



THE STATE OF **GLOBALIZATION** IN HIGHER ED

NOON



TERRADOTTA

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Preface



Global education offices are seeing renewed student excitement—and more importantly, a deep desire—for international experiences and travel in real time. Following the significant impact left from the pandemic, institutions celebrated lifts on travel bans throughout 2022 and with that, a comforting answer to the pent-up demand that students had been feeling for several years.

Now in 2023, **a new chapter has begun in global education.** Institutions are focusing their efforts on expanding opportunities for both incoming and outgoing students as much as possible, and it's working; students are travelling in numbers that mirror or exceed pre-pandemic rates.

Additionally, **global engagement is continuing to be a strategic priority** for the majority of institutions. Similar to the findings in last year's *The State of Global Engagement* survey, **80% of the respondents see global engagement as part of their institution's multi-year plan.** Moreover, **71% of those international**

education professionals confirm what we've thought to be true all along; **the strategic priority of global engagement is keenly focused on expanding the total student experience.**

Throughout this report, you'll find the **258 global education professionals** who responded to the Terra Dotta 2023 State of Global Engagement survey provide very encouraging insights about global engagement initiatives as well as the current state of both study abroad and international students and scholars.

KEY FINDINGS

1

Global engagement is a strategic priority

- **80%** of higher education institutions state global engagement is **part of the strategic plan** to drive student experiences, the institution's reputation and revenue.
- Programs consist of a **mix of initiatives** with 88% having study abroad, 87% international education, and 60% on-campus experiences.
- **73%** of international departments view they are **strategically important** and 59% view they are a **source of revenue**.

2

Study Abroad & International programs are expanding

- More than **60% of outgoing** programs expect to send **more students over the next few terms**, compared to prior years.
- Western Europe (52%) and Asia (43%) have seen the **largest increases in study abroad interest**.
- **87%** of institutions enrolled **over 50 incoming** students in 2022-2023. **62%** have seen **applications increase** since COVID.
- Nearly **8 out of 10** institutions issued more than **50 I-20s** with over half attending.

3

Measuring success is a challenge

- Top metrics tracked for outgoing programs include the countries (81%), majors (68%), and programs being used (47%)...but overall **success is difficult to measure** and often not realized right away.
- Program **challenges** include **staffing (52%), budgets (49%), and scholarships (48%)** for outgoing students. Biggest obstacles to incoming programs are budget (35%) and staffing (22%). Offering **more financial support** would be something that could increase interest and help **students commit** to the programs.

4

Competition is increasing

- **41%** of incoming programs have **experienced increased competition** from other countries. The main reason is cost (44%).
- Institutions are **working with partners (60%)** and **investing in recruiting (49%)** to remain competitive.
- **Over 60%** of institutions **utilize outreach, marketing, and on-campus programs** to attract incoming students.

Global Engagement is a **Strategic Priority**



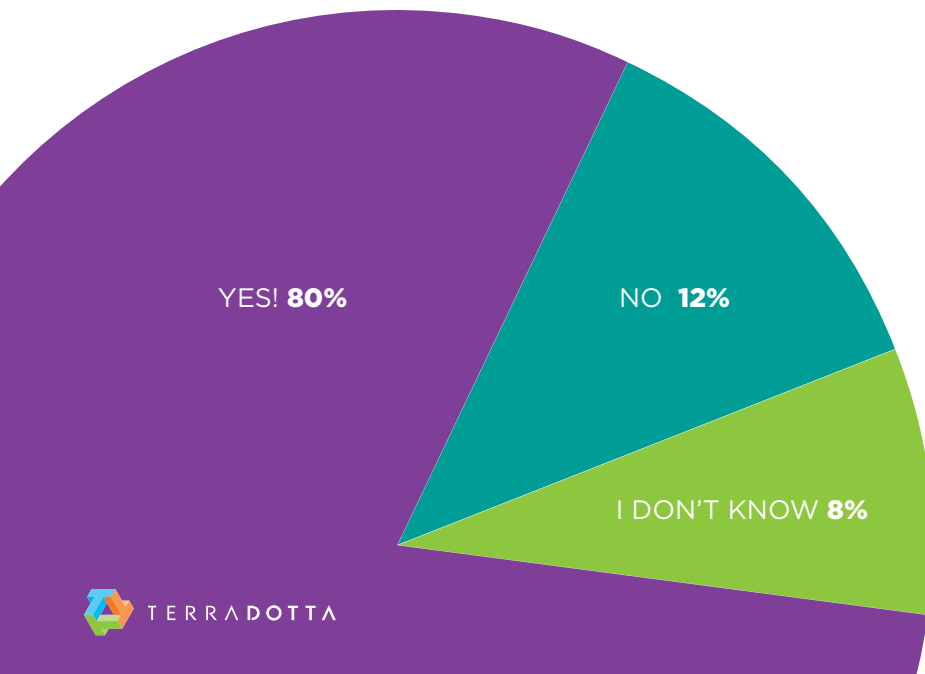
GLOBAL ENGAGEMENT has become an **integral part of strategic plans for 80% of higher education institutions** due to its crucial role in enhancing student experiences, bolstering institutional reputation, and driving revenue. By offering study abroad and study away programs, institutions provide students with **transformative cultural experiences, fostering personal growth and global perspectives.** This emphasis on global engagement also demonstrates a commitment to inclusivity, **enhances institutional reputation,** and attracts international students, thereby contributing to both **campus diversity and financial stability.** Overall, prioritizing global engagement aligns institutions with the demands of a globalized world and **positions them as leaders in higher education.**

Global Engagement is a **Strategic Priority**

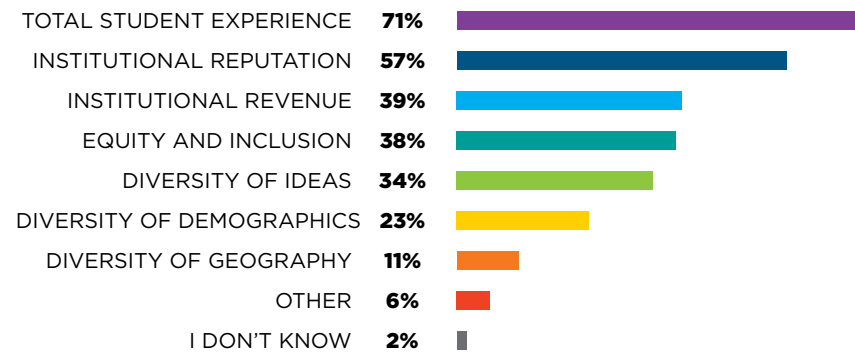
80% of higher education institutions state it is part of their strategic plan...

...to drive student experiences, the institution's reputation and revenue.

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?)



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



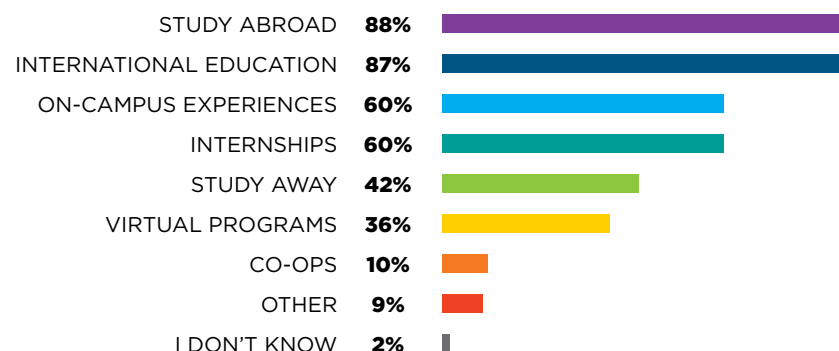
Program Growth is a Key Indicator for Global Engagement

GLOBAL ENGAGEMENT

encompasses diverse initiatives, including **study abroad programs, international education collaborations, on-campus multicultural experiences**, and more. Coming out of COVID, there is renewed interest in the global engagement industry. Students are also eager to travel again. Institutions are once again placing a strong emphasis on increasing student participation in these programs. By expanding access and providing various global engagement opportunities, **institutions stay attractive** among students' many choices while ensuring that students can actively **engage with different cultures, enhance their international perspectives, and develop the skills necessary for success in an increasingly interconnected world.**

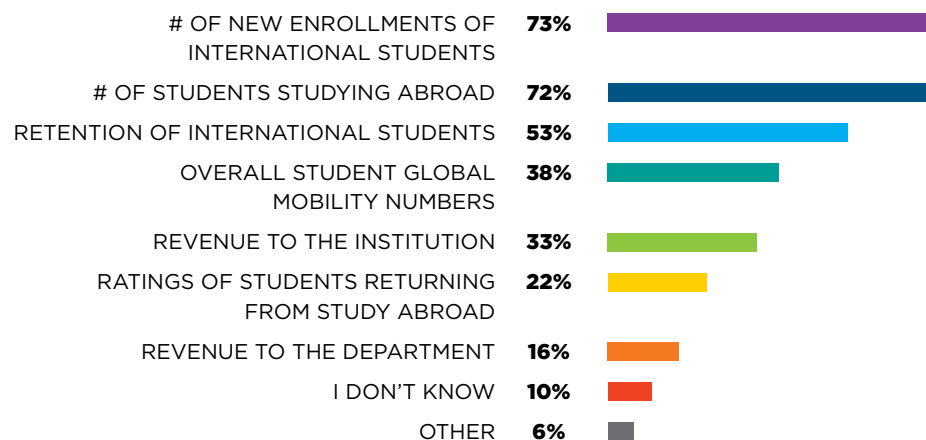
Global Engagement spans many different initiatives...

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



...with growth as the primary success metric.

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



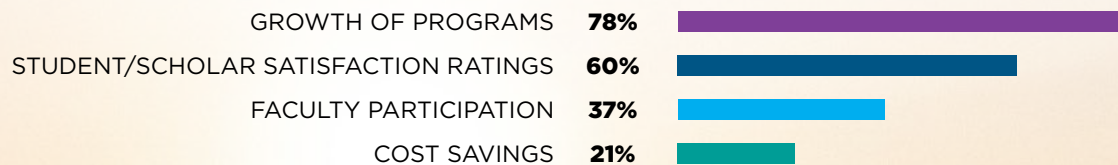
Student and Scholar Satisfaction

Ratings are Also Key Goals

DEPARTMENT STAFFING and budgets have remained stable over the past 12 months. Growth of programs and satisfaction ratings are key for 2023.

Growth of programs and satisfaction ratings are key goals for 2023

HOW WILL YOUR DEPARTMENT MEASURE SUCCESS IN 2023?
(PLEASE SELECT ALL THAT APPLY)



OUTGOING



Strong Growth Outlook for Outgoing Study Abroad Programs

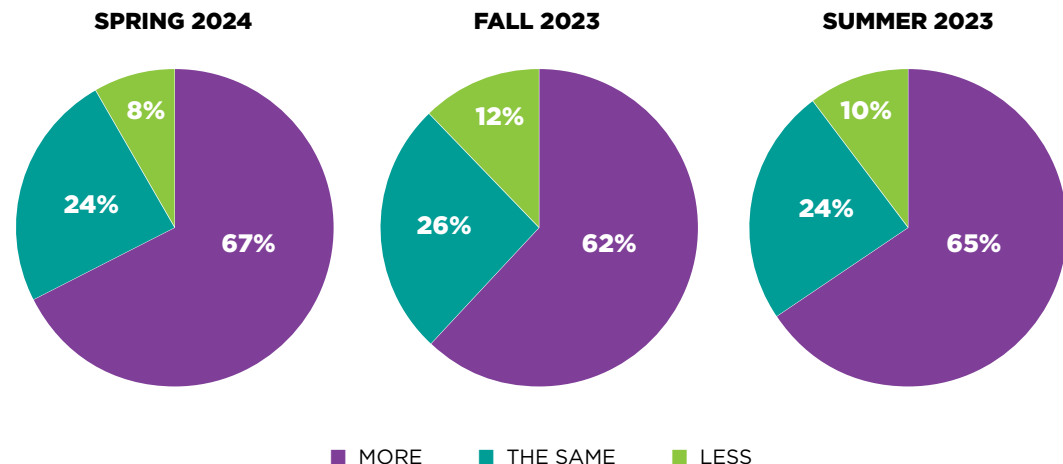
THERE IS an optimistic growth outlook for study abroad programs as the majority of respondents anticipate an increase in the number of students participating in such trips in the coming terms.

More than 60% expect to send more students, compared to prior years, over the next few terms.

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

“After 2+ years of isolation due to COVID, global engagement is more important than ever. I see study abroad as a valuable corrective to the lost socialization and maturation opportunities of the COVID years.

—SURVEY RESPONDENT



Western Europe & Asia are Top Destinations

INSTITUTIONS are observing the most significant surge in interest levels for study abroad programs in Western Europe and Asia.

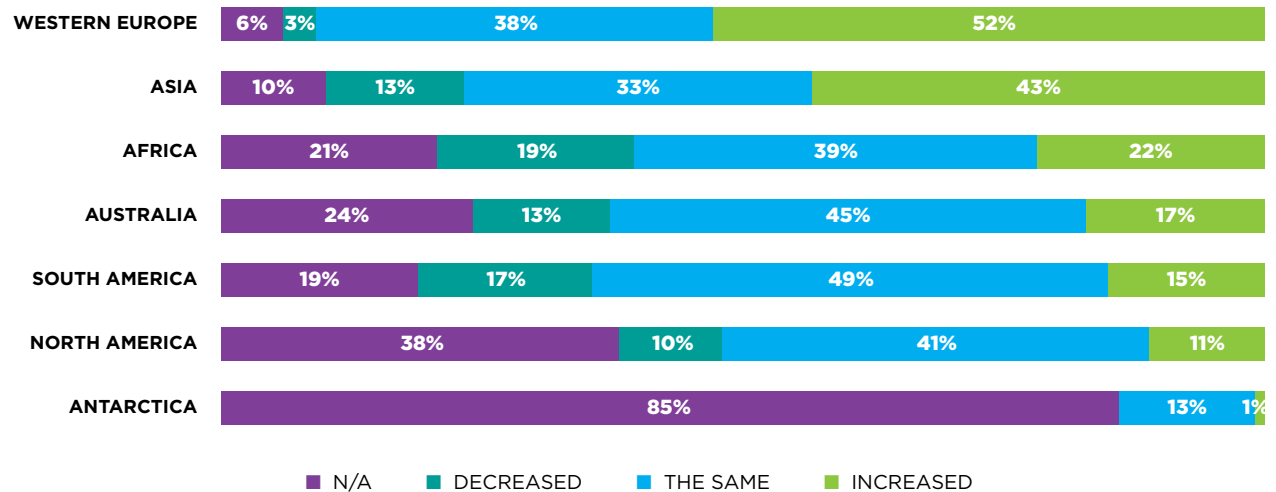
“Europe has become a coveted destination for study abroad, offering both academic excellence and a captivating cultural experience.”

—SURVEY RESPONDENT



Western Europe (52%) and Asia (43%) have seen the largest increases in interest levels.

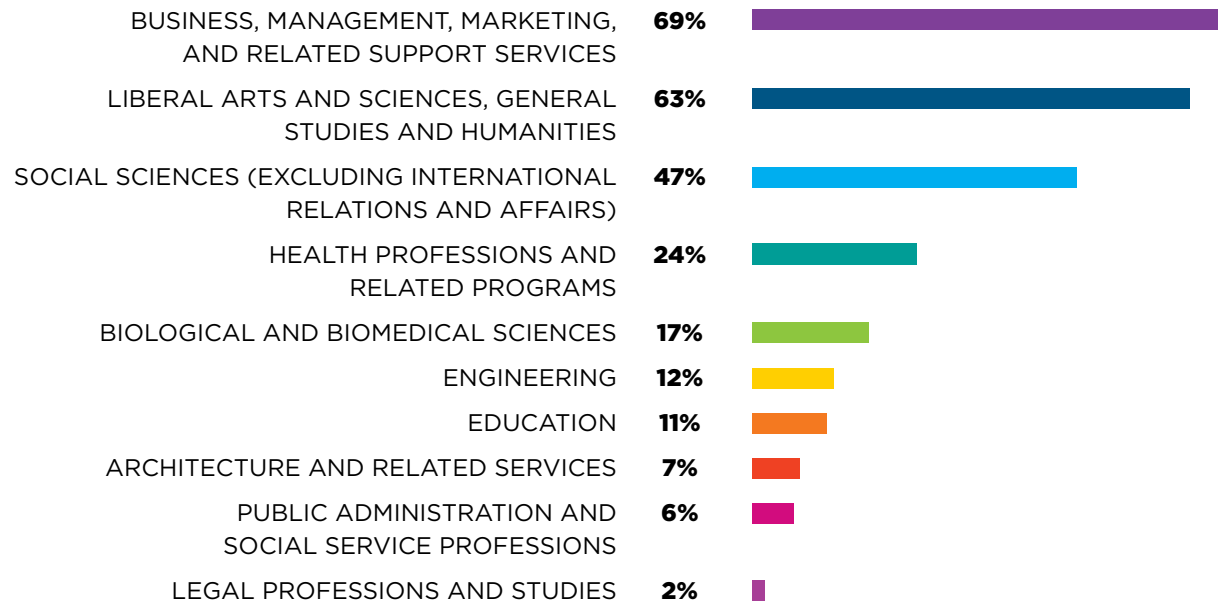
WHAT HAVE YOU OBSERVED REGARDING HOW THE TOP DESTINATIONS TRENDED OVER THE PAST YEAR? (WHERE IS INTEREST INCREASING, AND WHERE IS INTEREST DECREASING?)



Business, Liberal Arts & Social Science Majors are **Most Likely to Study Abroad**

**Top 3 outgoing student majors include:
Business, Liberal Arts & Science, and Social Sciences**

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



Overall Program Success

Includes Many Different Things

OVERALL PROGRAM SUCCESS

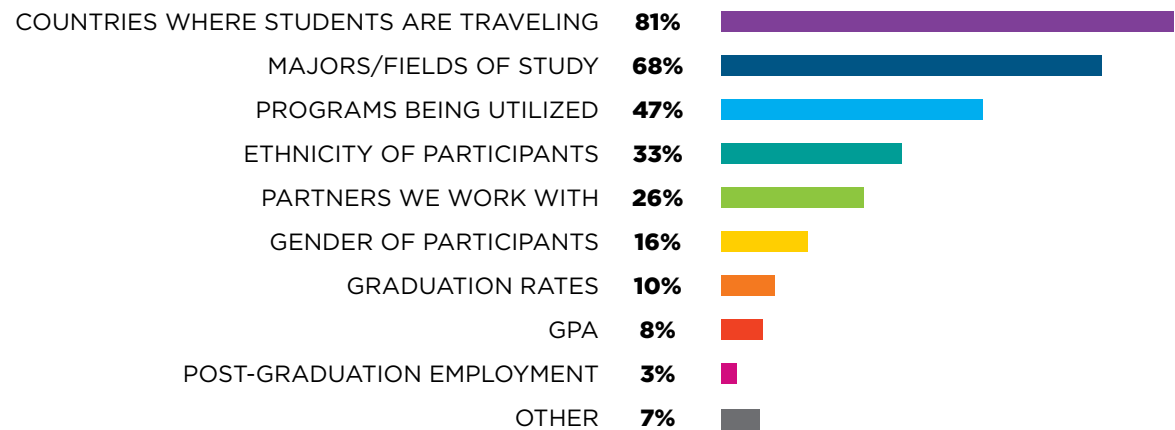
may include short-term measures, such as student satisfaction surveys and learning outcomes. Postgraduate employability and cultural competence are also essential but more challenging to measure.

“Success in study abroad is typically measured by the extent to which students are able to achieve their personal, academic, and professional goals and the degree to which they are able to engage with, and learn, from the host culture and community.

—SURVEY RESPONDENT

Top 3 metrics tracked are countries, majors, and utilization rates...

WHAT ARE THE MOST IMPORTANT STATISTICS YOU TRACK/REPORT ON FOR STUDY ABROAD? (PLEASE SELECT YOUR TOP 3)

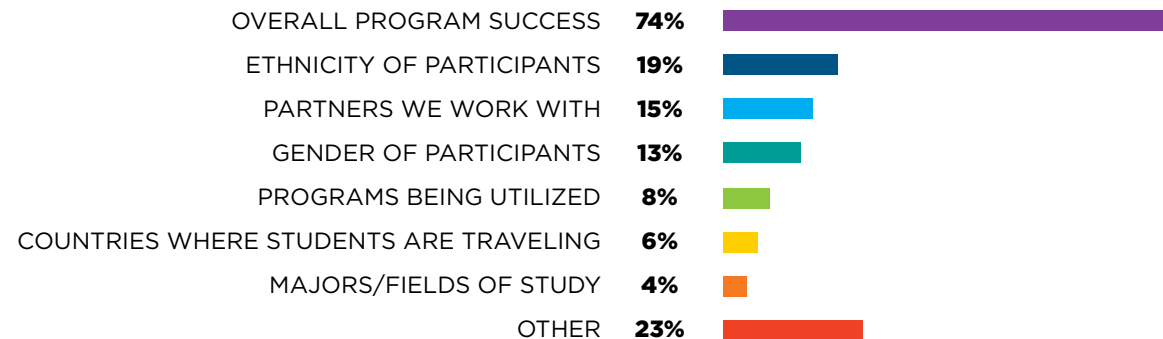


Overall Program Success Includes Many Different Things



...but overall program success also is difficult to measure.

**WHAT DO YOU GET ASKED TO REPORT ON THAT IS SOMETIMES DIFFICULT TO ASSESS?
(PLEASE SELECT ALL THAT APPLY)**



What Does **Overall Program Success** Mean to You?

“Did the student gain a **global perspective**? Is the student **culturally competent** and able to articulate their experience?”

—SURVEY RESPONDENT

“**Student engagement** with our school and **post-graduate** employability or **placement** in competitive residency/fellowship programs.”

—SURVEY RESPONDENT

“**Academic success** (comparable performance to home university), **positive** student **feedback**, student **interest in participating** in the program.”

—SURVEY RESPONDENT

“That the student had a positively **impactful experience** abroad. That may be **academically, socially or both.**”

—SURVEY RESPONDENT

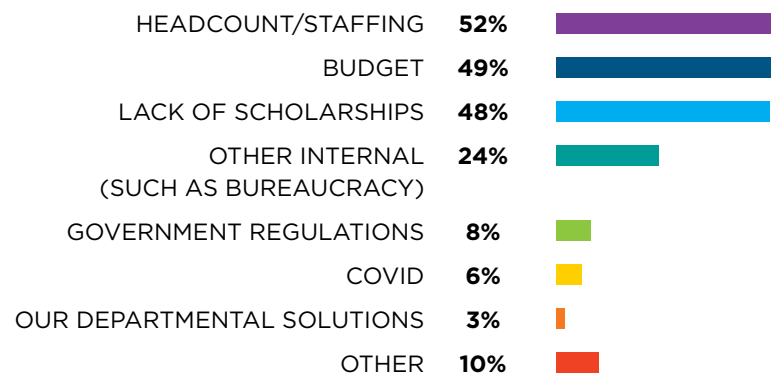
The Challenges

THESE FINDINGS HIGHLIGHT the complexities surrounding global engagement as it relates to study abroad. Headcount and budgets pose significant challenges for institutions as they strive to accommodate a growing number of students and allocate sufficient resources to support study abroad initiatives effectively. However, the biggest obstacle to increasing interest in study abroad is often the availability and accessibility of financial aid for students.

Many students face financial constraints that hinder their ability to participate in study abroad programs. The costs associated with tuition fees, travel, accommodation, and daily expenses can be prohibitive for some, limiting their opportunities for global engagement. The lack of adequate financial aid options specifically tailored for study abroad can discourage students from pursuing these experiences, creating a barrier to increasing interest in study abroad.

Top two challenges are headcounts and budgets...

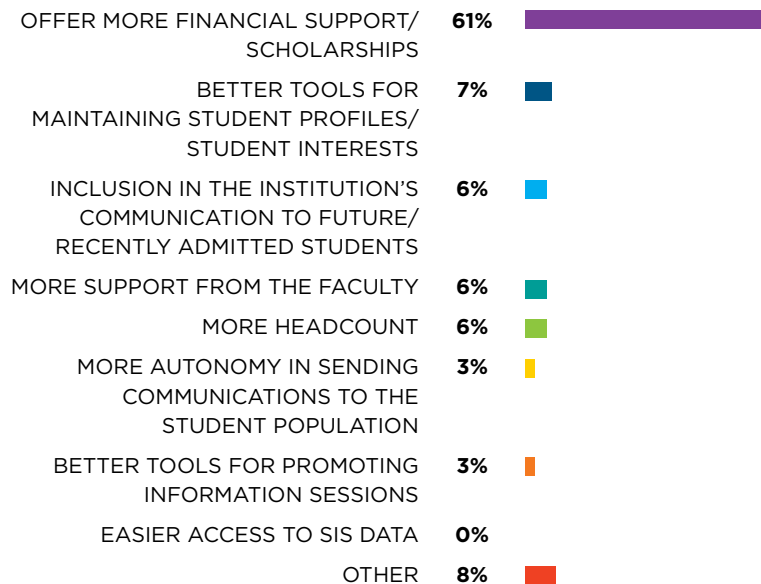
WHAT ARE THE BIGGEST OBSTACLES TO MEETING YOUR INSTITUTION'S OBJECTIVES IN STUDY ABROAD? (PLEASE SELECT YOUR TOP 2)



The Challenges

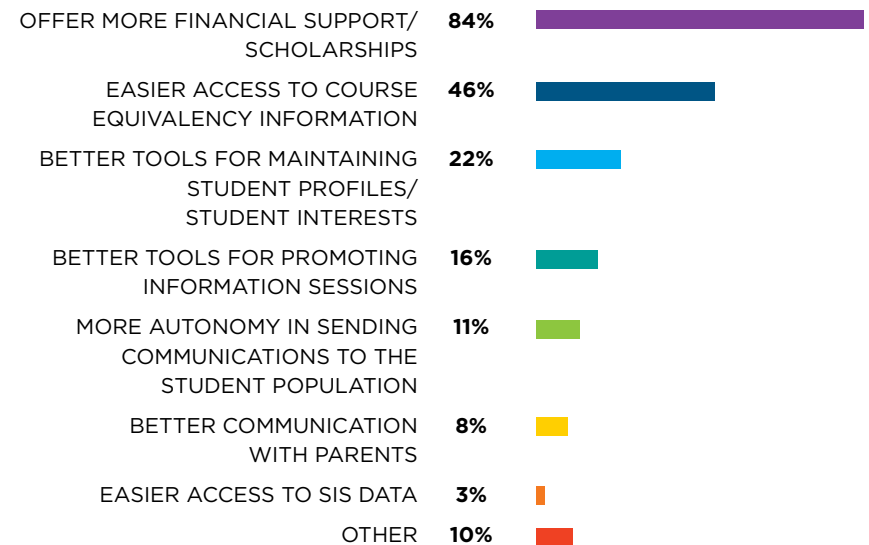
...but offering more financial support would be something that could increase interest...

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



...and help commit students to the programs

IF YOU COULD WAVE A MAGIC WAND, WHAT WOULD YOU DO TO INCREASE THE RATE AT WHICH STUDENTS CONVERT FROM "EXPRESSING INTEREST" TO "COMMITTING" TO A PROGRAM? (PLEASE SELECT 2 OPTIONS)



What Students Should Know About Study Abroad

If you could say anything to prospective study abroad students, what would you want them to know about the importance or impact of Global Engagement?

“Education abroad will change your life.”

—SURVEY RESPONDENT

“It is essential to explore other perspectives to be competitive in the increasingly global market.”

—SURVEY RESPONDENT

“Understanding the world and knowing how others see things differently is important to succeeding in the 21st century.”

—SURVEY RESPONDENT

“It is an opportunity that doesn't exist outside of college for most people, and that can drastically shape the way you perceive the world, for the better.”

—SURVEY RESPONDENT

INCOMING

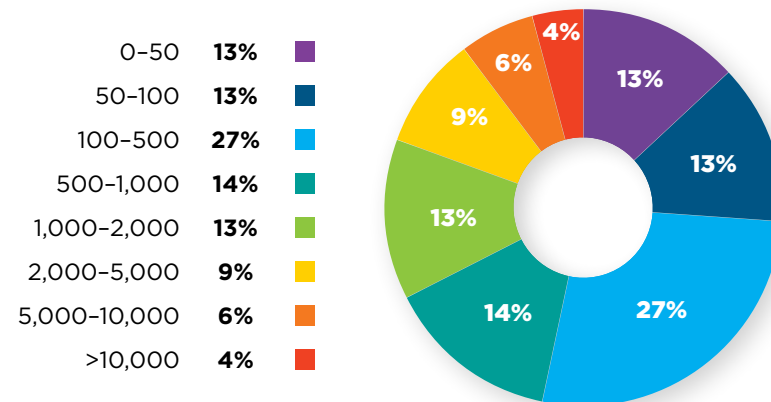


Incoming International Students **Are on the Rise**



Nearly 1/3 of institutions surveyed enrolled 1,000 or more incoming students in 2022-2023

HOW MANY INTERNATIONAL STUDENTS AND SCHOLARS DID YOUR INSTITUTION ENROLL FOR THE 2022-2023 SCHOOL YEAR?

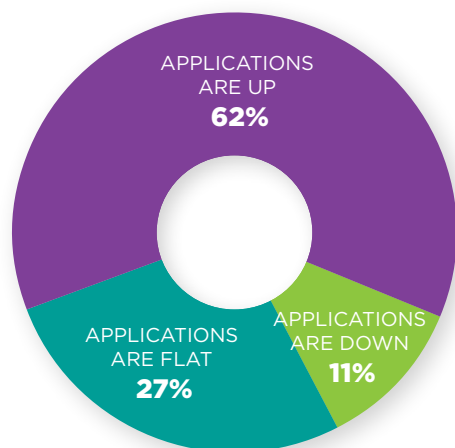


Most Institutions Seeing **More International Applications**

MORE THAN HALF of institutions are seeing increased interest from international students and scholars relative to pre-COVID levels.

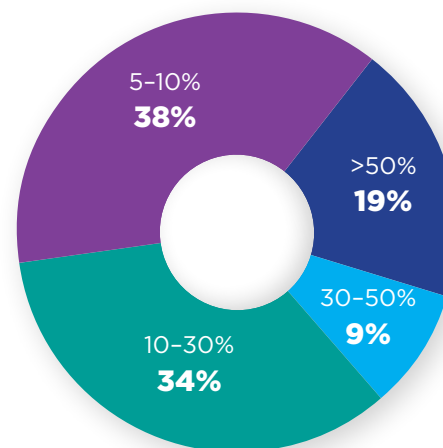
62% have seen applications increase since pre-COVID

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



62% are up by over 10%

APPROXIMATELY, WHAT PERCENTAGE ARE APPLICATIONS UP BY?

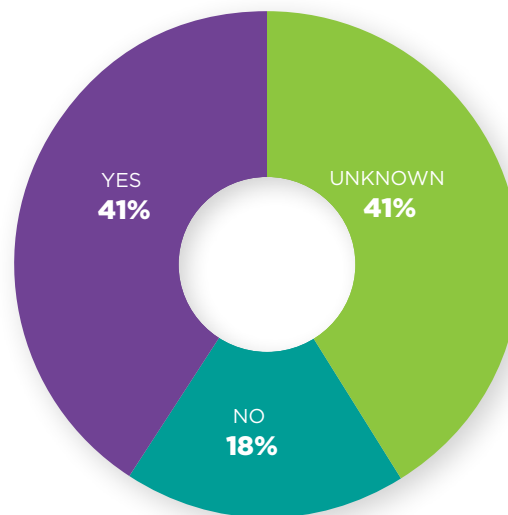


International Competition Increasing

ACCORDING TO THE SURVEY, 41% of the institutions surveyed have noticed heightened competition from other countries for international students. The primary factor driving this competition is the cost, as studying in other countries is considered less expensive. Respondents indicated their intention to collaborate with recruiting partners and invest in their own recruiting efforts to maintain their competitiveness in the global arena.

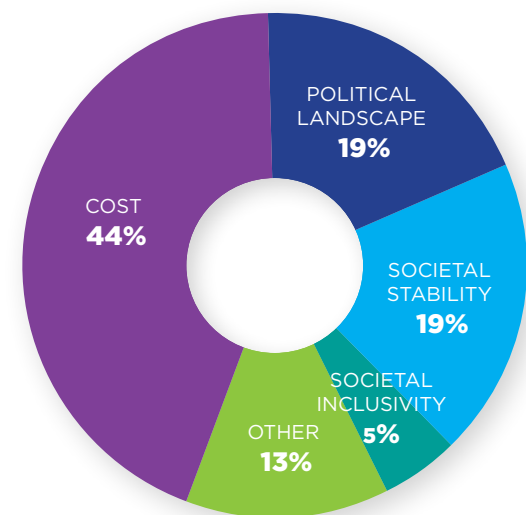
41% have experienced increased competition...

ARE YOU EXPERIENCING INCREASED COMPETITION FROM OTHER COUNTRIES?



...mainly due to cost (44%)

WHY DO YOU THINK COUNTRIES OTHER THAN THE U.S. ARE ATTRACTIVE TO STUDENTS?

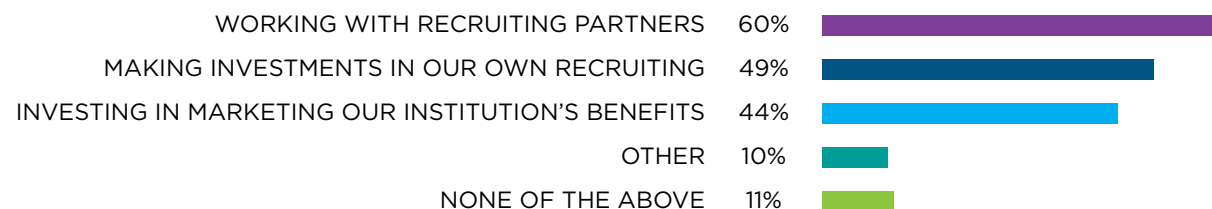


Remaining Competitive

Institutions are working with partners and investing to remain competitive



WHAT IS YOUR INSTITUTION DOING TO REMAIN ATTRACTIVE/COMPETITIVE ON THE GLOBAL LANDSCAPE? (PLEASE SELECT ALL THAT APPLY)

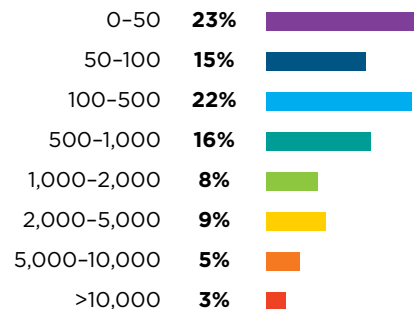


Nearly 8 Out of 10 Institutions Issued More Than 50 **I-20s**

NEARLY 80% of institutions issued 50 or more I-20s, with more than half of those students ultimately enrolling at the institution. Though the majority of international students apply to multiple institutions and receive multiple I-20s, most respondents believe that students typically receive five or fewer I-20s, suggesting a relatively focused and targeted approach to school selection.

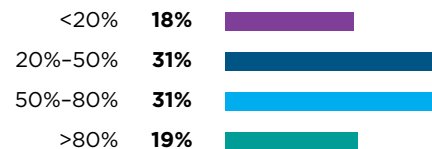
77% issued more than 50 I-20s...

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



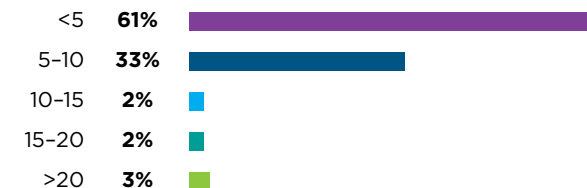
...more than half attended...

OF THOSE I-20S ISSUED, APPROXIMATELY WHAT PERCENTAGE ATTENDED?



...respondents believe 61% of students applied to <5 institutions

HOW MANY I-20S DO YOU THINK YOUR PROSPECTIVE STUDENTS ARE CONSIDERING?

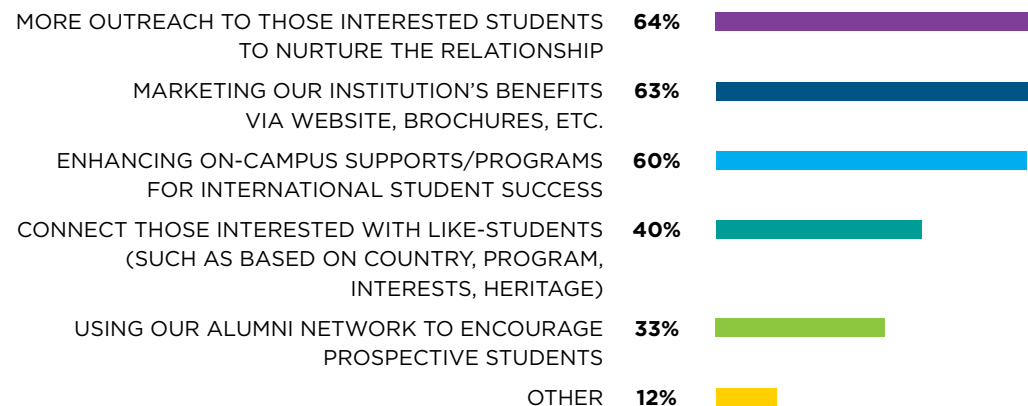


Attracting Incoming Students

Over 60% of institutions utilize outreach, marketing, and on-campus programs to attract incoming students



HOW DOES YOUR INSTITUTION ENCOURAGE STUDENTS TO CHOOSE YOUR INSTITUTION OVER OTHER AVAILABLE OPTIONS HERE IN THE U.S.? (PLEASE SELECT ALL THAT APPLY)

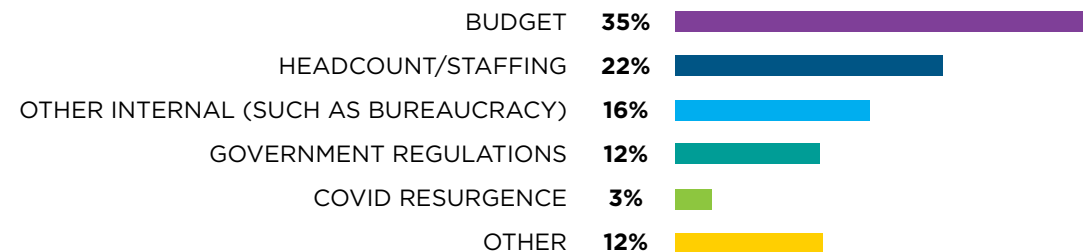


Attracting Incoming Students

Biggest obstacles are budget and staffing



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



The **Importance** of Global Engagement

If you could say anything to prospective international students, what would you want them to know about the importance or impact of Global Engagement?

“It accelerates your career development.”

—SURVEY RESPONDENT

“Global engagement is an essential piece to be successful in future careers.”

—SURVEY RESPONDENT

“In every diverse and growing global environment, it’s critical to engage the world. The skills, knowledge, and experiences will forever support your success!”

—SURVEY RESPONDENT

“Through global engagement, international students can gain exposure to new ideas and perspectives, which can broaden their intellectual horizons and deepen their understanding of the world.”

—SURVEY RESPONDENT

APPENDIX



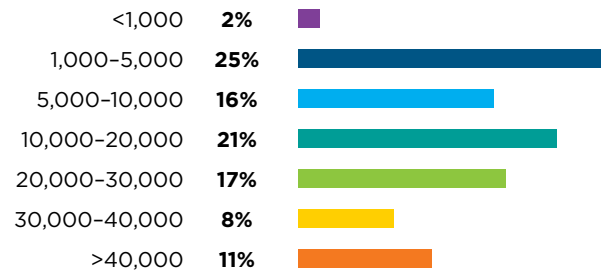
Respondent **Profile**

258

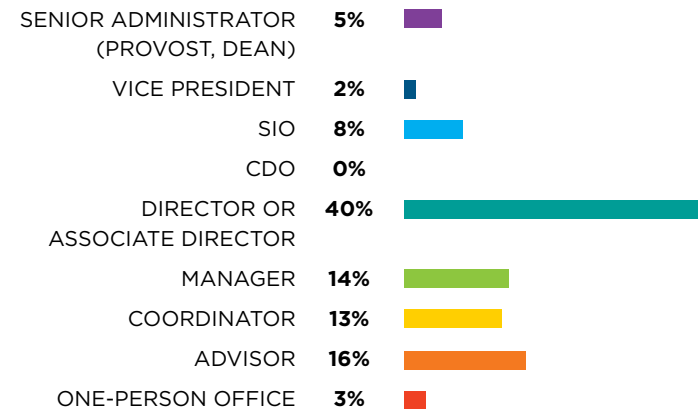
TOTAL RESPONDENTS

**INDIVIDUALS WORKING WITH THE
INTERNATIONAL DEPARTMENT AT
HIGHER EDUCATION INSTITUTES.**

RESPONDENTS BY INSTITUTION SIZE

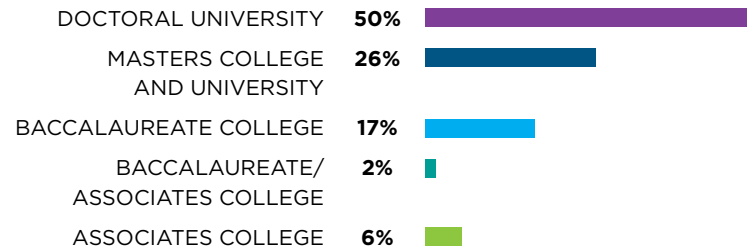


RESPONDENTS BY ORGANIZATIONAL ROLE

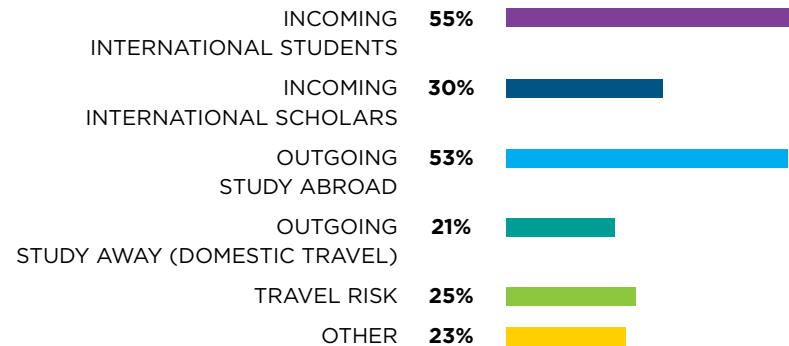


Respondent Profile

RESPONDENTS BY INSTITUTION TYPE



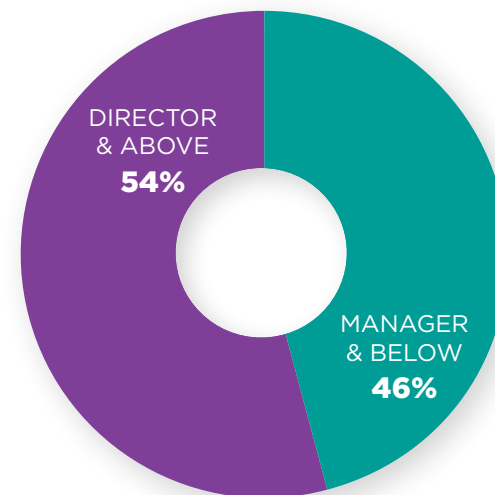
RESPONDENTS BY OVERSIGHT / RESPONSIBILITY



RESPONDENTS BY DEPARTMENT SIZE




RESPONDENTS BY JOB LEVEL GROUPING





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.

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