

# The next frontiers

Diversifying student recruitment

# This report is brought to you by:

## Studyportals

We are *the* international study choice platform, hosting over 3,450 universities across 120 countries and reaching more than 52 million prospective students from all around the world in 2021 alone.

Founded as a project subsidised by the European Commission and supported by many international student associations, Studyportals only grew stronger and more determined year to year.

Our mission is to make the world understand the power of learning, and we do this by making education choices transparent and accessible to students worldwide. With our platforms, we enable students to search for programmes and connect with the right universities.

We are dreamers, doers, and former international students ourselves, who have come together from around the world, determined to make one dream happen: to empower the world to choose education.

## Unibuddy

Unibuddy empowers universities to recruit, engage, and enroll prospective students through authentic peer-to-peer connections. Our student and staff chat, live events, and top-tier partnerships facilitate guidance through each stage of the student lifecycle. We purpose-built a digital platform for higher ed because better accessibility means that more students are getting the answers they need.

Community engagement leads to more informed decisions for students and better yield for universities, and it helps each school elevate their recruitment strategy. People are most influenced by their peers, so prospective students want to speak to someone who has actually lived the experience on which they're about to embark.

We keep students at the heart of all we do because human connection is the key to generating a sense of belonging. That's why 450+ global partners trust Unibuddy to help them help students find a place at their institution.

## Executive summary

A more nuanced approach to choosing source countries for recruitment goes beyond risk mitigation. It can translate into new opportunities. Universities can understand geographical differences in student interest, discipline or level and link these to their strategy and offerings.

This report focuses on diversifying source countries for student recruitments in the context of broader diversification strategies for universities. This is important for a variety of reasons—like bringing the perspectives of more diverse international student bodies into the classroom.

This report outlines the factors and frameworks that universities can use to spot trends and choose new countries on which to focus their recruitment efforts. It explores the drivers of diversification and the quantitative and qualitative factors that universities should consider when choosing new source countries for student recruitment.

This framework is exemplified with the identification of 17 countries that might be interesting for universities to pursue based on growth and student interest. For these 17 countries, the report provides insights into the behavior and aspirations of students. It identifies the fastest-growing destinations and subject areas, key demographic factors, and student concerns across 7 categories, from money to admissions.

Lastly, the report outlines the actionable steps surrounding the implementation of this framework for diversifying student recruitment.

## Introduction

Higher education institutions play a pivotal role in shaping the world as we know it by molding the leaders of the future, shaping societies, and advancing knowledge and innovation. For decades, universities have also been tasked with creating a more just and equal world, with education being considered a fundamental human right that should be accessible to people based on their individual capability (<https://en.unesco.org/news/what-you-need-know-about-right-education>).

This has led universities to place diversity at the foundation of their strategy. Traditionally, diversification—the action to achieve diversity—has been embraced by universities as a means for creating a stronger student body composition which promotes access, inclusion, and equity.

Diversification however, has grown to encompass many different areas of the university strategy that go beyond recruiting students from diverse backgrounds. This includes ensuring a diverse faculty and staff body, which leads to a more fruitful academic debate and research perspectives. It also includes diversifying their course portfolio to offer more innovative and inclusive programmes, either in new subjects or incorporating new teaching methods. It even involves where universities do their teaching, with some universities choosing to go where the students are instead of being constricted by their physical campus.

While all these aspects of diversity are important, this report focuses on diversity in relation to students. It explores how diversifying source countries and recruiting students with diverse nationalities and backgrounds can strengthen your strategy for a more inclusive university campus. In particular, this report deep-dives into a few countries that we see as promising for universities that want to have a more diverse student body, from Europe, Asia, Africa, and even South America.

This report also suggests ways to target prospective students across different continents to help university leaders take action and create a more diverse student recruitment strategy. It will spot differences and similarities across growing source countries and will help you analyse and understand how to reach out, engage, and recruit the students of tomorrow.

The global pandemic has made international mobility more challenging than ever before. We hope that this report helps universities make sense of the changing context for international student recruitment to prepare a resilient strategy for their recruitment in the coming years.

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# Why diversify

## Part One

Diversification is considered one of the best answers to the rising uncertainties of a changing global context, by considering alternatives to traditional student sources.

Diversification is mostly driven by concerns over the long-term success of one's institution, in particular, drawing the link between financial stability and the ability to execute on a university's mission.

# Primary drivers of diversification

The global mobility of students changed dramatically as a result of the Coronavirus outbreak. Diversification is more important than before, as universities can no longer afford to rely solely on a few source countries for their international student body. Universities must consider diversification as part of their strategies to mitigate risks, including not only geographical diversification, but also academic, product, marketing, and financial diversification. These are the top reasons for universities to diversify:

## **1. Quality of classroom experience**

International students enrich the classroom experience by contributing diversity and contrasting perspectives. International classrooms expose students to multicultural experiences, which aids in developing awareness and prepares students to interact with an interconnected world.

## **2. Knowledge-based economy**

Modern economies need a reliable input of highly-skilled graduates. Moreover, successful graduates often work in international firms. Having the right skill set includes multicultural awareness and the ability to work with international team members. Diversified programmes foster creativity and innovation, preparing pupils to engage in a multicultural environment.

## **3. Risk diversification**

Relying on a limited number of source countries increases the risk for universities—for instance, in the case of change in travel restrictions or diplomatic rows. Universities should not stop at expanding the source of student recruitment though. They should, among other efforts, offer more courses online, diversify marketing channels, reduce dependency on recruitment agents, and have a much broader portfolio of degree courses.

## **4. Rankings and reputation**

There is top talent among overseas students. Universities ensure that they recruit excellent students from all around the world by diversifying their source countries. The ratio of international students is often included in international rankings to boost one university's position.

Pluralism and participation are often core values of the modern academic environment. Not only do these translate into powerful assets in academic recruitment, but they can grow to be expected as core features of life on campus.



Institutions that want to appear global, innovative, and forward-looking create high expectations for their students. Fostering diversity on campus helps universities to live up to their high standards.

Agents can help universities secure a steady intake of students. However, without a solid diversification strategy, a university without multiple channels or with a limited selection of countries for international recruitment finds itself at a disadvantage in competing for the best foreign students.

By recruiting international students, your university is establishing a worldwide alumni network of ambassadors who will promote your institution around the world.

# How to choose countries of origin

## Part Two

Forward-looking institutions are faced with an apparently simple question:

“What will the class of 2030 look like?”

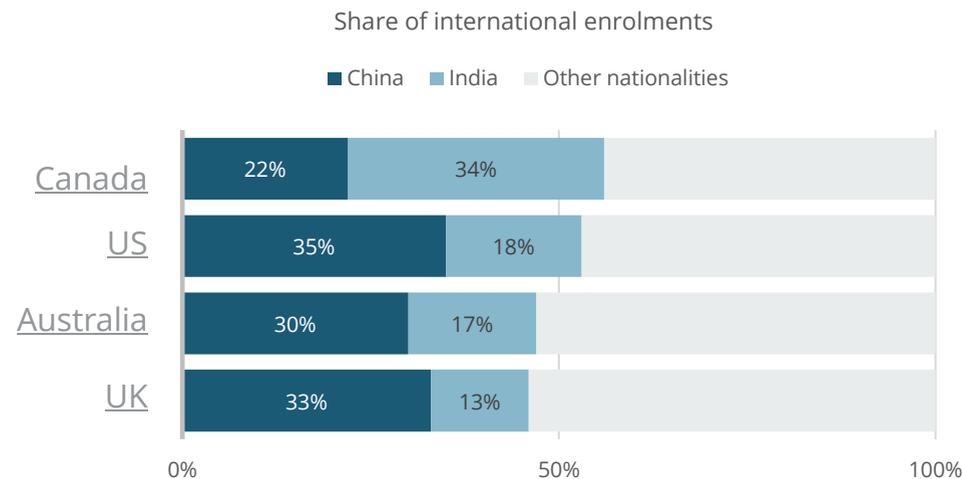
The answer needs to bring together the strategy of the institution, the reality of the market, and the preferences of students.

# Diversification

The challenge of diversification in higher education lies in finding the right mix that considers **changing demographics, growing populations, purchasing power, economic growth, government demand for highly skilled people, shortages in education capacity, or destination appeal.**

At the same time, global study destinations face growing uncertainties: border closures, disruptions to international travel, currency fluctuations, diplomatic rows, and government interventions that make internationalization a balancing act.

While universities want diversity on-campus, often recruiters tend to look at the low hanging fruit and the easiest markets, which are usually the populous ones (e.g., India or China). Although this may reduce costs where budgets and resources are limited, it does come with risks of over-exposure to one or two countries. Striking a balance between cost reduction and risk mitigation should be part of your institutional strategy.



# Diversification

## Reducing risk

Risk mitigation can be developed around the adage “don’t put all your eggs in one basket” (i.e. don’t risk everything on the success of one venture). Diversification has long been at the core of risk mitigation strategies, and a helpful framework of operations is provided as early as 2007 by [Maurits Van Roojen](#) et al.— at the time Vice President of International and Institutional Development at the University of Westminster.

The idea of diversification is to manage risks and be able to counter downward trends in one area with upward trends in another. This can be done by:

- Geographical diversification** to make sure that no nationality makes up more than 15% of the total international student population
- Academic diversification** to ensure that all departments have programmes that are relevant to international students (not only relying on few popular courses such as International Business, but also on less popular subject areas with high growth potential; Studyportals supply-and-demand data shows that this is the case for Environmental Economics and Policy)
- Product diversification** to increase the appeal of all types of programmes offered by a university (e.g., summer schools, language programmes, undergraduate or postgraduate programmes, on-campus and online programmes for international students)

To these, Studyportals adds two more:

- Financial diversification** should aim at having a buffer for rainy days to navigate downturns and semesters when the international student intake is severely reduced.
- Marketing diversification** translates to having multiple ways to communicate with prospective students across different channels: online and offline, education fairs and agents, alumni and partner universities, as well as a variety of digital channels like education portals, various social media, search engine marketing, etc.

# What to consider?



## Demographics

How many potential students (15-24 y/o) can you reach out to?  
Raw number and as a share of the country's total population.



## International students

How many students are studying abroad and how did their numbers change?



## GDP per capita

How is the economy performing per capita?



## Internet penetration rate

What percentage of the population use the internet?



## Gross enrolment ratio(s)

How many high-school graduates enroll in higher education? Is access to higher education equal across sexes?



## Outbound mobility ratio

What percentage of students studies abroad?

Japan	
<b>15-24 y/o</b>	11.8M (9%)
<b>International</b>	32,064 (+1%)
<b>Female ratio</b>	63%
<b>Mobility</b>	0.8%
<b>Internet</b>	93%
<b>GDP/capita</b>	\$40,113 (+0.3%)

# How to choose

Identifying focus countries for an HEI is no easy feat, yet it's one of the most critical decisions in international student recruitment and a core element of every student recruitment strategy and yearly plan. A good focus is essential to meet recruitment objectives in terms of student numbers and diversity with a limited budget.

Studyportals' approach combines quantitative and qualitative factors. This is what we recommend taking into account when choosing countries.

## 1. University strategy

What will the classroom look like in five years?

Certain countries may be higher in priority than others: institutional ties, governmental programmes, and concerns from different departments can narrow down your list even further.

## 2. Source market size

How large is student demand for international education in the country? Is this market worth the investment?

These two questions should lead to a list of 15-20 countries where the target segment is well defined and actionable.

## 3. Student interest

Are students interested in the value proposition my HEI can offer? Are they interested in studying my disciplines and/in my country? These questions define where marketing efforts can be more successful. They also challenge assumptions and reassess long-held beliefs.

What students say



What students do

# Regions

## Part Three

Each student's story is unique, depending on personal history, socio-economic background, and personal perspectives on the future.

Universities recognise these differences, but still need to select the best recruitment grounds for their goals.

By identifying regions, this report provides a window into the behaviour and outlook of promising recruitment grounds.

# Criteria for choosing countries

Among the criteria that were adopted was the focus on markets showing growing student interest (indicative of growing demand) together with high numbers of prospective students.

We choose not to focus on the usual recruitment grounds such as China, India and Nigeria.

The 17 countries we have chosen to highlight are not an exhaustive list. These countries may not necessarily be appropriate source countries for all regions and types of institutions. Malaysia and Nepal are already sizable recruitment markets for Australia. Vietnam is already a sizable recruitment market for Australia and Canada.

It may be helpful to read two white papers on [Asia](https://studyportals.com/intelligence/diversifying-student-recruitment-asia-focus/) and [Africa](https://studyportals.com/intelligence/diversification-of-student-recruitment-africa-focus/) that Studyportals published in early 2020.

The framework of this report can be applied to different countries to find matches student interest and a university's offerings.

# Beyond India

Relatively young, populous and in need of high-quality higher education, the countries neighbouring India can create powerful synergies with universities open to international students.

Their main resource lies in their demographics: the cohort of 15-24 y/o is growing, offsetting the general ageing trend of Asian societies.

The smallest country surrounding the Indian giant, Sri Lanka is clearly the outlier. It has a specific mix of high female participation rate, spending power, and older demographics.

For the entire region, Education and Training is growing as a subject of interest. The discipline students are looking for the most is Computer Science & IT: this encompasses a wide range of studies and attracts the bulk of search preferences from the region. There are, however, differences by country: while Pakistani and Bangladeshi students are also interested in Engineering programmes, their counterparts in Sri-Lanka and Nepal search for programmes in Agriculture.



## Pakistan

The large and populous country of Pakistan separated from India in 1947. **Its education system, however, is very similar to the Indian education system**, a characteristic which can play to the advantages of institutions already accustomed with working with Indian universities. Its academic year is compatible with Europe: it runs from September to June.



## Bangladesh

After gaining its independence in 1971, this Muslim-majority country has plenty to offer for agile recruiters. Its academic year runs from January to December, parallel to the calendar year. While internet speed is improving, it is still relatively slow. **Interestingly, students from Bangladesh are increasingly looking for opportunities in Education, Humanities, and Journalism.**



## Sri Lanka

Local institutions offer English-taught programmes, but **Sri Lankans are used to studying abroad. There are numerous diaspora communities in Canada, France, India, Australia and in the Middle East.**

Students have an extra push factor: in 2013 Sri Lanka's 15 state universities admitted "only 23,000 students [...] annually, out of the 220,000 who sit the university entrance (A-Level) examination every year." That same year, some 12,000 Sri Lankan students reportedly sought university education abroad.



## Nepal

The small, land-locked Himalayan country of Nepal displays a young and internationally mobile student population, but **its education system cannot handle the demand for higher education and struggles to connect to careers.** Their main destination of choice has been neighboring India, but its position is now challenged by the big pull of Chinese universities. Prospective students from Nepal browse more actively for opportunities in the Middle East and in Europe, with Business, Computer Sciences, and Engineering being the most sought-after disciplines.

While most study searches are in Kathmandu, Nepalese students from across the country can also be found online: digital platforms and social media are growing strongly by the year, and internet speed is increasing faster than the rest of the region.

## Sri Lanka



## Pakistan



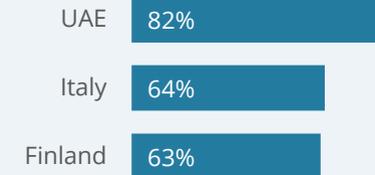
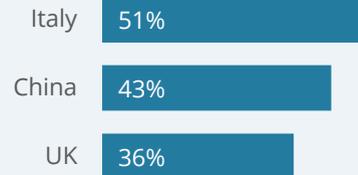
## Bangladesh



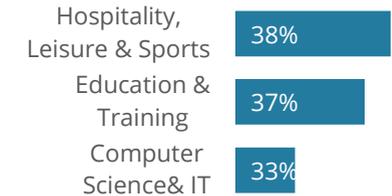
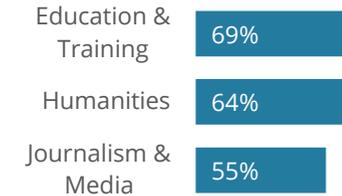
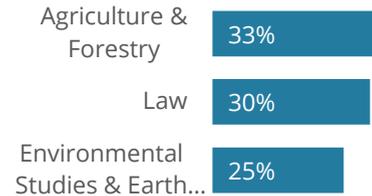
## Nepal



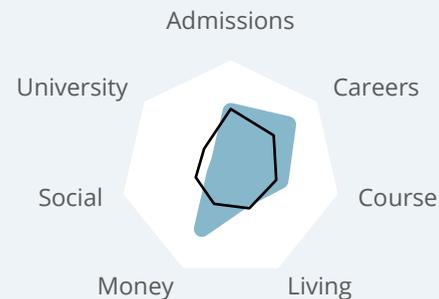
### Fastest growing destinations



### Fastest growing subject areas



### Student concerns (vs the global average)



### Main Factors

**15-24 y/o** 3.1M (15%)  
**International** 24,262 (+16%)  
**Female ratio** 26%  
**Mobility** 8.8%  
**Internet** 29%  
**GDP/capita** \$3,852 (+2.3%)

**15-24 y/o** 42.3M (20%)  
**International** 57,938 (+8%)  
**Female ratio** 12%  
**Mobility** 2.3%  
**Internet** 17%  
**GDP /capita** \$1,285 (+1.0%)

**15-24 y/o** 30.8M (19%)  
**International** 50,078 (-14%)  
**Female ratio** 20%  
**Mobility** 1.2%  
**Internet** 13%  
**GDP /capita** \$1,856 (+8.2%)

**15-24 y/o** 6.4M (22%)  
**International** 82,047 (+27%)  
**Female ratio** 14%  
**Mobility** 21.4%  
**Internet** 21%  
**GDP /capita** \$1,195 (+6.7%)

# Beyond China

The countries in South-East Asia are among the fastest growing countries on Studyportals' platforms, with Thailand and Vietnam booming in interest for full-time study options abroad.

The region, however, offers a lot of diversity: Vietnam and Thailand already reached their peak in the 15-24 age cohort; while Malaysia and Singapore's more modest numbers are stable; and the Philippines' study-age population keeps rising.

Wealth disparities are also apparent, with a rich Singapore juxtaposed with its less well-off neighbours. Price sensitivity is particularly high among students in Vietnam and Thailand, with 1 in 5 students looking at courses with no tuition fees. Nevertheless, GDP growth rates across the region are high, and online access is rapidly improving.

Malaysia and Singapore are also strong regional hubs, with highly ranked universities in Singapore such as the National University of Singapore (THE 21) and Nanyang Technological University (THE 46). Students from both countries look domestically for study options, however interest from Malaysia is down for domestic institutions (-6%) but up for institutions in Singapore (+121%).

Based on the last 12 months, Singapore and Malaysia are promising recruitment grounds for Computer Sciences & IT programmes, the Philippines and Vietnam for Agriculture & Forestry, and Thailand and Vietnam for Environmental Studies.



## Thailand

While traditionally students from Thailand have preferred destinations such as Australia, the US, UK and Japan, in the past year Studyportals recorded **growing interest to New Zealand (+375%), as well as Singapore (+250%) and European destinations such as Austria (+259%).**

However, Thai schools often teach in Thai and English is rare. The Thai school year runs June-March, while the academic year runs August-May.



## Malaysia

While the majority of the population is Muslim, Malaysia has a strong presence of Buddhists and Catholics. Its market is characterized by a strong job competition with HE as a differentiator, and high-quality offers are already present in the country: Malaysia hosts plenty of TNE campuses such as University of Southampton, Monash University, and the University of Nottingham Malaysia.

Its student population, mainly present in its major hub – Kuala Lumpur – and in Petaling Jaya, has a strong interest in post-study work rights and in finding financial aid. **Students in Malaysia are showing increased interest in Singapore (+203%), Italy (143%), and US (103%).**



## Philippines

About 70% of the Philippine higher education institutions are private: some are religious (private sectarian), while others are non-religious (private non-sectarian). The language of instruction is often English and Filipino; the academic year runs June-April. **The Philippines displays growth in interest for Canada (+53%) – since the 2018 IRCC streamlined visa procedure – Germany (+17%) and Norway (+27%).** Philippines – growth of interest for Medicine & Health - +24% and Education and Training +26%: the country has a tradition of sending students abroad for Medicine programmes, and that stays consistent, with especially interest for programmes in Clinical Psychology (+46%) and Nursing (+23%).



## Vietnam

Vietnam had preferred destinations such as Japan, US, Australia and Korea and is now showing **increased interest towards destinations such as Austria (+591%)** after the introduction of a new scholarship programme in collaboration with OeAD and VIED and ASEA-UNINET.

Interest from Vietnam grew significantly in Humanities (+478% YOY especially Language Studies +471% and Linguistics +451%) and Environmental Studies and Earth Sciences (471% especially Climate Studies and Meteorology +1568% and Environmental Economics and Policy +632%). Despite the significant growth in other subjects, Business & Management collects the lion share of Vietnamese interest.



## Singapore

Singapore, the smallest and richest country in the region has long adopted English as its education language. Its universities are well known to attract foreign talent with one in five students coming from abroad. The school year runs January-December. Students in Singapore increasingly looked at study options abroad: **their interest focused on North-America (Canada +48%, US +39%) and some destinations in Europe (Norway +44% and Italy +40%).**

## Vietnam



## Philippines



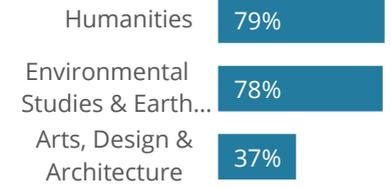
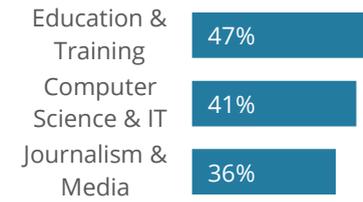
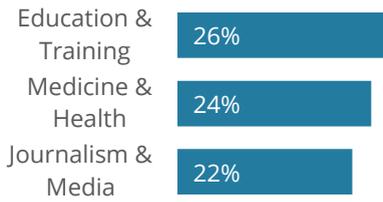
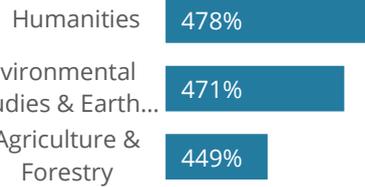
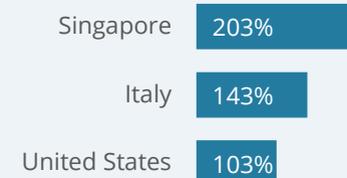
## Thailand



## Singapore



## Malaysia



### Admissions



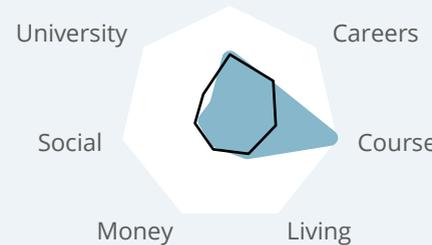
### Admissions



### Admissions



### Admissions



### Admissions



**15-24 y/o** 13.6M (14%)  
**International** 108,301 (+14%)  
**Female ratio** 32%  
**Mobility** 6.4%  
**Internet** 69%  
**GDP /capita** \$2,715 (+7.0%)

**15-24 y/o** 20.5M (19%)  
**International** 18,914 (+9%)  
**Female ratio** 40%  
**Mobility** 0.5%  
**Internet** 47%  
**GDP /capita** \$3,485 (+6.1%)

**15-24 y/o** 9.3M (13%)  
**International** 32,944 (+3%)  
**Female ratio** 58%  
**Mobility** -  
**Internet** 67%  
**GDP /capita** \$7,817 (+2.3%)

**15-24 y/o** 0.7M (13%)  
**International** 23,745 (+0%)  
**Female ratio** 97%  
**Mobility** -  
**Internet** 89%  
**GDP /capita** \$65,641 (+1.3%)

**15-24 y/o** 5.6M (17%)  
**International** 61,586 (-3%)  
**Female ratio** 49%  
**Mobility** 4.8%  
**Internet** 84%  
**GDP /capita** \$11,414 (+4.3%)

# Edge of Europe

Moderately wealthy, traditionally lacking the diplomatic weight or favourable demographics of their neighbours, these four countries may not be on the map for future recruitment grounds.

However, these four European countries have plenty to offer to shrewd recruiters. Their universities are well connected with other centers of study, and their degrees have wide recognition abroad.

The student population is eager to embark in studies abroad and kickstart global careers that are not so easily available at home. Traditionally, these needs have been fulfilled by European universities, including many British ones.

The main pull for students in these countries is finding the right course of study: a specialization not offered by local universities for their professional and academic development.

In other words, these students care most about what to study and course information and information availability are most important when communicating with these cohorts.

Moreover, students in these countries will need to find a way to combine the need to study abroad with the inward turn of the UK after Brexit, previously a more accessible and widely preferred destination.



## Portugal

Portugal will weather the demographic decline better than other countries, keeping its population stable. Its level of income and GDP per capita is higher than that of other countries in the Edge of Europe region.

Portuguese students are gaining interest in Humanities, with Language Studies, Linguistics, and Creative Writing being the most popular subdisciplines. Moreover, a strong desire for Computer Science & IT programmes is visible. As in the rest of the region, **there is a noticeable switch of interest from studying in the United Kingdom to other European countries; in the case of Portugal, it is China, Ireland, and Italy.**



## Poland

In Poland, the academic year starts in October and lasts till June, which gives students three months of summer holidays. Not only do the universities offer international education but studying in English is possible from primary education due to numerous IB World Schools active in Poland.

When considering options to study abroad, Poles used to be very much interested in the United Kingdom. However, **in the post-Brexit reality, Germany and Netherlands are top choices.** In comparison to other countries in the region, Poland has a relatively low student mobility ratio of 1.8%.

Humanities is the fastest-growing discipline; however, Polish students show also a very high interest in Computer Sciences & IT, which might result from the growing demand for ICT specialists in Poland and other EU countries.



## Romania

The outbound student mobility ratio is **the highest in the Edge of Europe region: 6.6% of Romanian students choose to study abroad.** Recently, the main study destinations are the Netherlands, Germany, and the United Kingdom. However, the countries where the Romance languages are spoken, like Italy and Spain, are increasingly becoming a popular choice.

Computer Science & IT stands out in terms of student engagement, showing that there is a growing demand for IT specialists in Romania. While the rest of the countries in the region are mostly interested in the course information, Romanians also like to gain insights into money matters.



## Greece

The number of 25-34 year-olds with tertiary education in Greece has been growing with women having a greater increase of share than men. As a result, **Greece has a relatively high female enrolment in tertiary education (150%).** Education at the Bachelor's level is free, while the average tuition fee for a Master's programme is USD 4,100. Greece maintains a steady presence of Transnational Education providers (TNEs), especially from British universities who often teach local students in Athens and Thessaloniki.

Greek students show increasing interest in Environmental Studies & Earth Sciences, Natural Sciences & Mathematics, and Agriculture & Forestry. The Netherlands is the number one study destination choice in the last 12 months.

## Portugal



## Greece



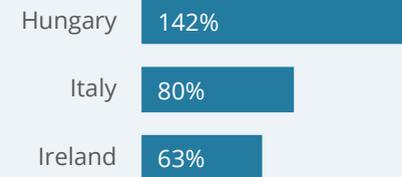
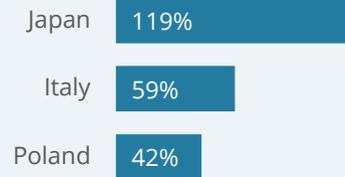
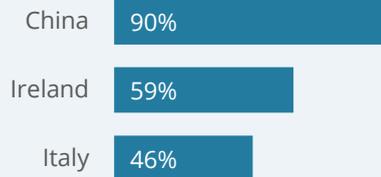
## Poland



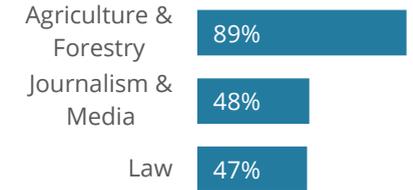
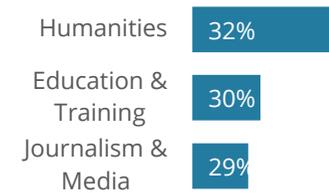
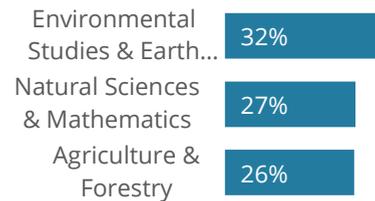
## Romania



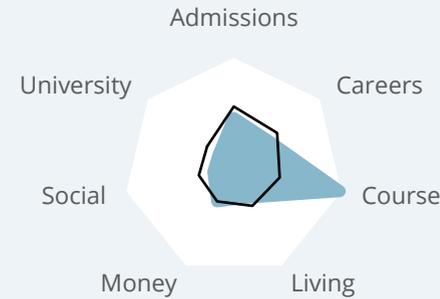
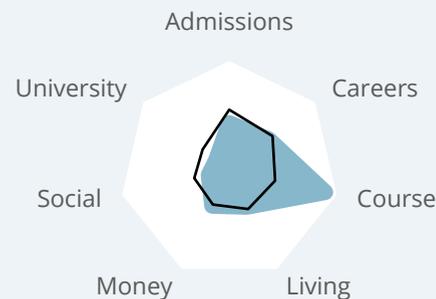
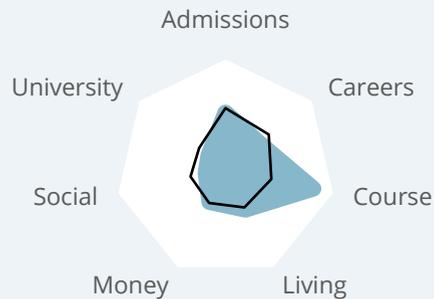
### Fastest growing destinations



### Fastest growing subject areas



### Student concerns



### Main Factors

**15-24 y/o** 1.1M (10%)  
**International** 15,082 (+7%)  
**Female ratio** 73%  
**Mobility** 5.6%  
**Internet** 75%  
**GDP** \$23,285 (+2.5%)

**15-24 y/o** 1.1M (10%)  
**International** 39,110 (+3%)  
**Female ratio** 150%  
**Mobility** 5.0%  
**Internet** 76%  
**GDP** \$19,151 (+1.9%)

**15-24 y/o** 3.8M (10%)  
**International** 26,380 (+5%)  
**Female ratio** 84%  
**Mobility** 1.8%  
**Internet** 80%  
**GDP** \$15,695 (+4.5%)

**15-24 y/o** 2M (10%)  
**International** 37,546 (+4%)  
**Female ratio** 58%  
**Mobility** 6.6%  
**Internet** 74%  
**GDP** \$12,890 (+4.1%)

# Up and coming

Brazil, Turkey, Japan, and Ghana share the same potential: a large student population which is not traditionally as mobile as others. International mobility may be stifled by strong offers at home, visa requirements, or monetary constraints.

Nevertheless, demographics differ: Brazil, Turkey, and especially Ghana are powered by growing populations, while Japan's is declining after reaching its zenith in the last decade.

Economics are similarly diverse: Japanese firms seek to hire an internationalized and forward-looking workforce; Brazilian and Turkish economies struggle with volatility both in prices and currency; Ghana's economic indicators are higher than most not only in Africa, but also in the Middle East and South Asia.

Student mobility is traditionally influenced by historic ties, expat communities, and shared languages: Japanese students in the US, Ghanaians in the US and the UK, Turkish students in Germany, and Brazilian students in the US and Portugal are all good examples of past dependency.

However, student mobility is changing, with students exploring more than just a few traditional destinations and considering more options abroad as English-taught programmes become gradually more available.



## Brazil

Brazil has young demographics, large universities, and historical ties with both Europe and North America. **More than 386,000 Brazilians studied abroad in 2019.** Their largest numbers flock to neighbouring Argentina, the US, and Portugal: affordability and availability seem to be the keys to Brazilian students.



## Turkey

Turkey, like Brazil, has a relatively young population, with **mobile students who traditionally apply to universities in historically close countries** (e.g., Germany), and a network of local higher education institutions catering to the needs of its growing population.

Turkish students equally represent both genders, whereas others, countries in this group usually present larger male student audiences.

Its population values degrees and most Turkish people attend university.



## Japan

Japan's demographics alone would not make it appealing to student recruiters. However, it has a singular mix of wealthy population, international companies, and interest in high-quality education. JAOS reported more than half of them pursuing a degree in either the US, Australia, or Canada before the pandemic. However, **"more students are going abroad and choosing locations other than America"** JAOS reported.



## Ghana

**Ghana hosts the youngest and most mobile cohort of students.** It has a long tradition of English-taught education, partly due to its historic ties with the UK.

Ghana's economy is among the most diversified in Africa with engineering and manufacturing complementing its primary sector. Its demographics will be the driving force behind Ghana ascend.

Interestingly, Ghana's higher education has historic ties with former Soviet countries, especially with Ukraine.

## Brazil



## Turkey



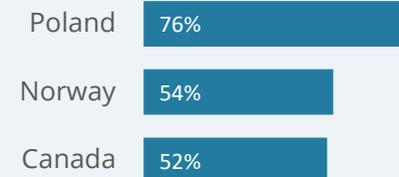
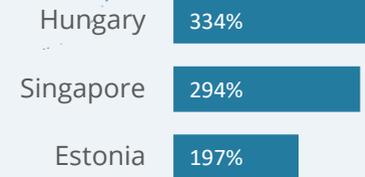
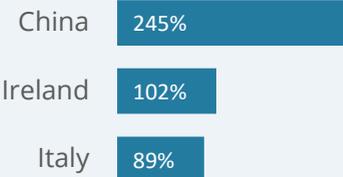
## Japan



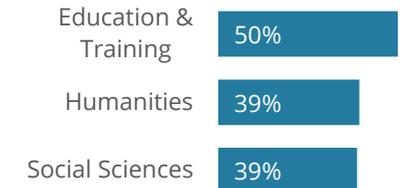
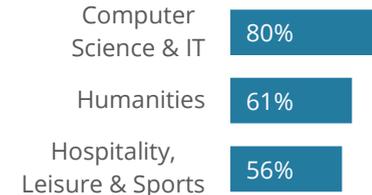
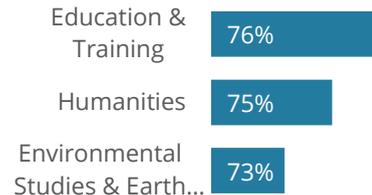
## Ghana



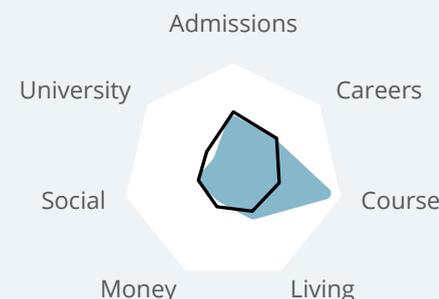
### Fastest growing destinations



### Fastest growing subject areas



### Student concerns



### Main Factors

**15-24 y/o** 33.7M (16%)  
**International** 70,055 (+20%)  
**Female ratio** 64%  
**Mobility** 0.9%  
**Internet** 74%  
**GDP** \$8,897 (+1.4%)

**15-24 y/o** 13.5M (16%)  
**International** 47,477 (+4%)  
**Female ratio** 111%  
**Mobility** 0.6%  
**Internet** 74%  
**GDP** \$9,127 (+0.9%)

**15-24 y/o** 11.8M (9%)  
**International** 32,064 (+1%)  
**Female ratio** 63%  
**Mobility** 0.8%  
**Internet** 93%  
**GDP** \$40,113 (+0.3%)

**15-24 y/o** 5.9M (19%)  
**International** 16,226 (+10%)  
**Female ratio** 16%  
**Mobility** 3.5%  
**Internet** 53%  
**GDP** \$ 2,210 (+6.5%)

# Conclusions and next steps

## Part Four

Universities need to translate a diversification strategy into actionable points.

Market insights, frameworks for action, and strategic advice can help institutions along the road.

# Bringing it all together

Students worldwide have different backgrounds, and their personal stories are often unique. To grant a fair access to education regardless of the origin is one of the goals of a diverse classroom.

Nevertheless, marketers have to make decisions about where to expand their recruitment outreach. Both geographical and thematic approaches come short of comparing countries. For instance, Malaysia and Romania may have similar GDP per capita, but different demographics and different student interest: only some universities have the capabilities to execute a recruiting strategy in the country.

As English-taught programmes become more available worldwide, student mobility opens to more destinations. Traditional destinations maintain their pull, as new countries come to be considered viable options: African students consider more and more Asian universities; Japanese and Brazilians now look beyond the US; European countries consider other institutions in Italy and in Scandinavia.

At the same time, students recognise universities as one of the main ingredients for a successful career, given the development of a knowledge economy and the need to differentiate themselves in the job market. Moreover, they increasingly look at their education as a meaningful way to engage with the world, solving problems both globally and locally. A renewed interest in Environmental Studies & Earth Sciences, Journalism & Media, Education, and Humanities emerged over the last 12 months. As such, institutions can benefit from adjusting their message to the new context.

# A comprehensive geographic diversification framework

The identification of source countries is one step in a broader diversification framework. Of course, geographical diversification should be a major focus of university decision-makers.

Geographical diversification, however, is interrelated with other aspects of diversification. Decisions about which recruitment countries that universities should focus on must consider student interest in different disciplines and subjects across different levels and formats.

Choosing focus countries is not a one-off process. In order to take full advantage of emerging trends, make sure you are up to date with global shifts in student interest.

Remember not to miss opportunities by being too focused too early on in the process—keep your options open and revisit different focus countries over time.

The following framework outlines some actionable steps for creating a diversification strategy.

# Actionable steps for creating a diversification strategy



## 1 Clarify your diversification objectives

- Start by clarifying your institution's objectives and primary goals for diversification.
- It is important to align your strategy and action plan- different drivers may lead to different tactics.

## 2 Understand the dynamics of your institution

- Understand which countries your university currently receives students from and why.
- Understand the factors that have created obstacles for diversification in the current recruitment process.



## 3 Understand the wider landscape

- Understand your institution's recruitment in the context of the wider higher education landscape and your competitors.
- Look for you institution's competitive advantages.

## 4 Identify opportunities across the different dimensions of diversification

- Examine geographical differences in student interest, discipline or level, and format that could translate into opportunities .
- Identify new opportunities by understanding how your offering matches the needs of different students.

# Actionable steps for creating a diversification strategy



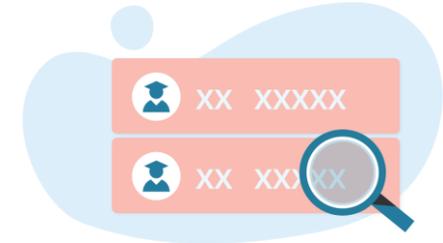
## 5 Take steps to understand features of the markets you would like to explore

- Access the quantitative and qualitative data available to understand the concerns of prospective students from focus countries.
- Utilising the conversational data enabled by the Unibuddy platform is one way to gain actionable insights into specific student concerns and areas of interest.



## 6 Articulate your offering in a way that appeals to these markets

- Create student personas in order to tailor recruitment and marketing tactics and successfully attract prospective students.
- There are tools you can use, such as A/B testing, on programme names to optimise the impact of your messages.
- Make sure students are getting the information they need at the right point in the student journey. Develop multiple touchpoints on various channels before, during and after enrolment.



## 7 Understand how to compare international students

- Recruiting students from different countries means understanding how a student's context may affect their application. It is impossible to gain an in-depth understanding of every aspect of every country. Understanding the kinds of aspects affected by context is a good starting point.
- Make sure you try not to judge students based on their literacy around the admissions process. This should not be a metric in accessing ability, as students have been exposed to different contexts and information.

# Methodology

## Part Five

Choosing the right mix of origin countries, programmes, and levels of education may sound complicated, but both public and proprietary information can help in understanding the differences and nuances of different countries.

# Indicators and aggregates

## Demographics

First and foremost, student recruiters will have to contend with adverse demographics in Europe, and – perhaps surprisingly – in Asia. The world is aging, with 2020 marking the first year where there are more people over 30 than under in the world. Moreover, the percentage of students studying internationally has been remarkably stable at roughly 2% over the last 30 years.

This does not spell doom to recruitment efforts, as other factors—participation rates in higher education and the shift to a knowledge economy—expand the target for recruiters. Nevertheless, one of the key drivers of international education has always been youth demographics: the age group between 15 and 24 years of age is perhaps the most representative for higher education institutions.

## Gross Enrolment Ratio and Female Gross Enrolment Ratio

The Gross Enrolment Ratio (GER) expresses the share of students continuing their education in the five years after the official graduation age. It is a proxy, telling of the coverage and efficiency of a country's education system. It can exceed 100% as is the case for Greece, Australia, and Turkey among others: this happens because a student can enrol multiple times in the five-year period, or they can have a late or early enrolment. It matters because it is possible to compare the size of the qualified group within the college-age population: it has been increasing steadily since the 1990s.

The Female GER describes the share of female students enrolling into tertiary education. It is interesting when it differs significantly from the GER: a lower value indicates a disparity in opportunities. If the goal is having a well-spread audience in an international classroom, it is advisable to apply extra care in recruiting from countries with large imbalances.

## International students and the Outbound Mobility Ratio

As expressed by UNESCO, the Outbound Mobility Ratio (OMR) is the share of students studying abroad (with the number of students in tertiary education as total). It is highly relevant as an indicator of the share of students that leave their home country to further their education. Lack of qualitative options for higher education in the home country, restricted access to study programmes, and accreditation of degrees play a significant role in the decision for studying abroad.

# Indicators and aggregates

## **Internet Penetration Rate**

This is the percentage of the population that uses the internet. Such a measure is a useful proxy to understand how finding information online is widespread across a country. While most of the young and literate students have access to the world wide web, low internet penetration rates may suggest that many student stakeholders (e.g., parents, relatives, tutors, and teachers) prefer a more direct approach: despite the pervasiveness of online marketing, a personal approach can be more effective.

## **GDP per capita**

With emerging countries now accounting for almost three-fifths of the world's GDP and the spending power of emerging economies on the rise, studying abroad is no longer a dream, but a real possibility for many young adults around the world. Despite the fact that other measures may be better suited at estimating wealth (e.g., median income, or disposable income per household), this metric has the advantage of being available and comparable across countries.

## **Student interest - What students say**

There are several ways of measuring student priorities, from national surveys to interviews with an institution's alumni or focus groups of prospective students. However, all of them are biased (to a degree) on their questions and are limited in their sample. Luckily, Unibuddy records student conversations as they emerge, providing a prime perspective to listen to prospective and current students worldwide.

## **Student interest - What students do**

Ideally, it would be presented as a breakdown of international students worldwide by the English-taught programmes they are studying. Unfortunately, such database does not exist. Studyportals, on the other hand, captures a sizeable share of prospective students looking for English-taught programmes worldwide, and keeps track of their interest. Since 2017 the dataset can be queried to retrieve data on the origin of student behaviour, and the disciplines, subdisciplines, and universities they are most interested in. Correlation studies demonstrated that student interest materializes in student enrolments 18 – 24 months in the future, making the dataset a real-time tool to monitor student behaviour.

# How we can help you

## **Unibuddy**

The Unibuddy platform allows colleges and universities to facilitate authentic interactions between prospective students, current students and staff on their own website—and the conversational insights are an actionable component of the Unibuddy offering.

The platform's dashboard permits schools to access conversational data, which is collected by an AI, in one place. The insights segment the data by time period, country, and area of study. No matter the parameter selected, the percentage of conversations per topic will also be displayed so that institutions can gain these pertinent insights into the interests and concerns of the students chatting on the platform. Through these insights, Unibuddy enables universities to use these parameters to learn when students from specific countries, or specific areas of study, are asking what.

For example, a university could learn that their prospective psychology students from the Philippines are asking about accommodation most frequently in the spring. This would in turn allow them to answer the most common questions in their database through their own marketing efforts on the most helpful and appropriate timeline.

Unibuddy can also assist institutions in tracking prospective students through the admissions cycle by integrating the platform with their CRM system. Unibuddy has a variety of direct and supported integrations, which can be discussed with a University Partnerships Manager. This integration can help the universities conclude whether or not these students have applied, deposited, and enrolled.

# How we can help you

## **Studyportals**

Extend your potential reach to every corner of the world, inspiring ambitious students to apply and enrol no matter where they're from. Strengthen the diversity and high educational value that are already part of your institution.

We offer multiple services and solutions to optimise your recruitment funnel for international students. From raising your exposure and brand awareness, to increasing traffic and leads from a specific country, to growing your number of applications and enrolments – every promotion with Studyportals is different and tailored to your goals and needs

Our results-based channels help universities and other providers with marketing and international student recruitment, by enabling you to reach a global audience and diversify your student population.

If you are interested in increasing the number of student applications and enrolments, to highlight your programmes and products to a global audience, Studyportals is the place to be.

Ready to grow and diversify your international student enrolments?

Contact us: [hello@studyportals.com](mailto:hello@studyportals.com)

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