1. **Background and Trends**

**Global Student Mobility:**

Nr of students studying outside their country:

* 2.1 million in 2000
* 5 million in 2015
* 8 million in 2025 (estimate)

In 2015/16 there were 1,043,839 international students in the U.S. (of which 29% were new students), with international enrollment accounting for 5.2% of the total higher education enrollment (20,264,000) in the country.

* 1 in 3 International Students study in New York, California or Texas

**Fields of Study:**

* Engineering 20% of all international enrollment
* Business and Management 19%
* Math & Computer Science 14%

**Major variations by field of study over the last year:**

* Math & Computer Science +25%
* Engineering +10%
* Education +10%
* Intensive English –17%

**Funding Sources of International Students:**

* 66% are funded by personal/family funds
* 17% are funded by their U.S. host universities
* 7% are funded by foreign governments and universities

**Recruitment Costs per Student:**

The **cost of recruiting a new international student at UM (FY16) was $840**[[1]](#footnote-1).

Cost of international recruitment per student in Australia (2012) = $4,600.

Median cost of recruiting a student (domestic+international):

* in 4-year public institutions = $578
* in 4-year private institutions = $2,232

**International Enrollment in the Region (similar institutions)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **University** | **(\*)****Engineering****(Y/N)** | **Ranking****US News** | **Inernational Enrollment** | **Total Enrollment** | **% Int’l****Stds** | **Total Int’l Enrollment and Revenue by State** |
| South Dakota State U | Yes | #202 | 943 | 12,589 | 7.5% | Enr. 1,981 |
| U South Dakota | No | #202 | 274 | 10,038 | 2.7% | Rev. $38M |
| North Dakota State U | Yes | #188 | 1,002 | 14,516 | 6.9% | Enr. 2,571 |
| U North Dakota | Yes | #202 | 945 | 14,951 | 6.3% | Rev. $54M |
| U Wyoming | Yes | #171 | 947 | 12,627 | 7.5% | Enr. 1,157Rev. $22M |
| Idaho State U | Yes | Not Ranked | 1,294 | 13,569 |  | Enr. 4,501 |
| U Idaho | Yes | #171 | 1,003 | 11,534 |  | Rev. $112M |
| Montana State U | Yes | #210 | 786 | 15,668 | 5% | Enr. 1,735 |
| U Montana | No | #214 | 506 | 13,358 | 3.8% | Rev. $50M |

1. **International Recruitment at the University of Montana**

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Comments:

* Phillipino students are almost all enrolled in the tDPT program (online) at the College of Health Professions and Biomedical Sciences.
* UM has a much smaller percentage of Chinese students than the U.S. average; recruitment efforts in this region are very competitive, with many other universities investing more in this market than UM invests in its total international recruitment plan. Furthermore, university rankings play a significant role in a Cinese family’s decisionto send their child to the U.S.. Nevertheless, since 2014 UM has engaged with several AIRC-approved recruitment agencies that work mainly in China. Although agencies play a significant role in recruitment in China, the outcome of these relationships takes time for fruition.

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**Recruitment Costs/Return on Investment:**

|  |  |  |  |
| --- | --- | --- | --- |
| Fiscal Year | Total Investment | Nr of New Recruited[[2]](#footnote-2) Students (for following Summer and Fall) | Recruitment Cost per New Student  |
| FY 14 | $150,000 | 279[[3]](#footnote-3) | $ 538 |
| FY 15 | $140,000 | 119  | $1,176 |
| FY 16 | $126,000 | 105  | $1,200 |
| FY 17 | $117,000 | 100 (estimate) | $1,170 (estimate) |

**Total enrollment of international students at UM (Fall ‘16)**

- 652 (non-US Citizens, includes Permanent Residents) total international students enrolled at UM in the Fall Semester of 2016 (official count), generating an estimated economic impact of $18,964,072 to the State of Montana during AY16/17[[4]](#footnote-4).

1. **2016-2017 UM International Recruitment Plan**

**Priority Markets[[5]](#footnote-5): Country (expected number of applications generated)**

* Japan (50)
* Nepal (30)
* Indonesia (15)
* Malaysia (15)
* Vietnam (12)
* Thailand (8)
* Myanmar (5)
* Russia (5)

Total number of applications expected from these 8 countries = 140

Enrollment Ratio in Fall 2016 (Apps to Enrolled) = 38%[[6]](#footnote-6)

Estimated number of students enrolled in Fall ’17 from 140 apps = 53

**Tuition & Fees generated by these 53 students, 1 year = $1,258,273**

**Marketing/Promotional Materials**

* Development & integration of Study in USA ad campaign and profiles (in progress)
* Overhaul of Website (completed November 2016)
* Printing of promotional materials in SE Asia to reduce production and shipping costs (in progress)
* Development of an agent packet/agent material plan and agent office distribution. ( Spring 2017)
* Design of program and market-specific brochures and materials.
* E-brochure and inquiry management, source tracking solution.

**Program Development Plans**

**Short Term**

* Entrepreneurship, leadership and innovation – partner with Blackstone Launch Pad (2-3 weeks running in winter and summer. Sightseeing component)
* Executive and/or students programs – 2 weeks to run anytime during the year. Minimum 12-15 students. Areas: Energy, Hospitality & Culinary

**Pathway Programs (degree-seeking):** UM & Missoula College

1. **Scholarships for International Students:**

Personal and family funds play a significant part in supporting international students in the U.S.; therefore, scholarships made available to international students are increasingly as important.

The ceiling for UM scholarships to international students has decreased from $10,000 in FY15 (recruiting for AY15/16) to $5,000 in in FY16 (recruiting for AY16/17) and again to $2,500–$3,000 in FY17 (recruiting for AY17/18). This contributes to reducing our competitiveness in international recruitment.

The University of Montana offers a unique academic and living experience and our international students find a home at UM and in Missoula shortly after they arrive, having very high levels of satisfaction with their choice of university. The academic excellence of our programs, our dedicated faculty, and the diversity of our community help with the retention and completion of these students, leaving recruiting them to come to a less popular state and city (compared to, for example, NY, California or Texas) as the main and most difficult task.

1. Total International recruitment cost (excluding admissions) = 126,000 (FY16; recruitment for AY 16/17). Number of new students enrolled Fall 2016 = 226 – 54 exch students – 52 tDPT students = 120. Expected number of new students enrolled in spring 30. Total stds=150

Average cost of recruiting one interntional student for AY16/17= $840/student [↑](#footnote-ref-1)
2. Students on F, J and O visas, plus Online Students. Excludes University Partner Exchanges and ISEP international students. [↑](#footnote-ref-2)
3. Includes 86 Brazilian BSMP students and 86 Japanese students. Two factors impacted these same nationalities in subsequent years: (a) the end of the Brazilian Government scholarships for studying abroad (BSMP), and (b) the increase of the minimum English Language proficiency level of full admission to UM from 61 to 70 TOEFL iBT, affecting mainly our largest Asian student population – Japan. [↑](#footnote-ref-3)
4. Montana ranks #47 in the U.S. with 1,735 international students. Estimated international students’ economic impact on Montana (2015) = $50,464,096 ($29,086 per student) [↑](#footnote-ref-4)
5. China is not currently included in this priority list due to the investment required to make a significant imprint. [↑](#footnote-ref-5)
6. 518 apps -43 exch -16 ISEP= 459 apps; 226 enrolled-36 exch -15 ISEP = 175; 175/459=.38 [↑](#footnote-ref-6)