

Changing destinations: Ideal attraction and actual movement of cross-border tertiary students from mainland China

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Globalization has driven growth in the market for cross-border students. Mainland China, with a burgeoning economy and the largest national population, has become an important source of cross-border students. This study identifies ideal attraction in mainland China to destinations for cross-border tertiary education, as expressed by ideal first and second choice destinations in 2008. The study then compares ideal destinations with the actual destinations of students over the ten-year period between 1999 and 2008. Findings indicate that the US and South Korea are under-performing while Japan and Australia are over-performing against the mainland Chinese public's ideal demand. Countries, territories and higher education institutions hoping to attract mainland Chinese cross-border students could optimize their draw by raising their awareness and addressing the concerns of this increasingly important market.

Keywords: international students; China; marketing; study abroad; higher education

INTRODUCTION

The integration of national economies began with the exchange of goods but, increasingly, includes the international flow of human resources. The state's role in overseeing immigration has shifted to a growing focus on using immigration to help in the production of economic benefit; governments are under pressure from the private sector to establish programs that attract skilled workers and fill gaps in the domestic labor market (Cohen, 2001). As national borders become more porous, "migrations do not just happen; they are produced. And migrations do not involve just any possible combination of countries; they are patterned" (Sassen, 1998, p. 56). As was the case for migrants in the past, contemporary migrants are drawn to destinations with demand for their skills, opportunities for education, and the promise of success; however, globalization facilitates increasing levels of migration.

In today's world, governments increasingly see themselves as competitors in a global knowledge economy. A similar set of pressures has influenced the need for higher education internationally (Luke 2005; Mok 2003). Economies compete globally for human resources, and governments believe that a strong higher education system that fosters high quality students and faculty is an important competitive advantage. Higher education institutions (HEIs) are increasingly taking on the role of production facilities in the knowledge economy, providing the creation and novel application of knowledge required by the government. In this new paradigm for tertiary education, HEIs become responsible for attracting and producing highly skilled human resources and economically applicable research.

Thus, “higher education has become one of the key conduits of new global flows” (Luke 2005, p. 159). These flows spread ideologies, enable faculty mobility, and increase collaborations between HEIs. Growing similarities can be seen in reformed curricula and the wholesale import and export of education programs or branch campuses across borders (Altbach & Knight, 2007; Mott 2004). Academic human resources are also more mobile; researchers, educators and even institutions are increasingly more active across borders (Knight 2006).

Mainland China serves as an important source of cross-border students because of its large population, underdeveloped domestic system of higher education, high rate of economic growth, and strong domestic market for high quality human resources. Students who study in foreign countries are often referred to as international students, but the term ‘cross-border’ students may be more suitable for students from mainland China, given their movement into special Chinese administrative regions such as Macau and Hong Kong, and the special case of Taiwan. In terms of population, mainland China is at the heart of the growing demand for higher education in East Asia and the Pacific, with the rate of growth for outbound cross-border students in the region averaging 10 percent each year from 2000 to 2007 (UNESCO, 2009). In 2007, Chinese cross-border students comprised 421,100 compared with 153,000 from India, 105,300 from the Republic of Korea (Korea), and 54,000 from Japan (UNESCO, 2009).

Given developing social and economic conditions in mainland China, the numbers of Chinese cross-border students seems likely to continue to, and international education marketers and destination countries would do well to be sensitive to the preferences and trends of cross-border mainland Chinese students (Bodycott, 2009). The present study examines recent historical trends in Chinese tertiary students’ destination choices and considers how the actual movement of students out of mainland China compares with the ideal national interest in potential destinations.

MARKETIZATION AND THE PURSUIT OF CROSS-BORDER STUDENTS

The number of students in tertiary education quintupled between 1970 and 2007 (UNESCO, 2009). As a result, some countries’ higher education systems have struggled to accommodate the larger numbers of students. Higher demand has led to a massification of higher education and, in many contexts, has prompted a surge in the number of private HEIs. These HEIs are often more susceptible to the influence of economic forces than publicly funded institutions, and have contributed to a process of marketization in higher education that has aroused concerns over quality assurance (Chan & Mok 2001; Lee 2003; Mok 2003).

High demand for higher education and concerns over quality represent significant push factors influencing destination choice in the international higher education market for cross-border students. Push factors consist of domestic pressures that push students to look abroad for higher education and pull factors are characteristics that can pull international attention to a destination for cross-border higher education (Mazzarol & Soutar, 2002). These push and pull factors play an essential role in the formation of trends in the market for higher education. Cross-border educational opportunities often offer an escape from a domestic system, providing relative benefits, such as the potential of gaining work experience abroad.

States and HEIs pursue these cross-border students for economic, financial, and educational reasons. Economically, states understand that HEIs produce knowledge, innovation, and talent that their domestic economies can put to use (Luke, 2005). As Mott (2004) explains, knowledge and intellectual capital drive dynamic growth and increase production capabilities on multiple

levels. Currently, “the means of knowledge production are concentrated on particular universities, cities, national systems, languages, corporations and brands with a superior capacity in production or dissemination that stamp their presence on the [knowledge economy] and pull the flows in their favour” (Marginson, 2009, p. 45). As this competition heats up, efforts to attract human resources intensify. Increasingly larger numbers of students seek out tertiary education and the number of players capable of influencing the international flows also grows.

Financially, cross-border students are an important source of revenue for HEIs and their host communities. Much like the tourism industry, cross-border tertiary education injects significant sums into local economies. In the 2006-2007 academic year alone, NAFSA (2008) estimated that cross-border tertiary students contributed \$14.5 billion or more to the US economy. In Australia, growing numbers of incoming cross-border students have “built Australia’s third-largest export industry—in education services—in the last two decades” (Australian Department of Education, Employment, and Workplace Relations, 2008, p. xii). Luke (2005), explains how HEIs faced with government funding cuts have taken on marketing strategies, including branding, advertising campaigns, quality assurance processes, and product diversification (in the form of new degrees) in order to attract more cross-border students. These steps by HEIs indicate the importance that institutions place on receiving the higher-paying cross-border students’ tuition fees in order to grow institutional revenue streams.

Governments also recognize the contribution of cross-border students to the national human resource pool. Cross-border students contribute to technical innovation and development within the countries that host them, with many of the most promising finding employment in their host countries after graduation. Chellaraj, Maskus, and Mattoo (2004) find that in the US, “larger enrollments of international graduate students as a proportion of total labor force result in a significant increase in patents awarded to both universities and non-university institutions as well as increases in total patent applications” (p. 26). Of these contributors to increased innovation, China has been a particularly important source of human resources. Ten- to fifteen-thousand world-class scientists and engineers in the US are international Chinese graduates that stayed to live and work in the country (Sigurdson et al., 2005).

HEIs also seek out cross-border students for the educational value they can provide to their domestic peers. This value often takes the form of exposure to linguistic and cultural diversity for students from a monocultural background. Cross-border students challenge their peers by adding new perspectives to classroom conversation and increasing awareness and appreciation for other countries and cultures (Bevis, 2002; Harrison, 2002). These experiences offer the opportunity to improve all students’ intercultural competence. A diverse student body also potentially offers advantages to students after graduation. They can serve an important role in an alumni network by facilitating international business or employment opportunities (Andrade, 2006). As such, cross-border students can contribute not only to their hosts’ economies and finances, but also potentially to the educational value of the HEIs they attend.

CROSS-BORDER DEMAND OUT OF MAINLAND CHINA

A number of push factors contribute to the high demand for cross-border education out of China, but the limited number of places in high quality institutions and subsequent high level of competition are certainly primary factors. HEIs in China are faced with a neoliberal discourse focused on meeting increasing demand, individual desire for personal investment, and consumer choice (Marginson, 2002). While certain elite HEIs thrive, the vast majority of the Chinese system of higher education is still recovering from its deterioration during the Cultural Revolution

(Guo, 2010). Even within elite institutions, “there is still a lack of will to create an open and free academic atmosphere . . . [and subsequently] the Chinese schools will be unlikely to nurture outstanding talents” (Guo, 2010, p. 175). Ambitious students compete for places in well-known HEIs and those who are unable to gain entrance often look abroad rather than accept a domestic HEI with a weak institutional brand.

The domestic system of higher education has struggled to meet higher consumer expectations, with the number of students attending HEIs growing nearly 19 per cent each year since 2000 (UNESCO, 2009). With no acceptable options at home, those who are financially able—and the growing Chinese economy has increased the numbers who are financially able—look abroad. Confucian influences (Guo, 2010) contribute to the “strong willingness of Chinese parents to invest heavily in their children’s education” (Yang, 2007, p. 260). The growing middle class no longer looks to the state to provide education, but increasingly relies on themselves and the market to support their children (Chan & Mok, 2001).

Another important potential push factor could be the currency exchange rate. Although the issue of Chinese yuan valuation is debated, most economists agree that the Chinese currency (RMB) is undervalued relative to international currencies (Shi, 2008). The exchange rate is a primary source of inflationary pressure (Riedel, Jin, & Gao, 2007) and, because the central government is attempting to bring inflation under control, increasing the value of the RMB seems likely to continue into the future. Though this issue often comes up as a point of dispute, “Chinese Vice Finance Minister Zhu Guangyao said . . . countries agreed on the direction of yuan reform, even if they disagreed on the pace of change” (Hepker, 2011). As the yuan gains in value over time, an increasingly larger proportion of students will be able to afford an education abroad. Together with sustained economic growth, changing currency value will help to ensure the number of Chinese cross-border students continues to grow.

The intense competition for jobs in China serves as another important push factor. Since economic reforms began, education has been central to China’s strategy for socioeconomic development (Chan & Mok, 2001). As the country shifts from an agricultural society to an industrial and, with time, post-industrial knowledge economy, the demand for high quality human resources will remain strong (Guo, 2010; Mott, 2004). The general public doubts that the labour market can absorb the sudden increase in graduates (Yang, 2007) and “a Chinese graduate with a foreign degree is perceived by parents and society to have better skills and employability prospects on returning home” (Gareth, 2005). Students are eager to differentiate themselves from peers in order to gain the greatest advantage in the domestic labour market. Thus, China serves not only as a source of cross-border students, but also as a labour market with a strong demand for the graduates that foreign HEIs produce.

Previous research on cross-border students out of mainland China focused on the decision-making process and influence of culture. Bodycott (2009) examined the relative importance of factors and features of cross-border higher education destinations for mainland Chinese students and parents. His study used a mixed methods design and examined a convenience sample of 251 mainland Chinese parents and 100 students who attended international education exhibitions in Beijing, Shanghai, or Guangzhou. As a result of the study, Bodycott makes recommendations concerning recruitment strategies; he found that education fairs, university representatives, and friends and family play an important role in cross-border education decision-making processes. Contrary to Mazzarol and Soutar’s (2002) research outcomes, Bodycott (2009) finds that mainland Chinese students have little concern for a destination’s immigration prospects, job market, or economy and

are more interested in higher education quality and opportunities for international and intercultural experiences.

Bodycott and Lai (2012) found that parents are the important final decision makers in 65 percent of the cases examined. Their study was based on data from questionnaires completed by ninety-five mainland Chinese students, and twenty-four self-selected (from the group of 95) student interviews. The study authors find that, for parents, cross-border education seems attractive because of the high level of local competition for HEI admissions and the possibility for emigration. For students, cross-border education is attractive because of the perceived limited quality of education in mainland China, and the opportunity to acquire foreign language skills, an international professional network, and educational prestige.

The studies provide insight into the experiences, motivations and decision-making processes of individual students and their families in cross-border education. However, they do not examine population trends in outbound cross-border students, nor do they draw on representative samples of mainland Chinese. Student and parent questionnaires, interviews, and focus groups provide a limited perspective of cross-border educational activities. The wishes expressed by students and families may not always reflect what actually occurs. Examining the actual movement of students compared with stated desires and preferences is essential. Additionally, prior studies draw samples from major cities, where families generally earn larger disposable incomes than in other parts of China; such a design does not provide results representative of the entire mainland Chinese population. As the mainland Chinese economy develops, better understanding of the population-wide interest in cross-border higher education destinations will continue to grow in importance.

STUDY

This study addresses three questions about the flow of cross-border tertiary students out of China:

- (1) What trends can be seen in Chinese cross-border students' changing destinations for higher education between 1999 and 2008?
- (2) How do students' actual destinations compare with the Chinese public's stated ideal destinations in 2008?
- (3) What insight do these findings provide about the process of destination choice?

Sample

The study analyzed two data sets to answer these questions. The first set is the UNESCO Institute for Statistics data (1999-2008) Table 18A: International flows of mobile students at the tertiary level (ISCED 5 and 6). This dataset provides yearly information on the actual movement of tertiary degree-students among states. The second dataset is the Chicago Council on Global Affairs' (2008) "Soft Power in Asia" Multinational Survey for mainland China (n=1237). This dataset includes an item that measures ideal interest in destinations for cross-border tertiary education as expressed between 25 January and 19 February 2008. The complete survey, conducted over telephone interviews in Mandarin Chinese, was fielded to 23,442 potential respondents leading to 1,237 completed interviews, 17,326 partial interviews, and 5,879 refusals. The sample was drawn using a stratified multistage sampling method in which all thirty-one provinces were divided into three strata by geography and Human Development Index. The sample was weighted according to the 2005 census, according to which 43 percent of Chinese live in cities or towns and 57 percent live in villages. The sample has a margin of error of $\pm 3\%$.

From the UNESCO dataset, the present study determined the total number of mainland Chinese cross-border-students going to the top five destinations for Chinese cross-border students for each year from 1999 to 2008. The US, EU, Japan, Australia, and the Republic of Korea (Korea), are the destinations for 95.4 percent of outbound cross-border students from mainland China over the ten years of interest.

From the Chicago Council on Global Affairs dataset, the present study uses responses to the question “If you were to send your children to receive their higher education in another country, which country would be your first choice? What about your second choice?” in order to determine ideal demand for the US, EU, Japan, Australia, and Korea. In these responses, the EU is coded as a single destination.

Scope and limitations

The scope of the present study is limited to nation-level analysis of data from mainland China. Limiting the analysis in this way allows for the data from two separate studies to be merged into a single dataset. The UNESCO dataset provides absolute numbers on the movement of cross-border students out of mainland China drawn from a complete sample of the mainland Chinese population and are, thus, totally representative of mainland China. Meanwhile, the Chicago Council on Global Affairs data draws on a large nationally-representative sample to determine overall ideal attraction to destinations for cross-border tertiary study.

As a result of merging the two datasets and data availability, there are three main limitations to the present study. Firstly, the present study cannot provide information about the relationship between ideal destinations (as specified by students or their parents) and actual destinations of potential cross-border students. Secondly, the low completion ratio of the Chicago data set telephone interviews (at 5.28%) may influence the reliability of the survey results; though the use of stratification and weighting of the sample helped to address these concerns. Thirdly, data for mainland Chinese ideal destination interest for cross-border tertiary education is only available for one year: 2008. So while data on actual movement span over 2008 and the nine preceding years, there are no data available for a year-by-year analysis of ideal and actual attraction. Thus, the present study is limited to analyzing trends in the actual movement of tertiary students over the 1999 to 2008 period relative to ideal destination in 2008.

ANALYSIS

The analysis of these data was taken in two steps. The first step is an analysis of cross-border tertiary student movement out of China. The study examined growth in the total number of outbound cross-border students, as well as each destination’s absolute number and market share of incoming students for the years 1999 to 2008. This step of the analysis provides insight into trends in cross-border student movement out of China.

The second step compared the Chinese public’s 2008 ideal interest in destinations with the actual destination choice over a ten-year period. The study uses ideal attraction as stated in 2008 as a benchmark to compare each destination’s ability to attract mainland Chinese cross-border students. Both ideal first choice and second choice mentions from the Chicago Council on Global Affairs data were combined and then recalculated as a percentage of total mentions. That percentage is then directly comparable with percent of market share for each destination. This

step in the analysis allows for ideal interest in destinations as measured in early 2008 to be compared with actual student movements in 2008 and the nine previous years.

The results of these analyses are discussed through the lens of Cubillo, Sánchez, and Cerviño’s (2006) framework for international students’ decision-making process. This framework breaks down pull factors into their constituent elements of personal reasons (i.e., personal improvement, advice), country image (i.e., cultural distance, city image, cost of living, immigration), program evaluation (i.e., international recognition, specialization), and institutional image (i.e., corporate image, faculty quality, facilities). Focusing on country-level destination choice, this study specifically concentrates on country image as it relates to real and ideal demand for particular destination countries. Further secondary research on country image is considered together with results from the primary analysis to contextualize the results on trends in the flow of cross-border students out of China.

RESULTS

The total number of tertiary cross-border students out of China has grown significantly in ten years, from approximately 97,000 students in 1999 to 417,000 in 2008, the total number has more than quadrupled. The total number of students by destination (Figure 1) reveals how most destinations’ intake of Chinese cross-border students have increased in kind with overall growth in the number of students. The US, EU, Japan, Australia, and Korea have seen the most growth in numbers of incoming students.

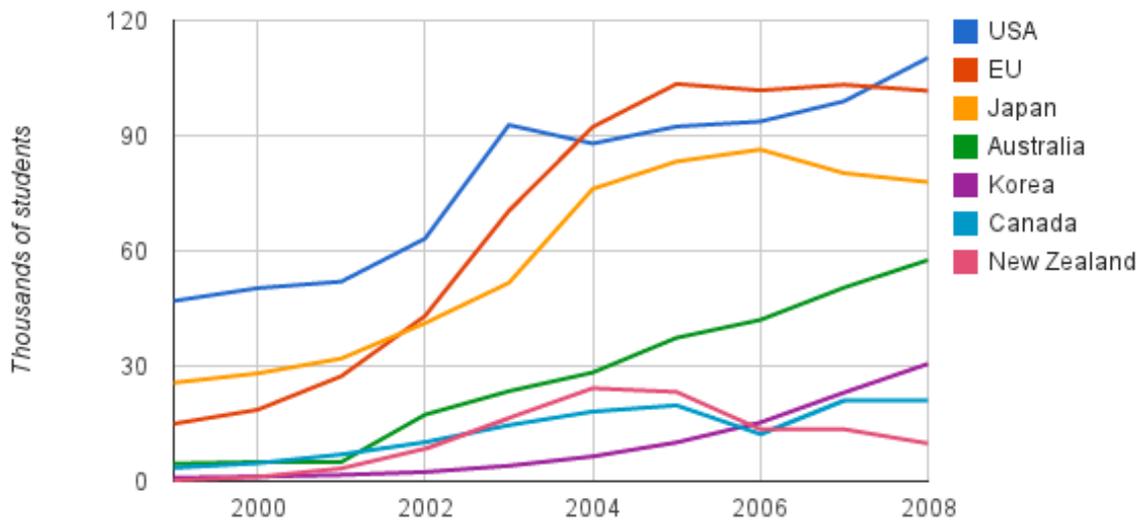


Figure 1. Total number of students received by destination

When the same data are viewed in terms of market share, they reveal a slightly different picture. As can be seen in the annual market share of students received by destination (Figure 2), not all destinations are receiving cross-border Chinese tertiary students relative to actual overall growth. Though the number of Chinese students going to most destinations continues to increase, that growth is not keeping pace with overall output of Chinese cross-border students. As a result, the market share of certain destinations is shrinking and some students are heading to new destinations.

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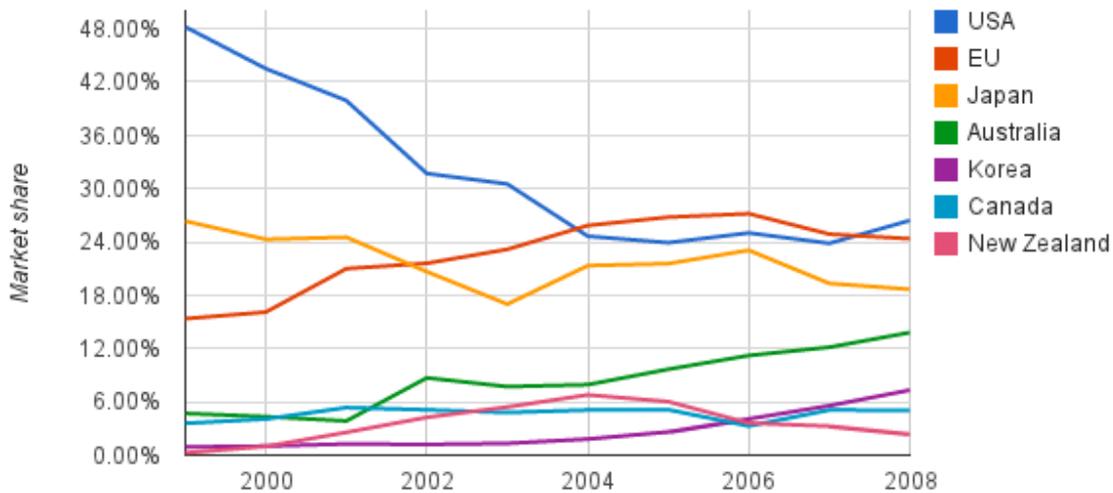


Figure 2. Annual market share of students received by destination

In addition to tracking numbers of cross-border students, one should also take into account public perceptions of particular destinations. The prestige or desirability associated with certain destinations is an important factor in understanding the cross-border flow of students. As ideal first choice (Figure 3) and ideal second choice destinations identified by the Chinese public (Figure 4) reveal, the mainland Chinese public overwhelmingly view the US and, to a lesser extent, the EU as desirable ideal destinations for tertiary education. Japan and Korea are also significant in that they also register in the mainland Chinese public’s consciousness. The large percentage of respondents who replied “I don’t know” or otherwise did not provide a second choice destination also indicates room for flexibility in the market for cross-border education in mainland China.

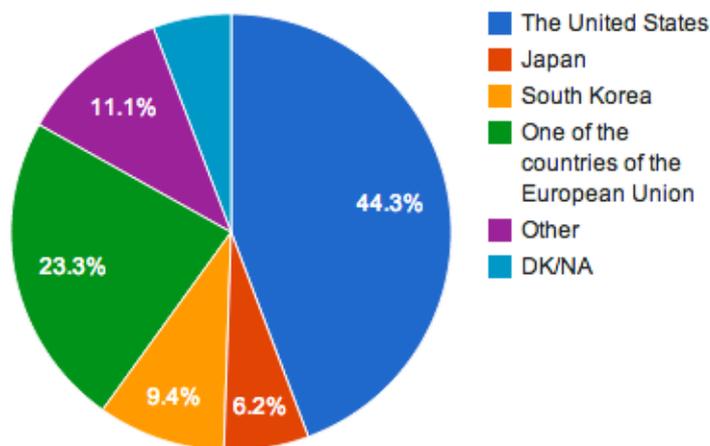


Figure 3. Ideal first choice destinations as identified by the Chinese public

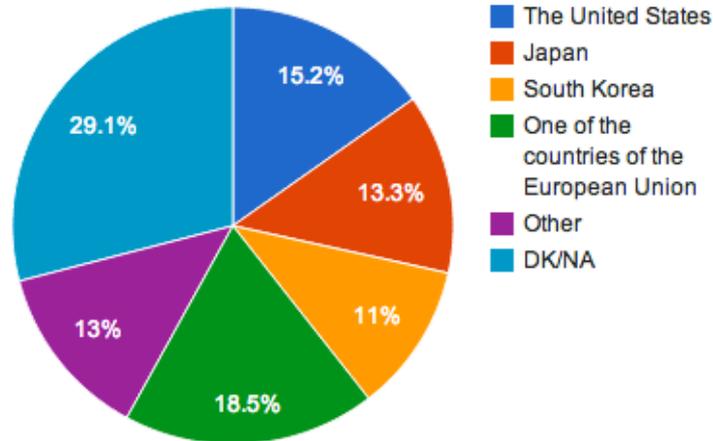


Figure 4. Ideal second choice destinations as identified by the Chinese public

Comparisons of 2008 ideal interest against market share by year (Figure 5) plots the proportion of mentions of a destination as an ideal first or second choice destination for cross-border tertiary education (in red) against that destination’s proportion of market share (in blue) by year. The figure reveals how changes in market share appear to be moving towards the Chinese public’s interest as stated in 2008, though some curious discrepancies do exist.



Figure 5. Comparisons of 2008 ideal interest against market share by year

Over the ten years between 1999 and 2008, Australia has continued increasing its share of Chinese students. Australia appears to be on track to continue gaining a market share of well over 10 percent, despite a proportion of total mentions of interest that is closer to 5 percent. Meanwhile, the US’s past over-performance progresses into the greatest under-performance relative to demand, with a discrepancy of over 10 percent. Korea and Japan’s market shares also continue to deviate from expressed public interest. Japan is over-performing and Korea under-performing, both with a discrepancy of roughly 5 percent. Trends in the data suggest that Australia and Korea are set to continue increasing their market shares, though Australia may begin to face some resistance as their market share moves increasingly further from the actual level of the Chinese public’s stated interest.

DISCUSSION

The results reveal that as outbound Mainland Chinese cross-border students grow in number, they are spreading to different destinations. The Chinese public's stated demand for a higher education from the US (35%) and EU (25%) remains strong as of 2008, but the data also reveal a healthy amount of demand for South Korea and Japan (both approx. 11.5%), as well as persistent growth in the actual number of students heading to Australia. Shifting popularity in destinations reveals that growing numbers of students seem tempted to remain in East Asia and the Pacific. This decision could be triggered by a number of changing factors, such as individual students' financial or academic situations. A close analysis of the findings suggests the possibility of a second-choice phenomenon for these students, and the potential for further growth in the number of Chinese cross-border students into Korea and the US. Focusing on destinations that deviate from stated demand, the discussion will first consider Australia and Japan as over-performing destinations before examining the US and Korea as under-performers.

Over-performing destinations & the second choice phenomenon

The growing number of outgoing cross-border students increasingly represent mainland China's overall population profile, with different levels of funding availability and different sets of personal and professional goals. As competition for admission into first choice destinations increases, more students may not have the financial means, academic qualifications or linguistic ability to pursue education at their first choice of destination. Students who are turned away from their first choice destination may ultimately pursue cross-border education at some alternative destination, in what could be considered a second choice phenomenon. These students are likely to head for a destination with relatively less competition or lower costs for a place at an HEI.

According to UNESCO (2009), 42 percent of students from East Asia and the Pacific choose to stay within that region, heading predominantly to Australia and Japan. As a result, East Asia and the Pacific has become the largest recipient of cross-border students from its own region. With effective marketing, other regional destinations could also benefit from the growing number of intraregional cross-border students (Bodycott, 2009), particularly the significant number coming out of mainland China. However as Australia seems to be a significant beneficiary of this phenomenon, with actual numbers of incoming cross-border students strongly over-performing against the mainland Chinese public's ideal demand. However, Japan appears to be in decline as a favoured destination for mainland Chinese students.

Australia's success in the cross-border student market is not accidental. As an English-speaking country, Australia naturally finds itself in a fortunate position, but further effort has gone into attracting large numbers of cross-border students. As Luke (2005) describes, "Australia is at the forefront of . . . branding and marketing of educational products, with entrepreneurial recruitment strategies that promote Australia as a relatively cheap, safe, and geographically easy alternative to the UK or US – particularly after the post-September 11 homeland security and visa restrictions" (p. 163). This strategic positioning of Australia in the market helps explain why Australia has over-performed in its ability to attract mainland Chinese cross-border tertiary students. Despite an expressed public interest in Australia as a destination by only 4.7 percent of the 2008 sample (Chicago Council on Global Affairs, 2008), actual market share of cross-border Chinese students was 13.8 percent. The second choice phenomenon not only helps to explain Australia's windfall, but could be used to predict future trends in the choice of destination by mainland Chinese cross-border tertiary students.

Meanwhile, Japan's former importance to cross-border mainland Chinese students appears to be in decline. Despite Japanese HEIs' reputation and rankings as the best in Asia, Japan faces more competition for mainland Chinese students from rival destinations in North America and Europe (Kuwamura, 2009); inbound cross-border mainland Chinese students seem to be heading elsewhere. Unlike other rival destinations, Japanese higher education lacks the international infrastructure for effective cross-border recruitment activities, with few overseas university offices or public educational information centres (Ministry of Education, Culture, Sports, Science and Technology (MEXT), 2008), though recent policies aim to address this issue. Meanwhile, the growing importance of English in the international stage has meant that Japan is struggling to attract Asia's best students (Ishikawa, 2009) and, although Japan has pushed for higher education internationalization since the 1990s and undertaken other programs more recently to attract more cross-border students, these efforts have run into issues such as overworked faculty, lack of English language ability, and concerns over the quality of instruction in a foreign language (Tsuneyoshi, 2005). As a result, though Japan over-performs against ideal demand as a destination for mainland Chinese cross-border students, the changing quality of students heading to Japan and Japanese HEIs' ability to maintain these inward flows may be a matter for concern.

Under-performing destinations

The US and Korea are under-performing relative to demand. Like Japan, the US faces a decline in inbound Chinese cross-border students. Meanwhile, Korea has experienced modest gains that are roughly comparable to those seen Australia. Although both the US and Korea under-perform against ideal demand, their reasons for doing so may be quite different.

In the case of the US, though HEIs in the US have taken on considerable numbers of students, they have the potential to tap into a pool of many more. Policy responses have included HEI-level initiatives that attempt to tap into the pool of applicants with strong academic but weaker English language skills (Bartlett & Fischer, 2011). These programs attempt to improve students' English as well as enhancing students' cultural understanding of US HEIs. As US HEIs seek out more funding in the face of financial troubles at home, further programs aimed at increasing numbers of cross-border students may begin to appear.

US HEIs are attractive to mainland Chinese cross-border students for a number of reasons. As a higher education system, the US is unchallenged in international higher education rankings, projecting an image of academic excellence. Studying in the US is seen as a symbol of elite socioeconomic status in mainland China and an important route for upward mobility; in fact, the Communist Party of China has explicitly instructed government bodies to seek out foreign educated employees (Pan, 2010). This element of luxury or prestige may help explain the relatively high demand for the US as a destination.

Yet as outbound cross-border students increase from all destinations, competition for places at US HEIs has grown more intense and the number of applications from mainland China has decreased. Examining graduate programs, the Council of Graduate Schools suggests that increased global competition, weakening country image, and changed visa policies of the US has led to this decline in applications (Warwick, 2005). In terms of country image, the Chinese media highlights the idea that the US is racist against Asians as can be seen in Hollywood depictions of Asian stereotypes and the negative experiences of mainland Chinese cross-border students who have studied in the US (Pan, 2010). Unfortunately, recent research seems to verify that Chinese students on US campuses are not integrating well into American society, with few close friendships between Chinese and American students (Gareis, 2012). Additionally, the image of the US as a strong

economy that can offer unparalleled employment opportunities following graduation has also weakened.

The 9/11 incident and subsequent visa reform issues have added a further barrier to mainland Chinese students' ambitions to study in the US. Following the events of 9/11, President Bush created the Interagency Panel of Advanced Science and Security to review visa applications from particular international students and prevent them from receiving training in sensitive areas on a case-by-case basis (Warwick, 2005). This added to the burden of paperwork necessary to study in the US and delays in the issue of student visas. The US issue of visas to Chinese nationals based on reciprocity means that the burden of paperwork for international students from China is particularly harsh and Chinese students, who represent only 11 percent of international students, have been subject to 57 percent of the delays between visa application and visa issue (Warwick, 2005).

In the case of Korea, under-performance relative to demand is likely to be due to problems with internationalizing domestic HEIs. Though the government in Korea has emphasized internationalization for higher education, the focus on quantitative indicators and economic benefits of internationalization has meant that the quality of internationalization processes have often been overlooked; Chinese students make up 70 per cent of total cross-border students (92.8% of cross-border students are from Asia) (Byun & Kim, 2011). For Korea to attract Chinese cross-border students, Korean HEIs will need to be able to offer a more diverse international environment. However, a hasty push for English-medium instruction and the adoption of international practices at Korean HEIs has led to conflict, and growing criticism and discontent with internationalization efforts (Byun, Chu, Kim ... Jung 2011; Cho & Palmer, 2012; Kim, 2005; Palmer & Cho, 2012).

These reform initiatives for domestic HEIs are complemented by Korean government efforts to attract foreign HEIs as a means of drawing more cross-border students to Korea and keeping Korean students from going abroad (MEST, 2007). These efforts are confined to the free economic zones in Korea. For instance, the Dutch Shipping and Transport College (MEST, 2008) has opened in Gwangyang Bay and SUNY Stony Brook, North Carolina State University, University of Southern California, and Belgium's Ghent University plan to open programs at Songdo Global University Campus in Incheon (Chung, 2012). For Korea to succeed, it will need a much more holistic approach to internationalization reforms based on broader faculty involvement and support.

Korea thus has a high level of demand relative to the actual market share because its HEIs do not have the institutional infrastructure in place to support a large cross-border student population. As more HEIs move to offer courses in English, aggressive recruitment of foreign English-speaking academics continues, and new approaches to internationalization emerge this situation could change. Additionally, Korea may benefit from *hallyu* or the Korean Wave. If the Korean Wave improves Korea's country image abroad (Jang & Paik, 2012), more mainland Chinese cross-border students may be drawn to Korea as a destination. If Korean HEIs make institutional changes that better serve the cross-border students and diversify cross-border student populations, they may be able to tap into this increased interest and awareness of Korean culture in East Asia and further afield.

CONCLUSION

As populations age and higher education finance issues emerge in developed countries, accelerating globalization will ensure that flows in the market of cross-border students remain an important issue. This study provides an overview of recent historical developments in the destination choice of cross-border tertiary students from mainland China, and assesses the performance of destinations in attracting these students relative to ideal demand. As countries, territories, and higher education institutions develop policies and marketing tools to improve their standing in the global higher education market, further research will be required on cross-border student movement. Beyond student numbers, further research is necessary to understand the quality and characteristics of students attracted to particular destinations. Such research would allow for more effective marketing tools by providing a deeper understanding of low-end, high-end and niche markets in global higher education.

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