

Movilidad internacional de estudiantes: tendencias entre mercados emergentes como herramienta estratégica para las oficinas de reclutamiento de estudiantes internacionales

International student mobility: trends among emerging markets as strategic tool for international student recruitment offices

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Fecha de recepción: 01 de Agosto de 2017 - Fecha de aceptación: 10 de Agosto de 2017

Resumen: El comercio de dinero y productos fluye libremente entre los países, así como el conocimiento. Hay alrededor de cinco millones de estudiantes que reciben educación superior fuera de sus países de origen, este número es tres veces mayor que en 1990. Las naciones con la falta de capacidad de una educación superior avanzada están aumentando el número de estudiantes que buscan nuevas oportunidades en el extranjero. Este nuevo entorno de Educación Internacional está ampliando la competencia entre las instituciones educativas y está conduciendo a estrategias más poderosas para el reclutamiento basado en una comprensión profunda de las tendencias de movilidad internacional de estudiantes. Este artículo se centró en cinco países emergentes: Nigeria, Brasil, Vietnam, Indonesia e Arabia Saudita, que han aumentado el número de estudiantes salientes durante los últimos años. Se analiza la situación actual de la educación internacional, comparando las tendencias entre los países emergentes y proponiendo enfoques y estrategias para mejorar los modelos de contratación en nuevos mercados emergentes.

Palabras clave: mercados emergentes; instituciones de educación superior; estudiantes salientes; estudiantes internacionales; movilidad estudiantil; reclutamiento internacional de estudiantes

Abstract: The trade of money and products is flowing freely across countries as well as knowledge. There are around five million students getting higher education outside their nations of origin, this number is three times bigger than in 1990. Nations with lacking capacity of an advanced higher education are increasing the number of students seeking for more new opportunities overseas. This new International Education environment is expanding competition among educational institutions and it is driving to more powerful strategies for recruitment based on a deep comprehension of international student mobility trends. This article was focused in five emerging countries: Nigeria, Brazil, Vietnam, and Indonesia and Saudi Arabia which have increased the number of outbound students during the last years. It is analyzed the current situation in international education, comparing the trends among the emerging countries and suggesting approaches and strategies in order to improve the recruitment models into new emerging markets.

Key words: emerging markets; higher education institutions; outbound students; international students; student mobility; and international student recruitment

Introduction

Nowadays, becoming international is easier than staying local as globalization continuous to open plenty of opportunities and new challenges for both students and universities. Higher education, has come through significant system's transformation as a result of communication and information revolution as well as the demand of new knowledge and international understanding of the future citizen who most perceived the world as a whole (Tremblay, Lalancette, & Roseveare, 2012). The driving force of globalization is creating a competitive international educational market, which is coming up with different marketing strategies to attract the rising number of students seeking for higher education overseas (Verbik & Lasanowski, 2007).

The increasing demand for international higher education from fast-growing economies and the rising number of scholarships programs promoted by home countries of international students is the major cause for the expansion of international student mobility (British Council, 2014).

Higher education institutions (HEI's) are starting to reinforce their efforts to recruit international students as they start to acknowledge the value and immediate fisical benefits that come with international recruitment in a shrinking world and know the importance of preparing citizens with a global mindset. (Levitz, 2008)

HEI's should expand and improve their recruitment strategies and ensure they are sustainable in order to attract more international student enrollments by actively seeking for a better understanding of behavior, needs, and decision making process of specific international student markets.

Importance of Education

Education according to Cambridge (2016) is the process of teaching or learning knowledge, and skills by attending an academic institution. John Dewey (1916) defines education as "reconstruction and transformation of experience". According to UNESCO (2016) education is a human right, as well as, an important factor in the social and economic growth of communities because it is linked to all the development goals. Therefore, education does not only help nations to escape poverty by developing the skills needed to improve the level of life but also influences in the productivity promoting a substantial economic growth (UNESCO, 2016).

In 1965, The Pacific and East Asian countries spent approximately 2.7 more years in school than those in sub-Saharan Africa. After a period of 45 years, the average annual growth in income per capita was 3.4% the Pacific and East Asia , but 0.8% in sub-Saharan Africa. The difference in growth is the result of the difference in education levels (UNESCO, 2013). This was explained by Neil J. Smelser & Seymour Martin Lipset (1964), when declaring that importance of education for lower social classes individuals by getting economic progress opportunities, better social mobility and developing competitiveness.

Background & International Education

International Education is based on a phenomenon named as “global student mobility” which is the movement of students to other nations seeking for education (UNESCO, 2014). According to William (2015), International Education was born after the Second World War from economic and political changes as a result of the broadly international development, where industrialized nations came together. So, schooling became the aspiration of the modern men & women and their nations, seeking for progress and economic development.

Within a few decades of the end of World War II, poor countries looked to their higher education systems as a way to raise standards of living and to reduce poverty as there was a belief that education could help societies to be more democratic (World Bank, 2000). Since 1960s, higher education had to face “new realities” in society such as: differentiation, internationalization, and expansion and knowledge revolution. All of them influencing developing countries and their policymakers to put more thought into higher education. (World Bank, 2000)

Since the 1970s, a great expansion in higher education across the world occurred. In 1985, approximately 1.1 million students were enrolled in higher education abroad. The number slightly increased in 1990 to 1.3 million and it tripled to 3.4 million in 2009. Today, there are approximately 5 million international students worldwide and this populations is forecast to increase to 8 million by 2025. (UNESCO, 2015)

Not only has the number of international student mobility grown the last decades, the country of origin has changed dramatically as well. In contrast, with the last century where students were from the most privileged sectors of society (World Bank, 2010). International Education is no longer a niche area reached only by a segment of the elite population, instead, it is now measured by billions of dollars going across borders and millions of students seeking for new educational opportunities in order to improve their quality of life.

United States, Canada, Australia and United Kingdom represent around 44 % of the world’s student international destinations. (Wilkins & Huisman, 2016). These countries have benefit from having English as the language of instruction and established systems of higher education with worldwide accreditation. In the United States, international students has been a source of economic sustainability and growth during the recession. They have contributed around 27 billion dollars in 2014, value that grew to 30, 5 billion in 2015 (NAFSA, 2016). The grown is driven by students from upper-middle-income economies and countries with a high quality of national scholarship program. It is projected by 2017, an increase in the global middle class expenditure in educational services by around 50 percent. Being that, a result of international organizations coming together and providing funding to low-income countries for education added to policies or programmes that aim to increase the outflow of students to pursuit HE overseas. (NAFSA, 2016)

The educational sector has come a long way in a short period of time: economic growth, higher incomes and governmental policies are determining where the students come from and a variety of factors influence to where they choose to go. For instance, studies have shown that

quality of education and lack of educational opportunities in the home county as well as the employment rates and the desire of a worldwide qualification, are the most important drivers leading students to pursue education abroad (Mazzarol & Souter, 2002).

Ambitious education plans equals aggressive economic development (Williams, 2015). Higher education, is now considered an important element to human and economic growth where student mobility has become a subject of political discussion in national and international organizations like the World Bank, UNESCO among others, who recognize that the possibilities to archive a sustainable development in emerging countries becomes nearly impossible without a strong higher education system. (World Bank, 2009).

As the demand for a cross-border education raises, the desire to attract these international student's population has grown with it. International Student recruitment is becoming the main source of financial health in many HEI's worldwide, so schools are starting to redouble and enhance their efforts to recruit international students as they start to acknowledge the value and prompt financial benefits that come with international recruitment in a shrinking world and know the importance of preparing citizens with a global mindset (Levitz, 2008).

Universities view international students as a way to boost their brand and image providing that multicultural learning environment by bringing different perspectives into the classrooms, as well as a quick fix financial contribution to their budgets. That being the case, there is a growing need for universities to look for new ways on how to respond to the fast growth and changes in the educational environment. Therefore it has become very important for the academic institutions to analyze the strategic processes related to student recruitment and investments in optimizing and diversifying their approaches to the international student's market.

Purpose

Even though the global student mobility is expected to grow, institutions have a difficult mission to compete for those talented and self-funded students. The problem is that many universities are not prepared to attract those students in a proactive way. International student recruitment is a complex, expensive and competitive activity that requires sustainable international student enrollment strategies. The main error is that institutions are relying all their budget and time on traditional recruitment sources, where the market is driven by the same group of countries like China and India, as a result, universities are focusing all their efforts in countries that are already over represented.

The trend of students going overseas was led by Asian countries (Vincent-Lancrin, 2015) but after improving their higher educational systems, left a pattern and doors open to new markets and a more diverse community of international students aiming to go abroad. A report made by World Education Services (2015) shows that there are new challenges and opportunities for institutions with new potential emerging markets like Nigeria, Brazil, Indonesia and Vietnam and Saudi Arabia which can be explored, so having the right strategy or approach will lead to a successful student recruitment beyond the traditional markets.

Institution's ability to adapt to external factors influencing international student mobility leads to a successful recruitment. In order to maximize the resources of institutions and to archive the recruitment goals, universities are encouraged to have a deeper understanding of the global mobility trends, the different decisions driving higher education abroad, the different segments of international students in order to channel their efforts and to adopt the right strategy to recruiting.

It is important to understand emerging markets from an overall perspective and to also define the needs from a unique context. The purpose of this article is to provide a thorough understanding of the trends and issues related to international student recruitment in 5 emerging markets so it can work as a guideline for a new business approach for institutional leaders worldwide in order make informed decisions and effectively set priorities that will increase the profits by improving the effectiveness of international student recruitment.

Top Emerging Markets

Currently, worldwide one in five international students is from either China or India, with approximately 712,157 and 181,872 students correspondingly (UNESCO, 2014) enrolled in higher education outside their home countries. Becoming the two most famous nation's leading international student mobility. The main reason in the mobility among Chinese students is the growing demand of high school graduates that are able to afford education abroad and in the case of Indian students is the lack of good Universities in India providing quality education.

United States is still the most popular destination for Chinese and Indian students but is recently falling away, according to ICEF Monitor (2016) the last two years China has had a slowly decreased in the number of students going abroad, this as a result of the increase in the capacity of the Chinese higher education system caused by a massive governmental investment in its own education over the past decade. In addition, data indicates that in 2015 a record of 409,100 Chinese students rebound home due to their strong home economy (ICEF Monitor, 2016). A similar trend is taking place in India, with a slow decrease among enrollments due to global economic issues (ICEF Monitor, 2012). In contrast with Chinese, most of Indian students abroad rely on scholarships or financial support to fund their education so many of them are pursuing education while having huge debts which has become difficult to payback during the last years (ICEF Monitor, 2012). In order to avoid falling in huge debts Indian students are changing their patterns and are in search of new destinations like China or even Germany which are closer to home and that provides high quality education at a cheaper value (ICEF Monitor, 2012).

As no other countries like China and India send as many students overseas, the contraction of outbound student's mobility of these key countries will cause a dramatic impact on the global student recruitment market. In the last years, institution in the main student destinations as United States, United Kingdom, Australia and Canada have had a substantial dependence on international students from these two countries, which has raised alerts in the industry (ICEF Monitor, 2015).

Even though China and India are still big enough to disregard, there are other developing nations, for which enrollment efforts should be polished and cultivated (WES, 2012). Governments of the fastest emerging economies are intensively contributing in higher education by investing in scholarship programmes for their students to gain the necessary skills abroad and then bring back home that knowledge so this will help to boost competitiveness, positive impact in incomes, as well as economic growth (British Council, 2014).

Therefore, there is a relationship between the nation's political and economic powers and the demand for higher education overseas (British Council, 2014). For this reason, Universities around the world are being encouraged to broaden their international enrollments, so there must be a shifting patterns into new sources to be considered.

In 2016, international educators have seen the significant entrance of emerging markets like: Brazil, Nigeria, Vietnam, Indonesia, Saudi Arabia (WES, 2015). These countries have shown an important increase in the number of outbound students as well as economic growth; thus it is important to take a closer look to this 5 promising targets.

Nigeria

African countries still struggle to provide and meet the demand for higher education. Even though the governments are investing in a better higher education quality, these initiatives will take time in order to have the expected results. Meanwhile the youth population who can afford to go abroad are choosing this way to improve their quality of life (NAFSA, 2015)

In Africa the increase in the number of outbound students is particular shown in Nigeria, which is the most crowded nation in Africa, expected to exceed US population by 2050 (United Nations, 2015). According to ICEF (2016) one –fifth of the 181 million people in Nigeria is between 15 to 24 years. So it has been targeted by experts as the next big education market.

For HEI's who are seeking to have diversify international student population, there are plenty of reasons to consider Nigeria. Population is not the only thing boosting the country, they also possess one of the tenth largest oil reserves worldwide and (INICEF Monitor, 2014) even with the collapse of the oil prices, Nigeria is expected to have one of the highest GDP growth in the world by 2050 according (ICEF MONITOR, 2016) . The merge of an increasing population and economic growth that is allowing the middle class to have access and to create demand for quality higher education that cannot be satisfied domestically, where around 1.7 million Nigerian students seek for a university and only half of them are able to get it (WENR, 2013). That is the main reason why Nigeria is now a source full of opportunities for international recruiters who are looking to fulfil that demand.

According to ICEF (2016), there were around 50,000 Nigerian outbound students all over the world, and only in 2014 Nigeria spent about \$8 billion dollars to cover scholarships, tuition, living expenses, health insurance, among others of their students abroad (University World News, 2014). Currently, around 17,920 students are in United Kingdom (UK Council for International Students Affairs, 2016) which is considered the first destination followed by 10,000

students in United States with a 20% increase over the previous year, other destinations chosen by Nigerians are: Canada, Australia and Germany (ICEF Monitor, 2015).

Based on the data mentioned above, it is not a surprise that UK is the most popular destination for Nigerian students this is the result of cultural and historical ties among these 2 countries, however, the Association of International Educators (2015) notes that the increase number of self-funded students will allow more Nigerians to choose to go to United States instead of United Kingdom changing the trend. At the time, US is not a leading destination due to financial, historical and the difficulties presented for processing the visa, so this is expected to change as a result of economic growth providing more student mobility.

The main fields of study chosen by Nigerians are: Engineering especially in Petroleum and Gas, Computer Science, also Medicine and Business courses and are in this areas where most of the Government scholarships are granted (ICEF Monitor, 2015).

The expectations of Nigerians studying abroad is to get a global market standard and to have better job positions in their country than those who studied local, as Multinational corporations prefer those who have an international degree (ICEF Monitor, 2015). A research done in Nigeria reported a skills discrepancy between what the employer was requiring and what the graduates were displaying, especially in decision making (University of World News, 2014).

In view of that, the British Council has projected a strong annual growth of Nigerian student mobility by 2024 (+8.3%) (ICEF Monitor, 2016). In brief, the forecast demand of higher education abroad is a useful indicator for education providers that Nigeria tends to be one of fast growing emerging markets in international education (ICEF Monitor, 2015).

Brazil

Latin America during the past ten years has grown its middle class around 50% which represents almost one third of all the population of this region. This growth is attributed to the demand of improvements in education (WES, 2015).

During the past 20 years, Brazil has emerged, and become the fifth largest population in the world and the biggest in Latin America with around 210,157,003 million people (Worldometers, 2016), as well as, the sixth largest economy in the world (Campbell, 2015). Since late 90's Brazilian middle class had a boom, their incomes increased and around 70% of Brazilians ascended to middle class (McKinsey & Company, 2015) which means their purchasing power increased allowing those citizens to spend in luxury items including international education (Higher Education Marketing, 2014).

In consequence of the economic development, Brazil is in need to pursue more research and to develop technological skills so foreign experience will become soon a requirement for employment (United Nations, 2013) this is why international student mobility plays a huge role in Brazilian society.

To encourage internationalization and innovation Government invested 10% of its GDP on education (Campbell, 2015). Jointly with the investment, the country implemented “Brazil Scientific Mobility Program” a scholarship program that was launched in 2011 to send 100,000 students abroad to promote scientific research by specializing in (science, engineering, technology and mathematics) in order to enhance country’s competitiveness (Institute of International Education, 2013) .

According to Higher Education Marketing (2014), approximately 200 million people were under the age of 19 transforming Brazil in a hub for international recruiters. So, it was not a surprise for teachers the presence of more Brazilian students in foreign classrooms.

Brazil has converted in one of the world’s top pool countries sending students abroad. In 2014, there were around 7,241,405 students seeking for higher education and approximately 30,729 were enrolled overseas (WES, 2015). Mostly in countries like: United States, Canada, United Kingdom and France (UNESCO, 2014)

Even though according to The Consulate General of Canada in Sao Paulo (2009) the most popular destinations United States and United Kingdom among Brazilian students were losing market share with Canada, as it was becoming more attractive due to the lower living cost and more job opportunities offered compared to other countries. Last year, there was a 78% increase with approximately 23,000 Brazilians studying in USA, so now Brazil is the number six sending country to USA compared to number ten from previous years (Institute for International Education, 2015)

One of the most common challenges for Brazilian students is the language skill required, according to CGS International Graduate Admissions Survey (2014), ESL (English as a second language) short programs are the most requested by Brazilians, as, not only the capacity to adapt to a global environment but also having an English proficiency level will be requested to advance in their careers. In addition to this, Business programs are also famous among students but a shift towards STEM fields is expected as a result of the government scholarships (WES, 2014).

To sum up, Brazil seems like a promising market for International Student recruitment looking not only for HE but also for ESL programs influenced by governmental support as vital skills for the global economy.

Indonesia

Asia has always been number one priority for international recruiters as it is the continent with the largest markets of students overseas (India and China). Aside from those countries, there are more regions showing a valuable potential for international recruitment initiatives such as South East Asia with around 300,000 students abroad (Higher Education Marketing, 2016).

Indonesia is the largest economy in South East Asia and it is forecasted to develop into top 10 in the world by 2030 (Higher Education Marketing, 2016). The political stability, the outstanding middle class development and the progress of urbanization are creating new

opportunities and challenges especially in the educational sector, transforming the country in a main target for international recruiters (ICEF Monitor, 2015).

According to the British Council Report (2016) Indonesia has shown an active engagement to education, during the last years, an increase in government investments has been done in their education sector. However, despite the improvement, the domestic higher education system is still weak and many institutions are not been able to meet the demand of the increasing middle class. Indonesia still needs to concentrate its efforts in improving its human capital and overcoming the inefficiency of its labor pool.

As a consequence, many Indonesians students keep seeking for institutions abroad for better opportunities (Higher Education Marketing, 2016) as degrees from foreign institutions are still considered a distinction in their marketplace. (ICEF Monitor, 2012).

UNESCO published in Global Flow of Tertiary-Level Students (2014) that approximately 39,000 Indonesian students were undertaking their Higher Education abroad, and their top destinations were: Australia (10,500 students), United States (7,500 students) and Malaysia (4,500 students) as mentioned in Jakarta Post (2014). In addition, most of them were enrolled in undergraduate programs in Business and STEM field as well as language proficiency programs (EHEF- Indonesia, 2015).

Even though Australia is still at the top of the list as a destination for Indonesians, during the 2014 and 2015, USA had the highest number of Indonesian students (8200) enrolled, representing an increase of the ten percent since 2005, so Indonesia had been named top emerging market of international students for US and had been also rated after Brazil and Vietnam, the third most promising market for international recruitment (Jakarta Globe, 2015)

The interested for the new study destinations is increasing specially towards Europe. Netherlands has become popular among Indonesian students due to the work visa they can get after graduation proportioning value and the opportunity of a global network which is at the top of the main facts guiding their decision making process when going to study abroad (Higher Education Marketing, 2016)

As was previous stated, the ambition of a better education, the fast economic growth of the middle class and the lack of balance in demand and supply of a quality educational system, converts Indonesia in a promising and attractive emerging market.

Vietnam

Which was one of the poorest countries in the world has dramatically changed, Vietnam, is currently considered one of the Asia's strongest and most populous economies worldwide with 94 million people (British Council, 2016) and with a GDP growth of 6.7% in 2015. As a result, Vietnam is expected to become an upper middle-income country by 2035 (ICEF Monitor, 2016).

The fact that economic growth has occurred, it has increased as well the number of students interested in higher education as families find themselves with enough purchasing power and interest in their children's to have a better education. However, the domestic

education sector still struggle with systematic and structural changes and is concerned about the lack of quality and low standards in a developed global world.

According to World Education Service (2015), there are inconsistencies between the classrooms and real marketplace so graduate students are unable to find jobs which means that universities in Vietnam are not producing the workforce that the society demands. That is the main reason why many students reject the idea to study in Vietnam and seek for new opportunities abroad (British Council, 2016). Seeing that, Vietnam is recognized as an important Asian emerging market for international education.

According to ICEF Monitor (2014), the Ministry of Education and Training mentioned that around 125,000 Vietnamese students pursued education overseas in 2013, which represents a 12% increase over the previous year. The Vietnamese market of international students is shared among top 3 destinations which are: Australia (26,015 students), United States (19,591 students), Japan (13,328) accounting for about 2/3 of the total outbound enrollment that year and at the same time ranking Vietnam as the eight sending country to USA (WES, 2015).

Australian visa situation is what puts this destination as number one for Vietnamese students but according to the World Education Service (2015), USA is considered by Vietnamese to have the best education in the world with technological and scientific qualifications, which makes it worth it for them the huge financial investment.

Reports also show that more than 50 percent of Vietnamese students enrolled in USA are studying Business or Engineering degrees (WES, 2015). As an additional data, the middle class growth has also increased the number of younger age students in USA, who represent a pool of Vietnamese secondary graduate students as an emerging and significant recruitment channel for Higher Education Institutions (WES, 2015).

According to a survey done by Institute of International Education (2014), shows that the main obstacle for students to go to USA is the cost of tuition as it is more expensive than other destinations. Even though, Vietnam has a strong growth market, the country is still transitioning, so affordability is still an important issue to consider. The World Education Service (2015), mentioned that 90 percent of Vietnamese student abroad are self-funded but as their income is still relative low compared to other developing countries, many of them choose to study in cheaper colleges worldwide.

Therefore, it is not a surprise that Vietnamese students are considered to be price sensitive, and that there is a growing trend for them to feel attracted by new educational destinations such as: China or Singapore, which are closer and more affordable (WES, 2015).

To sum up, Vietnam is an important emerging market for international education, as a result of an increasing trend of outbound mobility and enrollment at a younger age based on the demand of a better quality education at an affordable price.

Saudi Arabia

When thinking about Saudi Arabia, it is not a surprise that the first thing coming to mind is “oil”. It is the largest Arab country in the Middle East and it covers around a quarter of the world’s most known oil reserves, converting it in a very wealthy country. (WES, 2012).

However, during the last years, Saudi government has put more effort into expanding their economy aside from oil in order to obtain a feasible growth, and part of this changes includes investments in education. Consequently, the education system in Saudi Arabia is open and free for all citizens (Higher Education Marketing, 2014).

After understanding the emphasis in education as a mean to development, Saudi Arabia, is among the countries with most investment done in education with approximately 25% of its GDP going into improvements in this area. As a result of this huge investment, the country has managed to educate approximately 6 million people in less than 8 decades. In a short time, the country went has increase of 73% in the literacy rates (SACM, 2015).

Despite the investments, the education system is still no adequate to prepare qualified young students for a global modern economy. According to the University World News (2015), the reason for this lack of quality in education, is that the first university in the country was not established until 1957 and since then the education system has been focused in Arabic and religious studies. Therefore, Saudi students have had no other choice than to go abroad for a better education that can prepare them for the globalized world.

For HEI’s around the world, Saudi Arabia represents an important source of international students but also an unknown emerging market for international student recruitment with around 200,000 students abroad in 2015 and recognized as the number one country sending students from the Middle East (Oxford Business Group, 2015).

The dramatic outflow of Saudi students is a result of the need for an open minded society pushed by government ambitious scholarships “King Abdullah Scholarship Program” that was created in 2005 in order to provide complete funds to students and to increase the number of outbound mobility (Higher Education Marketing, 2014)

According to the University World News report (2015) most of Saudi Arabian students head to more familiar education environments having as a preference English speaking countries such as United States by being the host of the biggest number of Saudi students with approximately 92,618 in 2015 which represents an 54.8% of all Saudi Arabian students abroad (ITA, 2016) and also considered the fourth largest market of international students in U.S, followed by United Kingdom, Canada and Australia as top destinations.

Based on the Higher Education Marketing report (2014) the most frequent areas of studies chosen by Saudi students are more likely to be in engineering and business administration with 40% enrollment. Additionally, English as a Second Language programs are also common because of the poor English skills presented by students.

In 2015, in U.S. were 51.5% of Saudi Arabian students enrolled at a Bachelors level, 21% at a Masters level and around 27.6 % enrolled in a different program all of this contributing to a

1.7 billion dollars to the U.S. economy (IIE, 2015). Consequently, Saudi Arabia has a bright future as an international recruitment hub based on its government support and powerful market.

Strategies to approach these markets

When doing international recruitment it is important to keep in mind: what moves students to go study overseas? The interested in undertaking education abroad, has been motivated by the linkage it has with economic prosperity of graduate students. In emerging countries, as mentioned previously, the growth of the middle class but the limited access to education within their own nations drives to an increase in the quantity of students going overseas. (Mazzarol & Soutar, 2002).

The flow of international students abroad could be explained by the “push and pull” factors. Referring to push, factors those within the source country and where the initiative of undertaking international education is set up. On the other hand, pull factors are those that take place in the host country, making the place engaging for the international students (Mazzarol & Soutar, 2002)

For students, international mobility is a challenge and important decision. Therefore, intensive research is done, highlighting: university’s ranking, student’s reviews, language, financial support, tuition & fees, living expenses, visa requirements, work permission, weather which are within the most important factors (Ross, Grace, & Shao, 2013).

While emerging countries improve the access to domestic higher education, Nigerian, Brazilian, Indonesian, Vietnamese and Saudis, analyzed in this article, will continue to increase the desire of expanding their education overseas. Working with emerging markets presents rewards as well as challenges to meeting the international student enrollment goals of finding academic prepared and financial supported students. As coming from divergent backgrounds, different strategies must be put in place in order to attract the right students from these sources.

So, how can foreign educators approach African, Latin American, South-East Asian and Middle Easter markets? According to ICEF Monitor (2016), international education is based on building relationships with institutions overseas, students, and their families. In Nigeria, Africa, the market is continuously changing and uncertain, therefore when planning students’ recruitment an open to change and malleable strategy must exist. One of the greatest challenges are corruption and logistics as bureaucracy is high, so things not always move as fast as expected. Thus, connections are key, working with locals and governments will improve the process.

As relationship building is important in Nigeria, student ambassadors could be a great living proof of the value of the academic program offered by universities and work as inspiration for students. In addition Nigeria is a social country, data proves that there are 70.3 million of internet users in the country and 76% of web page views come from a mobile device so Nigeria is an easy market to get and communicate with, via social media (INTEAD, 2016).

Data suggests that international students are heterogeneous and divided in 4 groups: Strivers (high level of academic preparation and low financial resources), Highfliers (high academic level and high financial resources), Strugglers (low academic level and financial resources) and Explores (low academic level and high financial resources) (WENR, 2012).

Based on the different group of students, approximately 80% Nigerians are considered to be Strivers and Highfliers, as both are academically prepared where language is not a barrier as it is an English speaking country but the decrease in the value of Naira (national currency) against dollars is what makes them struggle when deciding their study destination. (WENR, 2012). It is important to keep all these patterns in mind when approaching the Nigerian market.

In Brazil, Latin America, the students are considered to be strivers by 45% according to World Education News (2015) report, showing that Latin American students have as a priority the cost and financial help offered by the university when choosing a destination.

Explorers, are also quite common in Brazil as most of students are in need for an English proficiency program prior attending higher education abroad as the language barrier continues to be a challenge for Brazilians, therefore ESL programmes, providing conditional acceptance and attractive financial options are ways to create competitive advantage when approaching this market (ICEF Monitor, 2014).

According to ICEF Monitor (2016) Brazilian students are more aware of the quality of education provided by international institutions as well as post work opportunities when applying to universities overseas, those factors have strong influence on the destination chosen. In addition, Brazilians highly value personal relations and the market is known to be driven by agents. So in order to meet the recruitment goals it would be important concentrating resources on building strong relationships with local education agents, especially on cities like Sao Paulo or Rio de Janeiro considered to have education institutions that are key, as well as the highest amount of wealth accumulated (ICEF Monitor, 2014).

Even though personal relations are important, a new cost-effective method to increase awareness of international institutions among Brazilian students is by using social media. In 2015, approximately 119 million people could be reached by it as 96% of the population was an online user and 90% of them were between the age of 15 and 32. It is expected that in 2018 Brazil will become the 4th largest advertising market (Sprinklr, 2015) so institutions taking advantage of this method will gain competitive advantage when recruiting.

For instance, in developing Vietnam and Indonesia representing South-East Asia, an important focus on employability, accessibility and brand reputation is needed by international recruiters to win these competitive markets, therefore, HEI's that can adjust with these requirements have higher possibilities to succeed with recruitment goals (Boumphrey, 2016).

Both, Vietnamese and Indonesian students, are considered to be mostly strivers because they are still highly price sensitive (WES, 2015). Mentioned this, Vietnamese and Indonesian students show attraction by scholarships that help compensate the costs.

In Vietnam, a recruitment method to create brand awareness is to focus high school visits on smaller cities like Hanoi that according to World Education News and Reviews (2015) offers more prospective students than bigger cities. And in Indonesia, they are concern about overseas qualifications, therefore, promotion must emphasize that the institutions are internationally recognized (Net Netives, 2015).

Although the most used method in South- East Asia is domestic recruitment, the use of social media is expecting to have more impact in the future. Facebook is the most know social media, with 69 million users in Indonesia and 31.3 million users in Vietnam (Chabrol, 2015), values that are expected to grow by 2018 (WES, 2015). Therefore, and effective use of social media is key when reaching students from these two countries.

Furthermore, in Saudi Arabia the Middle East, HEI's must understand the preferences and information-seeking behavior shown by prospect Saudi students interested in going abroad in order to reach this market. Approximately 50% of Saudis are considered to be explores as they have a strong financial resources but low academic preparedness (WENR, 2012), specially shown by English language as key challenge to go abroad with a 29% of students enrolled in ESL programmes.

As a result of the low academic preparedness shown by Saudis, make them more likely to use service of education agents to help them in the application process and university search in order to reach colleges abroad, so developing relationships with agents is a good way to enter the market (WENR, 2012)

When deciding where to go, Saudis are more likely to choose a destination by its language of instruction as they preferred English speaking countries and the network support they offer (Higher Education Marketing, 2014). Therefore, a well-developed orientation and ESL program should be developed in order to avoid a strong cultural shock as this is considered the main challenges for Saudis going abroad.

Universities' exhibitions and conferences are key to brand foreign universities in the Middle East as students from all over the country go to the exhibitions to meet representatives of universities and work as an important marketing tool for those targeting the Saudi market. (WES, 2012)

Additionally, a new emerging opportunity to communicate and create awareness among students in Saudi Arabia, is by social media networking. According to Higher Educational Marketing (2014), internet access has expanded during the last few years in the country, with 31 million users, YouTube, is the most popular social platform among young population, followed by Facebook with 7.8 million users and Twitter with 1.9 million users.

To conclude, 90% the country is unable to understand English (WES, 2015) so bilingual marketing strategies are necessary to reach this market as ambitious younger generations has the desire to study and improve their English level abroad.

Key Findings & Global Market Forecast

As has been noted, the growth in GDP per capital is correlated to the increase in number of students enrolled in tertiary education and increases as well the interests of students to go overseas. In particular, middle class members in emerging markets are more likely to spend in education as it is at the top of their financial priorities (ICEF Monitor, 2014). Consequently, an increase in the number of outbound students is expected. The table below demonstrates, the GDP growth forecasted by 2020 for the 5 emerging countries mentioned in this article as hub for international student recruitment.

Table 1: GDP Annual growth & Outbound Mobile students forecast

Countries/GDP	GDP Annual Growth Forecast 2020		Outbound mobile students forecast (000's)
	2016	2020	2020
Nigeria	-2.24	3.98	67
Brazil	-2.1	2.1	41
Vietnam	6.4	6.2	50
Indonesia	-1.4	-0.8	59
Saudi Arabia	1.4	3.5	54

Source: Trade Economics & U.S. International Trade Administration 2016

Based on the table, all of these economies show a GDP growth by 2020, therefore, there is opportunity for student mobility ratios to increase. It is useful to mention that the recent global recession is not expected to largely affect the mobility of students at a global level.

As an example, recession of 2009, where the world trade fell around 10% dragging 50 countries worldwide including those considered international students pools. Surprisingly, in 2009 despite the world recession, there was an increase of the global mobile students abroad as these countries maintained the positive number of outbound students. For instance, this suggests that international student flows are not affected in the short term by recession as apparently those households affected negatively were less likely to send their children to study abroad (British Council, 2012)

Consequently, this GDP growth forecasts by 2020, expects an increase in the outbound mobile student's ratios having as leader countries: Nigeria, Brazil, Vietnam, Indonesia and Saudi Arabia with a forecast of minimum 41,000 students and a maximum of 67,000 students undertaking tertiary education abroad.

As mentioned previously, the GDP does not affect the number of students going abroad but a decrease in the GDP impulse by recession, changing foreign exchange rates and political environments, does affect the study destinations chosen by students.

U.S according to data, has been the number one destination for globally mobile students hosting almost 975,000 international scholars a year. But it is starting to lose market share, due to global competition becoming stronger, high prices of HEI's in US compared to other English speaking countries and negative perception of students towards new president Donald Trump, who has shown dislike for foreigners during his political campaign (ITA, 2016).

Students are shifting their study abroad preference to more affordable study destinations and easier migration policies such as: Canada, Ireland, and Netherlands as well as Asian countries such as: China, Singapore and Malaysia that has been promoting over the last years as emerging centers of education (ITA, 2016)

Additionally, traditional recruitment marketing is still the most used method in emerging countries, as stated previously, despite traditions, higher education is changing the way of branding by using a cost effective method: social media platforms. The 5 emerging markets described in this article, show a trend towards social media use by millions of students, the popularity of Facebook, Twitter and YouTube, presents and new alternative for HEI's to approach a higher number of students and communicate with them at a lower price.

In the end, the countries chosen as new emerging markets, share economic trends, as increase in the growth rates and middle class as well as large populations so it is expected that they are all moving towards the top 15 economies around the world during the next decades. As a consequence of the economic growth, spread of online access has occurred, therefore, institutions making greater use of online platforms and social media marketing and service providers will be using a crucial component to attract prospective students in a more efficient way.

Conclusion

To conclude, internationalization of higher education has created a new market place where middle class families and governments highly value international education as the main driver to economic growth and development. So, this article identified, that tremendous growth is expected in the education sector although the existence of political and economic variations in the coming years.

Traditional markets of international students are changing for emerging countries which are considered a pool of opportunities for HEI's seeking to fulfill their recruitment goals. It is expected that for 2024: Nigeria, Brazil, Vietnam, Indonesia and Saudi Arabia will be at the top sources of outbound students worldwide, promoted by their GDP growth, large populations and not well established education system. Therefore, putting efforts in cultivating this countries is an opportunity for attracting and ensuring future enrollments.

English speaking countries like U.S, Canada and Australia are still expected to be at the top destinations for international students but a lost in market share is expected by the diversification of choices as a result of devaluation in currency in emerging markets and a trend of improvements in the education levels of Asian countries like China and Singapore which are expecting to host more international students in the near future.

Even though student mobility is expected to increase, HEI's have strong competition for talented students in target segments by understanding student mobility and information seeking trends. Rapidly changes in technology also means that exploring new emerging strategies such as the implementation of ESL programs, use of social media and the proper key stakeholder

relationships in specific countries will be needed to maximize opportunities in the international education market.

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