# Chapter 5
# Effective Global Mobility and International Recruitment During A Pandemic

**Chris Strods, Alex Berka, and Sarah Linney**

**Abstract**  The COVID-19 pandemic of 2020 has had a rapid, profound and unprecedented impact on international education and global student mobility. A near-total shutdown of international air travel over the first four months of 2020 has rendered millions of international students unable to travel to their destination country to commence or resume studies. Those students who were already in their destination country before the travel shutdown has been subject to widespread lockdowns, campus closures, and social distancing requirements, preventing them from engaging with their studies in the way they had anticipated and prepared for. Quacquarelli Symonds (QS) conducted two separate pieces of market research to quantify the impact of the pandemic on international student mobility and the expected impact on higher education institutions: a survey of prospective international students, and one of international education professionals at universities from around the world. The results of these surveys indicate that the pandemic has had an acute impact on the future study intentions of prospective students, many of whom say their plans have been affected, and express fear and uncertainty about what the future holds for their education. Most universities are expecting a drop in international applications in the coming intakes and have implemented measures to maintain learning during the period where on-campus instruction is not possible, although they too share uncertainty about what the coming months hold, and how best to respond.

**Keywords**  Global mobility · Student recruitment · International education · Crisis response

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## 5.1  Introduction

The disruption caused by the COVID-19 pandemic to higher education, and to global student mobility, in particular, is without precedence or parallel. A near-total shutdown of international travel, coupled with the closure of thousands of campuses around the world due to the introduction of social distancing regulations, has left educators and administrators in higher education with twin problems. Universities are determining how to continue to provide teaching and instruction to all students in a manner which maintains their physical safety and the quality of their education, while simultaneously trying to maintain a pipeline of new enrolments in a world where traditional recruitments practices are no longer feasible, and in which no guarantees can be made about what type of experience can be offered in the coming study periods. To better understand how COVID-19 has impacted higher education, it is useful to reflect on how the pandemic has evolved over the early months of 2020, and the impediments it has implemented for the operations of universities around the world.

### 5.1.1  A Brief COVID-19 Timeline

The COVID-19 disease is believed to have originated in the Wuhan province of China in late 2019, and to have remained largely contained within mainland China through much of January 2020, with only 125 confirmed cases outside of China by the end of January (Dong et al. 2020). To this point, there had been little disruption to university operations outside of China. In late February 2020, the number of confirmed cases began to accelerate in other Asian countries and continental Europe, with the World Health Organization (WHO) declaring a 'Public Health Emergency of International Concern' on January 30. However, as of 3 March, 80,304 out of 90,870 confirmed cases were in China (Sohrabi et al. 2020), and there were few international travel restrictions outside of China (Salcedo et al. 2020). Over the course of March, cases continued to rapidly accelerate to other countries and regions, most prominently in the European countries of Italy, Spain, and Germany. Outside of Europe, South Korea and Iran were also reporting larger and rapidly growing numbers of confirmed cases. By the end of March 2020, there were over 850,000 confirmed cases globally, and the epicentre of the pandemic had shifted from China (where new confirmed cases had slowed to less than 100 per day) to Europe, which was reporting over 30,000 new cases per day, and hosting over half of all confirmed cases globally (Dong et al. 2020). UNESCO data indicates that by the end of March 2020, 192 countries had implemented country-wide school closures (including primary, secondary and tertiary institutions), affecting over 91% of total enrolled learners around the world. As of the end of April, 177 countries still have country-wide closures in place, affecting over 72% of enrolled learners of all levels globally (UNESCO 2020). Coupled with near-total bans on international travel and severe restrictions on domestic travel in

many countries, the aggregate effect of the global response to COVID-19 has made it infeasible to maintain normal university operations for the immediate future.

### 5.1.2  Impact on Student Mobility

COVID-19 has impacted the global mobility of international students in two ways. Firstly, it has led to international travel bans which have prevented many enrolled students from travelling from their home country to that of their university to commence or resume their studies, and secondly, it has prompted domestic lockdowns and social distancing regulations in most countries, in turn leading to widespread campus closures and the suspension of face-to-face teaching.

#### 5.1.2.1  Travel Bans

The first COVID-19-related travel bans began at the end of January 2020 and were initially mostly limited to those travelling from mainland China (Kiernan and DeVita 2020), which at the time contained nearly all confirmed cases (Dong et al. 2020). This had an immediate impact on many Chinese international students who had flown home to celebrate Chinese New Year, which in 2020 was observed on 25 January. Taking Australia as a case study, which commenced its academic year in February, at least 100,000 Chinese international students out of a total of 163,000 were estimated to be in China when a ban was introduced by the Australian government on February 1 (Kellett and Ironside 2020). As of April, only 62% of Chinese residents on Australian student visas were in Australia, compared to 89% of visa holders from all other countries (Department of Education 2020).

The travel bans expanded beyond China in the following months, with further bans on travel to and from a large number of countries implemented rapidly over the course of March and April as the disease began to spread throughout the world, and precipitated by the WHO declaration of a pandemic on March 11 (ICEF 2020).

By the end of April 2020, over 96% of travel destinations worldwide had implemented travel restrictions of some type, most commonly mandatory quarantine and arrivals ban on non-residents (ICEF 2020). In response, many international airlines had ceased running their ordinary flight schedules and grounded their fleets for all but a small number of 'repatriation' flights.

In aggregate, these measures have made it near-impossible for any non-resident student to travel to most countries to commence or resume study (although in most cases those who were in their country of study prior to the bans being implemented were able to stay).

### 5.1.2.2   Campus Closures

While some students had found themselves out of their university's country and with no way of travelling there, in particular those studying in southern hemisphere destinations like Australia and New Zealand which were between academic years, most enrolled students were already in their destination country at the time the travel bans were implemented (Department of Education 2020).

Those international students who were already in their study destination when the travel bans took effect have been affected by the widespread restrictions on movement and physical interactions, and the subsequent campus closures. The inability to deliver classes in a face-to-face context has in some cases led to the temporary suspension of classes altogether, as well as a transition from face-to-face delivery to online delivery for the foreseeable future (Johnston 2020; BBC 2020; Levenson et al. 2020).

## 5.1.3   Impact on Enrolment Pipelines

As well as impairing the ability for enrolled international students to commence or resume their studies, the COVID-19 pandemic has (and is likely to continue to) adversely affect the capacity for universities to recruit and enrol students for future semesters, with universities largely unable to conduct any of the traditional face-to-face recruitment activities like career and study fairs which formed key components to most recruitment strategies. Furthermore, students will likely be unwilling to commit to study without any certainty that they will be able to travel to their intended destination when required, or without assurance that the student experience will be what they would expect if campus closures and social distancing measures remain in place for an extended period.

While the current restrictions remain in place, universities will continue to execute new recruitment initiatives, including pivoting to virtual events, enhancing digital marketing and branding campaigns as well as improve their remote teaching capabilities as they navigate the longer term challenges of effective and student-centric online education.

## 5.2   Survey Methodology

In order to better understand the ways in which global student mobility has been impacted by the COVID-19 pandemic, as well as what measures educational institutions have put in place to manage the effects of the pandemic on their capacity to deliver their curriculum and maintain a pipeline of future students, two surveys were developed: one targeted at prospective international students (the 'Student Survey'),

and one at professionals working in higher education institutions (the 'Institution Survey').

Both surveys were hosted on the SurveyGizmo platform and were written in English only. Cookie-based user filtering was used to prevent respondents from completing the survey more than once. Where possible, incomplete responses were used in the analysis as well as complete responses. Both surveys took an average of 10 min to complete, and no incentive was offered to respondents for their participation.

In total, $n = 32,645$ responses were received for the Student Survey, and $n = 1,016$ responses were received for the Institution Survey. In both cases, a convenience sample was used, and no weighting or quotas were applied.

### 5.2.1   Student Survey Methodology

The Student Survey comprised of an online survey sent to 'prospective international students'—that is, those who intended to study internationally within the 12 months, but had not yet enrolled at an institution. It included questions on whether and in what ways their future study intentions had been affected, their interest in alternative delivery modes, and what their expectations were of universities in helping minimize the risk of COVID-19.

The Student Survey data presented here was collected between 14 February and 30 April 2020. In some cases, data is presented as time-series with the dataset divided into weeks since the survey launched, while in other cases it is presented in aggregate.

The survey was distributed via two channels—an outbound email campaign and through promotion on QS' www.topuniversities.com website. For those who were reached via the email campaign, an initial email was sent on 18 February 2020, with periodic reminder emails sent to those who had not completed the survey. The website link was made live on 16 March.

### 5.2.2   Institution Survey Methodology

The Institution Survey component comprised of an online survey targeted towards professionals working in international education departments in higher education institutions. The survey included questions on how their institutions had been impacted by COVID-19 and expected to be impacted in the future, as well as what measures they had implemented, or were considering implementing to ameliorate the impact of COVID-19.

The Institution Survey data presented here was collected between 10 March and 30 April 2020. An initial email was sent to a list of higher education industry professionals on 10 March 2020, with periodic reminder emails sent to those who had not responded to the survey.

## 5.3   Survey Findings

### 5.3.1   Student Survey Findings

#### 5.3.1.1   Mobility Impacts

In our Student Survey, we asked respondents whether the COVID-19 pandemic had impacted their plans to study abroad. Across the life of the survey, a total of 46% said that it had affected their plans, while a further 25% said that they were unsure, and 29% said they believed it had not affected them (Fig. 5.1).

There is a clear shift in opinion over time, with the proportion of those believing themselves to be affected growing from 27% in mid-February to 50% by mid-March, and then stabilizing at between 60–63% throughout late March and April (Fig. 5.1).

There was also a growth in uncertainty over the same period, with the proportion of those who were 'unsure' about whether or not their plans were affected jumping from 16 to 34% in the week of 13–19 March, when widespread travel bans began to be implemented and immediately following the WHO declaration of a pandemic on 11 March. Conversely, the proportion who did not believe themselves to be affected by the pandemic fell from 60% in the first week of data collection (14–20 February) to just 13% in the final week of data collection (24–30 April) (Fig. 5.1).

In addition to asking *whether* they were affected by COVID-19, respondents were also asked *how* they had been affected by COVID-19—that is, how did they expect that their plans would change as a result of the pandemic. Across the life of the survey, a plurality of 47% said that they intend to defer their application and/or enrolment
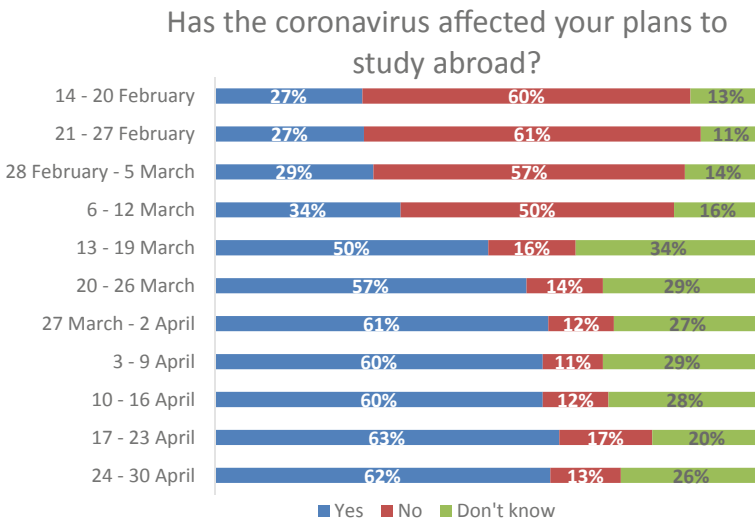


**Fig. 5.1**  Impact of COVID-19 on future study intentions

Which of these best describes how the coronavirus has changed your plans to study abroad?
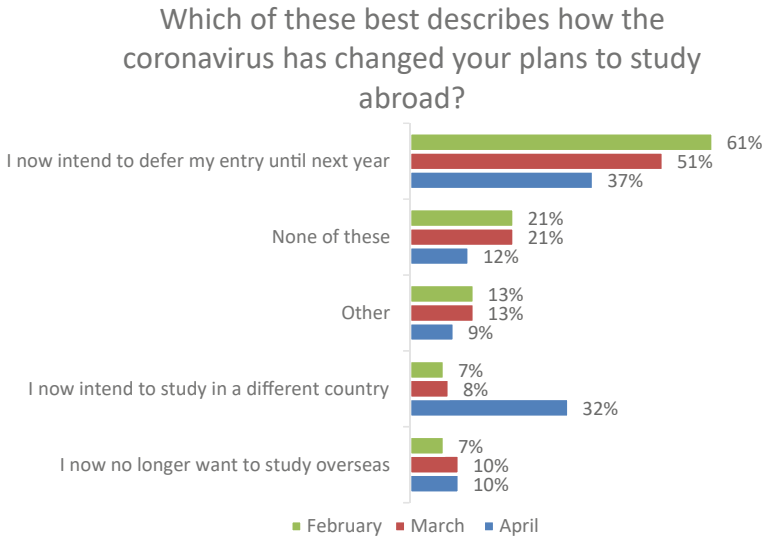


Fig. 5.2  The ways in which prospective students have responded to COVID-19

until the following year as a result of the pandemic, while only 13% said that they planned to study in a different country to the one they had initially planned to, and only 8% had abandoned their international study plans altogether (Fig. 5.2).

Again, this sentiment has shifted over the course of survey, with only 37% of responses received in February intending to defer, while 32% said that they were now intending to study in a different country. As travel bans began to take effect in March, and the prospect of choosing a different country to study in became less feasible, the proportion of those looking to defer rose to 51%, while the proportion looking to study in a different country fell to 8%. This trend continued into April, where 61% said that they intended to defer, and 7% planned to study in a different country.

Respondents were also asked to provide a qualitative response on how their study plans had been affected. Common themes included an inability to study due to cancelled language and/or entrance exams:

> Because of COVID-19, many of the exams that I needed, in order to apply, were cancelled or rescheduled. So, I missed the opportunity to study abroad.

> Because of the coronavirus, my GMAT test was cancelled. Not sure when or how I can complete the test. Not sure whether I can apply to the shortlisted universities on time, or whether I can make it out to get my F1 visa.

An unwillingness to pay for study without knowing what format it would take (typically with reservations about online study):

> I am unwilling to pay deposits now for the study year of 2020/2021 because I am worried that the coronavirus will not be over and that all classes will be online. I don't want to pay thousands to only get online tuition. I am also unable to book flights in this uncertainty.

And fear about travelling far from home amid a pandemic:

> COVID-19 has spread across the globe and so the airlines have stopped the incoming and outgoing of passengers of all countries. My family is now scared to send anyone anywhere, be it a foreign nation or just a trip to the grocery store! I'm now sticking to online study platforms for my studies.

> I am afraid of going abroad nowadays. The world is going to face an economic collapse. So, education could be come costly. That would be unbearable for my middle-class family, as well as for me.

> The Coronavirus is spreading too fast in nearby countries. My parents are scared to send me abroad.

The results suggest prospective international students have high levels of concerns regarding student mobility, as well as widespread uncertainty and fear about the future and how COVID-19 will impact their study aspirations, as well as reservations about the effectiveness of online study.

### 5.3.1.2  Perceptions of Online Learning

There is a long-demonstrated preference for international students to engage in their studies in a face-to-face, on-campus format. Research by Quacquarelli Symonds (2020) suggested that just 28% of prospective international students were interested in online learning, with 27% reporting the same in 2019 and 21% in 2018. For most international students, much of the value of a degree from an international university is in the ability to experience a different culture and make new friends, rather than simply receiving a qualification from a prestigious or well-known institution (Quacquarelli Symonds 2020).

One of the most immediate responses to the pandemic was a shift to online delivery of courses by universities in order to replace face-to-face learning, which had been rendered infeasible in most cases due to the social distancing requirements in effect around the world.

Respondents were asked about their interest in online learning as an alternative to face-to-face learning, with 58% expressing *some* degree of interest in online learning, though only 18% saying they were 'extremely' or 'very' interested in online learning. Conversely, 42% of respondents said that they had no interest in studying their degree online (Fig. 5.3).

While a majority of respondents express some level of interest in commencing their studies in an online environment (whether temporarily or otherwise), it appears that the traditional, face-to-face format is still preferred by a large proportion of prospects.

How interested would you be in studying your
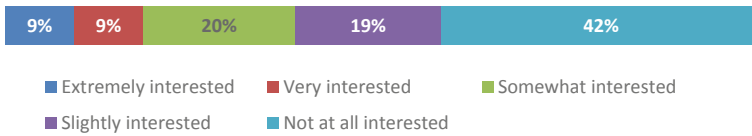degree online because of the coronavirus?

| 9% | 9% | 20% | 19% | 42% |
|----|----|-----|-----|-----|

- Extremely interested   ■ Very interested   ■ Somewhat interested
- Slightly interested   ■ Not at all interested

**Fig. 5.3**  Interest in studying online due to COVID-19

## 5.3.2  Institution Survey Findings

### 5.3.2.1  Teaching Challenges

The most immediate challenge presented to educational institutions by the COVID-19 pandemic is how to maintain normal teaching operations in the face of strict lockdown and social distancing regulations. This consists of not just the mode of curriculum delivery, but administration of assessments and examinations, management of on-campus student accommodation and curation of frequent and timely information about how operations are being affected, as well as updates on changes to student experience.

The Institution Survey solicited open-text feedback regarding what university professionals believed to be the 'biggest challenges' posed by the pandemic. The common themes in these responses included difficulties in determining the most accurate information to provide to students:

> The biggest challenge is not being able to know what information is true and what information is not. In addition, living in [a country] where the health system is not trustworthy, it's difficult to say that our institution is ready for a crisis.

> The Biggest Challenges Are Continuity Planning, Communications and Uncertainty.

Maintaining normal operations while ensuring safety of staff and students:

> Keeping Our Current Students, Faculty and Staff Safe and Healthy While also Trying to Keep Normal Operations Running. We Are also Very Concerned About Enrolment for Summer and Fall.

Rapidly transitioning to online curriculum delivery:

> Our Biggest Challenge Was How to Move from Traditional Education to e-learning and How to Overcome the Problem of Practical Courses and Training.

And for many, a mixture of all of these issues at once:

> The impact on student numbers has been significant, which means that there's pressure to reallocate funding to address shortages that have arisen. There are also communication and distance study options issues that are creating ongoing problems as we iron out the details of who needs what information or which resources.
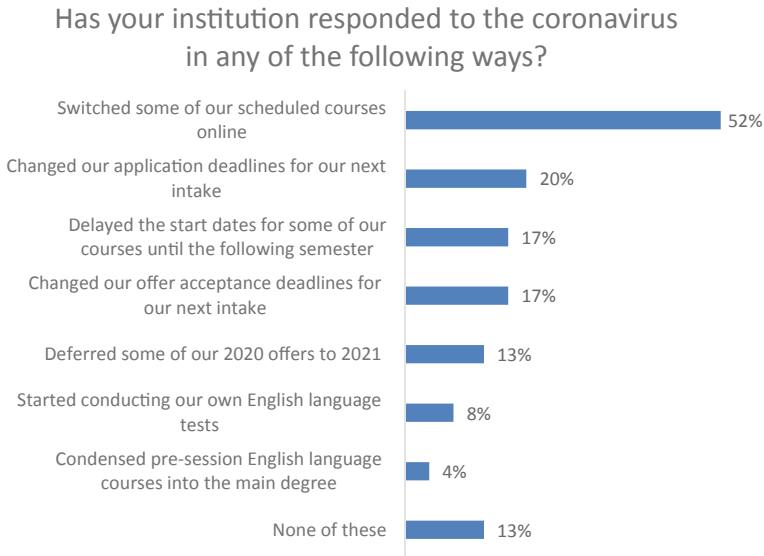
## Has your institution responded to the coronavirus in any of the following ways?

Switched some of our scheduled courses online — 52%

Changed our application deadlines for our next intake — 20%

Delayed the start dates for some of our courses until the following semester — 17%

Changed our offer acceptance deadlines for our next intake — 17%

Deferred some of our 2020 offers to 2021 — 13%

Started conducting our own English language tests — 8%

Condensed pre-session English language courses into the main degree — 4%

None of these — 13%

**Fig. 5.4** Measures implemented by universities to respond to COVID-19

> Our biggest challenges are keeping students and staff safe and well; avoiding panic; maintaining educational progress with innovative educational solutions, like going online; the financial hit of fewer students and expenditures on coronavirus-related necessities; and keeping our international students coming.

In the face of these challenges, respondents were asked if they had implemented any of a range of measures.

By far the most common response to the challenges of COVID-19 was to switch at least some courses from face-to-face to online delivery, with most respondents reporting that they had already done this. A much smaller proportion had extended application deadlines (20%), delayed term start dates (17%) or extended offer acceptance deadlines (17%), suggesting a preference to maintain normal teaching periods during this time (Fig. 5.4).

While 52% of the survey respondents had switched some of their scheduled courses online, this number is highly likely to increase as the pandemic continues, and face-to-face teaching remains infeasible or unsafe in many parts of the world over the coming months.

### 5.3.2.2   Open Communications

As was previously identified, the type and frequency of communications issued by universities to their students regarding the pandemic and its impact on education operations were raised by some educators as a point of uncertainty. When asked how frequently they were making contact with their students, the modal frequency was

"a few times a week", reported by 39% of respondents, while 25% said they were in contact "daily or more frequently". In aggregate, 81% said they were in contact with their students at least weekly—a figure which is likely to be even higher, given that 10% of respondents said they did not know how frequently they were in contact.

In terms of the channels used to communicate to students, email is by far the most widely used communications channel, with 84% of respondents reporting that they used email to convey information about COVID-19. Other commonly used communications channels include social media broadcasts (45%), direct instant messaging (23%), telephone calls (22%), and in the case of Chinese students, WeChat (19%). Universities recognize the need to be in constant contact with their student during this time, and email is an effective channel for mass communications, requiring few resources and the ability to reach large numbers with a single message. However, effective content curation and personalization of content—whether through email or a more personalized 1–1 channel like instant messaging and social media, has been proven to increase open and read rates (Stupar-Rutenfrans et al. 2019).

When asked whether the satisfaction and retention of international students had been discussed in planning discussions as a result of COVID-19, 25% said it had been, 36% said it had not, and 39% did not know.

For those who had discussed the satisfaction and retention of international students, many emphasized the importance of online learning tools, training those with limited English proficiency on these tools, reassuring international students, and addressing their concerns promptly. Given the expected pipeline effect of COVID-19 on future student recruitment, it is likely that retention of existing international students will become a greater consideration in the near-term.

### 5.3.2.3 Growing and Nurturing the Enrolment Pipeline

Aside from the challenge of maintaining daily teaching operations and providing appropriate information and support to students, universities will also be grappling with the challenge of securing a healthy pipeline of new student enrolments for future intakes. In a period where travel is heavily restricted and there is no certainty about whether or not they will be able to offer a face-to-face learning environment at the time of commencement, this poses a significant obstacle. This is particularly the case for international enrolments, who have the added uncertainty of not knowing when international travel restrictions will be relaxed, both in their home country and destination country, and therefore whether they will be able to commence their studies at all.

Overall, 51% of respondents believed that the COVID-19 pandemic would have a detrimental impact on the number of student applications they received at their institution, while a further 20% said they did not know. It is, therefore, unsurprising that 34% of respondents said they were currently looking to diversify the source countries which they relied on for recruitment purposes, and thereby expanding their potential pool of applicants. The markets most commonly highlighted as ones which universities were looking to expand into as a result of COVID-19 included Brazil,
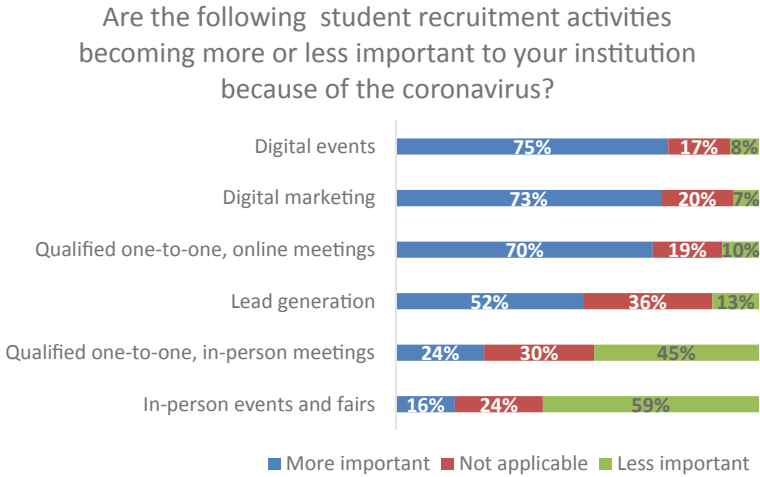
Are the following  student recruitment activities
becoming more or less important to your institution
because of the coronavirus?



**Fig. 5.5** Importance of student recruitment activities due to COVID-19

Colombia, France, India, Indonesia, Kenya, Malaysia, Mexico, Pakistan, Philippines, the Republic of Korea, Saudi Arabia, South Africa, Thailand, Turkey, United Arab Emirates and Vietnam.

In terms of the types of activities that universities are engaging in to recruit new students and maintain the enrolment pipeline, there is likely to be an increased reliance on digital recruitment initiatives in place of the more traditional face-to-face events like careers fairs; 75% of respondents said they would expect digital events to become more important, and 73% said the same for digital marketing. Conversely, 59% expect in-person events and fairs to become less important in light of the pandemic (Fig. 5.5).

Unsurprisingly, digital and online methods are becoming more vital as the coronavirus forces students and institutions to meet and communicate through digital means.

When discussing the language requirements for international students, 39% of institutions said they would not be admitting students who had not completed the required language tests, even if this was due to coronavirus restrictions.

In contrast, 17% stated that they would be admitting these students and 27% said they were still considering this change.

More than 1,000 US institutions are now accepting language test results from the Duolingo English Test (a language learning app), either as supporting evidence in conjunction with other English proficiency measures or as stand-alone proof, suggesting that many institutions are looking at alternative ways of conducting language testing (Morris 2020).

## 5.4 Discussion and Conclusion

At the time of publishing, there is still a high level of uncertainty over when restrictions on travel and social gathering will begin to be relaxed. However, it appears that the resumption of unrestricted international travel is not a realistic outcome in most places in the foreseeable future, and while some isolated countries are in the process of relaxing some of the most restrictive orders around internal movement and association, 'normal' university operations will continue to be infeasible in most places for some time to come.

It should come as little surprise then, that the vast majority of prospective international students either expect that their immediate study plans will be disrupted by the pandemic or are unsure whether they will be affected. In response to this disruption, there appears to be a clear preference for students to favor deferring their studies over alternative options. While online delivery will likely be the de facto standard of instruction in many places for the near future, there is a strong historical preference for face-to-face instruction, and it appears likely that many students who commence studying online would expect to transition to on-campus study when possible.

From a university perspective, many reported initial difficulties in managing to continue service delivery in the initial stages of the pandemic, including making decisions around campus closures, and the requirement to rapidly transition their face-to-face learning to online delivery. Despite these challenges, there appears to be a reluctance to quickly shift term dates, relax or delay application deadlines. There is, however, a widespread belief that applications from international students will decrease in the short term, owing to the suspension of international travel and the infeasibility of most face-to-face recruitment. As a result, many have identified a need to expand digital recruitment efforts, in order to maintain the pipeline of new students.

As the global situation develops, national responses will likely diverge, with some countries managing to control infection rates better than others, potentially enabling them to relax lockdowns, social distancing and internal and external travel restrictions sooner than others. This is likely to further complicate the university response, potentially necessitating a more complex framework which takes into consideration not only their own country's situation, but that of each individual country from which they source international students. Adaptation to the 'new normal' will be necessary, requiring universities to adjust quickly to changing circumstances in order to both maintain service levels for enrolled students and secure the pipeline of students for future intakes.

Finally, this project examined the entire global dataset as a whole. Future research could consider the impacts of COVID-19 on specific countries and regions, in terms of both inbound and outbound student mobility.

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