

World Education News & Reviews

Beyond More of the Same: The Top Four Emerging Markets for International Student Recruitment

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Executive Summary

Today, almost one in two international students in the U.S. is from China, India, or South Korea. This has led an increasing number of higher education institutions (HEIs) to seek out international students from a broader range of countries, as they look to diversify their student bodies. To this end, HEIs must not only identify emerging markets but also balance recruitment opportunities with potential risks and uncertainties of expanding their recruitment efforts. How prepared are HEIs to deal with emerging markets in an unpredictable and evolving environment, and how can they maximize opportunities for international student recruitment?

While there is increasing interest in recruiting from emerging markets, the identification of target countries is often based on anecdotal evidence, a method that is neither efficient nor cost-effective. We designed this study to systematically identify key emerging markets and offer near-term strategies to guide U.S. institutions in successfully nurturing them.

The study addresses the following three questions: 1) Other than the largest markets of China, India, and Korea, from which emerging markets should institutions recruit? 2) What makes these emerging markets promising for recruitment? 3) How can institutions navigate these emerging markets to achieve their recruitment goals? Using the Delphi method—a mixed method forecasting technique based on the anonymity and expertise of participants—we conducted two rounds of surveys with higher education experts in the field of international recruitment. Below are the key findings from the survey:

THE TOP FOUR EMERGING MARKETS

U.S. institutions should increase their near-term recruitment efforts in the following four emerging markets (by order of importance):

1. **Saudi Arabia:** With over 23,000 students currently enrolled in U.S. institutions, Saudi Arabia is and will continue to be an encouraging market, due to the extension of the *King Abdullah Scholarship Program*. U.S. institutions that offer Intensive English Programs and skillfully engage with government agencies have the greatest potential to recruit from this rich pool of fully sponsored students.
2. **Brazil:** Due to the launch of the *Scientific Mobility* scholarship program, U.S. institutions can expect a healthy flow of nearly 50,000 Brazilian students enrolling in short-term programs over the next four years. Institutions that effectively differentiate themselves from competitors can capitalize on this market opportunity.
3. **Vietnam:** High recruitment potential can be attributed to Vietnam's growing middle class and strong study abroad interests. This makes Vietnamese students the third largest body of international students at American community colleges. Institutions of higher education that identify and reach Vietnamese students with the financial means to study in the U.S. should enjoy a good deal of recruiting success in the coming years.

4. **Turkey:** Opportunities to recruit from Turkey are primarily from its graduate market and dual degree programs. Recognized as a tough market to develop, but one with a lot of potential, HEIs can overcome barriers by understanding the preferences and academic needs of Turkish student segments.

A PORTFOLIO APPROACH TO INTERNATIONAL RECRUITMENT

We conclude that the best way for universities to navigate the challenges and opportunities of recruiting from these top emerging markets is to adopt a portfolio approach for more effective risk management and growth. Institutions should:

- Diversify by recruiting beyond China, India, and Korea, and build a **portfolio of countries**.
- De-risk by employing a **portfolio of practices**, including financial relationships and engagement strategies, when cultivating emerging markets.

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Context of International Student Recruitment and Emerging Markets

It has become increasingly important for U.S. universities in recent years to seek out emerging markets for international student recruitment. On one hand, these markets present opportunities for enrollment growth, on the other, they present risk due to their uncertainty. According to the Boston Consulting Group, nearly 125 million households in emerging market cities will enter the middle class between 2010 and 2015.¹ At the same time, the slackening economic growth of China and India, which are currently the two main sources of international students coming to the U.S., may impact overall international student enrollment, calling into question the over-dependence on these countries.²

How prepared are U.S. higher education institutions (HEIs) to deal with emerging markets in an unpredictable and evolving environment, and how can they maximize opportunities for international student recruitment? What does this mean for HEIs that must make strategic choices about selecting and developing source countries for recruitment?

International student recruitment is inherently complex due to a wide range of source countries and competition among institutions of higher education within and beyond national boundaries. The recent worldwide financial crisis has led to budget cuts, adding a new sense of urgency among many institutions to recruit self-funded students.

In this new hypercompetitive environment of international recruitment, institutions must optimize at least five primary dimensions—quantity, quality, diversity, time and budget (See FIGURE 1). They are expected to recruit quality students, while ensuring diversity within the shortest span of time and with limited financial resources. These expectations present an enormous optimization problem, but can be managed with an informed and planned recruitment strategy.

FIGURE 1: Optimization Challenge



STRATEGIC CHOICE: TO PENETRATE AN EXISTING MARKET OR CULTIVATE AN EMERGING MARKET?

Most institutions rely on traditional source countries to solve the optimization problem as penetrating an existing market for enrollment growth is a less costly route in terms of effort, time, and budget. As a result, many institutions are seeing an over-representation of students from leading countries. Today, almost one in two international students in the U.S. is from China, India, or South Korea. On some campuses, Chinese students make up over half of the non-domestic student population. At the University of Iowa, Chinese students comprised more than 70% of international undergraduates in 2011.³

Institutions are beginning to realize the need to de-risk their dependence on only a few large markets. Risks develop when institutions rely on limited source countries, as there is a greater chance of losing a large share of an institution's international student population if some incident occurs that halts or slows down the pipeline.⁴ There are also reputational risks involved. An influx of students from one or few select countries can have unintended negative consequences on campus culture and diversity.

An alternative approach to international recruitment is to strategically identify and cultivate emerging markets (See TABLE 1 for term definition). This is especially critical because developing student pipelines is a time- and resource-intensive endeavor. A growing number of HEIs are branching out with their recruitment activities to reach underrepresented countries, fostering new channels of international students.⁵

A recent study by WES Research & Advisory Services found that international student segments differ by academic preparedness and financial resources.⁶ The report highlighted the importance of understanding different student segments to build an efficient recruitment strategy. In a similar vein, understanding the characteristics of different source countries is critical, as emerging markets present untapped potential and unknown challenges. (Download the report from <http://www.wes.org/ewenr/12aug/feature.htm>)

TABLE 1: What are Emerging Markets?

What are “Emerging Markets”?

In this report, “**emerging markets**” are characterized by their growth potential to send international students overseas. It is not synonymous with “emerging markets” as used in business and economics.

In economics, emerging markets are distinguished from mature economies, like the U.S., and are generally accepted as “emerging” by virtue of their recent fast economic growth.

Although emerging markets show growth potential for international recruitment, not all rapidly developing economies are emerging source countries, or vice versa. In other words, emerging markets in this study are defined by the potential they offer for institutions to recruit international students, not solely by their economic growth rate.

UNTAPPED POTENTIAL

Economic growth and expanding social infrastructure in emerging markets are fueling the appetite for higher education. In the tertiary education sector, experts forecast that Brazil could add 2.6 million students; Indonesia is projected to increase enrollments by 2.4 million; Nigeria will increase by 1.4 million and the Philippines, Bangladesh, and Turkey will each increase by around 700,000.⁷ Rising aspirations and growing affluence in emerging economies contribute to the number of families that find a U.S. higher education much more affordable than in the past. According to the 2012 World Wealth Report, Southeast Asia—a less developed, but rapidly emerging region—already surpasses Europe in the number of deca-millionaires.⁸ As a result, post-secondary education-seeking students are burgeoning in emerging economies, and those who can afford it are increasingly pursuing higher education overseas.

Due to these circumstances, emerging markets have enormous growth prospects, presenting a relatively untapped pool of international students for HEIs. These markets also present a lucrative recruitment opportunity for many public institutions facing budget challenges. Institutions that identify and establish pipelines in promising countries will not miss the opportunity to cultivate a future platform for international student enrollment growth.

UNKNOWN CHALLENGES

Working with emerging markets, however, is a double-edged sword. While it presents potential rewards, there are also challenges to achieving international student enrollment goals, particularly in finding academically prepared and self-funded students.

One relevant indicator of academic preparedness for U.S. HEIs is the students' English proficiency levels. The number of international students entering the Intensive English Program (IEP) pathway has gained momentum, particularly at public institutions, driving overall international enrollment gains in the past few years. Students enrolled in intensive English have soared by 24% from the preceding year to over 32,000 in 2010/11.⁹

The aforementioned WES Research & Advisory Services study similarly segmented international students by academic preparedness. “Explorers”—students with low academic preparedness and high financial resources—were more likely to plan on attending a second-tier school. Similarly, “Strugglers”—students with low academic preparedness and low financial resources—were more likely to attend an IEP.¹⁰

Despite the growth of middle- and high-income families in emerging markets, an overseas higher education experience is still costly. It is expected that many emerging economies, such as Nepal, Bangladesh, Pakistan, Nigeria, India, Morocco, Indonesia, and Sri Lanka, will retain a gross domestic product (GDP) per capita below US\$10,000 in 2020.¹¹ Clearly, challenges remain in identifying the volume of self-financed students from emerging countries and reaching them through a cost-efficient and effective channel.

Research Objective

While there is increasing interest in recruiting from emerging markets, the selection of target countries is often based on anecdotal evidence with limited supporting information to cultivate these markets. In this study, we systematically identify key emerging markets and offer approaches for successfully nurturing them. We focus on near-term attractiveness of new emerging markets to make our recommendations relevant and actionable, rather than theoretical for long-range planning.

The study addresses the following overarching questions:

1. Other than China, India, and Korea, from which emerging markets should institutions recruit?
2. What makes these emerging markets promising for recruitment?
3. How can institutions navigate these emerging markets to achieve their recruitment goals?

The research findings are presented in two key sections. First, we present the top four emerging markets along with their country briefs that highlight background information and respondents' comments from the survey. Second, we share conclusions and recommendations designed to help institutions formulate coherent emerging markets recruitment strategies.

From Which Emerging Markets Should Institutions Recruit?

To discern future growth markets of international student recruitment, we conducted two rounds of surveys with higher education experts in the field of international recruitment, using the online Delphi survey method (see APPENDIX for an explanation of the research methods). As a mixed method design of systematic data collection and analysis, we calculated aggregate ranking from respondents' views and analyzed open-ended comments on rationales behind their choice of country ranking.

Our analysis determined that the four emerging markets that show the highest recruitment potential for U.S. HEIs, by order of importance, are **Saudi Arabia, Brazil, Vietnam, and Turkey**.

The following country briefs provide the contexts, opportunities for growth and approaches to navigate these countries based on the analysis of the experts' comments.

1. SAUDI ARABIA

With one of the world's largest oil reserves, Saudi Arabia is an incredibly wealthy country. Nonetheless, in 1990, only 10% of the university-age Saudis, or 139,000 students, were enrolled in tertiary level education. Within a decade, however, Saudi Arabia has seen a five-fold increase in tertiary enrollment. The expanded access to post-secondary education can be largely attributable to the government's investment in education. In 2011 alone, the Kingdom spent US\$40 billion.¹²

A major pillar of the Kingdom's investment in education is the *King Abdullah Scholarship Program (KASP)*, which since 2005, has dramatically contributed to the outflow of Saudi students to overseas institutions of higher education. Between 2000 and 2010, the international mobility of Saudi students increased threefold, and in recent years nearly 90% were funded by scholarships.¹³ The U.S. continues to be the most popular destination, hosting roughly 40% of total Saudi students abroad.¹⁴ According to the Institute of International Education (IIE), there were 23,000 Saudi students at U.S. HEIs in 2010/11.¹⁵ More recent data from the Student and Visitor Exchange Program suggest that enrollments for 2012 may set new and significant records for Saudi students, with some 52,000 nonimmigrant students and exchange visitors in the Student and Exchange Visitor Information System (SEVIS) as of March 2012. This compares to 36,500 students in March 2011.¹⁶ It should be noted that Saudi Arabia is primarily an undergraduate market (roughly half), and 40% of Saudi students are enrolled in business/management or engineering.¹⁷

At a Glance: Saudi Arabia

Economic Indicators

GDP* (2011): \$577 billion
 GDP growth, annual % (2010): 4.6%
 GDP growth, annual % (2011): 6.8%
 GDP per capita, PPP* (2011): \$24,434

Education Indicators

Gross Enrollment Ratio:
 • Upper Secondary (2010): 94.8%
 • Tertiary (2010): 36.8%
 Enrollment:
 • Upper Secondary (2010): 1,441,403
 • Tertiary (2010): 903,567

Student Mobility Indicators

Outbound Mobility (2011): 41,532
 Outbound Mobility Ratio (2010): 4.6%

Students in the US (2010/11): 22,704
 • Change from 2009/10: 43.6%
 • Rank in Top Places of Origin: 6
 • Academic Level:
 - 48.2% undergraduate
 - 20.3% graduate
 - 29.8% other
 - 1.7% OPT

Source: World Bank; UNESCO Institute for Statistics; IIE.

*For all country briefs: GDP and GDP per capita, PPP are in current US\$.

OPPORTUNITIES FOR INTERNATIONAL RECRUITMENT

With the greatest recruitment potential among the four noted emerging markets, our experts agreed that the scholarship program provided by the Saudi government promises to provide a sustained stream of Saudi Arabian students. The continued expected growth of Saudi students relies on the "extension of study abroad sponsorship funding," as shared by a vice president of enrollment at a midwestern institution. Similarly, Jane Robinson, Director of the International Center at Missouri State University, stated that they "continue to receive many applications from scholarship and non-funded [Saudi] students," shedding light on the financial capacity of even Saudis who are not scholarship recipients.

CHALLENGES FOR INTERNATIONAL RECRUITMENT

Saudi students with scholarships are a financial boon to universities. However, regulations set by

sponsoring agencies can limit student enrollment from a particular country. The Saudi Arabian Cultural Mission (SACM) is the main agency that administers the Saudi Arabian scholarship program in the U.S., and it designates U.S. HEIs that are eligible to host government-financed Saudi students. Institutions that are not recognized by SACM due to the unavailability of certain majors/programs cannot host students. Even institutions that are already recognized may find aspects of the scholarship program a hindrance because of structural policies, such as “limits on enrollment per institution placed by scholarship program administrators,” as indicated by Sara Allaei, Assistant Dean for International Affairs/Director for International Enrollment & Services at Indiana University-Purdue University Indianapolis.

These limits mandate that U.S. institutions stay abreast of changing policies that sponsoring agencies institute, and that they also investigate other opportunities to recruit self-financed Saudi students. For example, as of January 2012, 13% of Saudi students overseas were doing so at their own expense.¹⁸ This indicates that there is a subset of the Saudi market on which U.S. HEIs can capitalize. Institutions must better understand the profile, preferences and information-seeking behavior of prospective Saudi students to reach these segments. One way this can be achieved is through social networking. For instance, Riyadh is the most active Twitter city in the Middle East with many university-age users, and YouTube has become a popular platform among young Saudis.¹⁹ Institutions should explore emerging social media channels for more targeted marketing strategies.

Another key challenge that emerged from our experts’ comments was students’ academic preparedness. According to IIE, 29% of Saudi students are currently enrolled in intensive English language training, representing the highest proportion of any international student group.²⁰ The University of Denver’s Associate Dean and Director of International Student Admissions, Marjorie Smith, echoed that “Many need English as a Second Language (ESL) and we have limited space for conditionally admitted students.” Despite the major growth potential of Saudi students in the U.S., academic preparedness may pose a challenge.

To address these matters, some institutions have recently established IEPs and expect to see more interest from Saudi students. Since nearly half of current Saudi students in the U.S. are enrolled at the undergraduate level and government scholarships cover the entire duration of their studies abroad, U.S. HEIs can expect sustained interest in the IEP plus a four-year degree model. The recent extension of the *King Abdullah Scholarship Program* to 2020²¹ promises a continued stream of Saudi students to the U.S. Institutions that can provide for their ESL needs may be able to attract a larger pool of fully sponsored students.

Additional resources: Saudi Arabia

- Obtaining Secondary Credentials from Saudi Arabia. *World Education News & Reviews*. <http://bit.ly/M11liq>
- WES Data Trends Among Saudi Applicants for Credential Evaluation. *World Education News & Reviews*. <http://bit.ly/A41ICS>
- World Data on Education: Saudi Arabia. International Bureau of Education. <http://bit.ly/Ncbmea>
- King Abdullah Scholarship Program. Saudi Arabian Cultural Mission to the U.S. <http://www.sacm.org/>
- Saudi Students Flood in as U.S. Reopens Door. (07/27/2012). *The Wall Street Journal*. <http://on.wsj.com/OtmST4>

2. BRAZIL

Brazil, with the world's fifth largest population and sixth largest economy, is a rising global power. Its per capita GDP at PPP that has grown by 60% in the last decade, and in 2011 stood at US\$11,700. Although tertiary level access remains relatively low compared to other emerging markets (35% gross enrollment ratio), the number of post-secondary students has increased threefold over the last decade to nearly 6.6 million.

The U.S. is the most popular destination among internationally mobile Brazilian students, with one in three studying at American institutions.²² In 2010/11, there were nearly 9,000 Brazilian students in the U.S.²³ Of those, nearly half were enrolled at the undergraduate level, with one in four majoring in business/management and one in five studying in the soft sciences, humanities, or arts disciplines.²⁴ Currently, only 22% of Brazilian students are majoring in fields related to science, technology, engineering and mathematics (STEM), as compared to nearly 43% of Chinese and 73% of Indian students. A shift towards these disciplines is expected with future incoming students given the focus of the government's scholarship program.²⁵

At a Glance: Brazil

Economic Indicators

GDP (2011): \$2,477 billion
 GDP growth, annual % (2010): 7.5%
 GDP growth, annual % (2011): 2.7%
 GDP per capita, PPP (2011): \$11,719

Education Indicators

Gross Enrollment Ratio:
 • Upper Secondary (2008): 92.9%
 • Tertiary (2009): 35.1%
 Enrollment:
 • Upper Secondary (2010): 9,284,000
 • Tertiary (2010): 6,552,707

Student Mobility Indicators

Outbound Mobility (2011): 27,151
 Outbound Mobility Ratio (2009): 0.4%

Students in the US (2010/11): 8,777
 • Change from 2009/10: -0.1%
 • Rank in Top Places of Origin: 14
 • Academic Level:
 - 46.3% undergraduate
 - 34.8% graduate students
 - 9.9% other
 - 9.0% OPT

Source: World Bank; UNESCO Institute for Statistics; UN Data; IIE.

OPPORTUNITIES FOR INTERNATIONAL RECRUITMENT

Survey respondents confirm the potential of Brazil as the second emerging market for international recruitment identified in this study. Cheryl Borden, Director of International Admissions at Elon University noted, "The Brazilian economy is also thriving and more and more students are looking to attend school in the U.S. The government has also initiated a number of programs to encourage students to study in the U.S., particularly in the STEM fields."

With the launch of the US\$1.7 billion *Scientific Mobility* (formerly known as *Science Without Borders*) scholarship program in 2011, at least half of the 100,000 undergraduate and postgraduates funded by the Brazilian government and the private sector are expected to study in the U.S. over the next four years. Brazilian students majoring in STEM disciplines are eligible for the scholarship. The majority will study abroad during their junior year and return to their Brazilian university to complete their degrees.²⁶ Experts commented that their institutions have begun building relationships with Brazilian universities to increase the likelihood of attracting more students.

The inaugural cohort of 650 *Scientific Mobility* students arrived in the spring of 2012 with another 1,500 for the Summer and Fall 2012.²⁷ Although the average stay for scholarship-funded Brazilian students is short, the size of Brazil's student pipeline guarantees a promising future for U.S. universities

CHALLENGES FOR INTERNATIONAL RECRUITMENT

Comments from our experts suggest that the Brazilian market is challenging. One reason is the “competition from other universities” for the same Brazilian students, said Alan Huesing, Director of International Education at East Texas Baptist University. In fact, more than 250 U.S. institutions have secured, or are currently vying for agreements that allow them to host these students.²⁸

The fundamental concern, however, is that many institutions do not have a strong history of enrollment or recruitment experience in the Brazilian market. Many notably “[lack] academic context and limited information for recruiters.” Lacking country-specific market information prevents institutions from matching their institutional capacities, disciplines, program level, and location to meet Brazilian student preferences and needs. An executive director at a northeastern institution finds challenges in finding Brazilian students “interested in STEM fields related to technology and agriculture/environment”, which are the strongest majors offered by the school.

As competition for sponsored Brazilian students intensifies among host institutions, those that further investigate student characteristics will be able to identify market entry opportunities. A cost-effective method for deepening understanding and increasing institutional awareness among prospective Brazilian students is through social networking. The fact that 96% of Brazil’s Internet population uses social media offers the possibility of reaching over 79 million people, which can increase the institution’s brand reputation.²⁹

Another challenge of recruiting Brazilian students is their need for additional English language instruction. It is estimated that about half of the first cohort of the *Scientific Mobility* program undertook English language training. This may present difficulties for HEIs that do not offer English language programs, since additional English courses, if necessary, are required for Brazilian scholarship holders. As the Director of Graduate Admission and International Recruitment at the College of Saint Rose, Colleen Thapalia, shared, “Our institution does not have a campus-based ESL program, so conditional admission is complicated.” The Brazilian government also acknowledges language proficiency as an obstacle and plans to invest more in training.³⁰ For now, U.S. institutions seeking to host Brazilian students—with or without scholarship support—must consider the provision of intensive English training and academic support programs.

Additional resources: Brazil

- International Bureau of Education. World Data on Education: Brazil. <http://bit.ly/N5GPht>
- Brazilian Scholarship Scheme Gathers Steam. *World Education News & Reviews*. <http://bit.ly/HV6ISN>
- Brazil Scientific Mobility Program (undergraduate). Institute of International Education. <http://bit.ly/Ncc8rC>
- Brazil Scientific Mobility Program (graduate). LASPAU: Academic and Professional Programs or the Americas. <http://bit.ly/lqQCfI>
- U.S. colleges see opportunity as Brazil sends students abroad. (08/29/2012). *Reuters*. <http://reut.rs/NUyEII>

3. VIETNAM

Vietnam is a new Asian tiger, and has one of the fastest growing economies in the world. Currently, 45% of the population is under the age of 25, which means a young, growing population will continue to demand increased access to tertiary education. Vietnam's GDP has tripled within the last decade, outpacing other rapidly developing countries and the global average. Although it is the least affluent among the top four emerging markets identified in this report, Vietnam witnessed the strongest growth in economic prosperity during the first decade of the new century. Between 2000 and 2010, per capita GDP (PPP) increased 126%, as compared to 26% in Saudi Arabia and 60% in Brazil.

Over the same time frame, Vietnam experienced a ten-fold expansion in tertiary level enrollment. Today, over two million Vietnamese students are enrolled in tertiary studies. This will continue to increase as a result of the growing youth population and economic expansion. According to the Vietnam Ministry of Education and Training (MOET), the number of Vietnamese students overseas has surged in recent years, and in 2011 there were more than 100,000 Vietnamese students overseas.³¹

One of the most popular destinations for Vietnamese students is the U.S., which hosted 14,888 students in 2010/11, a six-fold increase from 2000/01.³² More recent SEVIS data reveal that there were over 18,500 nonimmigrant students and exchange visitors in 2012.³³ Currently, about three in four Vietnamese students in the U.S. are enrolled at the undergraduate level. Nearly 60% of the total were studying at a community college—almost 10% of total international enrollments at community colleges, and just 0.2 percentage points less than the Chinese student body.³⁴ Business/management is the most popular field, attracting 40% of Vietnamese students; another 20% are enrolled in engineering or math/computer science programs.³⁵

OPPORTUNITIES FOR INTERNATIONAL RECRUITMENT

The growing aspirations of the expanding educated class, supported by economic development, drive the international mobility of students from Vietnam. Students who are academically qualified and have the financial means are known to seek academic opportunities abroad.³⁶

Many experts have confirmed the data trends and insights: Vietnam's thriving middle class is attracted by U.S. HEIs—especially at the undergraduate level—making it the third highest-ranked emerging market in our study. According to a statement by the Vice Chancellor for Global Affairs of the State University of New York (SUNY), Mitch Leventhal, Vietnam has “tremendous pent up demand, a large college-age cohort, significant personal savings, and strong ties to the U.S.” In response to increasing inquiries, some institutions, like the University of California-Santa Barbara, are cultivating this market by making their second trip this fall, according to Lisa Przekop, the Associate Director of Admissions. Those who have already begun actively recruiting from Vietnam are seeing their early efforts pay off. Colleen Thapalia stated that they have a “good momentum [of Vietnamese students], and current Vietnamese students are good ambassadors, [and are] happy and doing well in their coursework.”

In particular, a few experts have observed an increase in associate degree-holding Vietnamese students who wish to transfer to a four-year college and complete a bachelor's degree in the U.S. In 2010/11, there were 9,000 Vietnamese students enrolled at American community colleges, making Vietnam

the third largest international population studying at these institutions.³⁷ Additionally, Vietnam's MOET announcement this summer that it will invest US\$21.6 million for *Project 911*, which includes sending 10,000 PhD students abroad until 2020. This indicates the prospects of recruiting Vietnamese students at the graduate level in the coming years.³⁸ Vietnamese students' thirst for higher education and opportunities abroad presents a rich market for U.S. HEIs to tap.

CHALLENGES FOR INTERNATIONAL RECRUITMENT

At the same time, financing a U.S. education is the most cited obstacle to recruiting students from Vietnam. A director of international programs at a midwestern public university stated that Vietnamese students largely "lack the financial resources to pay for higher education." Despite growing prosperity, Vietnam's GDP per capita is still low as compared to other top emerging markets, such as Saudi Arabia, with a GDP per capita that is seven times greater than Vietnam's. The Vietnamese government has a few overseas study scholarship programs mostly at the graduate level, and some, such as *Project 322* (master's programs), are being phased out.³⁹ Another director at a private western institution stated that they "perceive [Vietnamese students] to be financially needy, but academically very gifted. And we do not offer need-based aid." It is no surprise that 90% of Vietnamese students abroad are self-financed,⁴⁰ attesting to the limited financial support from both the Vietnamese government and host institutions. For U.S. institutions with limited or no funds for needs- or merit-based aid, recruiting Vietnamese students is difficult.

In order to efficiently take advantage of this window of opportunity, U.S. HEIs must understand different segments of Vietnamese students who are financially viable and uncover the conduit to reach them. The prevalent use of education agents, especially at the community college level, and, the exponential rise in access to technology⁴¹ suggests that social media can be a powerful channel to engage Vietnamese students.

At a Glance: Vietnam

Economic Indicators

GDP (2011): \$124 billion
 GDP growth, annual % (2010): 6.8%
 GDP growth, annual % (2011): 5.9%
 GDP per capita, PPP (2011): \$3,435

Education Indicators

Gross Enrollment Ratio:
 • Upper Secondary (2010): 65.4%
 • Tertiary (2010): 22.3%
 Enrollment:
 • Upper Secondary (2010): 3,585,790
 • Tertiary (2010): 2,020,413

Student Mobility Indicators

Outbound Mobility (2011): 47,938
 Outbound Mobility Ratio (2011): 2.4%

Students in the US (2010/11): 14,888
 • Change from 2009/10: 13.5%
 • Rank in Top Places of Origin: 8
 • Academic Level:
 - 74.2% undergraduate
 - 16.3% graduate students
 - 6.0% other
 - 3.5% OPT

Source: World Bank; UNESCO Institute for Statistics; IIE.

Additional resources: Vietnam

- List of Recognized Institutions by Vietnam's Ministry of Education & Training. <http://bit.ly/Mgylhb> <http://bit.ly/ROjkLF>
- World Data on Education: Vietnam. International Bureau of Education. <http://bit.ly/MHsOnK>
- Secondary Education Country Profile: Vietnam. UNESCO. <http://bit.ly/NfbtWf>
- Higher Education in Vietnam: Student Growth, Faculty Shortages and International Partnerships. *World Education News and Reviews*. <http://bit.ly/bi9Spj>
- Rising Number of Vietnamese Study Abroad. (01/16/2012). *DTI News*. <http://bit.ly/LqTHxr>

4. TURKEY

Turkey's booming economy showed a GDP annual growth rate of 9.2% in 2010 and 8.5% in 2011. Its per capita GDP (PPP) is higher than Vietnam's and Brazil's, but considerably less than Saudi Arabia's. Turkey's youth population (ages 15-29) is large, making up 30% of the total population, the highest in Europe.⁴² Although upper secondary gross enrollment ratio (GER) shows no difference as compared to Vietnam (Turkey: 64%; Vietnam: 65%), Turkey currently offers greater access to tertiary level education than Vietnam with a GER of 46% (2.9 million students in 2009).⁴³

The U.S. is the most popular destination for outbound Turkish students, with roughly one in four is enrolled here.⁴⁴ Since 2000/01, Turkey has been among the top 10 places of origin for international students in the U.S. with 12,000 now studying at American institutions. Approximately 40% of Turkish students are enrolled in engineering or business/management, and another 13% are in the social science fields; and the large proportion are pursuing graduate degrees.⁴⁵

OPPORTUNITIES FOR INTERNATIONAL RECRUITMENT

Turkish students are increasingly seeking opportunities abroad because only one in three students who take the national placement test are able to secure a place in a Turkish university.⁴⁶ In addition, bleak employment prospects (more than 30% of Turkish youth under 25 are jobless⁴⁷) for recent graduates will likely entice financially able Turks to continue their studies abroad.

Many experts cited that their institution already hosts Turkish students and actively recruits from Turkey, with a handful reporting existing institutional relationships. Respondents expressed that the recruitment potential of Turkey lies in the graduate market. Chuck Olcese, Director of International Affairs at Pittsburg State University, mentioned Turkey's "need for graduate education," and another associate director of a southern HEI has observed that Turkish students are strong in science (also reflected in a recent publication that reported on Turkey's strong growth in scientific research output⁴⁸).

According to a recent IIE report on transnational collaborative programs, Turkey is the third most popular country with which U.S. institutions have established joint or dual degree programs.⁴⁹ A large share of respondents, including Susan Jagendorf-Sobierajski, Executive Director of International Education at SUNY College of Agriculture and Technology at Cobleskill, NY, reported that forming relationships with Turkish universities and developing dual degree programs enable U.S. HEIs to

At a Glance: Turkey

Economic Indicators

GDP (2011): \$773 billion
 GDP growth, annual % (2010): 9.2%
 GDP growth, annual % (2011): 8.5%
 GDP per capita, PPP (2011): \$17,499

Education Indicators

Gross Enrollment Ratio:

- Upper Secondary (2009): 63.9%
- Tertiary (2009): 45.8%

Enrollment:

- Upper Secondary (2009): 3,329,122
- Tertiary (2009): 2,924,281

Student Mobility Indicators

Outbound Mobility (2011): 48,820
 Outbound Mobility Ratio (2009): 1.6%

Students in the US (2010/11): 12,184

- Change from 2009/10: -1.7%
- Rank in Top Places of Origin: 10
- Academic Level:
 - 29.0% undergraduate
 - 52.8% graduate students
 - 8.4% other
 - 9.8% OPT

Source: World Bank; UNESCO Institute for Statistics; IIE.

advance their recruitment goals in the Turkish market. Based on our experts' predictions, it seems that a history of engagement and complex forms of partnership, such as transnational programs, will continue to attract Turkish students.

CHALLENGES FOR INTERNATIONAL RECRUITMENT

At the same time, lack of institutional resources for recruitment, such as a budget for travelling or financial aid for international graduate students, are among the biggest challenges that reduces Turkey's recruitment potential. Even institutions that have adequate staff resources and upper management support to actively recruit, may find Turkey a difficult market. Respondents remarked on its market volatility. As an associate vice president of a midwestern public institution expressed, "[We] need continuing presence in the country." Our analysis suggests that Turkey may be one of the tougher recruitment markets, requiring persistent and continuous efforts to bear fruit. Though these challenges are not unique, the Turkish market's higher dependency on graduate level students and lack of a large-scale scholarship program makes it lowest in recruitment potential among the four emerging markets in this study.

Difficulty in cracking the Turkish market can be overcome by accumulating detailed student preferences beyond academic levels and majors. According to a recent study, almost half of Turkish students choose their study destination based on their perception of what potential employers will value. The most important source of information for prospective Turkish students is an institution's website.⁵⁰ In addition, social media is a promising method to engage with potential Turkish students. Currently, 96% of the Internet population in Turkey uses social media, totaling 30 million Facebook users and 4 million Twitter accounts—or 4th and 8th place in global users, respectively.⁵¹ Since Turks are becoming increasingly Internet savvy, American universities should explore online marketing and better understand the behavior and needs of Turkish students to ultimately recruit them at low cost.

Additional resources: Turkey

- University Listing & Bologna Process of Turkey. The Council of Higher Education. <http://bit.ly/M6ba2v>
- World Education Data: Turkey. International Bureau of Education. <http://bit.ly/M28EE1>
- Turkish Education Profile. ENIC-NARIC. <http://bit.ly/NclxLX>
- Turkish Student Statistics. Republic of Turkey Ministry of National Education. <http://bit.ly/lj58DE>
- U.S. Graduate Schools See Significant Increase in Foreign Enrollments. (11/08/2011). *The Chronicle of Higher Education*. <http://bit.ly/td9Mtt>

Recommendation: A Portfolio Approach to International Recruitment

We recommend that U.S. HEIs adopt a **portfolio approach to international recruitment** (See FIGURE 2). This framework consists of two tactics that efficiently utilize institutional resources to achieve recruitment goals. Universities and colleges should build 1.) a portfolio of countries, and 2.) a portfolio of practices.

FIGURE 2: A Portfolio Approach to International Recruitment

Portfolio of Countries	Diversify by recruiting beyond China, India and Korea, and build a portfolio of countries with a mix of growth and risk.
Portfolio of Practices	Reduce risk by employing a mix of practices, including <i>financial relationships</i> and <i>engagement strategies</i> , when cultivating emerging markets.

Institutions should recruit in emerging markets and, thus, build a **portfolio of countries**. The up-and-coming markets that HEIs should target for their near-term recruitment efforts are Saudi Arabia, Brazil, Vietnam, and Turkey. This diversification strategy will help institutions mitigate the risks associated with over-dependence on select markets, and enhance prospects for enrollment growth. However, emerging markets present both opportunities and challenges. Adopting a **portfolio of practices** (including *financial relationships* and *engagement strategies*) can help U.S. institutions increase their opportunities when recruiting from emerging markets.

The portfolio approach argues that targeting multiple emerging markets with a mix of practices diminishes the inherent risk involved with them. This strategy is designed to help institutions capitalize on the opportunities and overcome the optimization problem of recruitment. If incoming students are not sufficiently prepared academically, or if a sudden drop in applications from one country occurs, a portfolio approach balances the overall risk because resources are not exclusively invested in one target market. As competition among HEIs continues to expand rapidly, U.S. HEIs that efficiently maximize their limited resources ensure they will exert greater influence on prospective international students.

FIGURE 3: A Portfolio of Practices for Targeting Emerging Markets

Financial Relationships	Engagement Strategies
<ul style="list-style-type: none"> • Exercise institutional relationships to tap into sources of funding. • Offer institutional scholarships strategically. 	<ul style="list-style-type: none"> • Partner with foreign institutions for enhancing visibility and deeper relationships (e.g. dual degree programs). • Engage with potential, current and former students through social media to improve word-of-mouth and brand recognition.

FINANCIAL RELATIONSHIPS

To tap into sources of funding, institutions should leverage their institutional competitive advantage (e.g. program/major) and relationships with sponsoring agencies. Many emerging economies, such as Saudi Arabia and Brazil, are initiating scholarship programs that send students overseas for higher education as a part of building the capacity of the national workforce. For U.S. HEIs dealing with budget cuts, these international students represent a boon because they not only pay full tuition, but they also diversify the student population.

As these types of scholarship plans become more prevalent, U.S. institutions should proactively pursue the opportunities to host funded students. In order to receive these students, institutions must fulfill requirements often set by sponsoring agencies (whether they are funding organizations, embassies, or others). As an example, SACM manages the *KASP* scholarship process by placing Saudi Arabian student at approved American universities, colleges, and IEPs. To host Brazilian students under the *Scientific Mobility* program, American universities and colleges must apply to organizations that administer the following scholarship holders: IIE for undergraduate programs and Academic and Professional Programs for the Americas (LASPAU) for PhD programs.

A new era has evolved in which institutions no longer simply interact with prospective students. Today, they must increasingly engage with other oversight parties that open opportunities and limit recruitment from the prospective pools. Western Michigan University receives more than the standard number of sponsored Saudi students through SACM because of its rigorous English language program.⁵² As illustrated, U.S. HEIs that skillfully use their institutional competence will be able to tap into these sources for tuition-paying students.

At the same time, however, financial capacity and scholarship funds should not be the sole drivers of U.S. HEIs recruitment efforts. Institutions can strategically decide to enroll students who lack financial ability from particular emerging markets, such as Vietnam, as a method of diversification. U.S. HEIs are not as “need-blind” to international students as popularly perceived,⁵³ but in this time of strained budgets, institutions are forced to use their limited scholarships strategically.⁵⁴ Financial aid needs differ by various student segments; thus, “institutions must take a realistic account of their ability to meet the diverse needs of their international students.”⁵⁵ Offering limited need-based scholarships deliberately and aligning them with different student segments can help their institutions diversify their international enrollment population.

ENGAGEMENT STRATEGIES

U.S. HEIs should draw on their pre-existing ties with institutions in emerging markets to reach their goals. For instance, dual degree programs or partnerships with Turkish universities open doors to longer-term and deeper relationships with the potential country to attract students in terms of both quality and quantity. Institutions that evaluate their existing relationships and leverage them skillfully have the potential to reap the greatest benefits from emerging markets.

Other than engagement at the institutional level, current and former students will act as ambassadors to promote U.S. institutions, as evidenced by the Vietnamese market. Using their voice, particularly

through social media, institutions can amplify a positive sphere of influence on potential students. The aforementioned WES Research & Advisory Services study found that the second most popular channel used by international students during their college search stage is personal networks (following visits to the institution's website). Once again, an emerging information source for these students is social media.⁵⁶ Today's youth increasingly perceive other students and alumni networks as authentic information sources as a result of their knowledge of and direct experiences with the HEI.

The worldwide rise of the Internet population further reveals the expansive reach that social media can have. Moreover, because the social networking user base is growing more quickly in developing economies than in developed ones,⁵⁷ the implications for online marketing and recruitment are immense in emerging markets (See TABLE 2). Of Turkey's 35 million Internet users, 31.5 million are on Facebook and three out of four are between the ages of 16 and 34.⁵⁸ Substantial social network use coupled with an expanding mobile device penetration in Turkey present a chance for HEIs to use these technological platforms to increase institutional awareness and brand recognition.

TABLE 2: Internet Usage in Emerging Markets

Emerging Market	Internet Users (in million)	Penetration (% of population)	Facebook Users (in million)	Popular Local Social Networking & Online Resources
Saudi Arabia	11.4	43.6	5.2	Maktoob
Brazil	79.2	39.0	56.5	Universo Online Orkut
Vietnam	30.5	33.7	6.9	Zing / Zing Me Clip.vn
Turkey	35	44.4	31.1	Mynet Eksenim

Source:

Internet Users and Penetration (as of Dec. 2011). Internet World Stats. www.internetworldstats.com

Popular Local Social Networking & Online Resources. Alexa. www.alexa.com

Facebook Users (as of July 2012). Socialbakers. www.socialbakers.com

From the standpoint of institutions, recruitment through social networks can be an effective method to break into new and difficult emerging markets without incurring additional costs. Of course, a social media presence alone will not recruit international students. Institutions that consistently monitor and creatively engage with emerging markets at all stages of the college search and application process will identify potential students and their needs and preferences to ultimately yield a positive multiplier effect. Today's highly interconnected digital global youth population and tight budget environment demands that institutions of higher learning harness social media as a student engagement and recruitment tool.

Conclusion

Today, almost one in two international students in the U.S. hails from China, India, or South Korea. A significant decline in the number of prospective students from these traditional markets is unlikely in the near future, but the unpredictable global economy and environment draws attention to institutions' over-reliance on these sources. Moreover, fierce competition for international students suggests the need to reduce the risk of limited recruitment strategies.

While there is an increasing necessity to recruit from emerging markets, the identification of countries is largely based on anecdotal evidence, which is neither efficient nor cost-effective. This study addresses the gap by systematically identifying key emerging markets and suggests approaches to navigate these markets.

U.S. institutions should increase their near-term recruitment efforts in the following four emerging markets (by order of importance): **Saudi Arabia, Brazil, Vietnam, and Turkey.**

We conclude that the best way for universities to navigate the challenges and opportunities of recruiting from emerging markets is to adopt a portfolio approach for more effective risk management and growth.

Institutions should use the following strategies:

- **Portfolio of Countries:** Diversify by recruiting beyond China, India, and Korea and build a portfolio of countries;
- **Portfolio of Practices:** Reduce risk by employing a mix of practices, such as financial relationships and engagement strategies, when cultivating emerging markets.

This report provides higher education professionals with insights to prioritize more effectively their efforts towards their goal of recruiting beyond more of the same and venture into new and emerging markets.

Appendix

METHODS

Our study gathered the opinions and predictions of higher education experts using the Delphi method to identify future growth markets for recruiting international students.

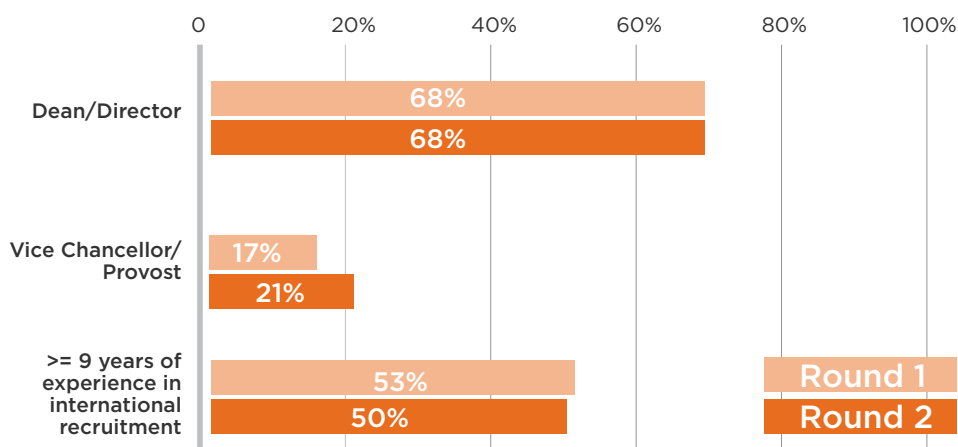
A Delphi study aims to achieve the most reliable consensus of opinion by conducting two or more rounds of intensive surveys to the same group of geographically dispersed experts, utilizing anonymity and controlled feedback.⁵⁹ The strength of this forecasting technique lies in its iterative communication process among expert panelists and integration of their combined experiences and opinions.⁶⁰ As international student recruitment is an inherently complex and evolving domain, we used the Delphi approach for its suitability in addressing questions that have high uncertainty.⁶¹

For this study, we defined “expert” as a higher education professional who holds a title of Director/Dean or higher, and is responsible for international student recruitment. Professionals who fit these two criteria were carefully and systematically selected from the 2011 Higher Education Directory and WES internal database. We then sent the panel an email invitation to complete an online survey through Calibrium, a web-based Delphi method software. Our aim was to garner a panel of 15 to 30 experts, which is the standard participation for Delphi surveys.⁶²

We employed two successive survey rounds—Round 1 (R1) and Round 2 (R2)—to identify the future growth markets (other than China, India, and Korea) for the 2015/16 incoming class for which HEIs will be recruiting in 2013. This recruitment cycle was chosen in order for our recommendation to be relevant for HEIs’ near-term efforts. The aim of R1 was to shortlist the emerging markets through rankings, which 53 respondents completed. The purpose of R2 was to establish a consensus of the source countries with the highest growth potential. In this round, 28 experts re-ranked the top five countries from R1 in light of their peers’ opinions. We then calculated rankings from R2 results and coded experts’ comments to summarize the countries that U.S. HEIs should actively target to maximize their return on investment for recruitment efforts.

Based on the analysis of the rankings, Taiwan surprisingly ranked fourth among the emerging markets. However, this is likely the result of an historical pipeline of Taiwanese students. We triangulated this with the qualitative analysis of the open-ended comments and decided to exclude this aberration from further analysis. Experts described Taiwan the “new Japan,” as HEIs “formally saw a great number of students, but not so much now.” Echoing these comments, IIE data has reported negative growth of Taiwanese students in the U.S. since 2007/08. Additionally, Taiwan is a mature economy with high tertiary GER and a declining youth population. For these reasons, though Taiwan may still be a large market, based on sheer size volume, we did not classify it as an emerging market due to its limited *future* potential for international recruitment.

WHO PARTICIPATED IN THE SURVEY?



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Interested in participating in future WES research on international enrollment trends as an expert? Please email your interest to Yoko Kono at ykono@wes.org

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