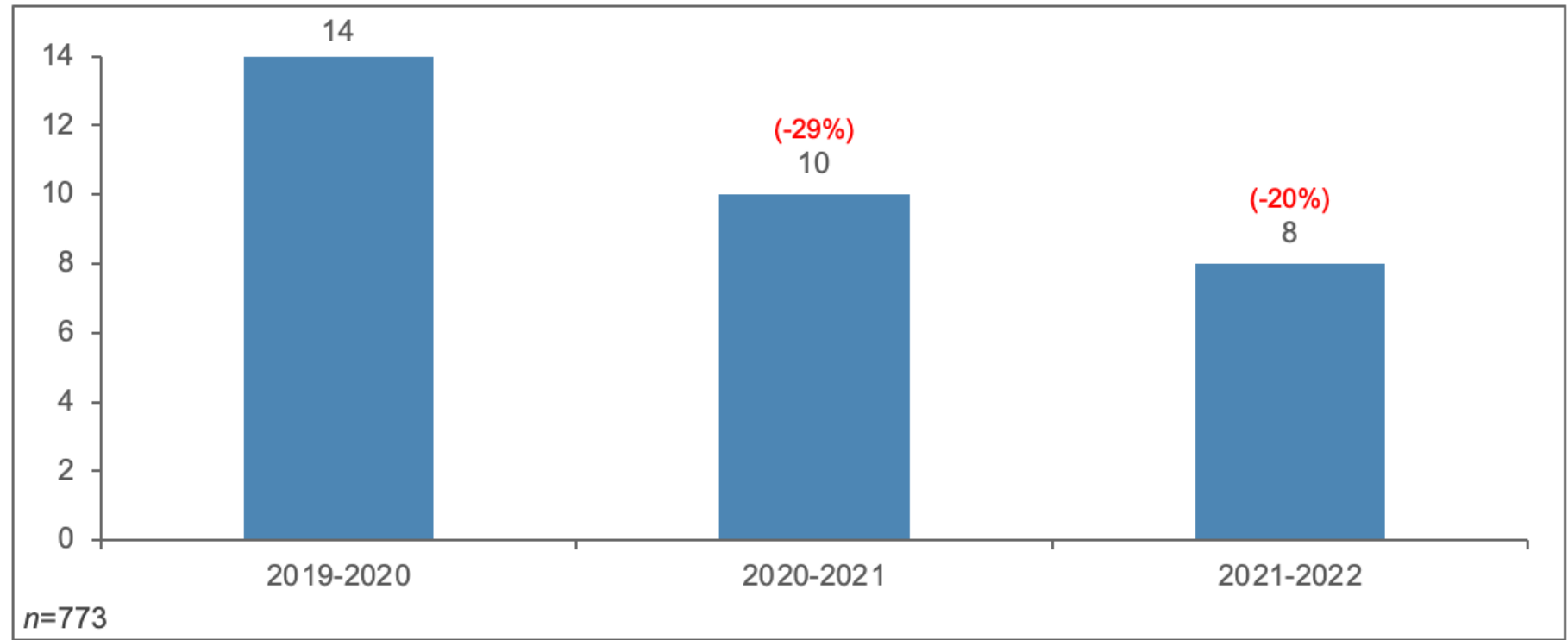
Enrolment

Change in number of students on F1 visas at NAIS member schools, 2020-2022



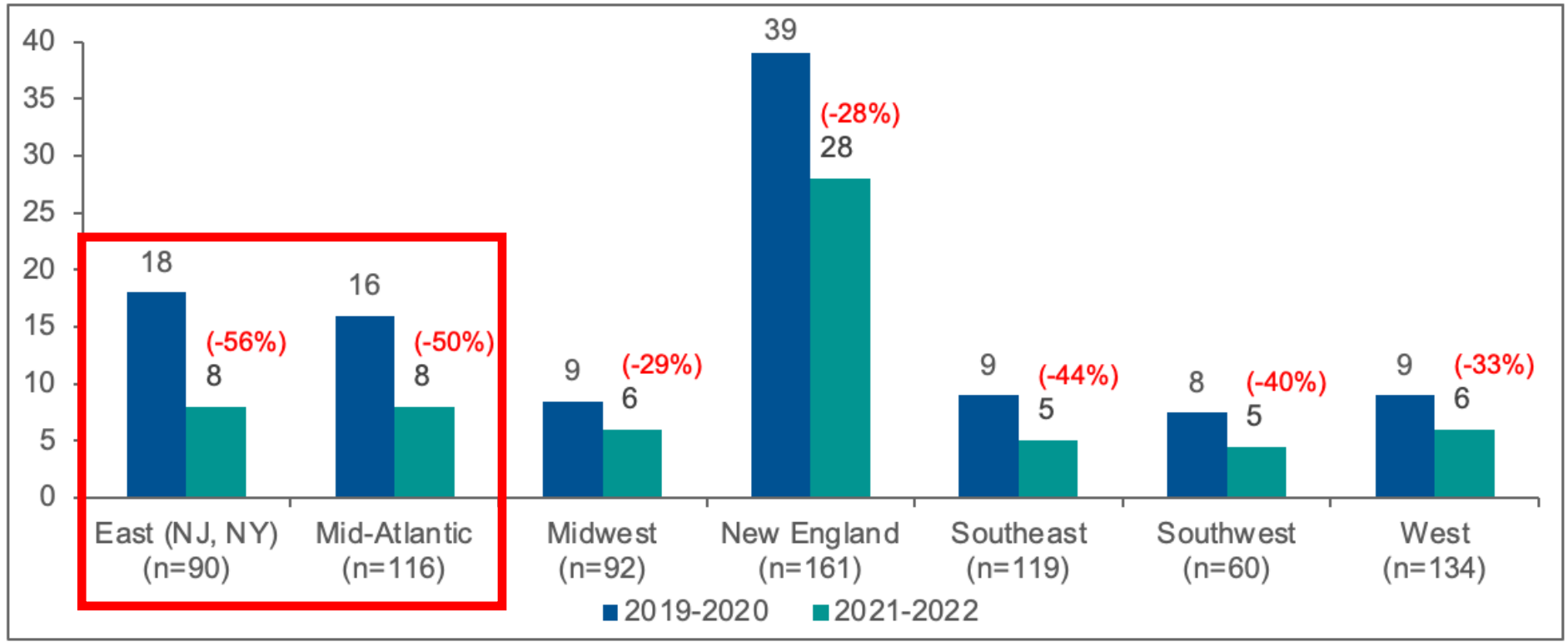
Enrolment

Median number of international students in independent schools, 2020-2022



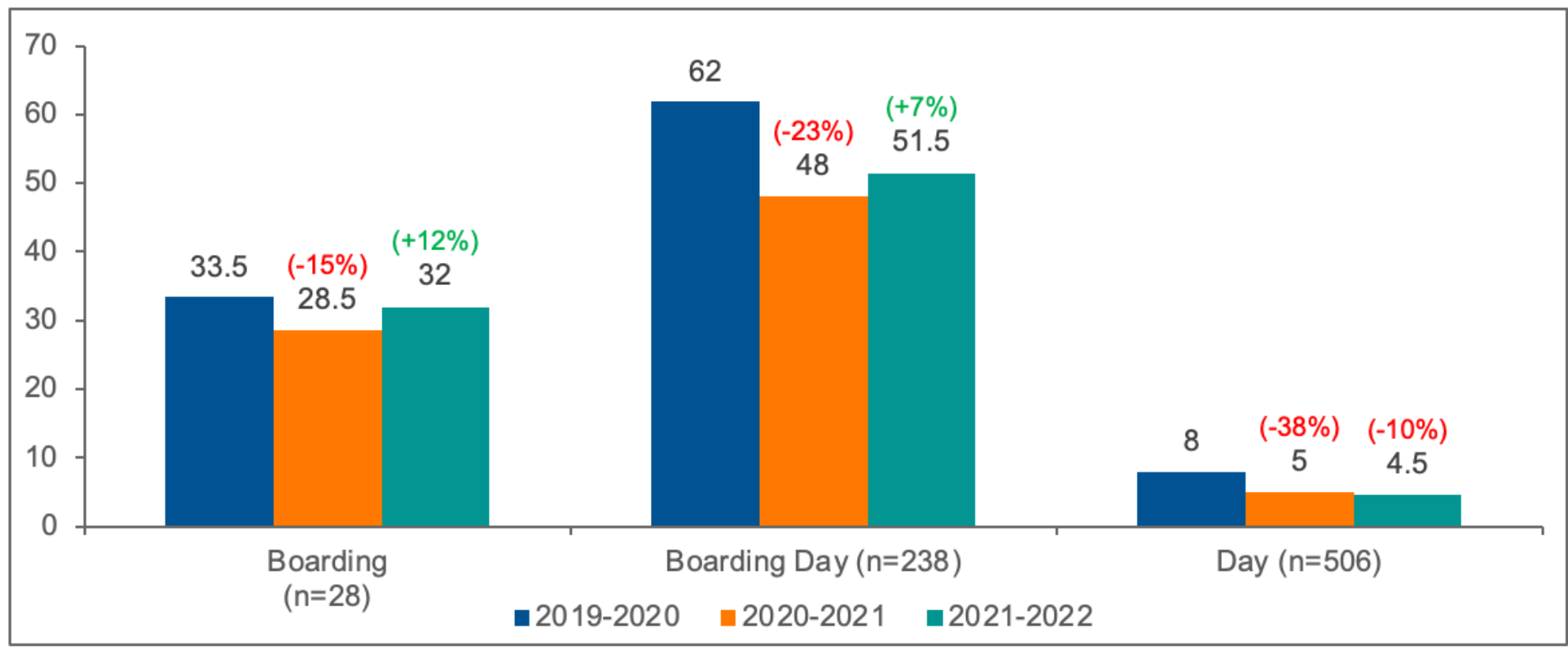
Enrolment

Median number of international students at independent schools by region, 2020 vs. 2022



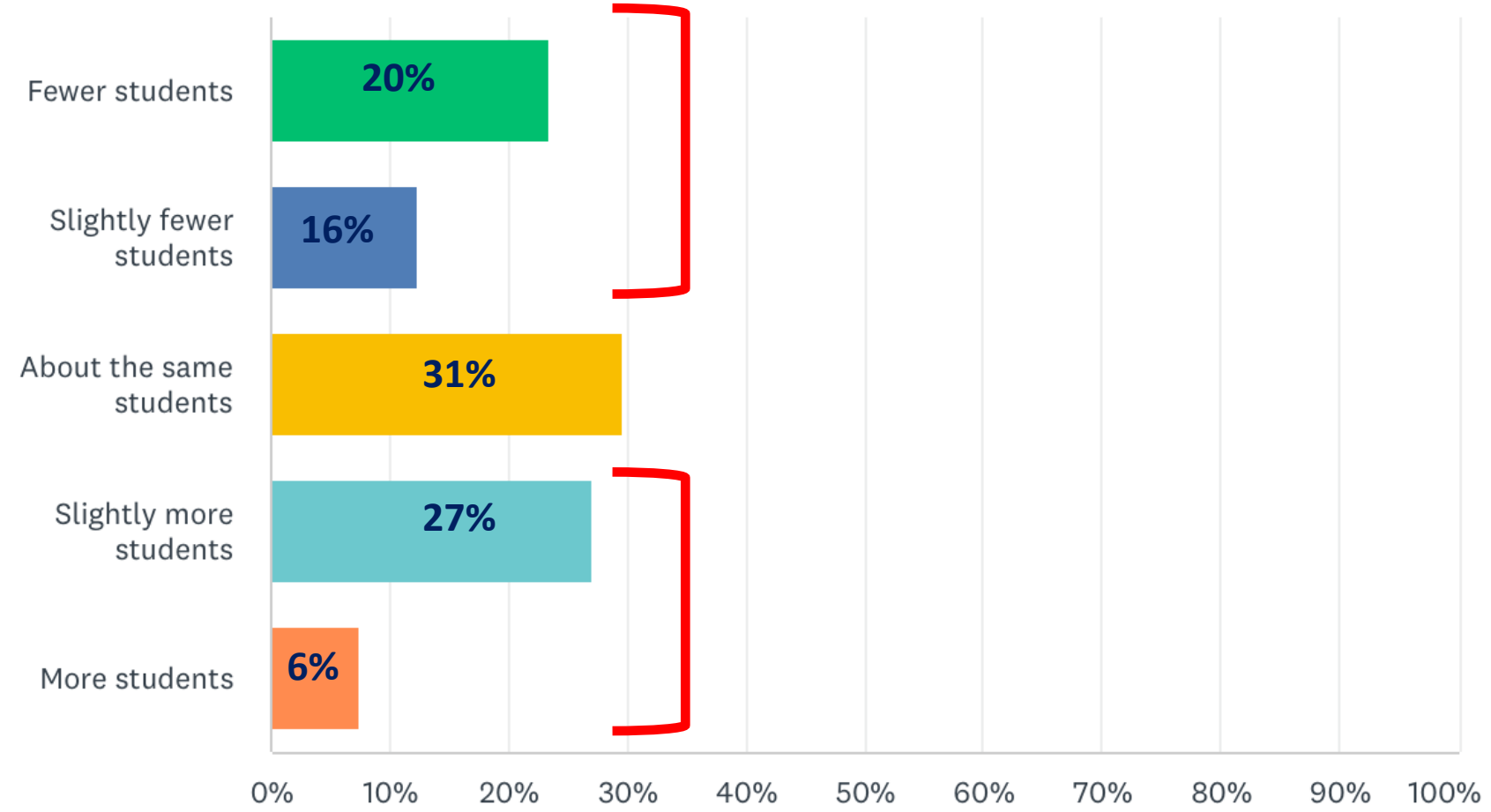
Enrolment

Median number of international students at independent schools by type of school, 2019-2020 to 2021-2022



Enrolment

Compared with this time last year (August 2022 vs August 2021), how would you describe your **total** international student enrollment?



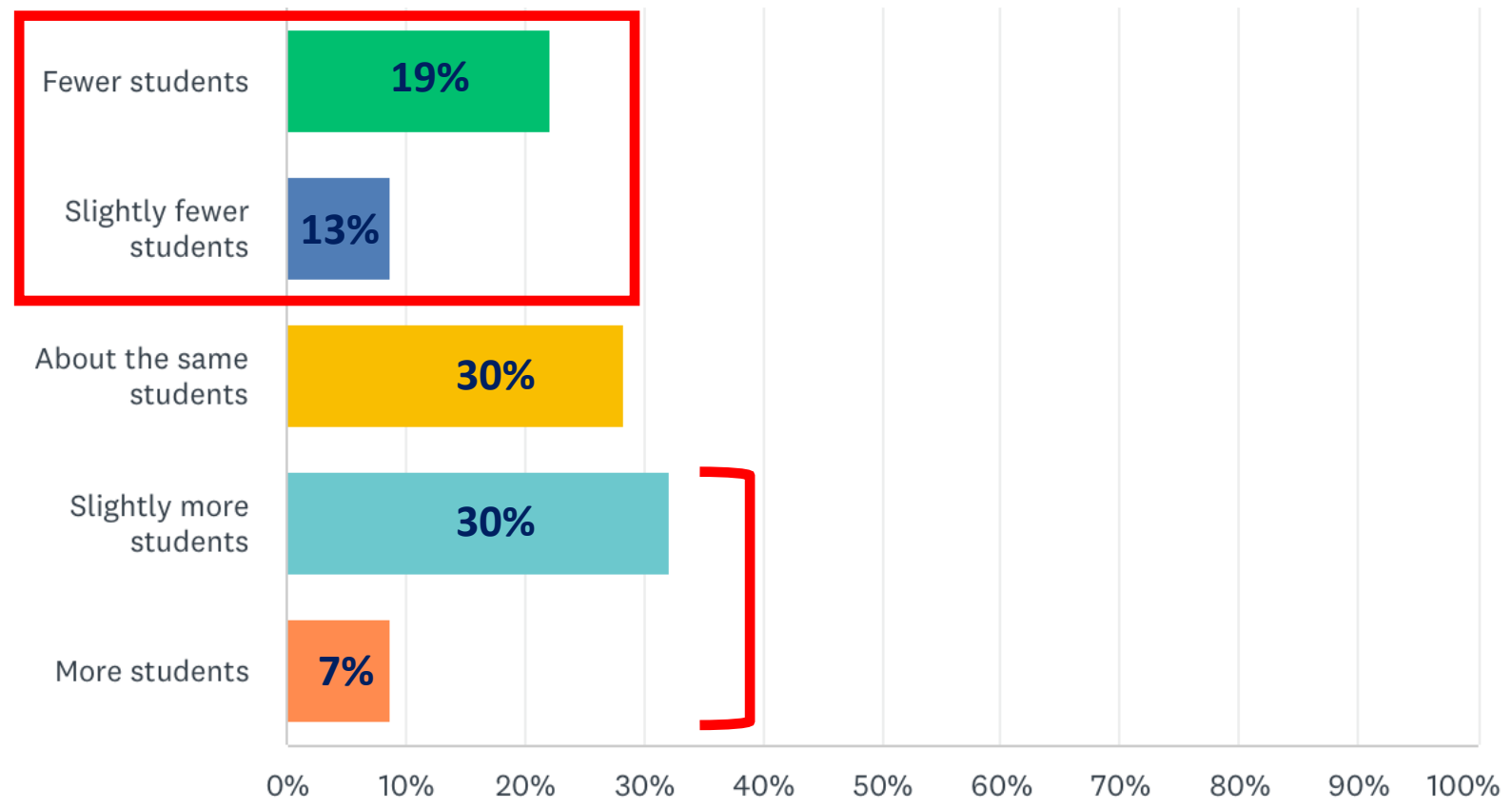
Enrolment

Compared with this time last year (August 2022 vs August 2021), how would you describe your **total** international student enrollment for the following countries?

	FEWER STUDENTS	SLIGHTLY FEWER STUDENTS	ABOUT THE SAME	SLIGHTLY MORE STUDENTS	MORE STUDENTS	N/A - DO NOT ENROLL STUDENTS FROM THIS COUNTRY	
China	29.46% 33	11.61% 13	39.29% 44	10.71% 12	4.46% 5	4.46% 5	
South Korea	12.84% 14	3.67% 4	22.02% 24	13.76% 15	1.83% 2	45.87% 50	
Mexico	7.34% 8	7.34% 8	25.69% 28	7.34% 8	0.92% 1	51.38% 56	
Canada	5.50% 6	3.67% 4	28.44% 31	14.68% 16	0.92% 1	46.79% 51	
Vietnam	6.42% 7	10.09% 11	22.94% 25	6.42% 7	3.67% 4	50.46% 55	
Japan	6.42% 7	6.42% 7	21.10% 23	8.26% 9	1.83% 2	55.96% 61	
Brazil	3.67% 4	2.75% 3	22.94% 25	9.17% 10	3.67% 4	57.80% 63	

Enrolment

Compared with this time last year (August 2022 vs August 2021), how would you describe your **new** international student enrollment for 2022-2023 compared to 2021-2022?



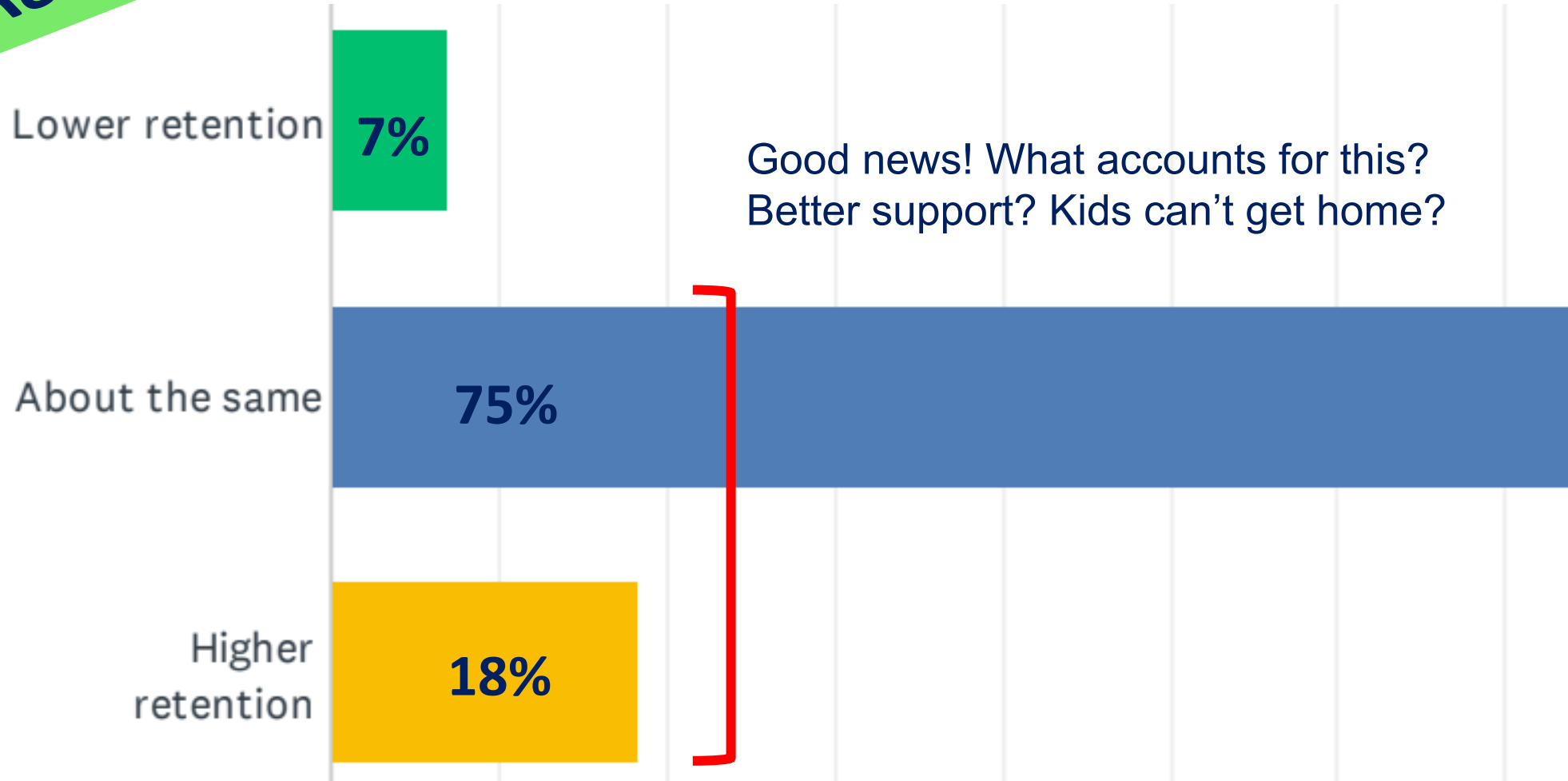
Enrolment

Compared with this time last year (August 2022 vs August 2021), how would you describe your **new** international student enrollment for the following countries?

	FEWER STUDENTS	SLIGHTLY FEWER STUDENTS	ABOUT THE SAME	SLIGHTLY MORE STUDENTS	MORE STUDENTS	N/A - DO NOT ENROLL STUDENTS FROM THIS COUNTRY	TOTAL
China	33.04% 37	8.04% 9	30.36% 34	18.75% 21	5.36% 6	4.46% 5	112
South Korea	12.04% 13	3.70% 4	25.00% 27	12.96% 14	0.93% 1	45.37% 49	108
Mexico	7.34% 8	9.17% 10	25.69% 28	4.59% 5	2.75% 3	50.46% 55	109
Canada	6.48% 7	5.56% 6	27.78% 30	13.89% 15	0.00% 0	46.30% 50	108
Vietnam	8.41% 9	9.35% 10	21.50% 23	6.54% 7	3.74% 4	50.47% 54	107
Japan	10.19% 11	4.63% 5	21.30% 23	8.33% 9	1.85% 2	53.70% 58	108
Brazil	3.70% 4	3.70% 4	21.30% 23	11.11% 12	3.70% 4	56.48% 61	108

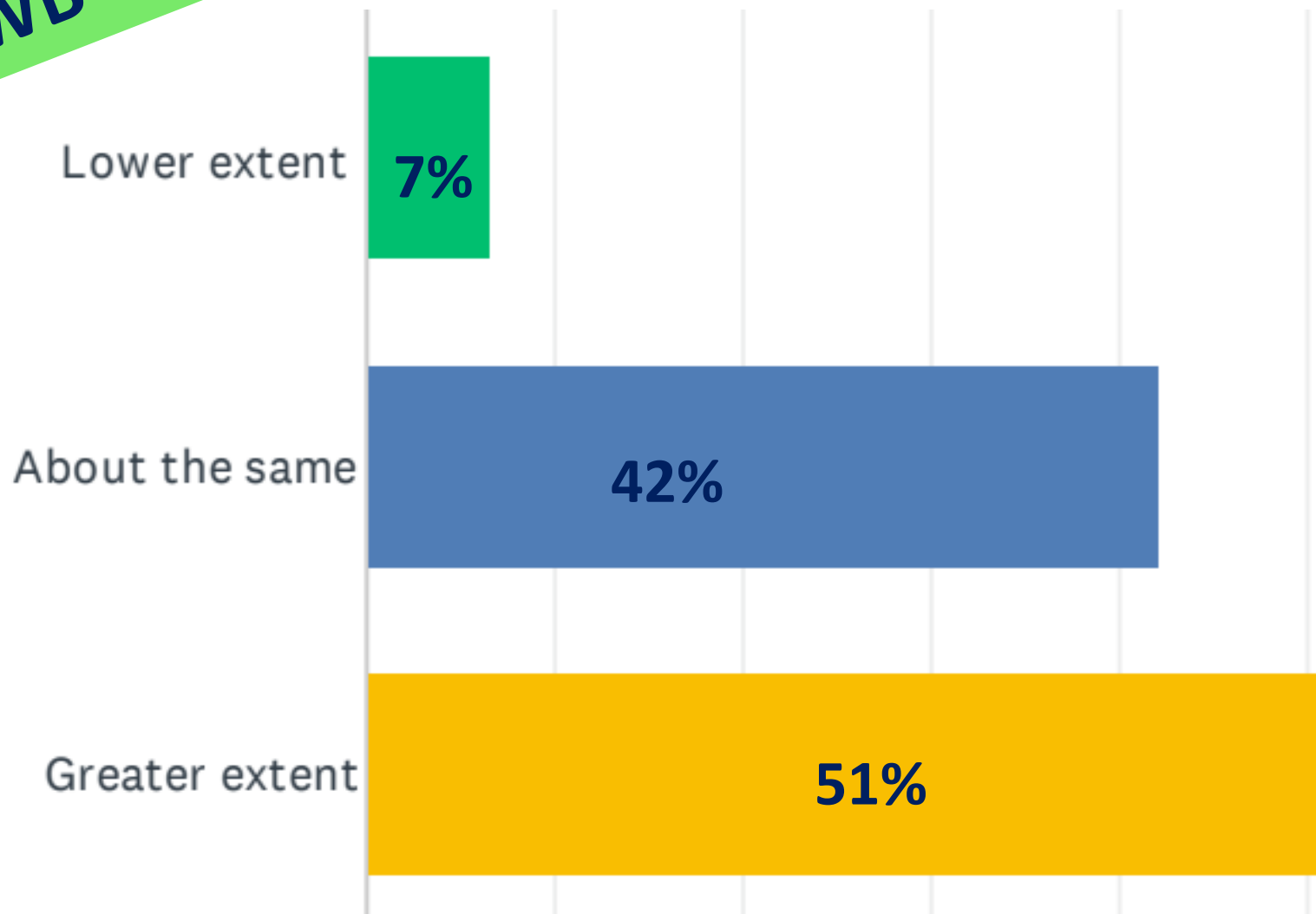
Retention

NAIS Popup Survey April 2022 **Retention 2019-20 vs 21-22**



HWB

NAIS Popup Survey April 2022 **Students Seeking HWB Support** 2019-20 vs 2021-22



What type of support vs 2019-20?

HWB

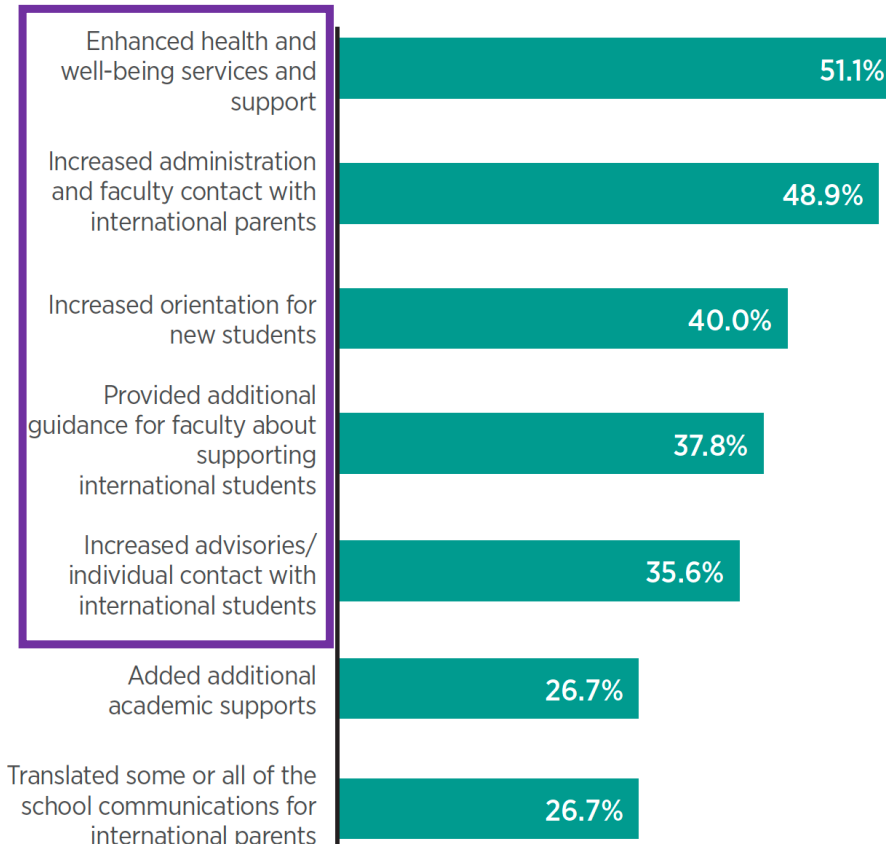
NAIS Popup Survey April 2022

TRENDING Since 2018, international student enrollment has risen in many U.S. schools, including NAIS schools, and in their enrollment.
Recruitment and retention strategies, including an increase in faculty-based support, are being used to address the challenges of international student enrollment.

NAIS schools are providing support for health and well-being support for international students.

FIGURE 6

PERCENTAGE CHANGE IN TYPES OF SUPPORT FOR INTERNATIONAL STUDENTS, 2019-2020 TO 2021-2022



Chat box reflection

What admission strategies might you adopt or enhance based on these changes?

Landscape

Markets

- U.S. as Destination
- What Parents Want
- Top 5 Markets
- Competition
- Insights
- China

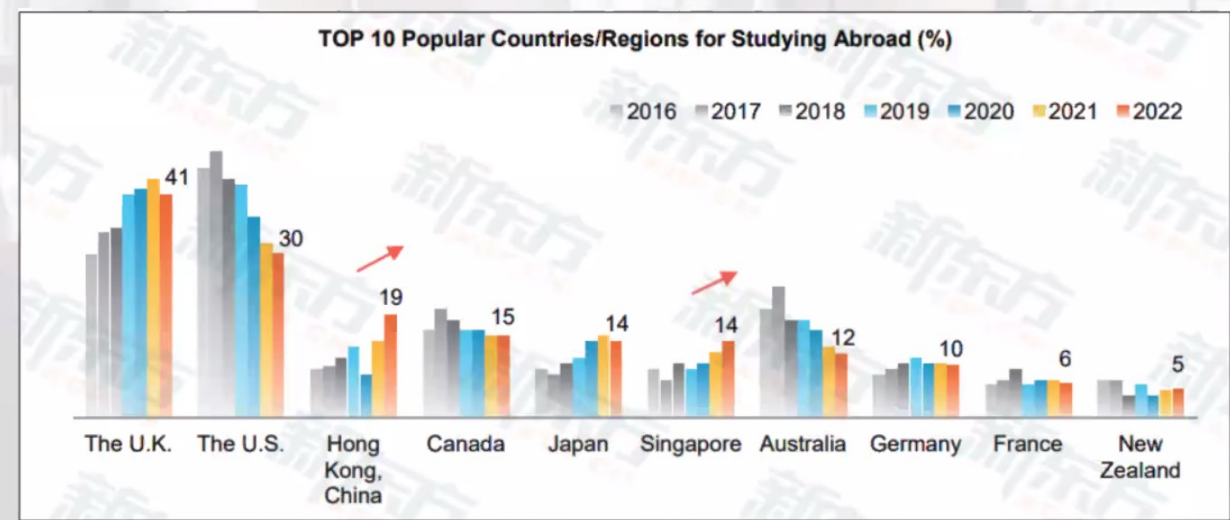
U.S.A.



Drivers of study abroad

UK Still Leads, but USA Gaining Ground

Recent survey data indicate that interest in the UK as a preferred study destination may have peaked among Chinese students and parents, while the US continues to edge out other popular destinations



Parents

NAIS Research: Jobs to Be Done for Parents of International Students

NAIS has previously published research on the [reasons why parents enroll their children in independent schools](#). The research, conducted using the Jobs-to-Be-Done (JTBD) methodology, sought to understand the context that led families to independent schools and the outcomes they sought in sending their children there. As a follow-up to this research, NAIS conducted interviews with parents and guardians of international students. The interviews sought to understand the JTBD of parents of international students and how these Jobs may differ from those of parents of domestic students. The interviews were conducted by phone primarily with parents of students from China but also parents from European and other Asian countries. The calls took place during the fall of 2020. This report presents the results of these interviews.

What Do Parents Want?

Chat box reflection

Job 2

- Schools in home country not rigorous enough
- *Want a school that can challenge and engage so child's potential filled; cares about college track*

Job 3

- Schools in home country traditional + not innovative
- *Want a school that will help child think creatively and communicate with others from different backgrounds; goal is to prepare child for global community*

Job 4

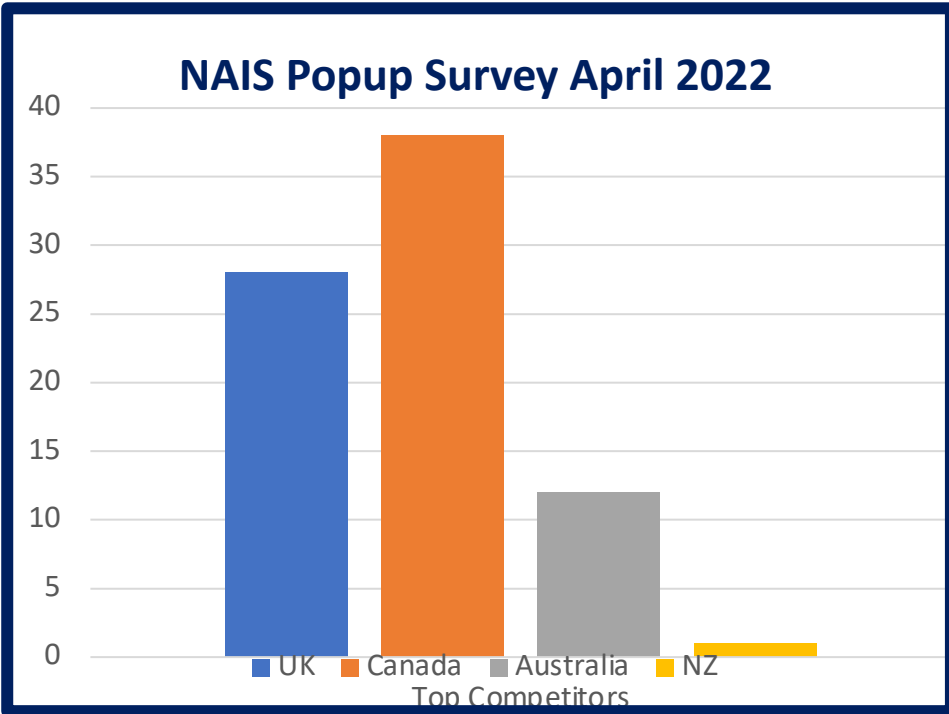
- Schools in home country can't get child into 'elite' U.S. college
- *Want a school with an 'elite' reputation that will help child get into an 'elite' U.S. college*

Top 5 Mkts

Our Top Markets

1. China
2. South Korea
3. Mexico
4. Canada
5. Vietnam

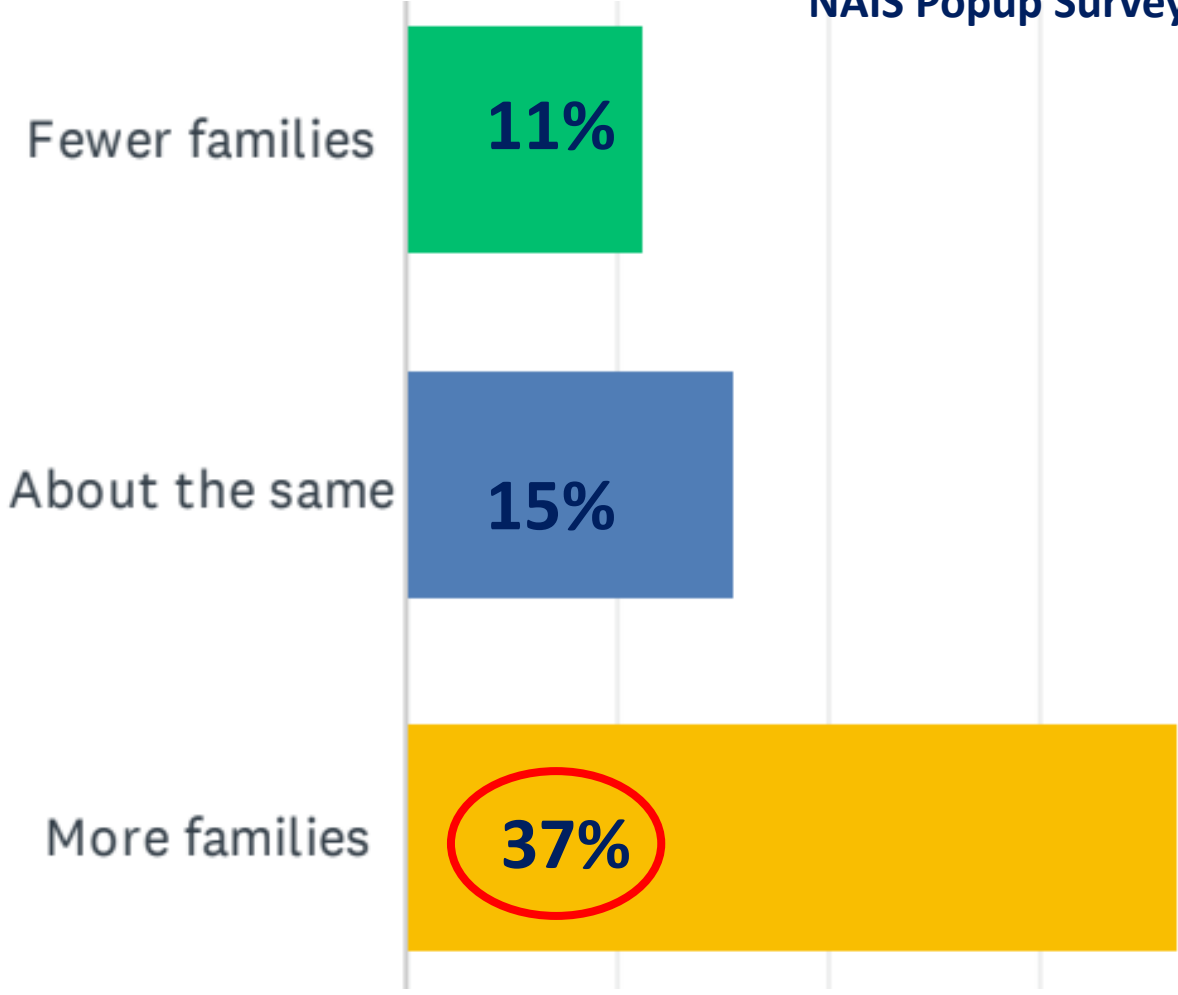
Our Top Competitor Countries



Top 5 Mkts

Families choosing schools in home country or region 2019-20 vs 2021-22

NAIS Popup Survey April 2022



Insights

Practitioner Observations

Chat box reflection

- Lockdowns have slowed application flow
- JP/HK/SK are solid but not as robust as pre-C
- Renewed interest in ARAMCO market
- Renewed interest in SP, IT, FR, SE, DK
- Africa has strong potential; agents key
- Loss of in-person contact hurt
- 2024-25 will be better
- Financial aid for target markets
- Challenge finding/vetting agents



A Changing China Market

- Higher ed capacity growing
- Reputation growing
- Shrinking tertiary population
- English import de-emphasized K12
- Feeder international schools and curriculum revamp
- **Expect peak within 5 years and then flat**

Landscape

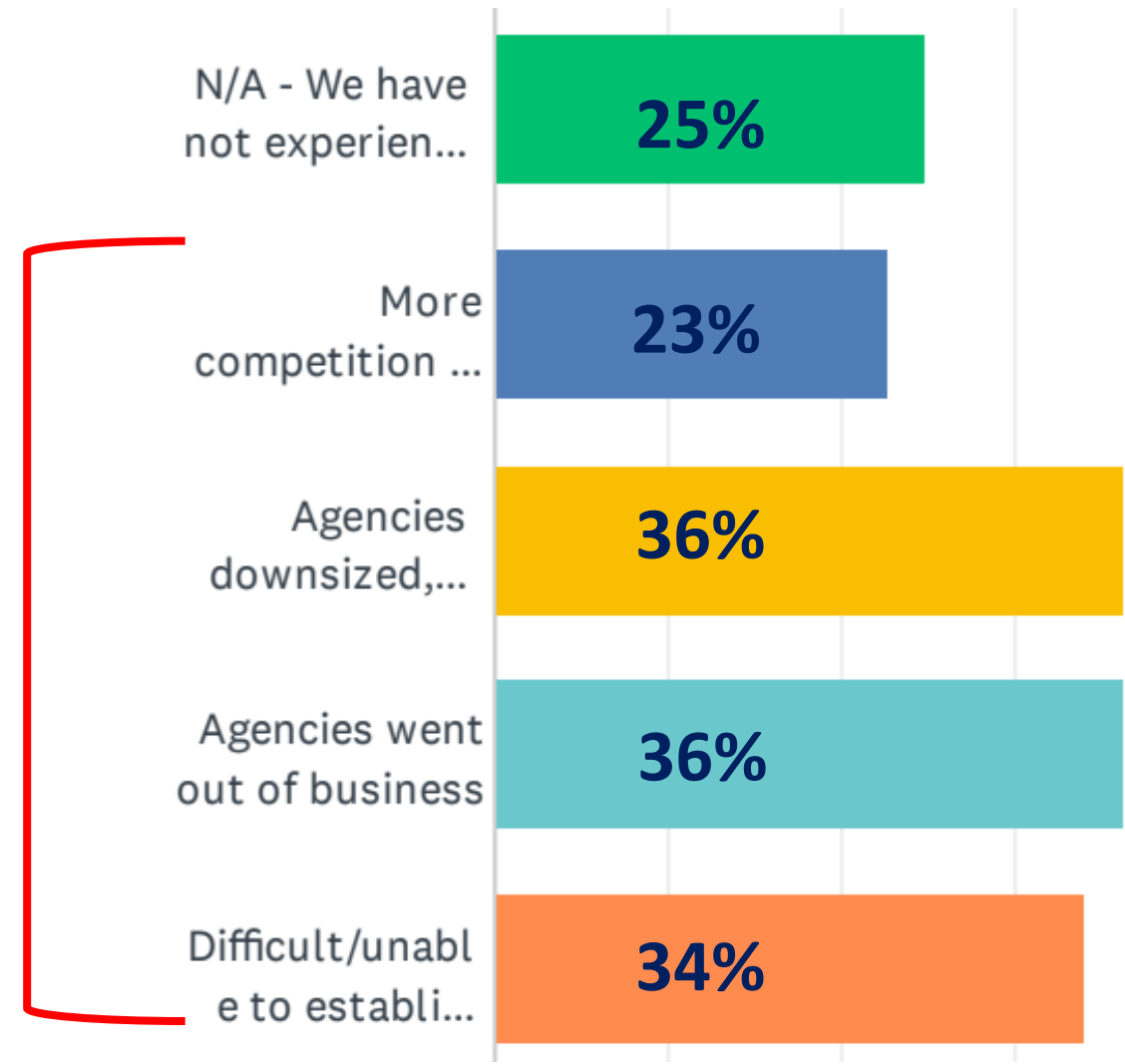
Agents

- Engagement
- Agent Experience
- Insights

Engagement

NAIS Popup Survey April 2022: Challenges working with agents 2019-20 vs 2021-22

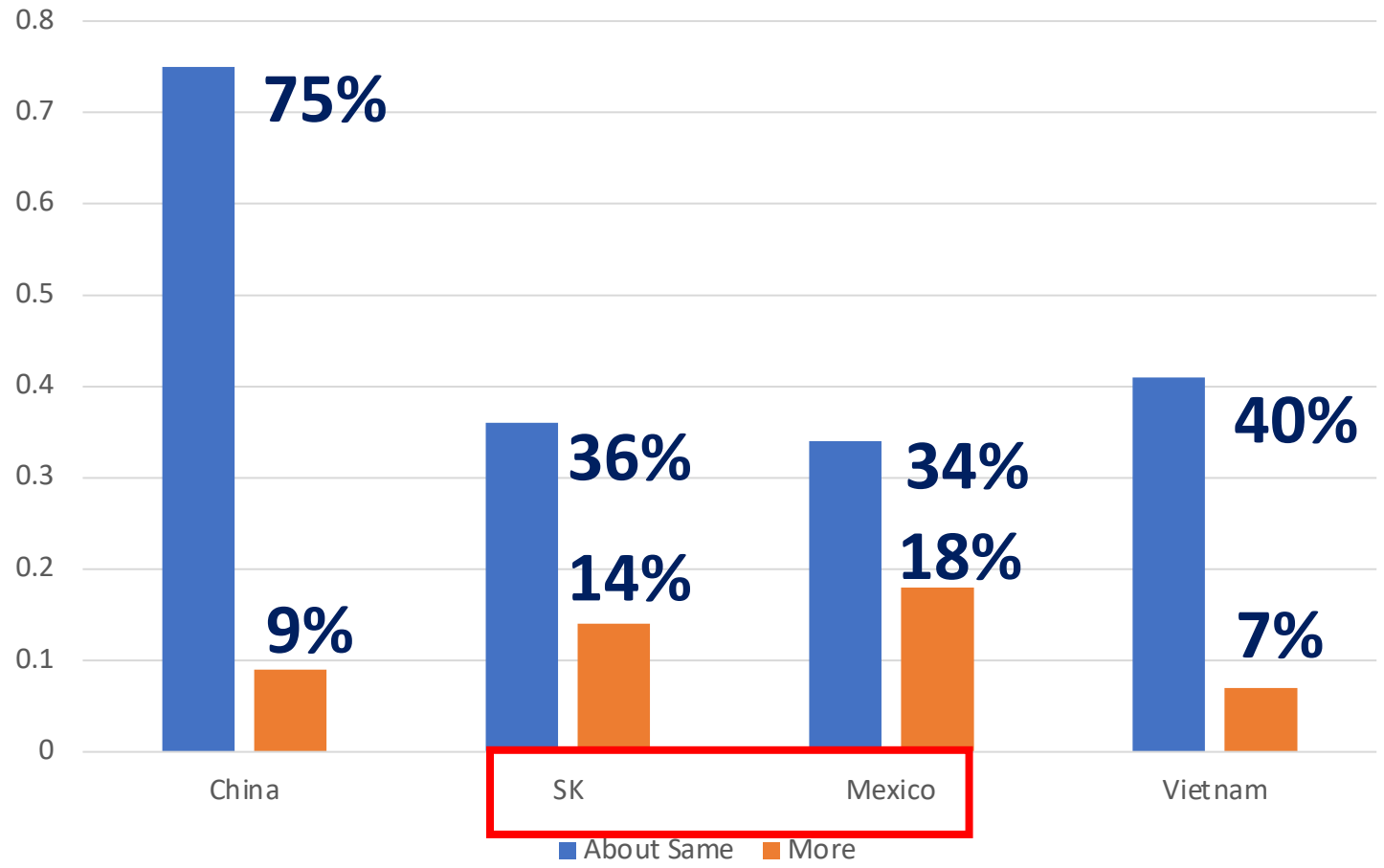
Problematic



- N/A - We have not experienced any difficulties with agents
- More competition for fewer agents
- Agencies downsized, resulting in less client time
- Agencies went out of business
- Difficult/unable to establish relationships with new agents

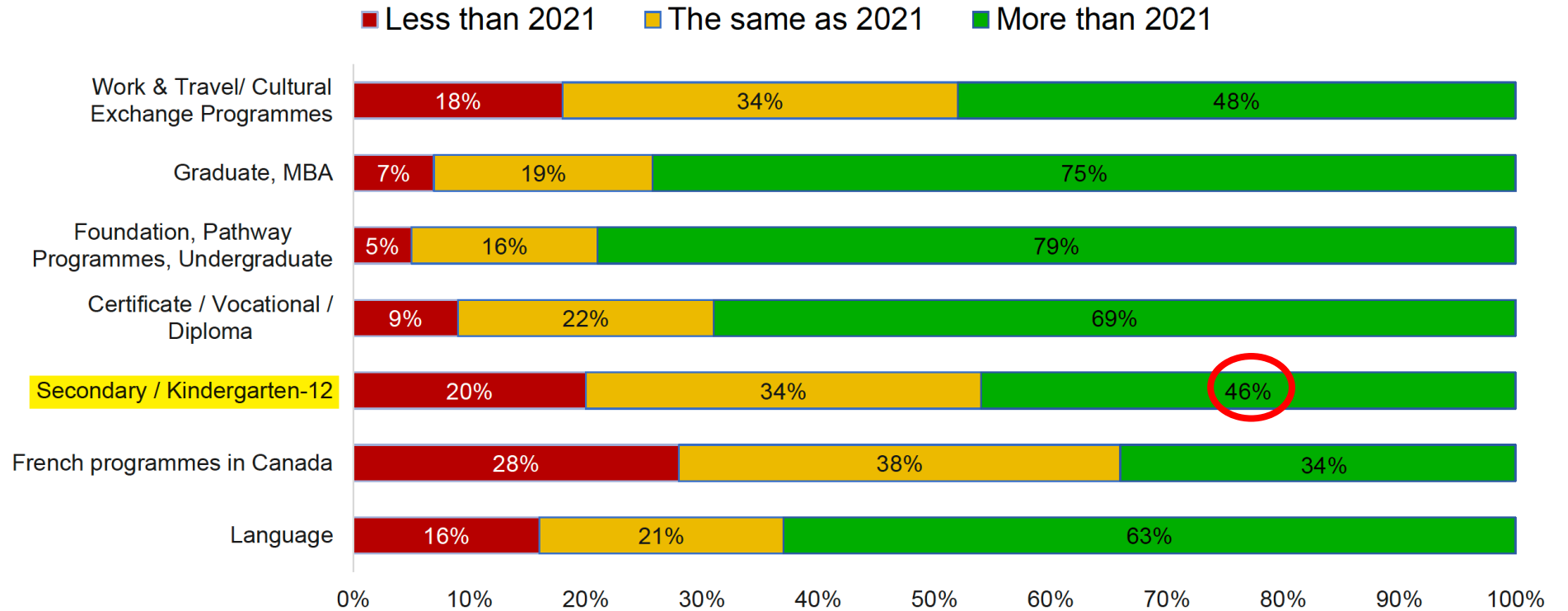
Engagement

NAIS Popup Survey April 2022: Families working with agents for 2022-23 compared with 2019-20 school years



Agent Exp

What are your expectations for student enrolment figures for 2022?



Insights

Agent Observations

- 20% went out of business in China in 2020
- Large and smaller firms ok; using subagents more
- Offering more services than before: in-country rep, digital marketing, online events, etc.
- U.S. still very popular but also most costly
- In-person travel still tough in some countries; better scene in a year
- It's all about digital marketing
- Especially in China...it's all about the mobile
- Parents and students much savvier consumers: more aware of brand, value, and cost
- Marketing must be market specific
- Don't over rely on China
- Vietnam is strong but fewer wealthy families
- Vietnam still benefits from in person
- JP good but fewer families (demographics)
- SK strong but increasingly price sensitive
- Europe is good; relationships with families key
- Agent-Client relationships need to be nurtured

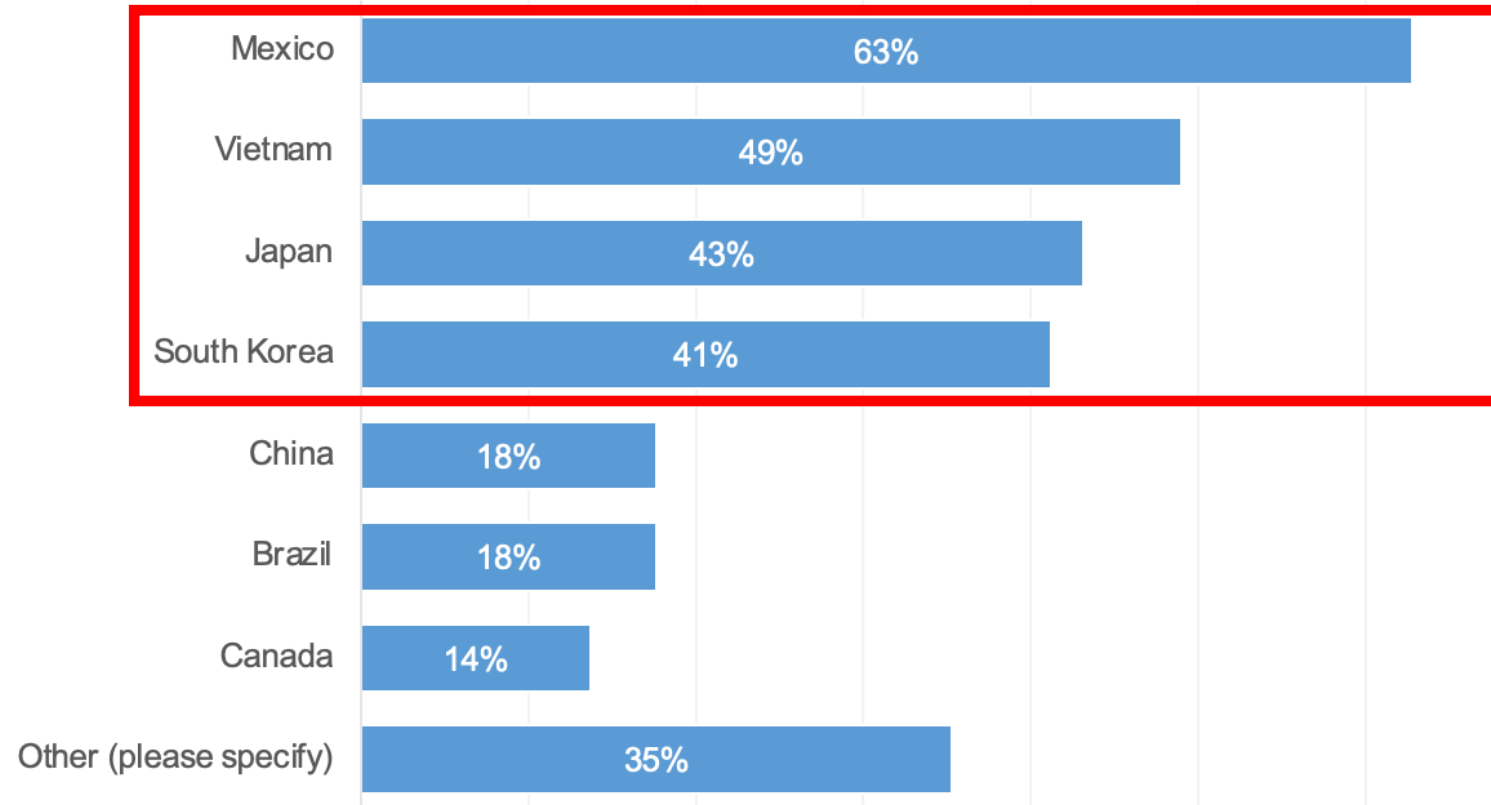
Landscape

Strategies

- Travel
- Targeted Strategies
- Strategies for China

NAIS Popup Survey August 2022 **When Travel 2022-23**

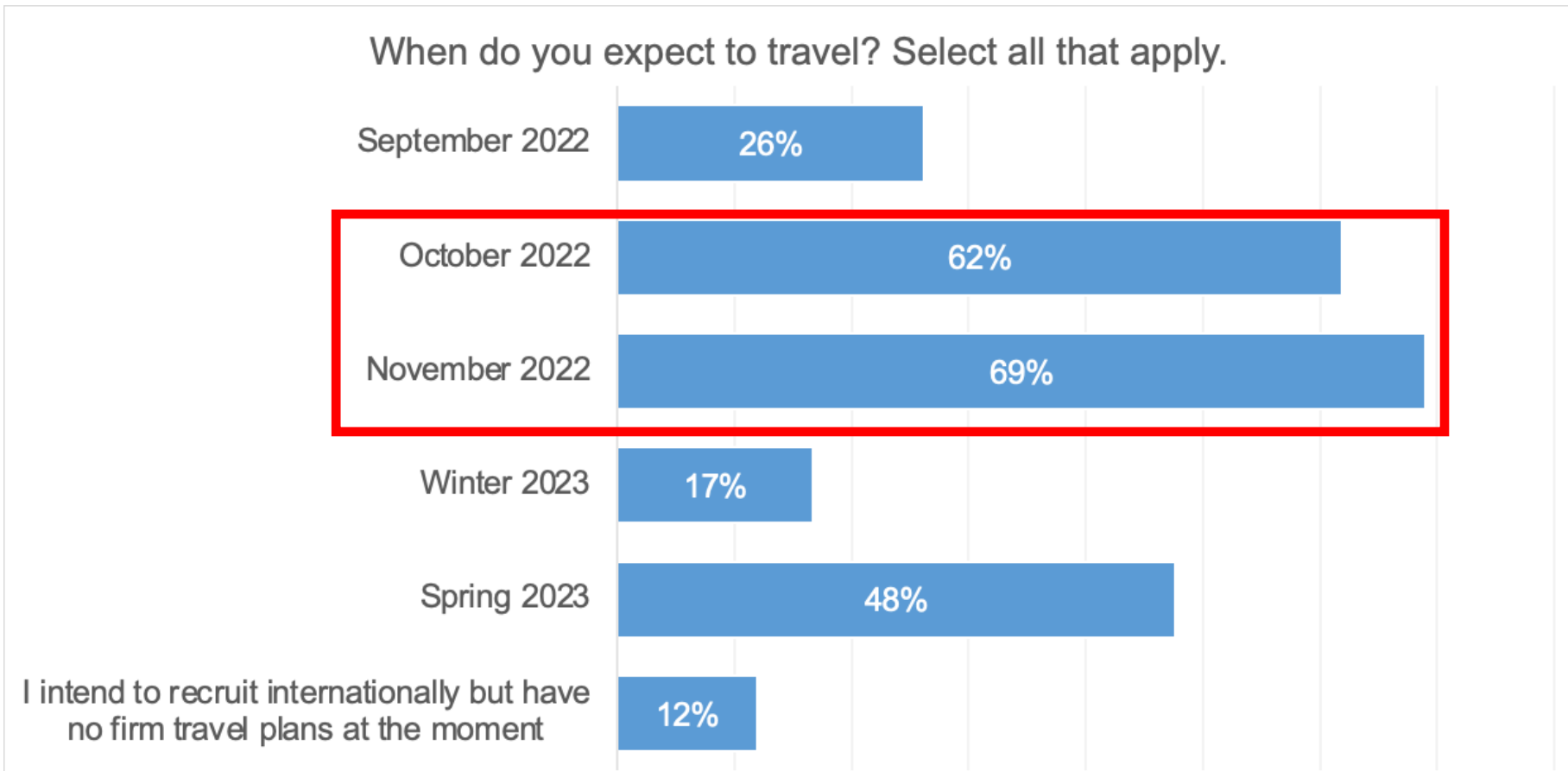
Which of the following countries do you plan to visit as part of your 2022-23 international student recruitment efforts? Please check all that apply.



Travel

NAIS Popup Survey August 2022

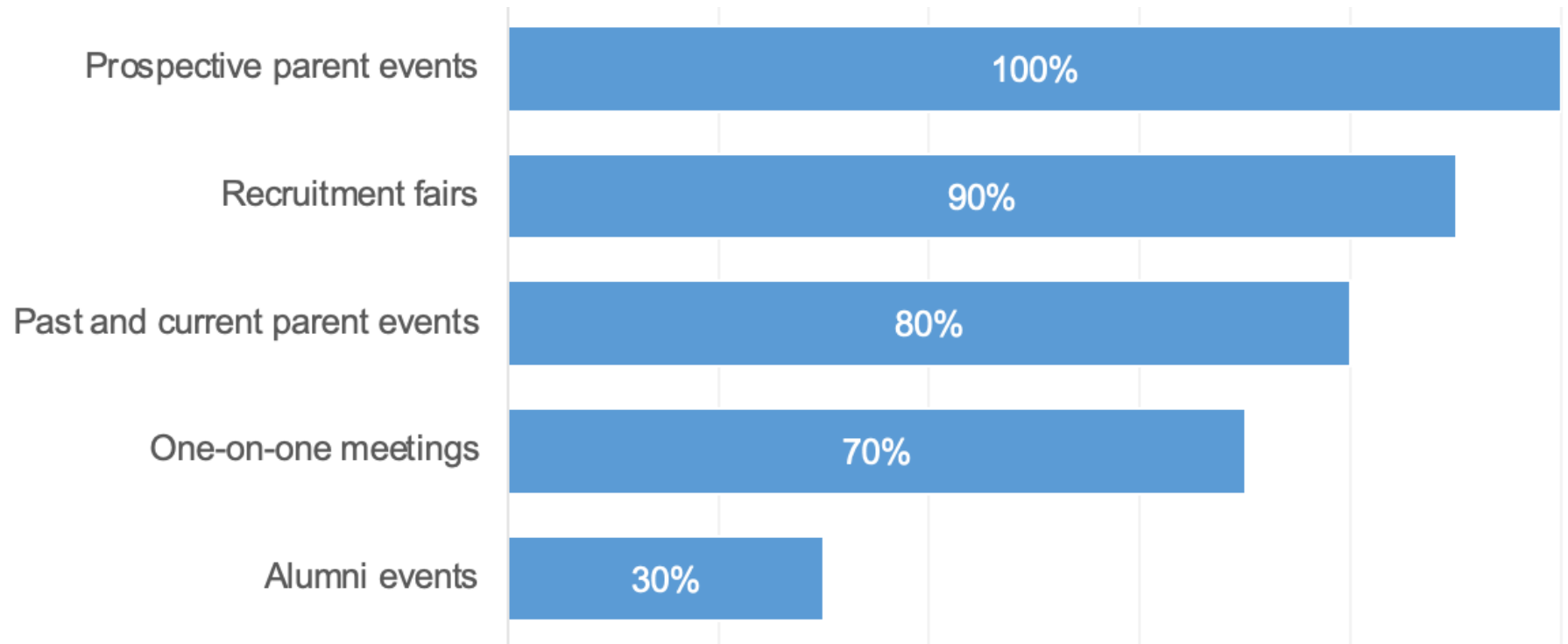
Travel Plans for 2022-23



Travel

NAIS Popup Survey June 2022: **International Recruitment Events**

- **Meet in person**
- **Be seen**
- **Reconnect**



Targeted

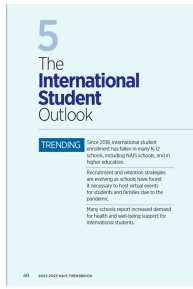
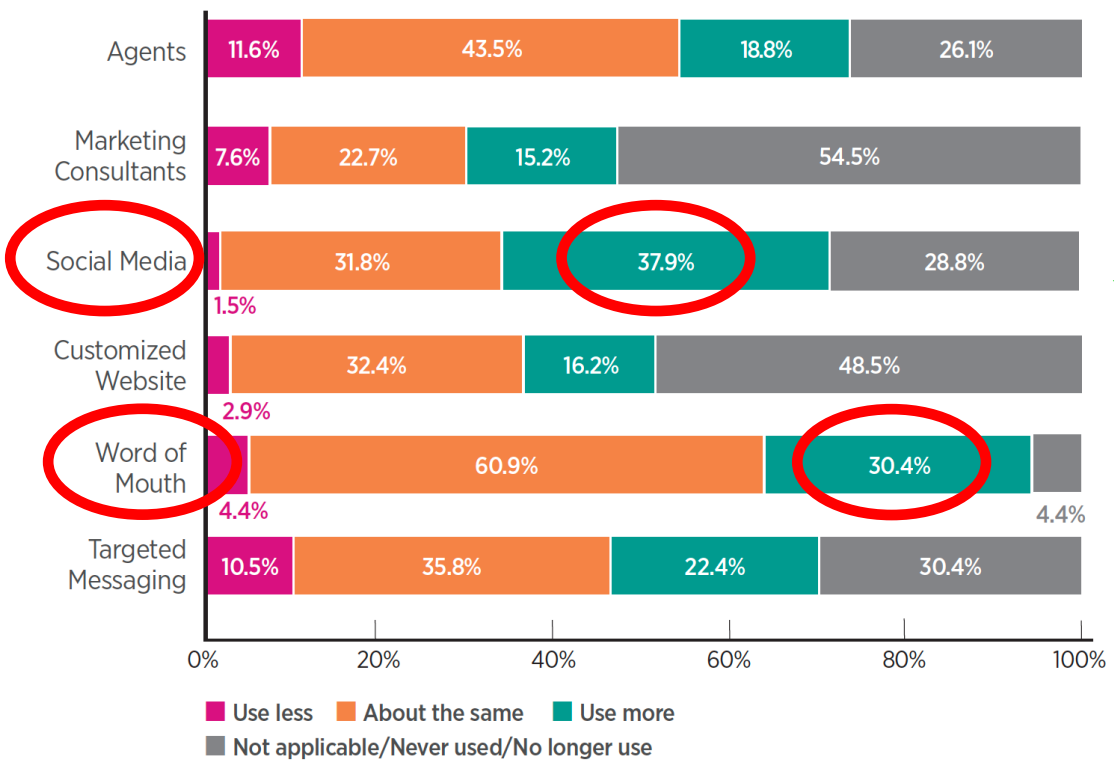


FIGURE 5
PERCENTAGE CHANGE IN USE OF RECRUITMENT STRATEGIES, 2019-2020 TO 2021-2022



Source: NAIS, International PopUp Survey, "Enrollment and Recruitment," April 7-18, 2022

Your experiences? How do they change by market?

China: WeChat and WeChat Live
 Korea: Kakao and KakaoTalk
 Mexico/Brazil: FB, Instagram, TTok



Strategies CN



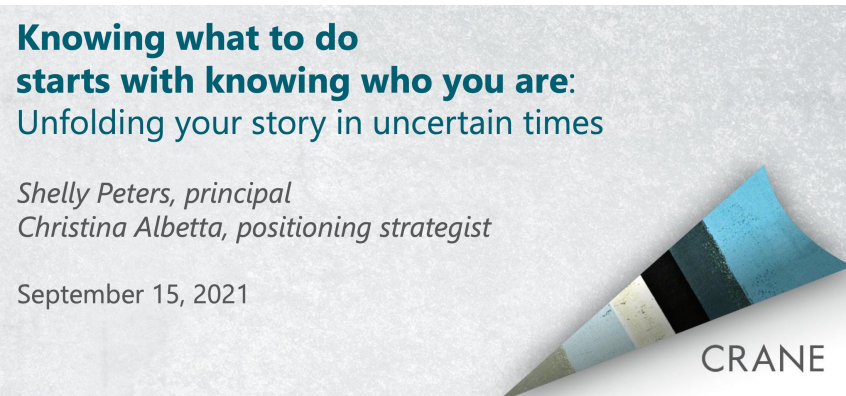
- Focus is on mobile content...most Chinese access the internet via their phones
- Online no longer dominated by three tech companies: Baidu, Alibaba, and Tencent (BAT); no more hyper marketing using their data; privacy laws
- Digital marketing

Strategies

If you can only do three...

NAIS Research: Jobs to Be Done for Parents of International Students

NAIS has previously published research on the reasons why parents enroll their children in independent schools. The research, conducted using the Jobs-to-Be-Done (JTBD) methodology, sought to understand the context that led families to independent schools and the outcomes they sought in sending their children there. As a follow-up to this research, NAIS conducted interviews with parents and guardians of international students. The interviews sought to understand the JTBD of parents of international students and how these Jobs may differ from those of parents of domestic students. The interviews were conducted by phone primarily with parents of students from China but also parents from European and other Asian countries. The calls took place during the fall of 2020. This report presents the results of these interviews.



Know Your Parents!

Know Your Unique!

Know Your Market!

Customized Market Research (CMR)
Mexico: Education Sector

CS Mexico - May 2021

About this Report
 Location: Mexico
 Report Date: May 18, 2021
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If you have any questions about this service, please contact the International Field Office that prepared this report. To proceed with another service or for general inquiries, please contact your local U.S. Commercial Service Field Office.

U.S. Department of Commerce | International Trade Administration

Customized Market Research (CMR)
Vietnam: Education Sector

CS Vietnam - May 2021

About this Report
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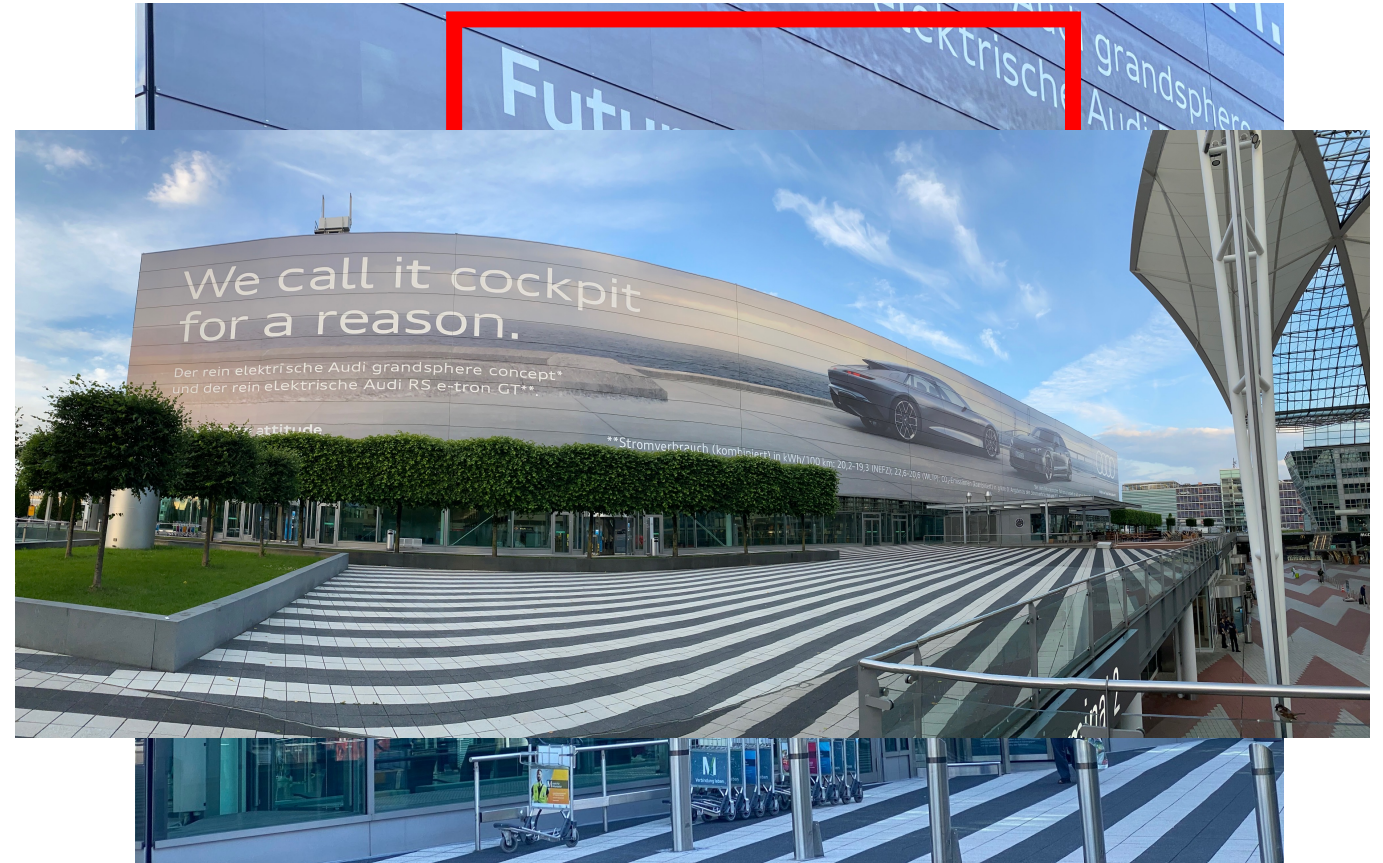
U.S. Department of Commerce | International Trade Administration

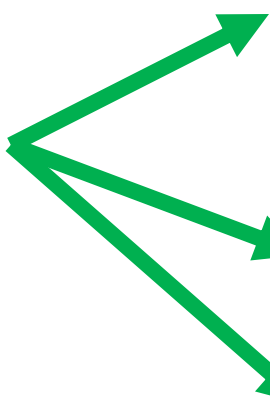


Becoming Futurists

- What It Means
- Why It's Key
- How To
- Futurist Hat

Future is an Attitude





Strategic resilience means thinking holistically about the needs of the organization. From experimenting with new opportunities at the edge of the operation to strengthening the speed, responsiveness and agility at the core.

Now and Next!

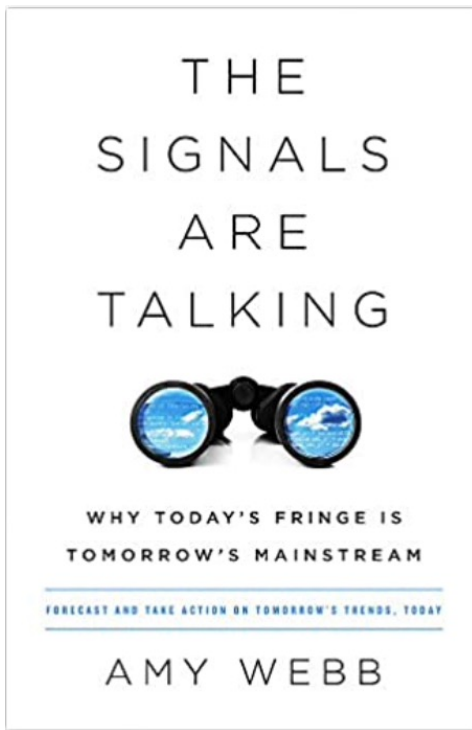
Mind the Gap

Now vs Next



Re-perception (n)

The ability to see, hear, or become aware of something new in existing information. Noticing what others missed.



“Forecasting the future requires a certain amount of mental ambidexterity...you need to learn how to think in two ways at once—both monitoring what’s happening in the present and thinking through how the present relates to the future.”



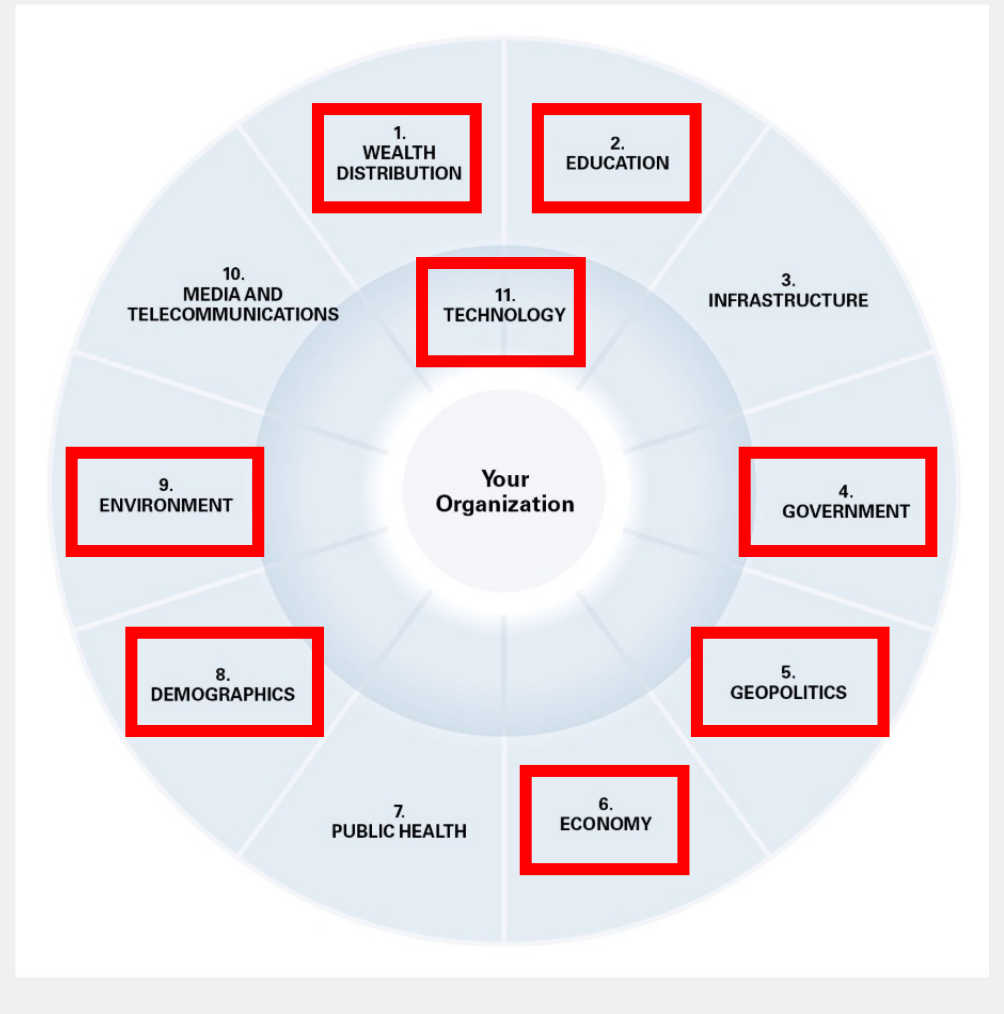
What Is A Futurist?

A futurist is someone who models next-order outcomes using a broad spectrum of weak signals, strong signals, trends, and other factors. Futurists do not make predictions. They make projections in order to create a state of readiness, to determine strategic actions, to aid in decision-making, to build long-range plans, or to simply imagine alternate future states.

FUTURIST AMY WEBB

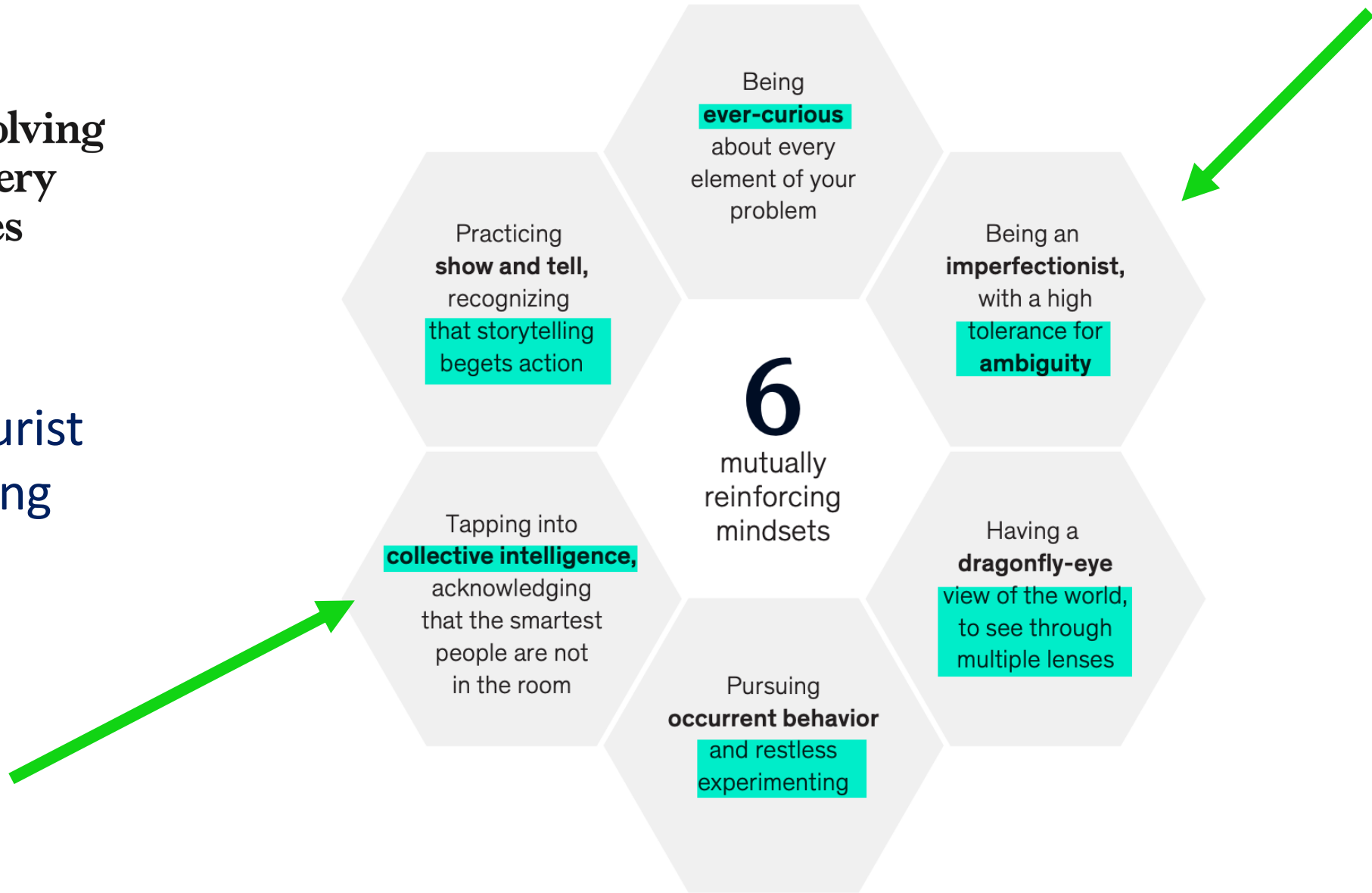
The 11 Macro Sources of Disruption

This simple tool shows the 11 sources of macro change that are typically outside a leader's control. Because technology is so intertwined with everyday life, it is shown as intersecting with all the other sources.



Six problem-solving mindsets for very uncertain times

Being a futurist means having essential mindsets.



Keeping Your Eyes on the Horizon

Generative

Strategic



Signals

0-2

3-5

5-10

10+

Now



NEXT

“ It is better to be surprised by a simulation, rather than blindsided by reality.

—Jake Dunagan, Institute for the Future

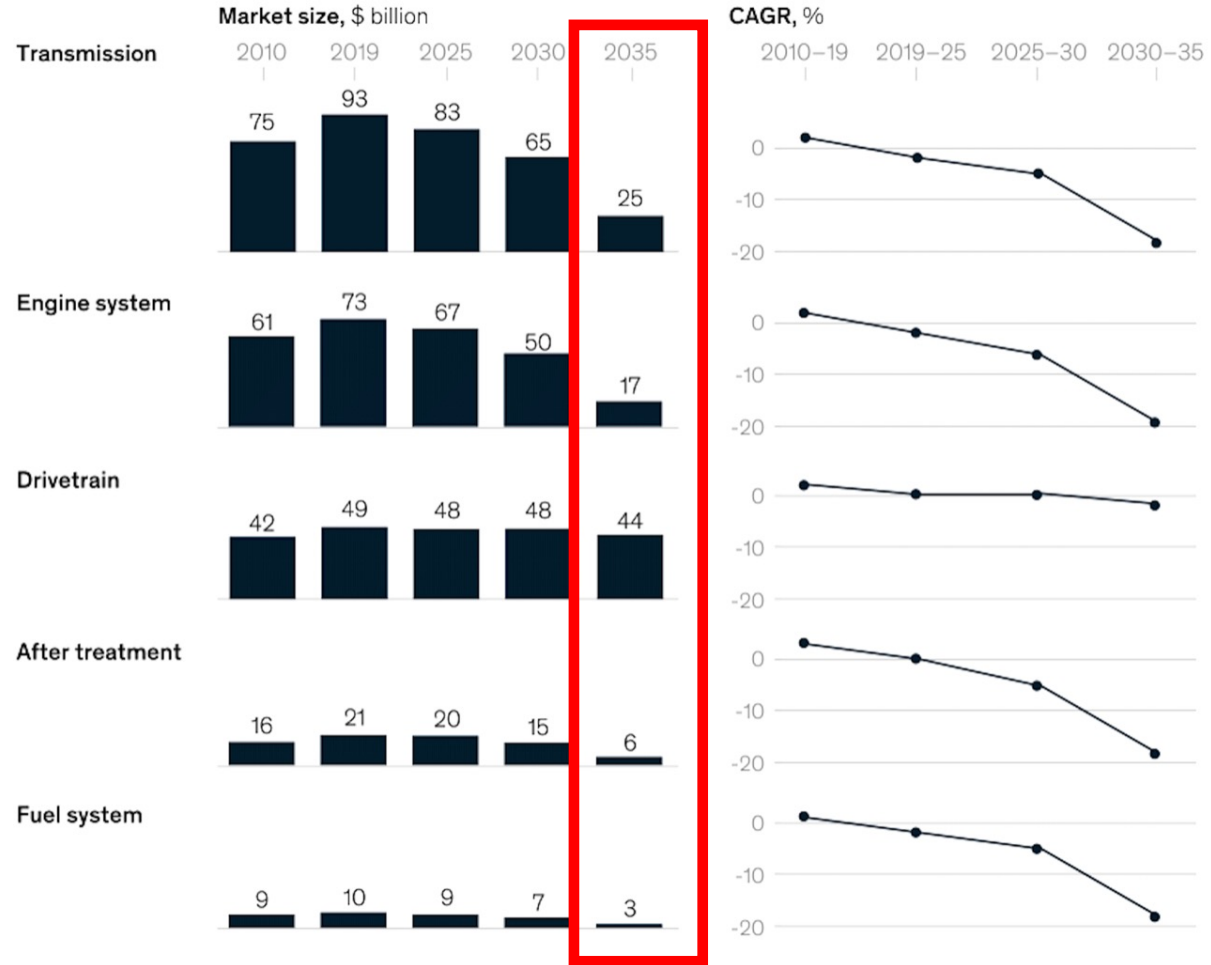


Signals

McKinsey
& Company

Suppliers of internal-combustion-engine components will begin to see growth stagnate and shrink.

Trends across groups of internal-combustion-engine groups



Source: McKinsey analysis

Futurist Hat

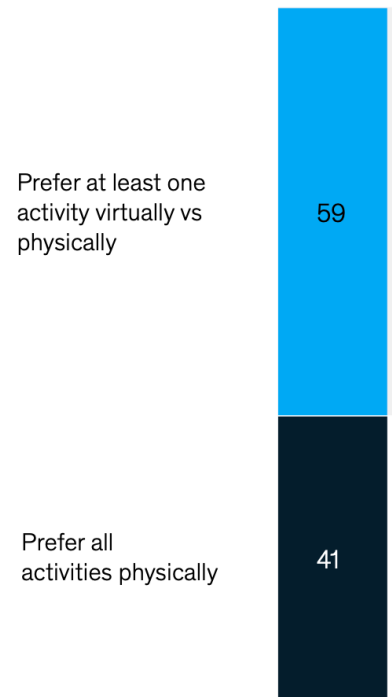
What If...there was a whole new market space?



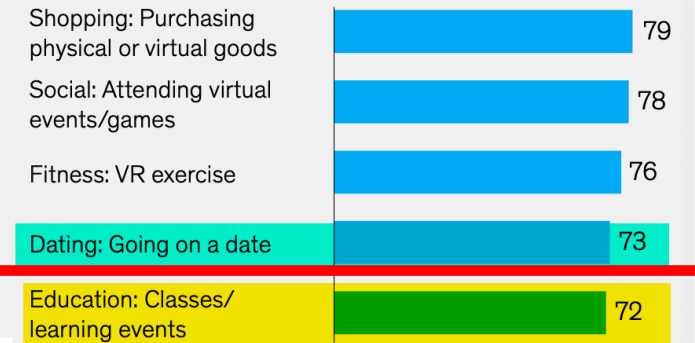
The metaverse is the envisioned end state—incorporating all digital worlds alongside the physical world, with interoperability between them all.

Consumers are looking forward to shifting a range of their activities to the virtual world.

Preference for at least one activity in immersive world compared to physical alternative,¹ % of respondents



Top 5 activities most preferred in an immersive world compared to traditional alternatives,² % of respondents



Futurist Hat

What If...there was a whole new market space?



The metaverse is the envisioned end state—incorporating all digital worlds alongside the physical world, with interoperability between them all.

INSIDE HIGHER ED

The [10] universities that will deliver programs in the metaverse this fall are part of a growing ed-tech trend that promises to broaden higher ed's reach.

College in the Metaverse Is Here. Is Higher Ed Ready?

Proponents say virtual reality boosts student engagement and achievement. Others worry it may prioritize corporate profits and violate student privacy. As 10 metaversities launch this fall, the details are being worked out in real time.

Futurist Hat

What If...there was a whole new approach to an education that appealed to specific markets?

MISTI MIT Global Experiences

Covid FAQs Faculty Funds Partnerships APPLY GIVE CONTACT

Programs+ Your Resources About

Where Visionaries Find Global Opportunities

MISTI makes it possible for MIT students to experience the world while advancing knowledge, tackling tough challenges, and preparing for lives of impact, service, and leadership in an interconnected global society.

Where will MISTI take you?

Futurist Hat

What If...we looked at different data points that point to new markets?

SINGAPORE AIR SHOW



AIR TRANSPORT

Boeing Sees Dramatic Rise in Asia's Traffic Share by 2040

by Peter Shaw-Smith - February 12, 2022, 10:00 PM



Data Gravity Index Score Reflects Intensity

The Data Gravity Index Score measures the intensity and gravitational force of enterprise data growth for Global 2000 Enterprises across 53 metros and 23 industries globally. The score, as measured in gigabytes per second, provides a relative proxy for measuring data creation, aggregation and processing.

(Boeing)

Data Gravity scores, as measured in gigabytes per second, illustrative of actual results

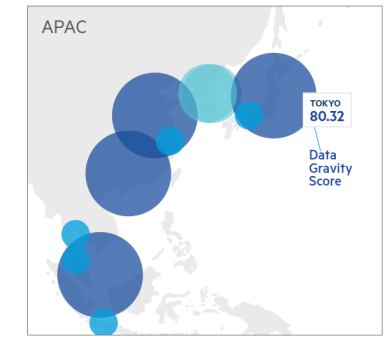
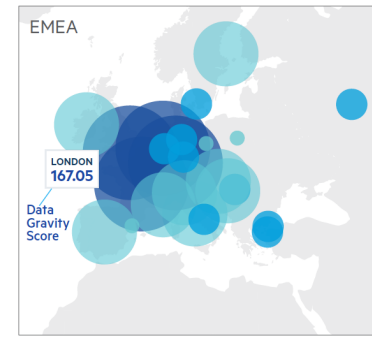
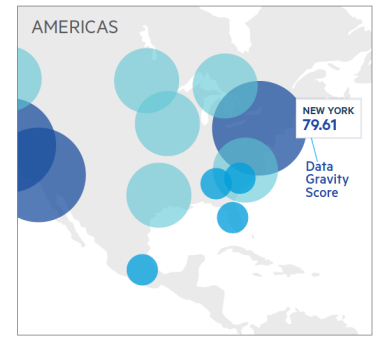
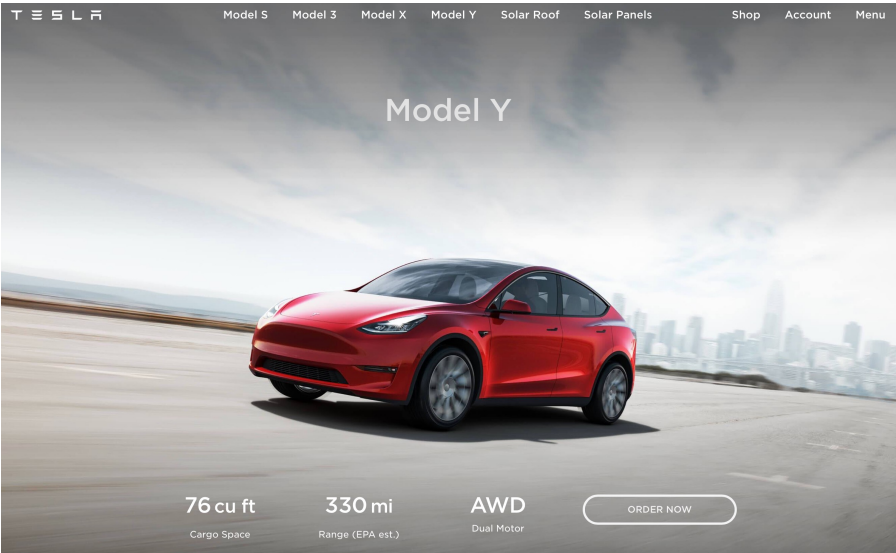


Fig. 1.3 and 7. Data Gravity Index, Dec 2020



Futurist Hat

What If...we redesigned the admission experience so it was fun and joyful?



Taking Delivery

Taking delivery of your new Tesla is a quick and easy experience. With [Tesla Tutorial videos](#) available right on your touchscreen, you can learn about the features and functions of your Tesla from the driver's seat.

After placing your order, sign in to your Tesla Account to [complete the required delivery tasks](#) and prepare for delivery. The latest updates on delivery timing, VIN assignment and appointment details will be available in your [Tesla Account](#).

Depending on location and eligibility, your Tesla will be available for pickup at a delivery center or will be delivered to your location. Please note that delivery dates may change based on many factors including logistics and completion of your pre-delivery tasks.

Pick up from a Tesla location

- [Express Delivery](#)

Delivered to your location

- [Tesla Direct](#)
- [Carrier Direct](#)

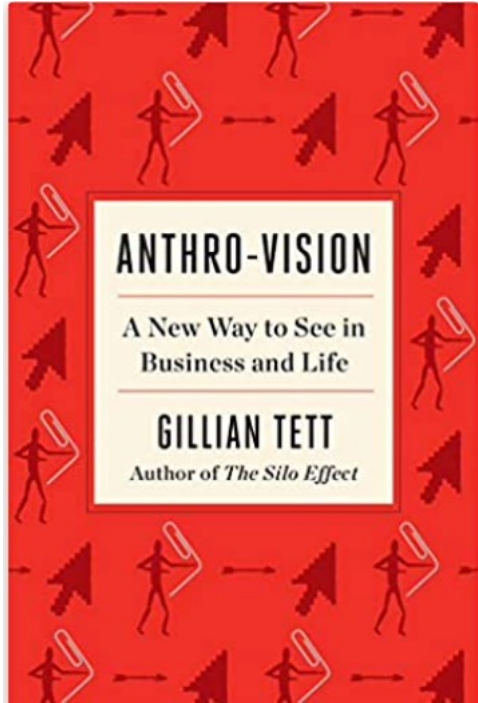
Strategic Framing

Off-mic!

Discussion: Strategic Considerations [10]

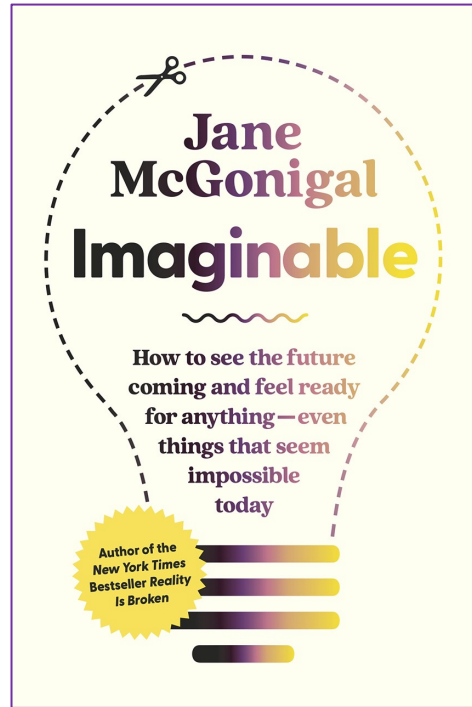
1. How is your school planning for an international student market that could generate fewer students than before the pandemic? What are the implications for the student experience at your school and for your budget?
2. How could you modify your recruitment strategies to adapt to a radically changed market?
3. What would a more diversified approach to international student recruitment look like for your school? How would you implement the program? How would you allocate resources to ensure success in multiple markets?

Approach



**Compulsive
Curiosity**

Mindset



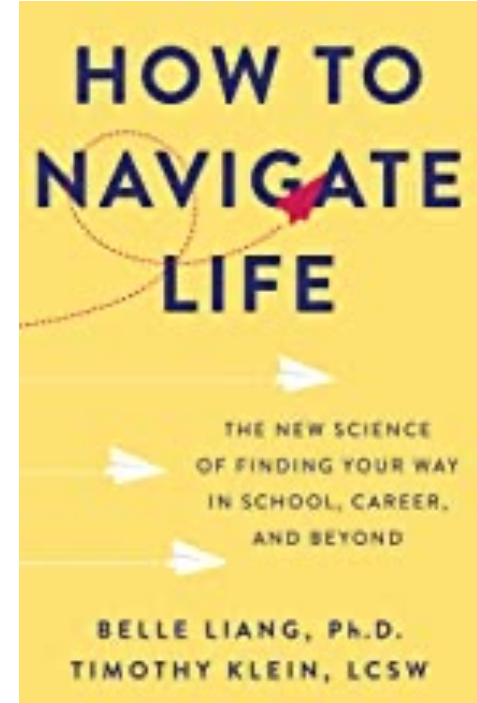
Resilience

Opportunity



**Tech Often
Produces
Surprises**

Purpose



**Good for the
world and soul**

Thank You!

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5

The International Student Outlook

TRENDING

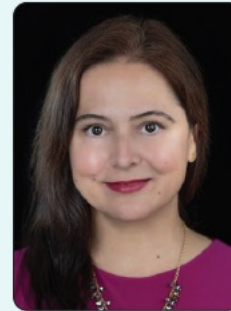
Since 2018, international student enrollment has fallen in many K-12 schools, including NAIS schools, and in higher education.

Recruitment and retention strategies are evolving as schools have found it necessary to host virtual events for students and families due to the pandemic.

Many schools report increased demand for health and well-being support for international students.



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Ioana Suciú Wheeler is director of global initiatives.



Resources

- NAIS Trendbook 2022-23 (8/22)
- 'Knowing What To Do Starts with Knowing Who You Are' [[handout](#) and webinar [highlights](#)] (Crane, 9/15/21)
- '[NAIS Research: Jobs To Be Done for Parents of International Students](#)' (1/21)
- [Value Creation in the Metaverse](#) (McKinsey 6/22)
- Amy Webb (Future Today Institute, [SXSW YouTube](#), 3/22)
- [The Future of China Recruitment](#) (Sinorbis, 6/22)
- [Trends in Chinese International Education and Student Mobility](#) (Sunrise International, 7/22)