

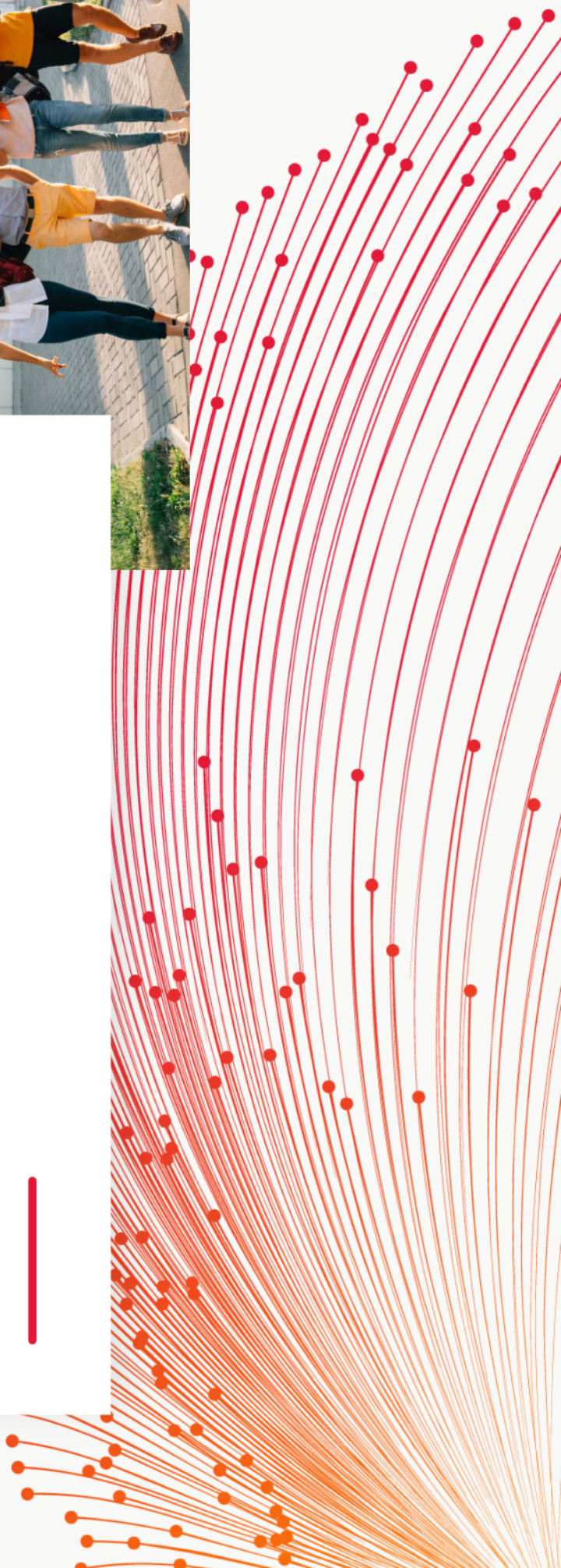
**Breaking into Emerging  
Markets:**

**Setting your Recruitment  
Strategy with Data, Digital  
Marketing, and Partnerships**



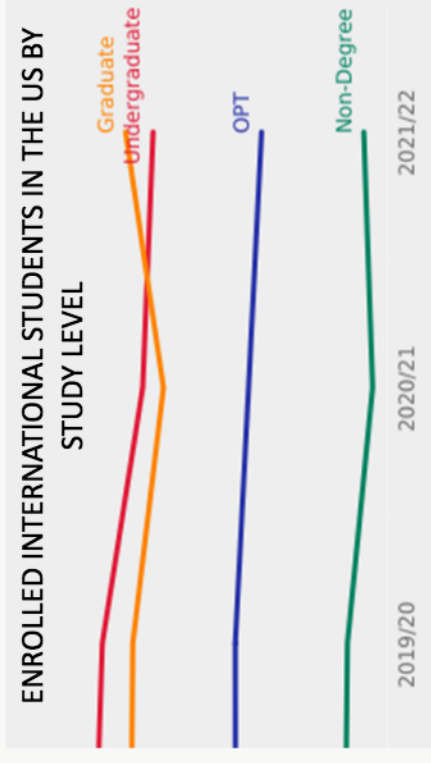
# DIVERSITY TRENDS

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# US ENROLLMENT TRENDS

- US enrollments grew by 3.8% in 21/22, returning the total number of students to near pre-pandemic levels
- While enrollments from some historical top-senders are declining, enrollments from emerging markets are on the rise



## Top 10 countries by enrollments this year vs. last year

Bars show the current year enrollment by country. Lines show enrollments in the previous year for comparison.



# EMERGING MARKET CHACTERISTICS

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- Large population base
- High percentage of youth
- Growing income levels
- Expanding middle class populations
- Education systems unequipped to meet demand
- Labor market gaps
- High unemployment rates

# EMERGING MARKETS TO WATCH

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## Asia

- Bangladesh
- Pakistan
- Indonesia

## Latin America

- Brazil
- Mexico
- Colombia

## Africa

- Nigeria
- Ghana
- Kenya

## Northern Hemisphere

- Turkey
- Egypt
- Germany

# EMERGING MARKETS: ASIA

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## Pakistan

- Enrollment growth: **17.4%**
- **#16** sender to US
- **5th** most populous nation
- **64%** of population is under 30
- Post-secondary student population **will surpass the US** by 2025



## Indonesia

- Enrollment Growth: **6.9%**
- **#21** sender to US
- **4th** most populous nation
- Projected to grow into the world's **4th-largest economy** by 2050



## Bangladesh

- Enrollment growth: **28.2%**
- **#13** sender to US
- **8th** most populous nation
- **One quarter** of the population is aged 15-29
- Steady, inclusive economic growth



# EMERGING MARKETS: SUB-SAHARAN AFRICA

## Nigeria

- Enrollment growth: **12.3%**
- **#10** sender to US
- **6th** most populous nation
- **Largest youth population** in the world
- GDP per capita projected to grow by **30%**



## Ghana

- Enrollment growth: **16.2%**
- GDP per capita **nearly doubled** over past decade
- **57%** of the population under the age of 25



## Kenya

- Enrollment Growth: **+8.5%**
- **75%** of the population is under 35
- Steady economic growth



# EMERGING MARKETS: LATIN AMERICA

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## Brazil

- Enrollment growth: **6.4%**
- **#8** sender to US
- **7th** most populous nation
- Expected to be in the **top 5** countries of **post-secondary enrollments** by 2035



## Mexico

- Enrollment growth: **11.7%**
- **#9** sender to US
- **10th** most populous nation
- **46%** of the population is under 25
- Large demand for English language education



## Colombia

- Enrollment growth: **13.6%**
- **#20** sender to US
- **One quarter** of the population is aged 15-24
- Rising income levels





# EMERGING MARKETS: NORTHERN HEMISPHERE

## Turkey

- Enrollment growth: **4.4%**
- Large gap between university capacity and demand for education
- Europe's youngest population



## Egypt

- Enrollment growth: **8%**
- Most populous nation in the region
- **60%** of the population is under the age of 30
- High youth unemployment

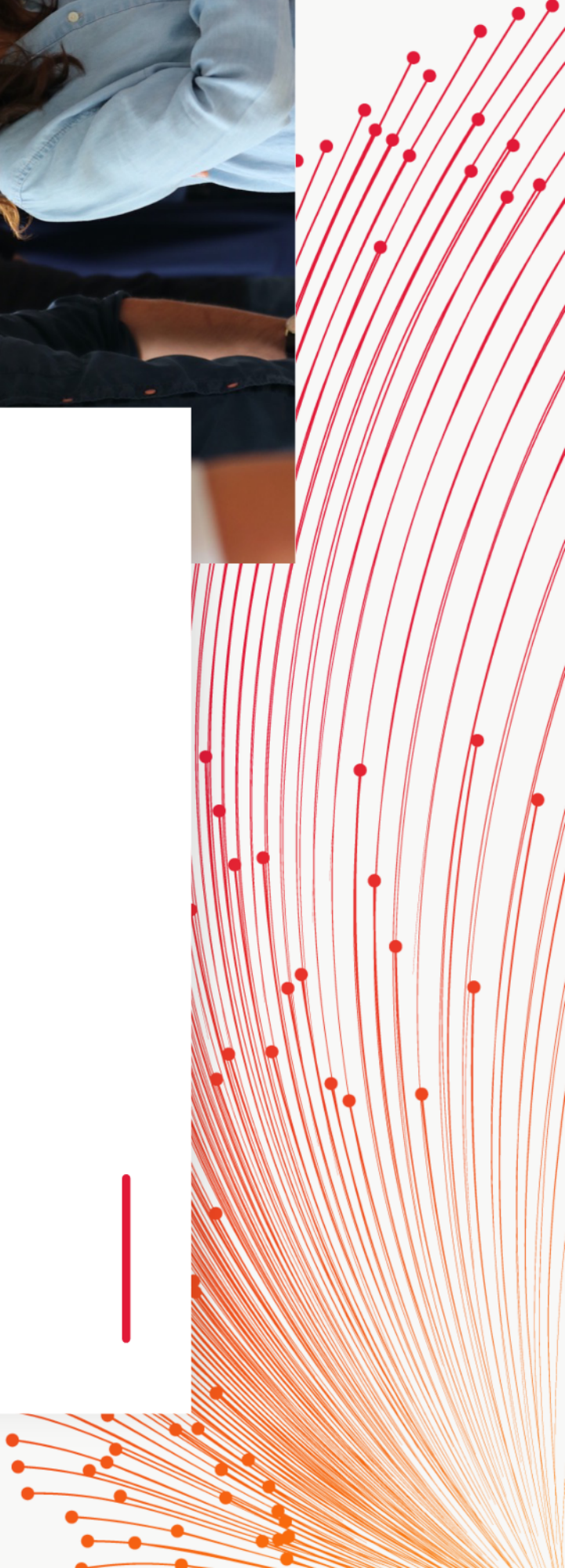
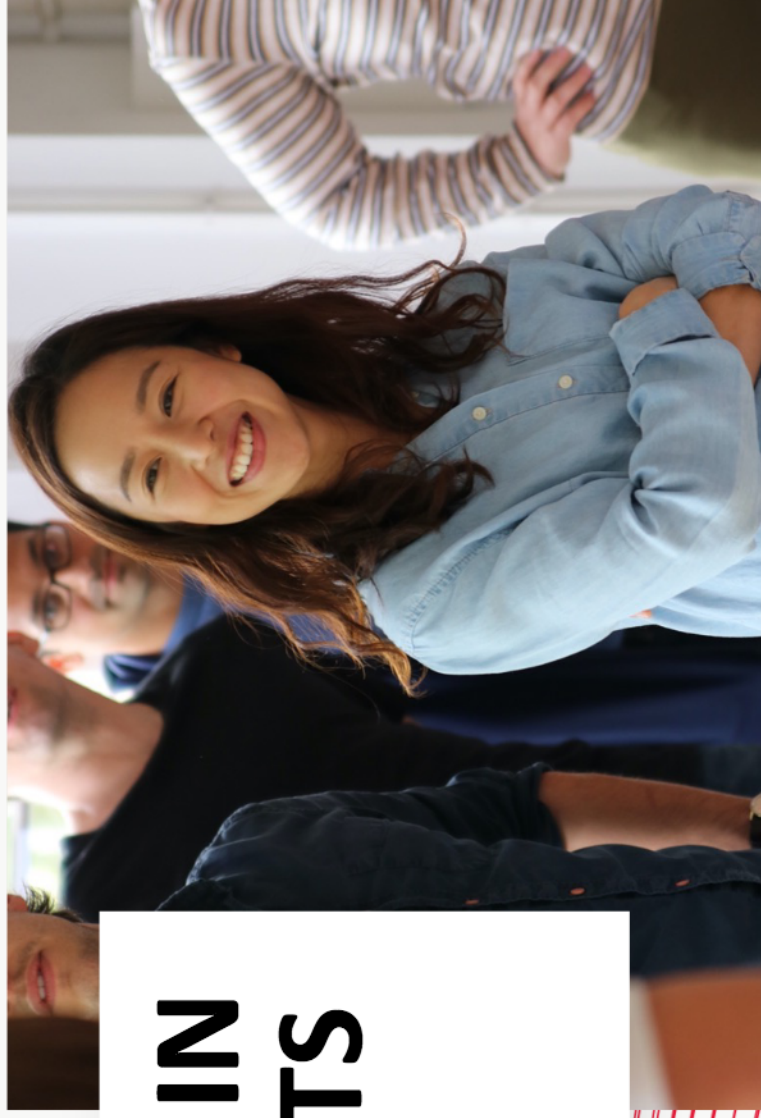


## Germany

- Enrollment growth: **59.4%**
- **#17** sender to US
- Largest enrollment growth out of any country
- Europe's strongest economy

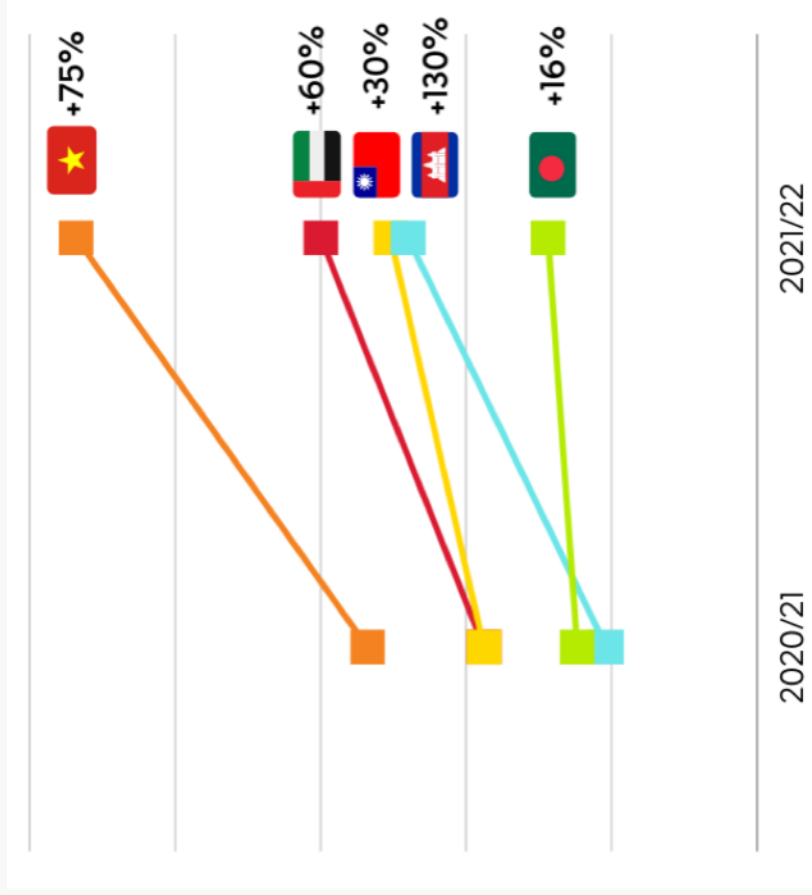


# IDP DATA TRENDS IN DIVERSITY MARKETS



# DIVERSIFICATION TRENDS: ENROLLMENTS

CHANGE IN ENROLLMENTS, TOP 5 DIVERSITY MARKETS  
20/21 TO 21/22 SCHOOL YEAR



Vietnam

UAE

Taiwan

Cambodia

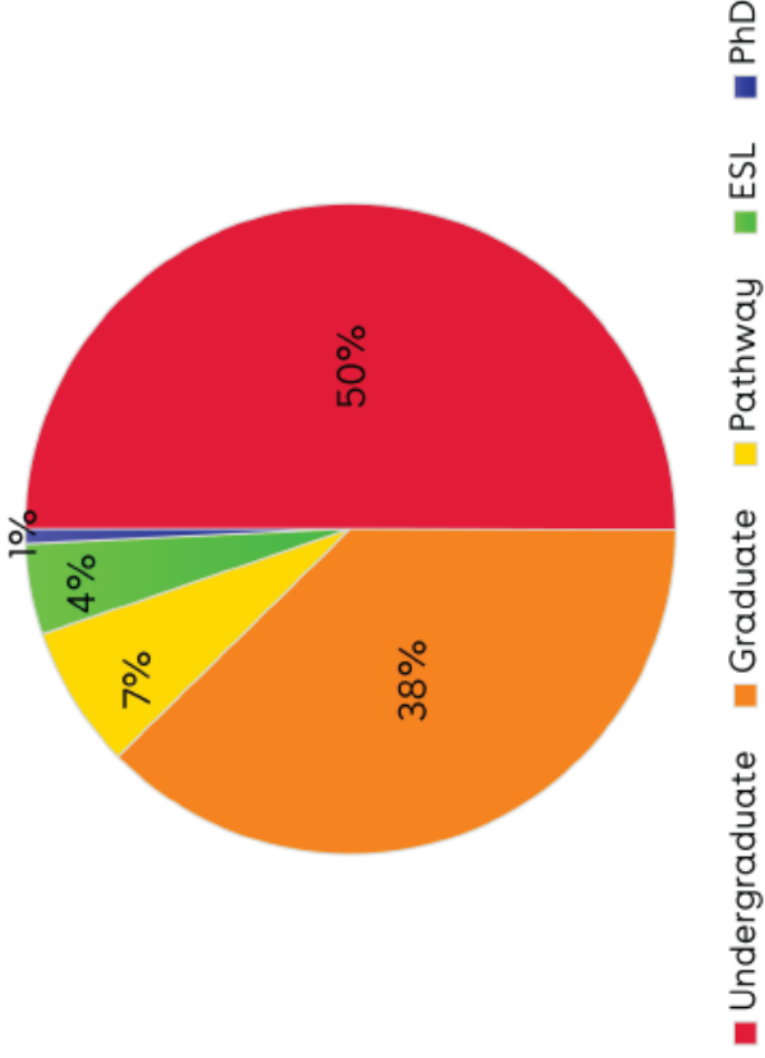
Bangladesh

**+57%**

increase in  
diversity enrollments,  
20/21 to 21/22

# STUDY LEVEL IN DIVERSITY MARKETS

DIVERSITY APPS AND ENROLLS  
BY LEVEL OF STUDY



# UNIVERSITY OF TORONTO IQ PROJECT



# PROJECT OVERVIEW

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- **Rationale:** Need for data-driven insights to guide diversification strategy
- **Scope:** enrollment data for undergraduate programs in target markets, undergraduate portfolio gap analysis, program fee analysis, quantitative analysis of university perception benchmarked against competitor set
- **Research approach:** Dynamic Market Analytics and Primary Research



## UNDERGRADUATE MARKET REVIEW

Bangladesh, Malaysia, Nigeria,  
Singapore, Taiwan, UAE, Vietnam



# PROJECT COMPONENTS

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- Student placement and study sector analysis, for each target market by destination (Canada, Australia, UK, and US)
- Fee analysis
- Counsellor survey analysis
- Summary: Aspects to establish, attributes to maintain, areas to improve, strengths to leverage
- Full report, summary and on-demand dashboards



## MALAYSIA UG STUDENT PLACEMENT TRENDS

### COUNSELLOR SURVEY

In this section

- Key takeaways
- Student placement detailed analysis



## NIGERIA STUDY SECTOR TRENDS

## DESTINATION: AUSTRALIA

### RESEARCH HIGHLIGHTS: QUANTITATIVE

Based on close interaction with students in their market, IDP's Canada, counselling teams across the globe have identified key concerns, opportunities, and strengths for the University of Toronto to leverage

# IQ





Leaders in International Higher Education

2023 Annual Conference

# Using Institutional Data for Global Strategy

Jane Gatewood, PhD

*Vice Provost for Global Engagement*

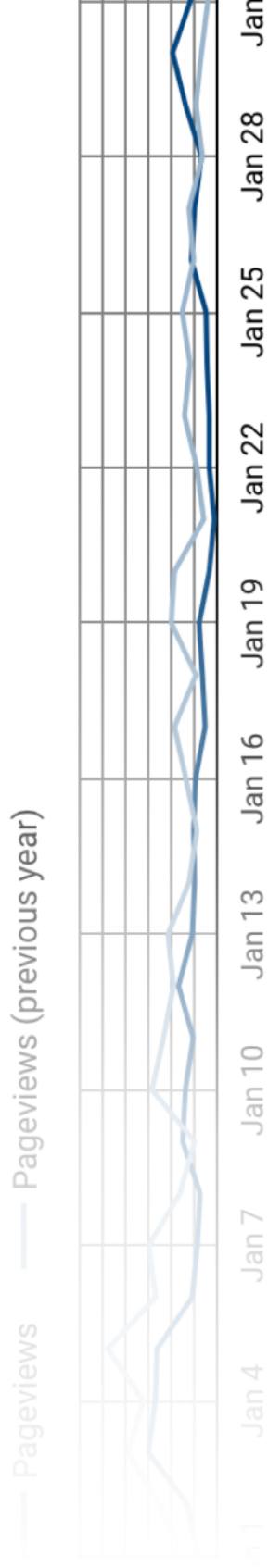
University of Rochester







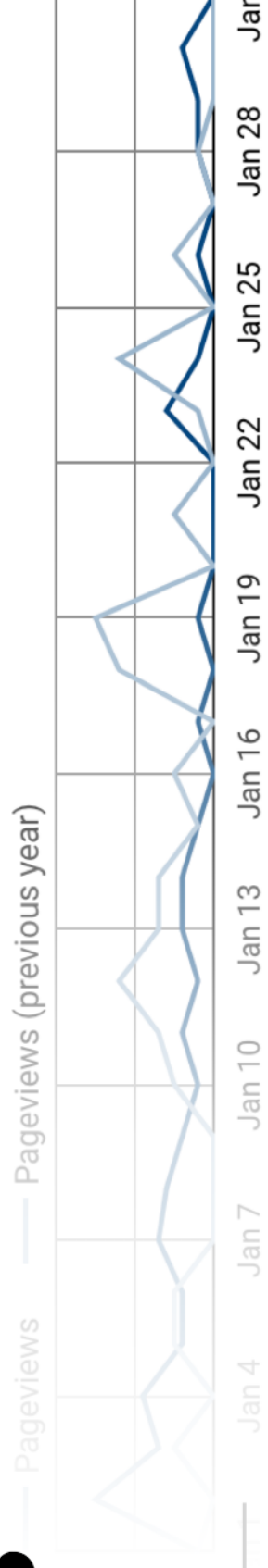
China



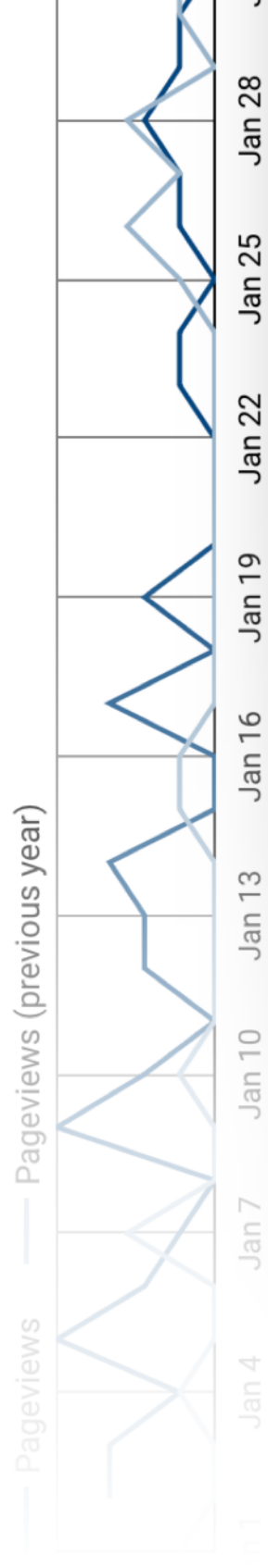
# Admissions Data

- Webpage visits - by URL & by country
- Application source country
- Application feeder institutions

Vietnam



Indonesia



# International Student Data Comps

<p><b>International Students Globally (UNESCO)</b></p>	<p><b>International Students in US (IIE Open Doors)</b></p>	<p><b>Source Country Rank in US % of international students in US (IIE Open Doors)</b></p>	<p><b>International Students UR</b></p>	<p><b>Source Country Rank @ UR % of international students at UR</b></p>	<p><b>UR YOY Increase/ - Decrease</b></p>	<p><b>UR 5-year Increase/ - Decrease</b></p>
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# Institutional Dashboards

Navigation Link	Description	Data Source
<a href="#">Aggregate View</a>	Overview of all international connections captured in this analysis.	
<a href="#">Faculty Travel</a>	Summary of faculty travel for professional purposes.	Terra Dotta (Center for Education Abroad)
<a href="#">Formal Collaborations</a>	Formal agreements (MOUs, exchange agreements, etc.) established with foreign institutions	Internal records (OGE)
<a href="#">Graduate Feeder Institutions</a>	Pipeline of applicants for graduate study	Slate (GEPA)
<a href="#">Funding Collaborations</a>	Funding collaborations	COEUS (ORPA)
<a href="#">Education Abroad</a>	Summary of study abroad activities by undergraduate and graduate students.	Terra Dotta (Center for Education Abroad)
<a href="#">Research Measures</a>	Publications, clinical trials and awarded grants shared with scholars at foreign institutions.	Digital Science Dimensions



UNIVERSITY of  
**ROCHESTER**

AT&T

# Institutional Self-knowledge Hierarchy of Needs

Institutional Self-knowledge

**LEARN**

Analytics, metrics, aggregates

**AGGREGATE/OPTIMIZE**

Cleaning, norming, prep

**ALIGN/TRANSFORM**

Flow, infrastructure, storage

**MOVE/STORE**

Internal data, external data, user-generated content, etc.

**COLLECT**

# Preparing to Venture Off the Map

Dr. David L. Di Maria

Associate Vice Provost for International Education

# Closing the Knowledge Net



Now that you have the data...

...how do you  
obtain support  
for entering  
new markets?



# Integrated Planning

## Academic Affairs

Academic Plan

College Plans

Library Plan

Strategic Enrollment Plan

## Student Affairs

Health Services Plan

Residence Life Plan

Student Services Plan

Transportation Plan

## Other

Advancement Plan

Budget Plan

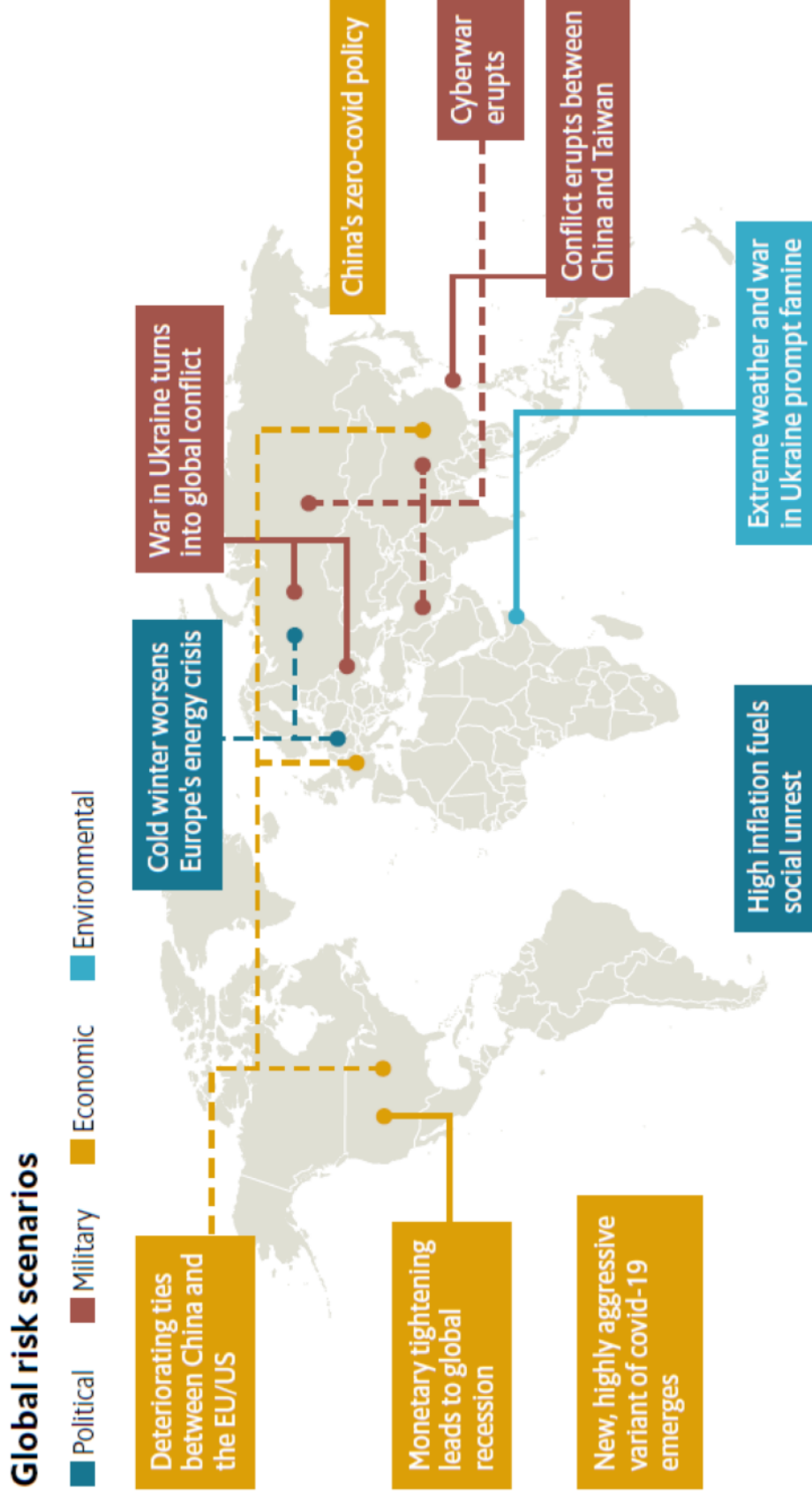
DEI Plan

Facilities Plan

IT Plan

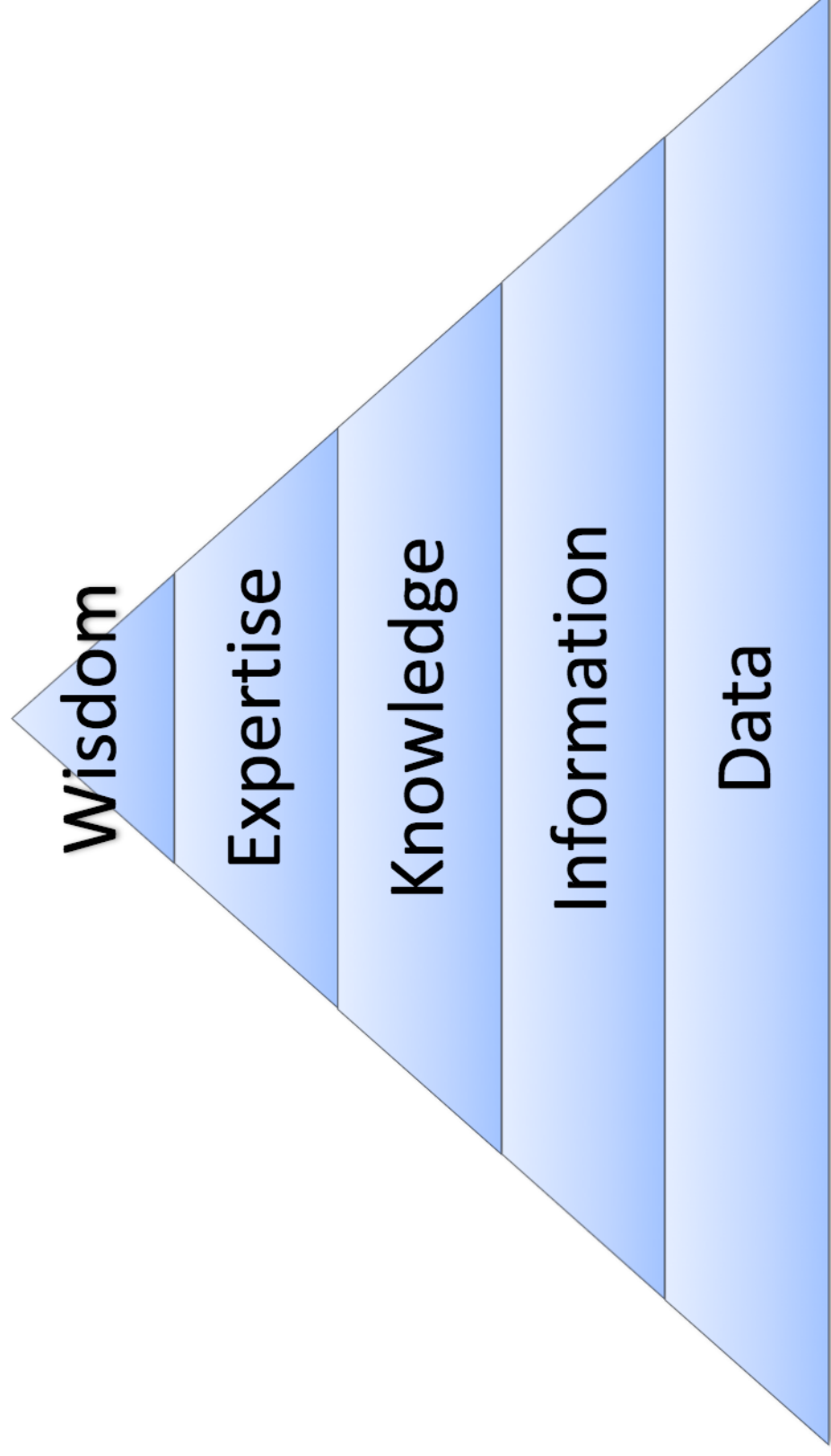


# Acknowledging Risks



Source: EIU.

# Supporting Organizational Intelligence

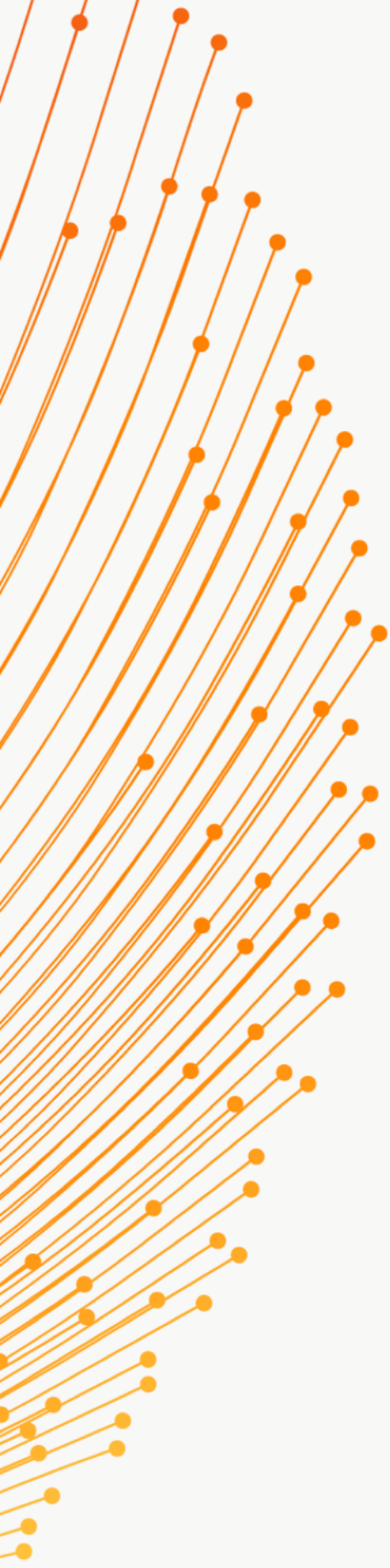


Human  
Capital

Structural  
Capital

Relationship  
Capital

Competitive  
Capital



# DISCUSSION

