

2022

THE STATE OF
GLOBALIZATION
IN HIGHER ED



TERRADOTTA

CONTENTS

Preface	3
Global Engagement is a Strategic Imperative	4
Departmental Integration Nascent	7
Need for Data	8
Measuring Success	9
Program Growth Drives Departmental Success	10
Global Engagement Revives and Thrives	11
Outgoing: Study Abroad Is Back	12
Incoming: International Education Returns	20
Conclusion	26
Appendix—A Profile of Global Professionals	27



Preface



While the entire higher education ecosystem has been impacted by unprecedented challenges over the past two years, global education offices and study abroad programs were hit especially hard as travel is their lifeline. And just as in other times of crisis, global education professionals quickly rallied and adapted to continue to deliver globalization opportunities to students—offering virtual programming, study away and more.

Today, **travel is coming back**. We hear it from the industry, our clients and from students. But we wanted to take a deeper dive into the hearts and minds of the global education professionals to determine the global education outlook from the ones who have been on the front lines of travel.

We surveyed more than 120 global education professionals to get their perspectives and to understand their experiences in managing incoming international education and outgoing study abroad and study away programs. From advisors to deans, across higher education institutions of varying sizes, the overwhelming takeaway is that **global engagement is experiencing a revival, and in many ways is accelerating its evolution**. Study abroad programs are bouncing back and institutions are investing in their incoming international students to enhance diversity and inclusion on campus.

Here's what we found.

Global Engagement is a Strategic Imperative



GLOBALIZATION continues to be a critical tenet of higher education as more employers recognize the importance of a global perspective and experience. In addition, study abroad students have shared how their travels to other countries and experiences in other cultures have helped make them global citizens. It is the only way to cultivate a truly diverse and inclusive world.

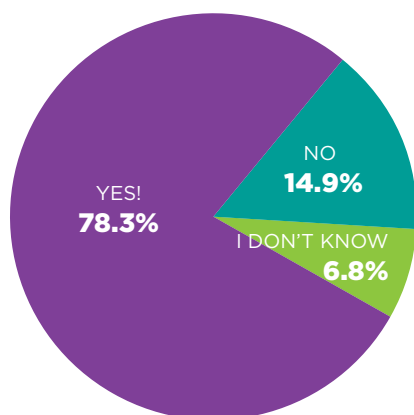
Global engagement is critical to higher education success—both for the incoming international students and the cultural experiences and diversity they bring to campus and the global experiences outgoing study abroad opportunities afford their participants.

“We believe that the cross-cultural experience moves the needle for personal development and maturity more than almost anything else the student can do during a college education.

—SURVEY RESPONDENT

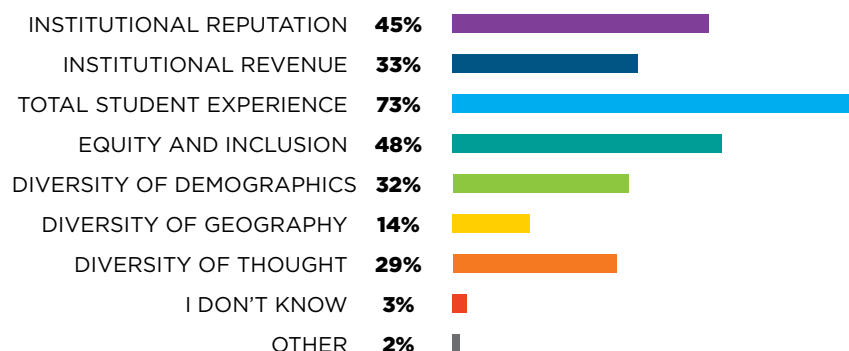
Four out of five respondents, **78%**, said that global engagement is of strategic importance to their institutions and part of their multi-year institution's plan or mission.

IS GLOBAL ENGAGEMENT AN AREA OF STRATEGIC IMPORTANCE FOR YOUR INSTITUTION? (I.E. IS IT PART OF THE MULTI-YEAR PLAN OR PART OF THE MISSION OF THE INSTITUTION?)



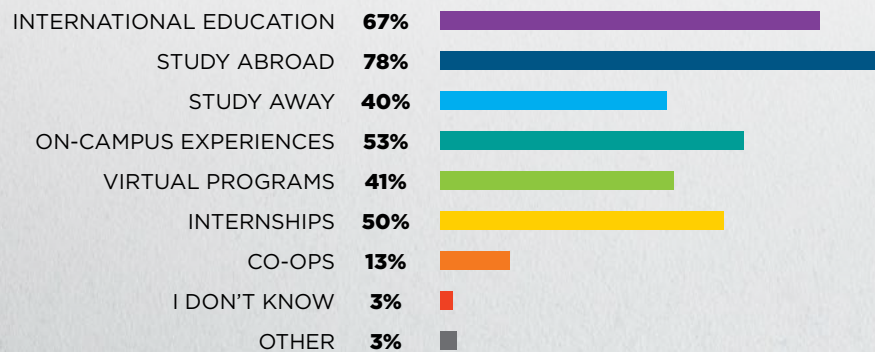
And the reasons why have much to do with the experiences afforded to students. **72%** said that global engagement is a key factor in the **student experience**, followed by **47%** who said that it is important to **equity and inclusion** and **45%** percent who said global engagement is important to the **institution's reputation**.

REGARDING THE QUESTION ABOVE, CAN YOU ELABORATE ON THE TOP REASONS WHY GLOBAL ENGAGEMENT IS OF STRATEGIC IMPORTANCE TO YOUR INSTITUTION? (PICK UP TO 3 REASONS.)



When asked about which initiatives fall within the global engagement purview at their respective institutions, **78%** of respondents said **Study Abroad** and **67%** said **International Education** are included in their globalization efforts. Other responses included **On-Campus Experiences (53%)**, **Internships (50%)**, **Virtual Programs (51%)** and **Study Away (40%)**.

**WHICH OF THE FOLLOWING FALL WITHIN THE REALM OF YOUR
INSTITUTION'S GLOBAL ENGAGEMENT INITIATIVES?**



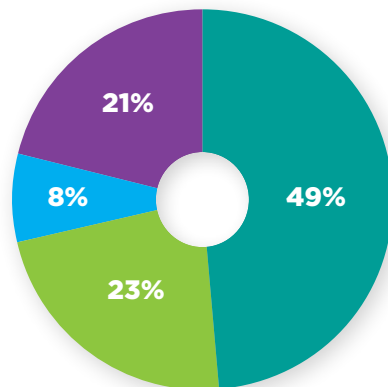
Departmental **Integration** Growth

TRADITIONAL HIGHER ED CONCEPTS of incoming international and outgoing study abroad programs are evolving into a more inclusive and connected global education experience—fueled in part by the rise of virtual programming during the pandemic.

With these new dynamics, momentum is shifting away from siloed study abroad or international education departments and integrating for a comprehensive and strategic view of global engagement, which also requires expanded duty of care considerations. As institutions embrace the value of preparing all students with enriching global experiences, they are seeking a modern, campus-wide international education approach.

Respondents were asked about their institution's organizational structure for global engagement efforts. Interestingly, only one in four **[23%]** said their **departments are integrated** and rollup to the same administrative office. Nearly half **[49%]** said their internal **departments collaborate but operate separately** and **21%** said **each department (incoming and outgoing) operates completely independently of the other**. Many colleges and universities are working toward eliminating global engagement silos to a more integrated, enterprise-wide operation.

WHAT BEST DESCRIBES YOUR INSTITUTION'S ORGANIZATIONAL STRUCTURE WHEN IT COMES TO GLOBAL ENGAGEMENT?



- EACH DEPARTMENT (INCOMING, OUTGOING) OPERATES INDEPENDENTLY
- DEPARTMENTS COLLABORATE, BUT ARE SEPARATE
- DEPARTMENTS ROLL UP TO THE SAME ADMIN OFFICE AND ARE INTEGRATED
- OTHER





Need for **Data**

AS ONE RESPONDENT put it: “There is such a need for data today. The trick is to make it digestible. **The real need is a comprehensive view of global engagement, not just incoming and outgoing.** What are your faculty doing abroad? Who are they publishing with? There are a lot of touchpoints.”

Another commented: “When we think of the global engagement, **we try to account for the scope of the whole ecosystem:** domestic students, international students, and how to foster cultural experience between the two.”

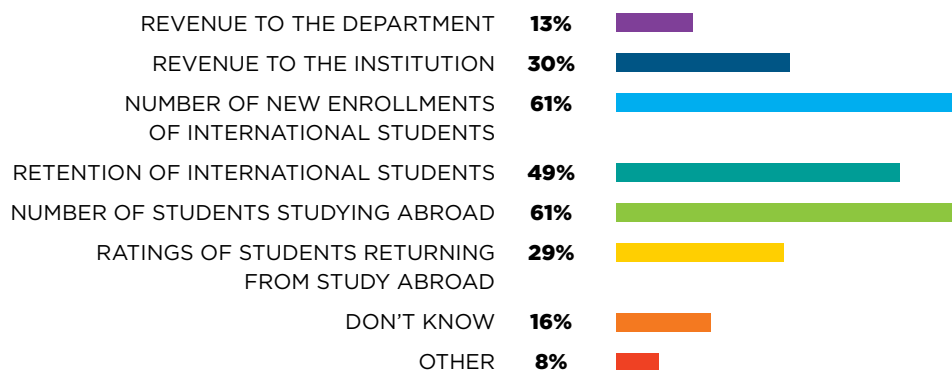
Measuring Success



MEASURING GLOBAL ENGAGEMENT'S SUCCESS is critical to ensuring performance is aligned with the goals of advancing the program's development and value for students. When asked how respondents measure their institution's success in regard to their global engagement efforts, program growth led the charge.

Across an inclusive global engagement view, other top measures of success include the number of **students studying abroad [61%]** and the number of **new program enrollments [61%]**. **Retention of international students** is a success metric for half of respondents and generating revenue for the institution is a benchmark for **30%** of respondents. In contrast, **29%** measure success based on ratings of **students returning from other countries** and only **13%** said they track success based on **revenue to the department**. These responses prove how important program growth is to institutions.

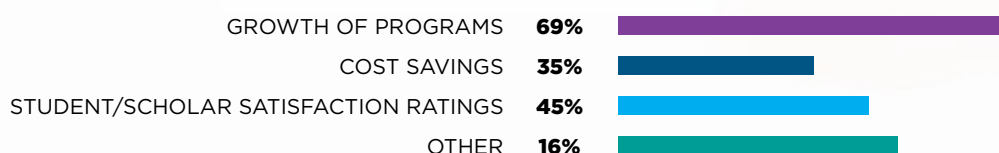
HOW DOES YOUR INSTITUTION MEASURE SUCCESS IN ITS GLOBAL ENGAGEMENT EFFORTS? (SELECT ALL THAT APPLY.)



Program Growth Drives Departmental Success

WHEN LOOKING AT the department-level success, program growth remained a top metric. An overwhelming **69%** said they look to **program growth** to determine success along with **45%** for **student/scholar satisfaction ratings** and **35%** for **cost savings**.

HOW WILL YOUR DEPARTMENT MEASURE SUCCESS IN 2022?



“Some of the things we’re looking at in regards to this is the success of internationalization. It’s not just how many go in and go out. How do we really measure internationalization? If every student has a global experience, **how do we define a global experience?** It’s about measurement, but also how we define experiences.

—SURVEY RESPONDENT



Global Engagement **Revives and Thrives**

OUR SURVEY UNCOVERED additional insights from global education leaders about their institutions' outgoing study abroad programs and their commitment to ensuring inclusivity and diversity on campus by supporting incoming international students.

The findings indicate that as COVID-19 restrictions loosen and international borders reopen, **study abroad and international education are experiencing a revival.**

An overview of the Outgoing and Incoming findings follow.



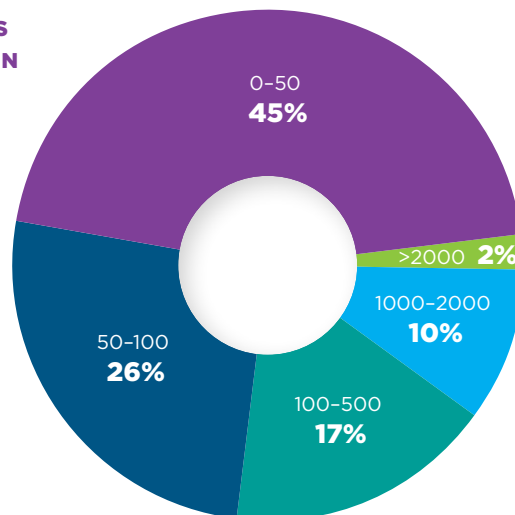
Study Abroad is Back



STUDY ABROAD most certainly took a big hit with the onset of the pandemic. Who can forget those turbulent days in February and March 2020 when institutions had to quickly get students back home? To get a baseline of how this school year is going and to project for the future, we asked about recent activity levels and near-term projections.

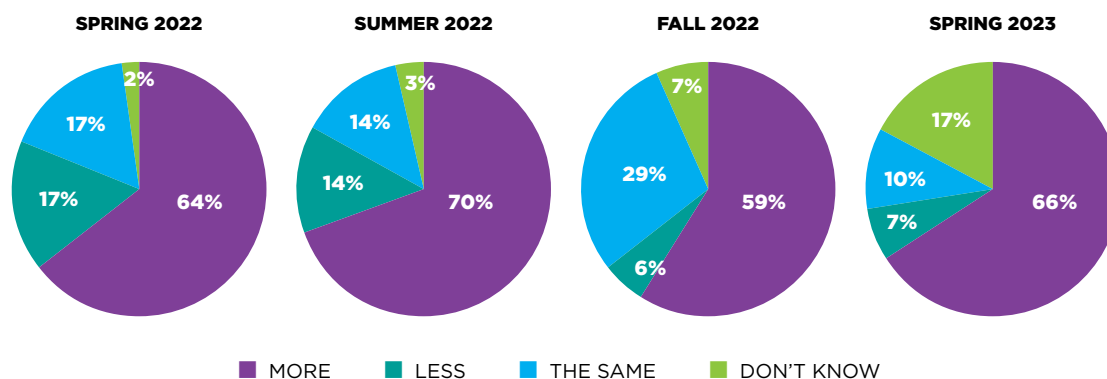
Our survey indicates that more than **70% of respondents sent fewer than 100 students abroad in the fall of 2021**. Even though COVID-19 was waning at the time, activity levels in Study Abroad were still lagging pre-pandemic levels.

**HOW MANY STUDENTS
DID YOUR INSTITUTION
SEND ABROAD IN
THE FALL OF 2021?
(APPROXIMATELY)**



As the pandemic moves even further to our rear-view mirrors, study abroad is getting back on track. Well over half **[59%]** of global engagement professionals **anticipate increases** to their study abroad participant numbers for **Fall 2022** and even more **[66%]** anticipate an increase for **Spring 2023**.

COMPARED TO THE FALL OF 2021, ARE YOU PLANNING TO SEND MORE, LESS OR THE SAME NUMBER STUDENTS ON STUDY ABROAD IN THE COMING TERMS?



Students Agree

And the momentum of study abroad is backed up from the students' perspective. In our related survey of students, less than **40%** of the students surveyed indicated they were very concerned about COVID and the risks to their health. Put another way, over **60%** of respondents are, at worst, only moderately concerned.

We also asked students how COVID was affecting their thoughts about studying abroad. Only **16%** of students surveyed said that COVID concerns are holding them back from their intentions to study abroad.

STUDENT QUOTE

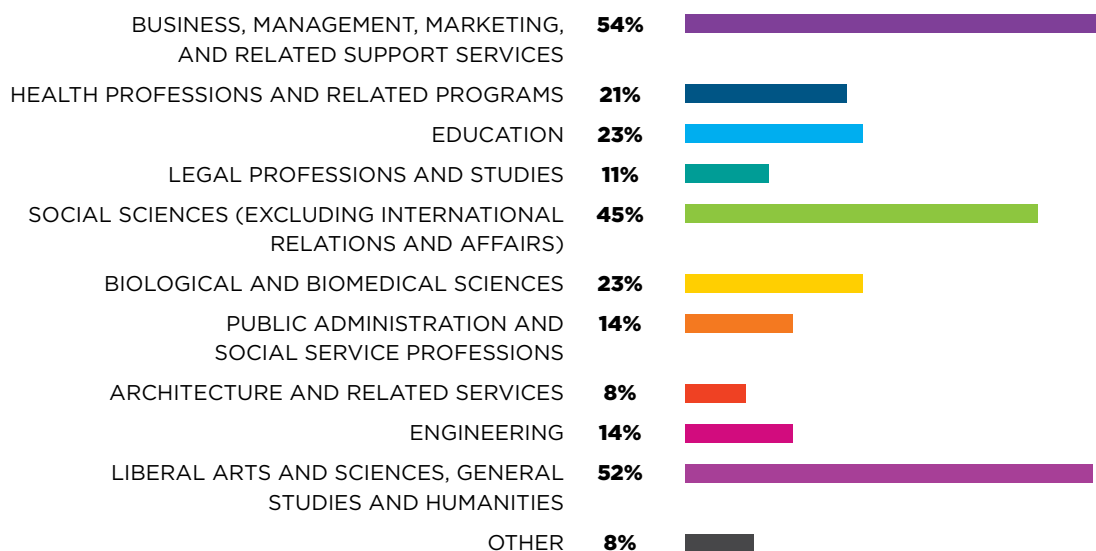
"There will always be health concerns. It's up to us to take precautions that will allow people to travel."

Who Is Studying Abroad?



AND FOR THOSE STUDENTS STUDYING ABROAD the top fields of study include Business, Management, Marketing and Related Support Services **[54%]**, Liberal Arts and Sciences, General Studies and Humanities **[52%]**, Education and Biological and Biomedical Sciences **[both 23%]**, and Health Professions **[21%]**.

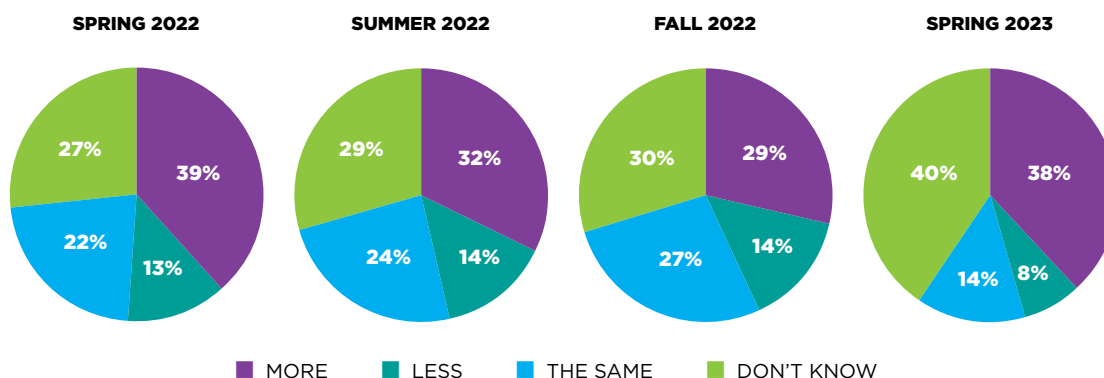
WHAT ARE THE TOP FIELDS OF STUDY OF YOUR STUDY ABROAD PARTICIPANTS? (PICK UP TO 3)



Globalization, Internationalization, and **Accessibility**

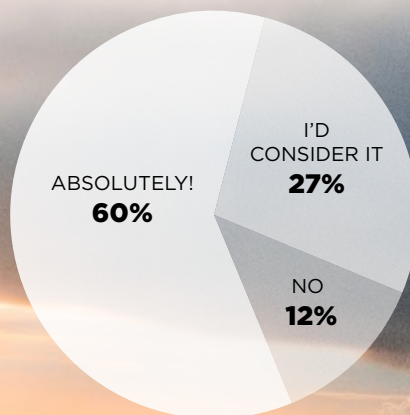
STUDY AWAY, a domestic travel program available for students to study in different regions of their country, gained momentum during the pandemic as it is a more accessible opportunity for students to gain new cultural experiences without having to travel internationally. While not a new concept, it is one that saw heightened interest during the pandemic, and one that over one-third of institutions expect to see growth in the coming terms. As this is a more accessible option for students with varied financial supports, there is continued interest in the number of Study Away participants institutions are planning to send in the future. Nearly **40%** of respondents say they **plan to send more students on Study Away trips in Spring 2023, than in Fall 2021.**

COMPARED TO THE FALL OF 2021, ARE YOU PLANNING TO SEND MORE, LESS OR THE SAME NUMBER STUDENTS ON STUDY AWAY IN THE COMING TERMS?



In fact, it is important for institutions to note that more than half **(60%)** of students in our recent student survey **voiced their interest in Study Away** as an alternative to a study abroad program because it's a way to receive cross-cultural exposure and global engagement without traveling to another country. In addition, **virtual programs offer students globalization experiences through intercultural project-based learning with peers in other countries.**

COVID AND OTHER ISSUES MAY CONTINUE TO MAKE INTERNATIONAL TRAVEL DIFFICULT. WOULD YOU BE INTERESTED IN INSTITUTION-SPONSORED DOMESTIC TRAVEL PROGRAMS AS A REPLACEMENT FOR INTERNATIONAL TRAVEL? (OFTEN CALLED, STUDY AWAY.)



As the pandemic exacerbated some of the financial and logistical barriers students and their families face when looking to participate in a study abroad program, virtual and study away options can be more accessible.

“Trying to find ways to bring global experiences to campus, It's not reasonable to set a goal that everyone can study abroad, nor should everyone, due to things like climate change. Virtual and domestic programs are a viable option for many.

—SURVEY RESPONDENT



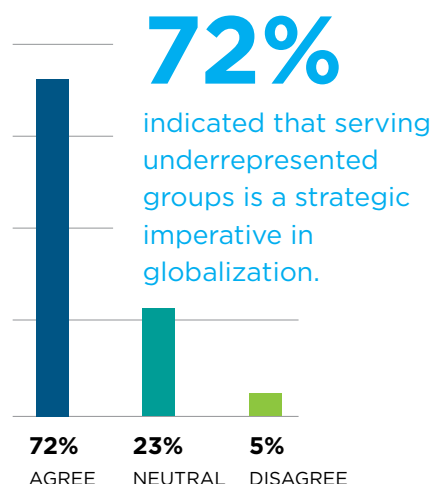
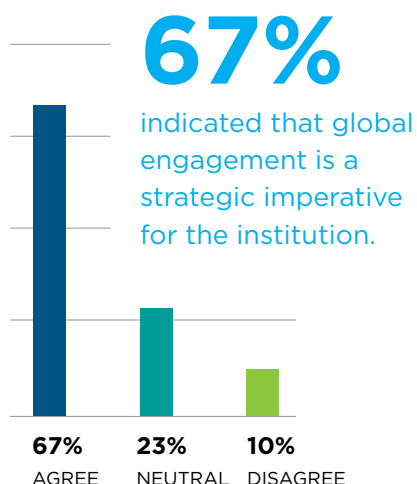
Serving Underrepresented Students

WITHIN GLOBAL ENGAGEMENT,

finding ways to support underrepresented students is an issue of rising importance for institutions. While **67%** of participants said global engagement was an imperative for the institution, an even greater percentage (**72%**) indicated that within globalization, serving underrepresented groups was critical.



This includes **support for first-generation students and other non-traditional students such as low-income, minority, rural and LGBT+ students**. Some schools have developed programs to pair students with shared experiences and backgrounds to help encourage global program participation as many often struggle to participate in traditional study abroad programs and may not express interest based on financial, logistical or other demands.

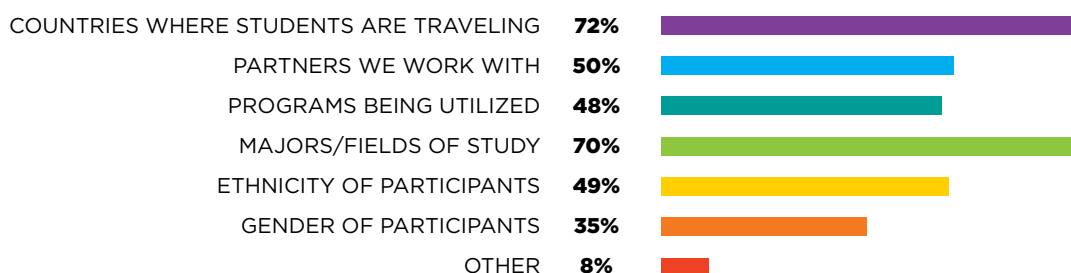


Reporting

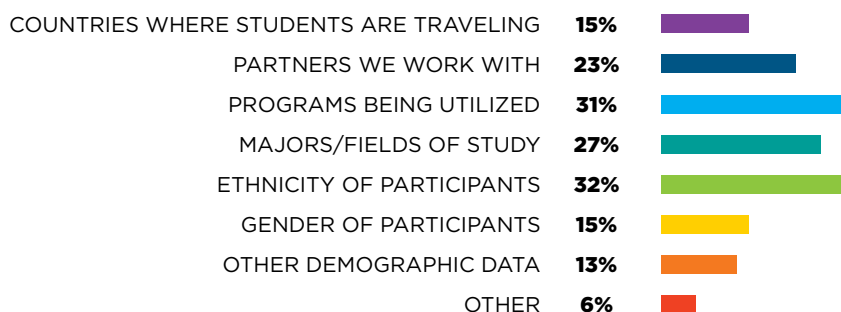


REPORTING on global engagement programs is critical to running an efficient and successful program, knowing where students are traveling in the world at any given time and to being able to benchmark and validate success institution-wide. So, when we asked survey participants about the most important statistics to report on the leading responses indicated that being able to quickly get to the stats on which **countries students are traveling to**, the **majors/fields of study** are the biggest quick call stats that study abroad departments need to report. Also, nearly **50%** of participants said that they are **tracking their partners and programs and ethnicity and other demographic data**. Data-driven insights are important to be able to tap into with ease as they can help support program creation and growth. As such, the most important categories of reporting criteria that study abroad professionals say they are evaluating are also the same categories of information that can be the most difficult to assess.

WHAT ARE THE MOST IMPORTANT STATISTICS YOU TRACK/REPORT ON FOR STUDY ABROAD?



WHAT DO YOU GET ASKED TO REPORT ON THAT IS SOMETIMES DIFFICULT TO ASSESS?

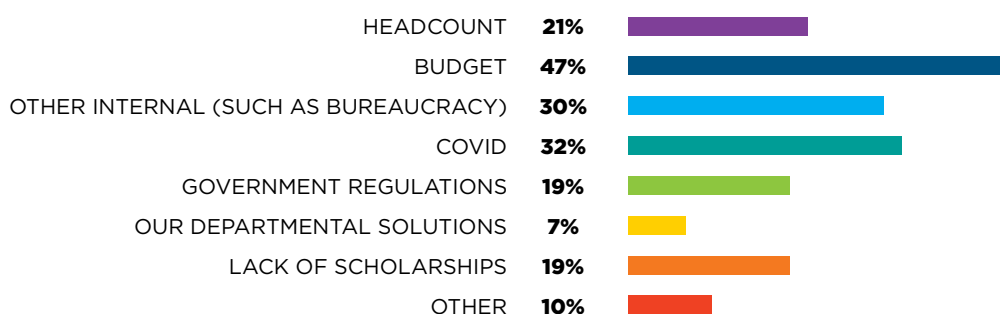


Challenges

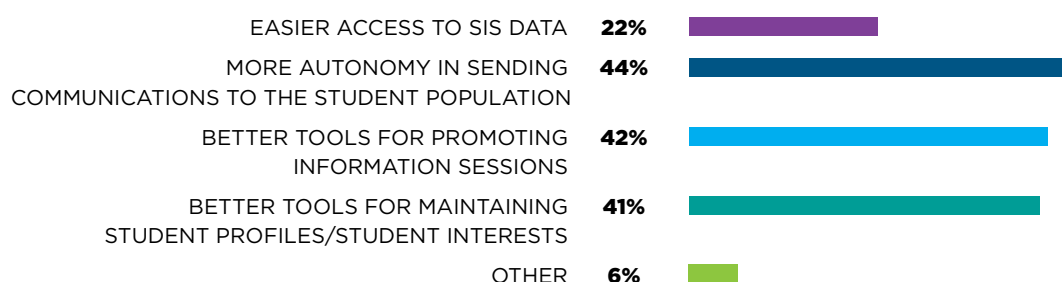
WHEN IT COMES TO what holds Study Abroad offices back from meeting their institution's objectives the biggest obstacles they report are budget, COVID and internal issues/bureaucracy. But what is more revealing is what they would like to do most to increase interest in study abroad. With more than **40% desiring more autonomy** in sending student communications, better tools for promoting informational sessions **and better tools** for maintaining student profiles and interests, it is clear that program leaders want tools **that help integrate, automate and personalize communication, to streamline program promotion and increase student participation.**



WHAT DO YOU SEE AS THE BIGGEST OBSTACLE IN MEETING YOUR INSTITUTION'S OBJECTIVES IN STUDY ABROAD/STUDY AWAY? (PICK TOP 2)



IF YOU COULD WAVE A MAGIC WAND, WHAT WOULD YOU DO OR CHANGE TO INCREASE INTEREST IN STUDY ABROAD?

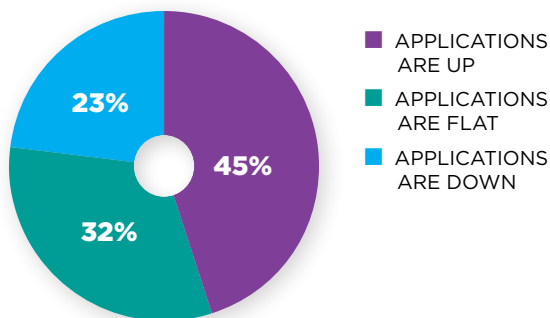


International Education Returns

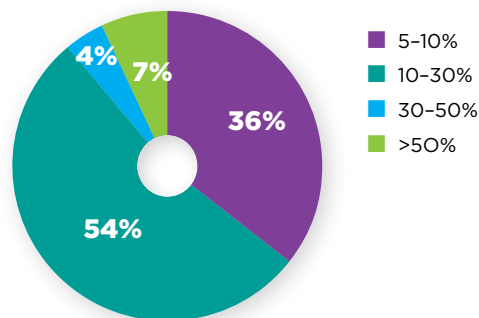
WHILE THE U.S. BORDERS were closed to international visitors for more than 18 months during the pandemic, many schools were able to continue their programs for current international students and via virtual programming. Thankfully, **normal travel patterns are resuming and with it the international education market is coming back**, with almost half of global education professionals reporting that applications are up, relative to before COVID.

When asked about the institution's level of interest among international students and scholars, **nearly half [45%] reported an increase in applications** compared to pre-COVID levels. **One-third [32%] said applications are flat** and only **23% reported applications are down**.

HOW WOULD YOU DESCRIBE THE LEVEL OF INTEREST FROM INTERNATIONAL STUDENTS AND SCHOLARS IN ATTENDING YOUR INSTITUTION RELATIVE TO THE YEAR BEFORE COVID (2019)?



IF APPLICATIONS ARE UP, BY APPROXIMATELY WHAT PERCENTAGE?

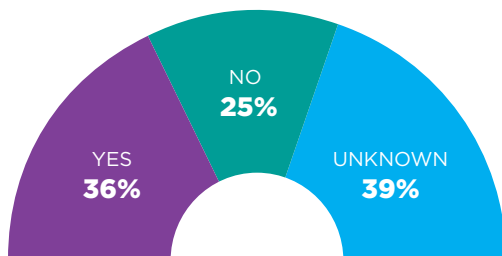


Competition Heating Up



WHEN ASKED ABOUT COMPETITION from other countries, 36% report they are experiencing increased competition from other countries as many are looking to fully resume and grow their international enrollments. One of the interesting aspects of the question, “Are you experiencing increased competition from other countries?” is that **39% responded with “Unknown,”** which indicates the need for more robust data tracking of international students and international travel in higher education. Many, still, are experiencing competition, as **36% responded with “yes”** and **25%** said they were **not experiencing competition.**

ARE YOU EXPERIENCING INCREASED COMPETITION FROM OTHER COUNTRIES?



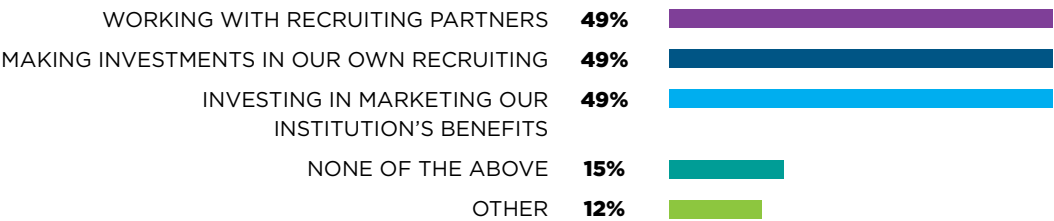
“We are living in a global society and it is imperative that we learn to communicate, live, and work together.

—SURVEY RESPONDENT

THE NEXT CRITICAL COMPONENT to a strong and successful program for incoming students is to actually attract the student and retain them. So, what are institutions doing to remain attractive and competitive among international students given the competitive landscape? **The three top initiatives were Working with Recruiting Partners [49%], Making Investments in Their Own Recruiting [49%] and Investing in Marketing Their Institution [49%].** As institutions and specific departments know, communication is key to any program, and the best way to entice program participation and increase enrollment is to strategically market how and where students are reached, ideally through their preferred communication channels.



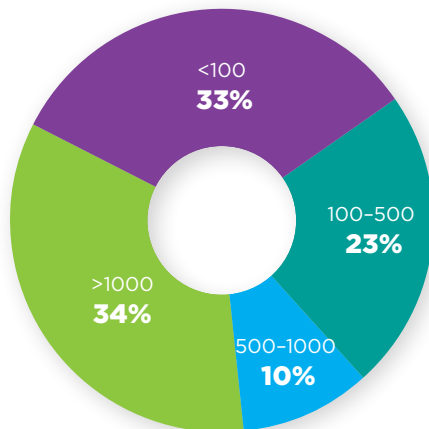
WHAT IS YOUR INSTITUTION DOING TO REMAIN ATTRACTIVE/COMPETITIVE IN THE GLOBAL LANDSCAPE?



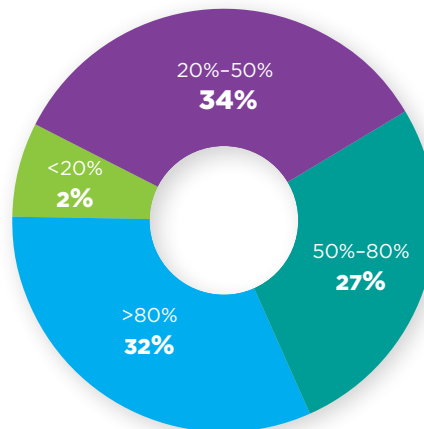


Even amid the pandemic's effects in 2021, **33%** of schools report issuing less than 100 I-20s last year, **23%** report issuing 100–500 I-20s and **10%** issued 500–1000 while **34%** issued more than 1000 I-20s. And of those issued, one-third report that 80+ percent of the I-20s attended.

HOW MANY I-20s DID YOUR DEPARTMENT ISSUE LAST YEAR?

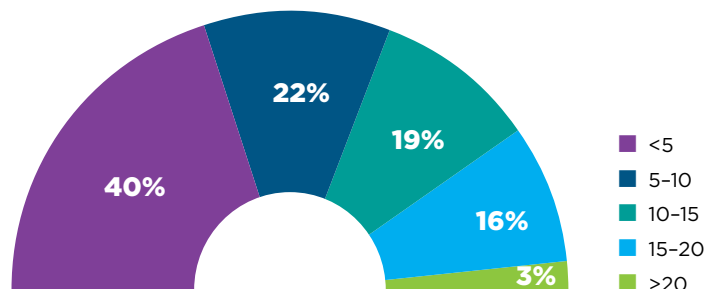


OF THOSE, APPROXIMATELY WHAT PERCENTAGE ATTENDED?



Similar to U.S. students, international students apply to multiple institutions and receive multiple I-20s. The majority of global engagement professionals think international students are considering less than five schools, and 22 percent think prospective students are considering 5–10 schools.

MOST INTERNATIONAL STUDENTS APPLY TO MULTIPLE INSTITUTIONS AND RECEIVE MULTIPLE I-20s. HOW MANY I-20s DO YOU THINK YOUR PROSPECTIVE STUDENTS ARE CONSIDERING?



Encouraging International Growth on Campus



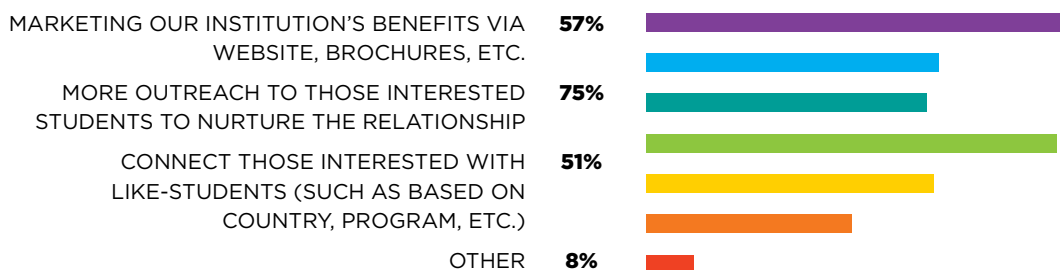
THERE ARE SEVERAL ways global engagement professionals encourage these students to choose their institution over another. The top ways global engagement professionals say they are **vying for students include nurturing the relationships with interested students [75%], marketing the institution's benefits through its website [57%]** and **connecting interested students with similar students already attending**—based on country of origin, programs studied, etc. **[51%]**.



Global engagement is essential to our individual and communal success in a global society. Globalization impacts all of us, and we are all actors in an interconnected world. It is imperative that we understand our role(s) within that context.

—SURVEY RESPONDENT

HOW DOES YOUR INSTITUTION ENCOURAGE STUDENTS TO CHOOSE YOUR INSTITUTION OVER OTHER AVAILABLE OPTIONS HERE IN THE U.S.?

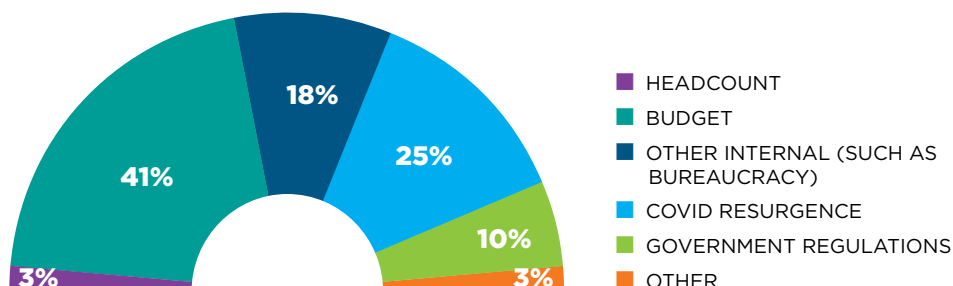


Challenges

THE BIGGEST CHALLENGE global engagement professionals report in meeting their institution's objectives in international education is **Budget [41%]**. And one in four believe **a resurgence of COVID cases and restrictions will continue to be an obstacle in the future**. Technology adoption to help streamline international enrollment processes and compliance can help alleviate budget challenges as automation frees up the global team so they can spend their time and energy where it really matters—helping recruit and onboard new students, developing programs to enhance the international student experience on campus and advising international students to ensure they are thriving.



WHAT DO YOU SEE AS THE BIGGEST OBSTACLE IN MEETING YOUR INSTITUTION'S OBJECTIVES IN INTERNATIONAL EDUCATION?



CONCLUSION



GLOBAL ENGAGEMENT IS STRATEGICALLY IMPORTANT to today's college campuses. Students know this and look for global opportunities and global diversity. Having international students as part of the higher ed community adds to the on-campus experience and the global and cultural opportunities afforded to students through study abroad are priceless.

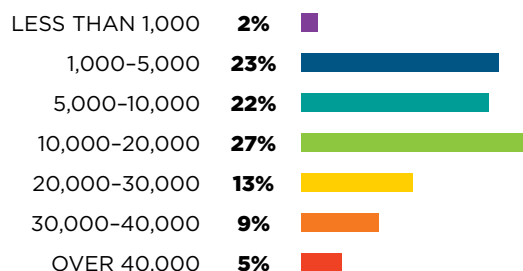
And global engagement professionals are passionate about helping their institutions and students rebound from the COVID effects on travel and grow their programs. Our survey helped lay out the challenges and opportunities ahead for both global professionals and study abroad teams. Terra Dotta has successfully ridden the waves of international travel for more than 20 years and what we see is that **a more holistic, integrated and comprehensive view of global engagement**—incoming, outgoing, and on-campus—will help global education as a whole provide cross cultural opportunities and tap into data and program management to fully integrate and grow global education. **In the post-COVID era, students want global experiences more than ever.**

APPENDIX

A Profile of Global Professionals

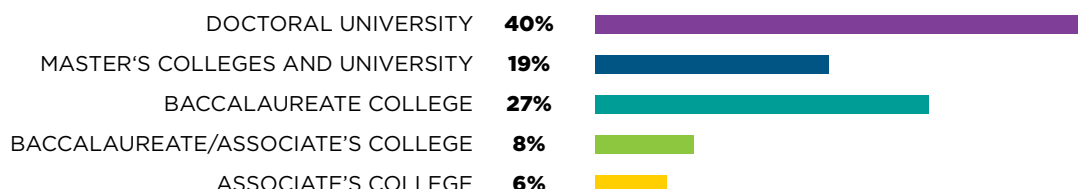
WHILE THE State of Globalization in Higher Ed survey participants reign from schools of **<1000 students** to more than **40,000**, **45%** were from schools with enrollments of **<10,000 students** and **40%** were from schools with enrollments from **10,000–30,000**.

WHAT IS THE LEVEL OF YOUR INSTITUTIONAL ENROLLMENT?



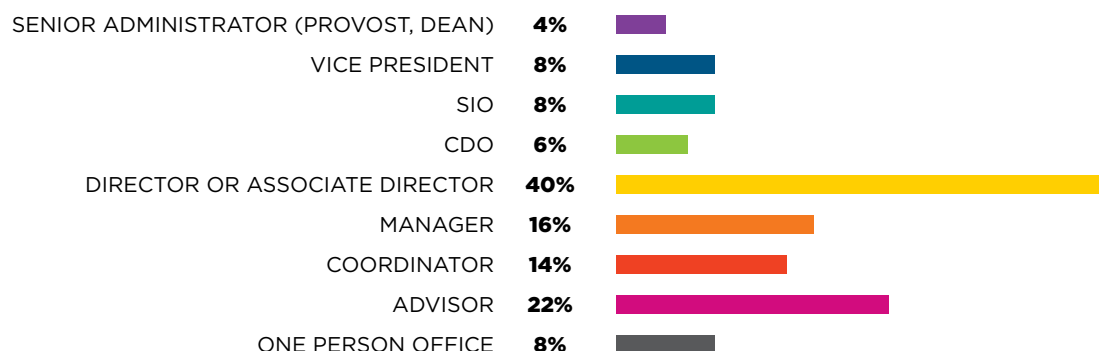
39% reported from **Doctoral Universities**, **27%** from **Baccalaureate Colleges**, **19%** from **Master's Colleges and Universities** and **14%** from **Associates Colleges**.

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR INSTITUTION TYPE?



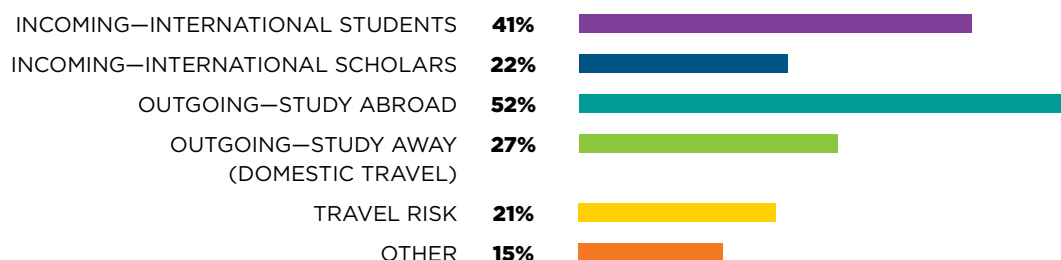
Most of the survey participants **[40%]** were **Directors or Associate Directors** and **22%** were **Advisors**. But we also received executive level input, with one in five respondents **[20%]** being **Senior Administrators (Provost, Dean), VPs or SIOs**.

WHAT IS YOUR JOB LEVEL? (CHOOSE ALL THAT APPLY.)



When it comes to their domain areas of global engagement expertise or interest, more than half **[52%]** of respondents focus on **Outgoing/Study Abroad** programs, **42%** oversee **Incoming/International Students**, while the remainder work in more niche departments, such as **Outgoing/Study Away for Domestic Travel [27%]**, **Incoming/International Scholars [22%]** and **Travel Risk [21%]**.

WHAT IS YOUR AREA OF OVERSIGHT/RESPONSIBILITY OR DAY-TO-DAY INVOLVEMENT?
(CHOOSE ALL THAT APPLY.)



See for yourself.

We invite you to learn how Terra Dotta can help you achieve your global engagement objectives. Contact your Terra Dotta representative or reach us online.

 www.terraddotta.com  sales@terraddotta.com



Global Engagement Solutions for Higher Education