The Next Education Frontier: Fueling Enrollments via International Expansion

The American higher education system has faced many challenges in recent years, but perhaps the most acute is how the continued decline in enrollments threatens institutional survival. While the COVID-19 pandemic certainly accelerated that trend, enrollment downturns for U.S. universities had already been on the horizon for years.

Meanwhile, the looming “enrollment cliff” — the steep drop in the college-age population beginning in 2025 — remains top of mind for many. How, then, can higher education institutions remain competitive as enrollments continue to drop?

One promising growth strategy is focusing on international students, particularly those interested in online programs they can complete from their home countries. Traditionally, U.S. institutions have focused on recruiting international students for campus-based programs, but now many such students are more interested in obtaining a U.S.-based education without relocating. In addition, other regions are experiencing rapid population growth. Together, those factors offer significant new opportunities for American universities to reach international learners.

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Google, in collaboration with research firm GWI, conducted the Google/GWI International Learner Higher Education Study in March and April 2023. Researchers surveyed 3,726 international students to gauge their interest in U.S.-based education programs, reveal their academic goals, and identify potential enrollment barriers.

According to the survey of international students from Canada, India, and the U.K. who expressed interest in U.S.-based education programs:

- **Upskilling, reskilling, job placement, and career services are top priorities.** Forty-three percent of surveyed students said that US-based online programs stand out over in-country programs because they offer more opportunities to upskill and reskill, while 49% of prospective students reported job placement and career services as important factors when considering education programs.\(^1\)\(^2\)

- **Flexibility is critical.** Forty-two percent of surveyed students said that a US-based online program stands out because it offers more flexible learning options than in-country programs.\(^3\)

- **Affordability remains a leading consideration, especially for prospective students.** Fifty-three percent of surveyed prospective students rank affordability as an important factor when considering an education program.\(^4\)
International expansion may look complex, but the opportunity cost of missing out on new sources for enrollment is far too great to ignore. To leverage international students’ clear interest in U.S. online programs, higher education leaders can develop recruitment strategies to help increase enrollments.

So where should they start?

First, they need to determine where to focus their efforts. Factors to consider here include determining the level of demand for U.S. online education programs in the target countries and the difficulty of rolling out programs in those regions.

For instance, U.S. institutions typically start by expanding programs to other English-speaking countries because localizing the content will be much easier. However, they also need to explore the audience size and enrollment opportunities in non-English-speaking countries. Once priority countries have been identified, universities need to determine which programs make the most sense to launch in each new market. That decision will vary by country depending on demand or interest and on an institution’s ability to adapt content for different audiences and delivery formats.

As just one example, 36% of surveyed students in India were interested in enrolling in a U.S. online program to prepare for a job in technology or IT. That means universities targeting students in India should prioritize programs that align with those interests in their rollout strategies. Ensuring the proper market fit for each program is essential for a successful launch.

Second, universities need to recognize and determine how to address the leading barriers to enrollment. Even when a country has a strong interest in or high demand for a U.S. university’s offerings, such roadblocks can result in missed opportunities. Affordability is one such hurdle. In fact, according to the survey of international students from Canada, India, and the U.K. who expressed interest in U.S.-based education programs, 60% of surveyed prospective students reported cost as the leading barrier to enrollment in a U.S. online program. That finding underscores the importance of ensuring that programs have cohesive pricing strategies that take purchasing power and similar factors into account, and that also provide ample financial aid and payment options.

Finally, universities must ensure that they’re operationally prepared for conducting international business. Many considerations go into this step and, not surprisingly, it’s one where many institutions encounter significant challenges. For example, once institutions are able to enroll students from specific countries, they’ll need to ensure that they can accept international payments. Focusing on operational rigor will help enable successful program launches and reduce the number of hurdles universities face as they expand to new markets.

The institutions that best meet this challenge can expect serious competitive advantage, says John Farrar, the education industry director for Google: “Higher education brands that focus on expansion and internationalization — liberating content and instruction — will be rewarded for providing access to education and reaching students beyond their traditional regional boundaries.”

As higher education leaders tackle the enrollment challenges and plan for long-term enrollment growth, a strategic approach to international recruitment and program rollout — if done correctly — may turn out to be a key driver for their overall plans and success rates.

Patricia Velázquez is the Strategy and Insights Lead for the Education industry at Google. Lesley Chou is the sector Industry Research Lead at Google. The authors would like to thank John Farrar, Google’s Education Industry Director, for contributing his insights to this article.
References

Footnotes refer to survey respondents from Canada, India, and the U.K. except where indicated otherwise.

1. Google/GWI International Learner Higher Education Study, current and prospective students; n=3,726.
2. Google/GWI Study, prospective students only; n=2,739.
3. Google/GWI Study, current and prospective students; n=3,726.
4. Google/GWI Study, prospective students only; n=2,739.
5. Google/GWI Study, current and prospective students from India only; n=1,225.
6. Google/GWI Study, prospective students only; n=2,739.

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