

# Diversifying International

BY CHARLOTTE WEST

**T**HE TOP DESTINATION COUNTRIES for study abroad have become largely dependent on the same major sending countries: China, India, and South Korea. However, in recent years increased attention has been paid to the need for institutions to diversify their recruitment bases.

The general consensus among international enrollment management professionals is that while numbers are expected to remain strong for the next several years, no other country currently has the potential to become the next China or India. To compensate, institutions need to broaden their approach.

“Few UK universities can afford to lose the Chinese market. But can we find another country to replace China or India? Probably not. We are still looking to those countries to maintain market share, but to diversify the risks, we are developing the smaller markets,” says Sky Zheng, director of international recruitment at the University of Sunderland in northeastern England.

A May 2015 report from World Education Services (WES) concluded that institutions should develop more sustainable international student enrollment strategies by pursuing a diverse portfolio of source countries—especially those from emerging markets. WES identified four countries—Brazil, Nigeria, Indonesia, and Vietnam—as emerging markets that institutions should focus on in the near-term.<sup>1</sup> Other recruitment experts have also pointed to smaller countries in Latin America, the Middle East, and Africa as emerging markets with a strong potential for growth.

For the last decade, China, India, and South Korea have remained the top three sending countries to the United States. While growth from India and China has remained strong, the number of South Korean students in the United States dropped by 3.7 percent in 2013–2014, marking the third consecutive year of decline (IIE, *Open Doors* 2014). Despite the decline, South Korea has nevertheless maintained its third place ranking since the early 2000s.<sup>2</sup>

Experts agree, however, that China and India will remain major source countries, at least for the near term.

# Recruitment

Finding emergent sources for international students is becoming an important issue for higher education institutions in the United States and other major destination nations.



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“The past five years of international student makeup in the U.S. have consistently shown us who the top feeders are, namely China, India, and South Korea. However, while Chinese student enrollment in the United States grew exponentially—from 14.6 percent in 2008–9 to 31 percent in 2013–14 per IIE *Open Doors* data, the rest of the top 10 list remained within a 5 percent growth margin where growth was observed,” says Jia Jiang, director of graduate enrollment management at American University’s School of International Service (SIS).

She says institutions are starting to move beyond the traditional top three markets: “As U.S. universities welcome international students to their campuses, it becomes evident that the challenge is no longer how to fill a class with international students, but how to attract international students from more than just the top sending countries.”

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Marjorie Smith, associate dean and director of international student admission at the University of Denver, confirms that institutions are starting to look beyond the traditional markets in order to develop sustainable recruitment strategies and not be so dependent on single countries. “Most campuses are working hard to ‘diversify their diversity’. Simply put, because Chinese students represent such large portions of our enrollments, we must concentrate our resources on increasing representation from other countries. We are seeing a shift away from simply increasing the numbers of international students, to increasing the variety of countries represented,” she says.

Jiang says that China will likely remain the largest player for the foreseeable future. After a decade of investing in its physical infrastructure, the country is now turning to human capital, positioning itself as an attractive destination for international students. However, she adds that the U.S. higher education system is still hugely attractive to Chinese students, especially at the undergraduate level today, although more students intend to seek employment back in China after graduation.

She predicts that the trend will change in the long term because of the increasing number both of U.S. universities that are now opening branch campuses or field offices in China and of Chinese universities that are adopting inno-

vative, global curriculum models that make study abroad less necessary.

“In both instances, without leaving China, Chinese students can easily have an integrated international experience both culturally through their American or other international classmates and academically through their global curricula,” Jiang explains.

At New York University Polytechnic School of Engineering, 50 percent of its international graduate enrollment currently comes from China and 30 percent from India. Around 85 percent of all of its graduate students are international.

Raymond Lutzky, senior director of graduate enrollment management and admissions, is not as optimistic as some of his colleagues about the persistent streams of students from these two major sending countries.

“I believe that India and China are more volatile than most enrollment managers would like to believe,” he says.

He explains that enrollment from India is tied closely to the exchange rate between the rupee and the U.S. dollar, as well as U.S. immigration policy, including the ability for students to stay and work in the United States after graduation.

Chinese enrollment, on the other hand, is dependent upon factors such as Chinese public opinion about the value of U.S. education and brand sensitivity. He notes



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that both countries are also building up their higher education systems.

“Getting in now should be a short-term strategy. It will be 10 years before things start breaking down. India, I believe, will fade less quickly than China,” Lutzky predicts.

Other experts expect continued growth from India, with some shifts in the market. According to Rahul Choudaha, WES chief knowledge officer and senior director of strategic development, the demographics of Indian students coming to the United States will change in the next several years.

“While India happens to be the second largest source country, a majority of the students are enrolled in STEM master’s programs. The new growth opportunity is the undergraduate students from India... The economic liberalization and growth of new sectors like the IT services industry during the 1990s has created a new class of well-compensated white collar professionals,” he says.

Choudaha explains that the children of these professionals are now getting ready for college. “(They) will become the main drivers of international mobility among Indian students,” he adds.

Canada has also seen an upswing in the number of Indian undergraduates. The University of British Columbia (UBC) has seen an increase in Indian students in the last few years. “We’ve seen a resurgence from India over the last two years, but we’ve also been focusing our efforts there a bit more. Indian students and their families are very interested in outcomes and a return on their investment. The fact that Canada allows students to stay and work three years post-graduation is an attractive option for Indian students,” says Karen McKellin, executive director of the International Student Initiative at UBC.

Representatives of British universities are concerned about recruitment from India, but expect continued growth from China. However, they too are looking to diversify their portfolios.

“In five years, I will still be seeing China as the largest recruitment market. I’m not too optimistic about numbers from India, especially as the current UK immigration and visa policies have had an impact on enrollment from India,” says Zheng.

Other recruitment trends in India and China include focusing on less penetrated cities and regions within each

country. “Unless there are surprises (and there always are), these countries will remain strong markets for the foreseeable future. The next frontier will be to target the ‘second tier’ cities in these countries—those with substantial interest and resources but less exposure and access to study abroad information,” Smith says.

## Economic Growth and Government Scholarships in Latin America

More recruiters are starting to turn their attention to Latin American countries due to a combination of economic growth, a young population, and government support for study abroad. International mobility in the region as a whole has gotten a boost from U.S. President Barack Obama’s 100,000 Strong in the Americas program, an initiative launched in 2011, as well as funding from Latin American governments to send their students overseas.

JoBeth Brudner, managing director for Linden Educational Services, has led many educational tours in the region. She believes Latin American countries—which currently send 8 percent of all international students studying in the United States (IIE, *Open Doors* 2014)—will remain steady markets for international student recruitment.

Jiang concurs: “Commitments and initiatives taken on all parts tell us that the Americas will remain promising and enterprising and that the region as a whole is well positioned to become a tremendous sending market in the long term.”

John Eriksen, director of international admission at Bryant University, says that for his institution, the largest growth regionally for the 2014–2015 incoming class was from Central and South America.

Although South America is still not a major source region for University of Sunderland in the United Kingdom (UK), Zheng says that they too have seen promising growth from the region as a whole. “For the UK, South American countries have not been in the top 10 or even top 15 student source markets for the UK higher education sector, but we see some potential from Brazil, Colombia, Chile, and Mexico. We’ve seen increasing interest from prospective students in this region.”

Many recruiters have set their sights on Brazil as the largest country in South America. Brazil has received a lot of attention from universities and the media alike



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due to its Brazilian Scientific Mobility Program (BSMP), launched in 2011 and formerly known as Science Without Borders. The scheme provides scholarships for a one-year, nondegree program for Brazilian students to study abroad in the United States. BSMP is part of the Brazilian government's larger initiative to grant 100,000 Brazilian university students the opportunity to study abroad.

"There are many factors that come into consideration when a country decides to support study abroad, one of the key issues is a need to fill a gap in the country's professional, technological workplace. A prime example of this is Brazil," Brudner says.

There are currently 13,300 Brazilian students in U.S. universities, a 22 percent increase from 2013 (IIE, *Open Doors* 2014). Other large destination countries have also seen significant growth, with Canada experiencing a 17 percent increase of Brazilian students between 2012 and 2013 (Canadian Bureau for International Education).<sup>3</sup> In the UK the number of Brazilian students tripled to 1,700 after the launch of the mobility program, according to the British government.<sup>4</sup>

**"Brazil has a large demographic of young people and a fairly strong higher education system. Their students happily go abroad for a term or two, to obtain international experience and pursue language study..."**

Northern Arizona University (NAU) is one of the institutions that has benefitted from the recent growth. "I'm excited to see what happens with Brazil. In 2010 we had four students from Brazil, and this past academic year we hosted 174 students from Brazil," says Mandy Hansen, NAU's director of international admissions and recruitment.

She emphasizes that continued growth will be dependent on whether the Brazilian government will continue to offer scholarships and how many students it sends to the United States.

"Many of these students got their passports for the first time. It's really providing opportunity to a group of students who are not the elite class to exposure to life outside their home country and academic community," Hansen adds.

However, some international recruiters say that Brazil is not the right fit for all institutions. UBC, for example, has chosen to focus its efforts on undergraduate enrollment. "Brazil has a large demographic of young people and a fairly strong higher education system. Their students happily go abroad for a term or two, to obtain

international experience and pursue language study. What we are seeing here at UBC is that Brazilians are more likely to be interested in short-term programs, than a full four-year undergraduate degree," McKellin says.

Jay Schnoor, manager of international marketing and recruitment at Oregon State University, agrees. "In terms of future potential, in eight years Brazil will be really solid in the U.S. market if the economy continues to improve, but it could also be a numbers trap, as many students are mostly interested in English and short-term programs, rather than full-degree programs. You need to really understand what those students are studying by looking at the data from the last three years. If you don't have a program that fits, recruiting in Brazil is probably not the best strategy," he says.

Several experts also recommend looking beyond Brazil. Brudner and Jiang suggest exploring smaller emerging markets in Latin America such as Chile, Ecuador, Panama, Colombia, Paraguay, and Honduras.

"At the moment, Chile, Ecuador, and Panama are countries that have been experiencing economic growth over the past decade as well as increased government investments in education. These nations are enjoying economic stability, a growing middle class, a need for technologically skilled workers, a labor force that speaks English as well as highly educated professionals; they have been able to find assistance and solutions to what they need within the educational system of the USA," Brudner says.

"Keep Panama on target, this country is enjoying an economic boom and is closely tied to the USA. They will need more and more engineers and highly trained technician experts as the Canal Zone is in expansion as well as savvy global business people and financial experts for their growing international banking businesses and free trade zone."

She also encourages institutions to look at Paraguay and Honduras as part of long-term strategies in Latin America. "In the long term, countries such as Paraguay and Honduras should be carefully watched as emerging markets. These countries have reported steady growth in the number of students that they have been sending to the USA over the last five years."

"In the case of Paraguay, this is a very small market but one that can be developed; over the last three years the number of students traveling to the USA has constantly been increasing... Paraguay is enjoying a stable economic, socio, and political moment in its history and its need for highly qualified professionals is high," Brudner adds.

Jiang reiterates the importance of government funding in Chile and Ecuador: "Becas Chile, an ambitious





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government scholarship program funded by revenues generated by Chile's copper exports, increased sponsored students from 2007 (before the Becas program) to 2010 (after the Becas program) by 1,500 percent per an OECD/World Bank report in 2010. Ecuador government scholarships, though much smaller in scale, seek to fund Ecuadorian citizens for graduate studies overseas."

Jiang, along with Lutzky and Smith, also recommend looking at recruitment opportunities in Colombia, largely due to an innovative nonprofit organization called COLFUTRO, which offers talented students up to \$50,000 in loans and scholarships. Up to half of the loan can be forgiven upon return to Colombia.

"If you look at the metrics, Colombia has very promising growth," says Lutzky.

Finally, several institutional representatives mentioned Venezuela as an emerging market to keep on one's radar. "Families are looking to have their children study in safe, first-rate environments. The USA has always been the first choice for traditional Venezuelan families and more and more will be seeking ways to have their children study there," says Brudner.

However, Lutzky mentions that one challenge working with Venezuela is that the country's currency controls

sometimes make it difficult for families to get their money out of the country. He cautions that institutions should have a plan for how to deal with late tuition payments, for example.

Institutions that are looking to recruit in emerging markets in South America must consider it a long-term strategy. "To be successful, you need to commit resources for the long term. If Latin America is going to be a serious area of focus, you need to plan on having the same person, if possible, go down twice a year for the next three to five years," says Schnoor.

Brudner reiterates this sentiment, adding that personal relationships are extremely important in the region. "Latin America is a region of the world where meeting the person is important. A university that wants to create an enrollment plan to receive students from these emerging market countries should decide on a three-year plan because it will take time and it is important to build personal relationships. Latin Americans are all about the personal touch and getting to know you better," she says.

She adds that scholarships can be an attractive recruitment tool in Latin America: "Universities that are interested in attracting more students from Latin America should be looking at ways to assist the students with some

## Tips for Recruiting International Students in Emerging Markets

Recruiting in emerging markets for international students comes with its own sets of challenges and opportunities. Seasoned international enrollment professionals share some tips for successful strategies for recruiting in emerging markets.

"An obvious but too-often overlooked resource for recruitment planning and outreach is the EducationUSA network of advisers. Recruitment planners should always seek the advice of these on-the-ground observers and practitioners when determining cities and schools to visit, how best to appeal to students there, and other practical tips."

—**Marjorie Smith**, associate dean and director of international student admission, University of Denver

"When going into emerging markets, if you are going to get ahead of the pack, you are not going to be successful in the first couple of years. You need to have a long-term strategy. You need to decide: 'Do I wait for the market to mature and then go in, or do I go in first?' You end up spending a lot of time educating parents and students about how to apply, but it buys you tremendous good will and relationships."

—**Raymond Lutzky**, senior director of graduate enrollment management and admissions, New York Polytechnic School of Engineering



kind of financial aid. If the university can create a merit or talent based scholarship for students from Latin America that will help increase their visibility amongst the students in this region. As most of the in-region scholarship programs support graduate degrees it would be very helpful to provide some kind of aid to the undergraduate candidates.”

## Growing Economies in Southeast Asia

Two countries from Southeast Asia—Vietnam and Indonesia—are also catching the attention of recruiters. WES has identified both countries as emerging markets to watch for in the next three years.

“Both Vietnam and Indonesia have growing populations of 18–24 year olds, and economies, which are generating a larger middle class with aspirations for higher education. An increasing number of those students will be able to afford study abroad and are interested in programs that can address the needs of their evolving societies,” McKellin says.

Southeast Asia is one of the regions where University of British Columbia has decided to focus its recruitment efforts for a number of reasons. McKellin

says that there are several factors they look at when deciding to focus on a particular market for recruitment: demographics; domestic higher education capacity; level of secondary school preparation; math and English language proficiency; economic capacity of families; fields of study students are interested in; and visa approval rates.

“When looking at Vietnam and Indonesia as potential sources of more international students for our university and the kinds of programs we can offer, we are able to tick many of the boxes in the line-up above,” she says.

She adds that Indonesian students are interested in programs such as environmental science programs focused on human health and the sustainable use of land, food, and water resources to help address some of the most pressing issues facing the country’s fast-growing population of more than 250 million.

Smith adds that both Vietnam and Indonesia show a lot of potential for institutions seeks to increase their diversity. “In Indonesia’s

case, many schools will likely have a strong alumni base from which to draw for recruitment



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“Universities must invest in travel to the region. Face time within a country provides great opportunities to network with school counselors, government officials, students, and agencies. By traveling to a region, you are able to gain knowledge of the region that will help with attracting students. You are also able to engage with alumni and find great opportunities to build a brand within the region. It is very difficult to recruit out of the region without traveling there. Even if you decide to use an agency to support your initiatives, you need to travel to that country to train the staff and gain knowledge of the educational system.”

—John Eriksen, director of international admission at Bryant University

“In addition to coming up with responsive and innovative financial aid strategies that would be attractive to students from emerging market countries, universities will be more successful if they position themselves not just as a U.S. destination but an international destination. International students are increasingly aware of the global competencies that are required to succeed in an increasingly interconnected world. To be able to receive their education in a country where they get trained on these core competencies with ample opportunities to study beyond the U.S. border is the first critical step toward becoming a ready global citizen.”

—Jia Jiang, director of graduate enrollment management, American University School of International Service

support. Vietnam, on the other hand, is a new frontier for students coming to the U.S.”

In the United States, the number of Vietnamese students has grown every year for the last 13 years, with around 16,600 students from Vietnam studying on U.S. campuses in 2013–2014. Vietnam is also the eighth leading place of origin for students coming to the United States (IIE, *Open Doors* 2014).

Vietnam is, however, a price-sensitive market. As a result, more than half of Vietnamese students begin their undergraduate education in the United States at community colleges, according to WES.

Indonesia currently has fewer students than Vietnam represented at U.S. institutions, but growth is expected in the next several years. According to WES, Indonesia’s economy is predicted to become the seventh largest in the world and the country is also the fourth-largest country in terms of population. There has been slow but steady growth over the last three years, with the 2013–2014 level reaching nearly 8,000, the highest number of Indonesian students in 10 years (IIE, *Open Doors* 2014).

“Our ... research on emerging markets identifies Indonesia...as (a) potential growth market in the medium term. This opportunity is likely to be driven by the prospects of the economic growth, which in turn will provide the expanded middle class not only aspiration but also ability to fund their education abroad,” Choudaha says.

**“I feel that international recruitment is very fluid and ever changing. Saudi Arabia has been very important for the last few years, but with the newly crowned King, the scholarship program from Saudi might not continue into the future...”**

### **The Middle East: National Scholarship Programs are Key**

Saudi Arabia, like Brazil, has been in the headlines the last few years due to the very large number of students it has been sending abroad through its government-sponsored scholarship programs. In 2014 it was the fourth largest sending country to the United States, with nearly 54,000 Saudi students on U.S. campuses, with double-digit growth for the last seven years (IIE, *Open Doors* 2014).

However, while Jiang and others predict continued growth for the next several years, they also caution that the flow of students could slow if changes are made to the scholarship scheme.

“I feel that international recruitment is very fluid and ever changing. Saudi Arabia has been very important for the last few years, but with the newly crowned King, the scholarship program from Saudi might not continue into the future. If it does continue, it might be offered only for graduate or PhD students and therefore this could impact student mobility from the Kingdom. I still feel there is opportunity within the country, though, even if the scholarship program changes,” says Eriksen.

Eriksen believes there is also potential to recruit self-funded students due to economic prosperity in the region and a young population. He notes that companies such as Aramco and Sabic also have scholarships for students to study abroad.

Other countries in the region such as Qatar, Oman, and Kuwait have launched similar scholarship programs. Kuwait, in particular, appears to be a promising market.

For the past seven years, the number of students from Kuwait has increased at a double-digit rate. In 2013–2014, 7,288 students from Kuwait studied in the United States, up 42.5 percent from the previous year. According to the Institute of International Education (IIE), Kuwait entered the top 25 sending countries for the first time in 2012–2013 and remains in the top 25 for 2013–14, largely due to Kuwaiti government scholarships for its students to study in the United States (IIE, *Open Doors* 2014).

Northern Arizona University has seen its population of Kuwaiti students grow exponentially in the last few years. “I was looking at our numbers over the past five years, and from fall 2010 to fall 2015 we had a 377 percent increase from Kuwait. In fall 2014, we had 215,” Hansen says.

“We work really closely with the Kuwaiti cultural mission in Los Angeles. We have a dedicated staff member who works with sponsored students and who liaises with the offices. We’ve also been doing physical recruitment, at least once a year and sometimes twice a year,” Hansen continues.

Zheng also reports growing numbers from Kuwait at University of Sunderland. “One of the key drivers for us into the Kuwaiti market was that the Kuwaiti government has recently increased the number of student sponsorships to the UK and our competitors, equivalent sized UK universities, recruited good numbers,” he says.

### **Emergent Africa: Nigeria and Beyond**

World Education Services identified Nigeria as a booming emerging market for international student recruitment due to its position as the largest economy in Africa, a



burgeoning, young population, a lack of a high-quality domestic higher education system, and a growing number of middle- and high-income families.<sup>5</sup>

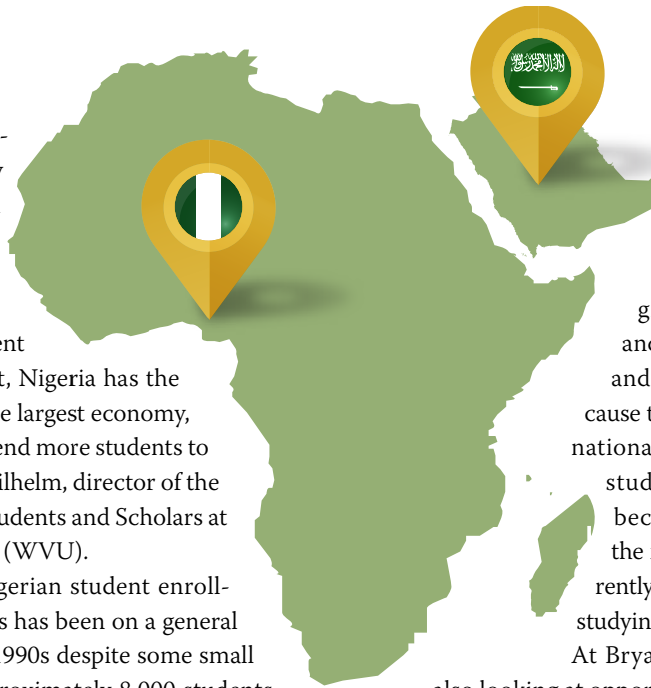
“In terms of recruitment on the African continent, Nigeria has the largest population and the largest economy, and they are starting to send more students to the U.S.,” says Michael Wilhelm, director of the Office of International Students and Scholars at West Virginia University (WVU).

According to IIE, Nigerian student enrollment in the United States has been on a general upward trend since the 1990s despite some small dips. In 2013–2014, approximately 8,000 students from Nigeria were studying in the United States, up 8.3 percent from the previous year. Nigeria has been the only African country in the top 20 places of origin for international students studying in the United States since 2007–2008 (IIE, *Open Doors* 2014).

The United States is the second preferred destination after the UK. In 2013–2014, the UK hosted more than 18,000 Nigerian students, and Nigeria is the third largest non-EU country of origin for international students in the UK, according to the Higher Education Statistics Agency. A 2012 report by the British Council also predicted that Nigeria would be the second fastest growing market for international students coming to the UK.<sup>6</sup>

Choudaha notes that growth in Nigeria, like Indonesia in Southeast Asia, is going to be driven by self-funded students.

In addition, Choudaha says that he believes that in the future many Nigerian students will choose to go to the United States instead of the UK, which is currently the leading destination. “Another reason for growth of Nigerian students... will be due to preference of this financially resourceful segment for the U.S. as the preferred destination. Currently, U.S. is not the leading destination for either Nigerian or Indonesian students. Due to historical, familial, and financial reasons, Australia and the UK are the leading destination for Indonesia and Nigeria respectively. In the next few years, economic growth will provide more mobility to the students and they will more actively consider the U.S. as the destination.”



Wilhelm says that WVU started recruiting in Nigeria more than five years ago to attract students to its niche programs such as petroleum and natural gas engineering and mining engineering because those correspond to major national industries. Since then, students and families have become more familiar with the institution and WVU currently has 85 Nigerian students studying a variety of majors.

At Bryant University, Eriksen is also looking at opportunities elsewhere on the African continent: “When looking at Africa, I tend to focus mostly on sub-Saharan Africa with my recruitment initiatives. As the economies in these countries continue to grow, I find there are more and more students who have the means to attend university in the U.S. Ghana has been a very steady market for Bryant University and we also have been focusing more attention on the southern cone. More importantly, the francophone countries of Senegal, Gabon, and Cameroon also have stable governments with strengthening economies. In a couple of years, I find that there will be more opportunities to recruit from these francophone countries that have traditionally sent students to universities in France. Currently, Rwanda, Kenya, and Ethiopia are also very hot markets for recruitment in East Africa.” **IE**

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**CHARLOTTE WEST** is a freelance writer based in Lima, Peru. Her last article for *IE* was “Degrees Without Borders” in the July/August 2015 issue.

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#### ENDNOTES:

- 1 <http://wenr.wes.org/2015/05/top-emerging-markets-international-student-recruitment/>
- 2 <http://www.iie.org/~media/Files/Corporate/Open-Doors/Fact-Sheets-2014/Countries/South-Korea-Open-Doors-2014.ashx?la=en>
- 3 <http://www.cbie.ca/about-ie/facts-and-figures/>
- 4 <https://www.gov.uk/government/world-location-news/uk-higher-education-strengthening-relationships-with-brazil>
- 5 <http://wenr.wes.org/2015/05/top-emerging-markets-international-student-recruitment/>
- 6 [http://www.britishcouncil.org/sites/britishcouncil.uk2/files/the\\_shape\\_of\\_things\\_to\\_come\\_-\\_higher\\_education\\_global\\_trends\\_and\\_emerging\\_opportunities\\_to\\_2020.pdf](http://www.britishcouncil.org/sites/britishcouncil.uk2/files/the_shape_of_things_to_come_-_higher_education_global_trends_and_emerging_opportunities_to_2020.pdf)