Breaking into Emerging Markets:

Setting your Recruitment Strategy with Data, Digital Marketing, and Partnerships
DIVERSITY TRENDS
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.
EMERGING MARKET CHARACTERISTICS

- 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

Asia
- Bangladesh
- Pakistan
- Indonesia

Africa
- Nigeria
- Ghana
- Kenya

Latin America
- Brazil
- Mexico
- Colombia

Northern Hemisphere
- Turkey
- Egypt
- Germany
EMERGING MARKETS: ASIA

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

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: +75%
- UAE: +60%
- Taiwan: +30%
- Cambodia: +130%
- Bangladesh: +16%

+57% increase in diversity enrollments, 20/21 to 21/22
UNIVERSITY OF TORONTO
IQ PROJECT
• **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
PROJECT COMPONENTS

• 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
Using Institutional Data for Global Strategy

Jane Gatewood, PhD
Vice Provost for Global Engagement
University of Rochester
Admissions Data

- Webpage visits – by URL & by country
- Application source country
- Application feeder institutions
# International Student Data Comps

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

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<td>Overview of all international connections captured in this analysis.</td>
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<td>Summary of faculty travel for professional purposes.</td>
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<td>Pipeline of applicants for graduate study</td>
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Institutional Self-knowledge Hierarchy of Needs

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

**Move/Store**
- Flow, infrastructure, storage

**Align/Transform**
- Cleaning, norming, prep

**Aggregate/Optimize**
- Analytics, metrics, aggregates

**Learn**
- Institutional Self-knowledge

Adapted from “The Data Science Hierarchy of Needs” by Monica Rogati
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

Global risk scenarios

- Deteriorating ties between China and the EU/US
- Monetary tightening leads to global recession
- New, highly aggressive variant of covid-19 emerges
- Cold winter worsens Europe's energy crisis
- War in Ukraine turns into global conflict
- China's zero-covid policy
- Cyberwar erupts
- Conflict erupts between China and Taiwan
- High inflation fuels social unrest
- Extreme weather and war in Ukraine prompt famine

Source: EIU.

Economist Intelligence Unit, *World at Risk 2023*, p. 3
Supporting Organizational Intelligence

Data

Information

Knowledge

Expertise

Wisdom

Human Capital

Structural Capital

Relationship Capital

Competitive Capital

Liebowitz, 2006. *Strategic Intelligence*, p. 7
DISCUSSION