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A Model for International Marketing and Recruitment in Emerging Markets: Factors Influencing Thai Students' Decision to Enrol at a Regional University

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Abstract

The imperative of revitalising international student recruitment post-COVID-19 pandemic amid geopolitical realignments has brought Australian universities to the forefront of strategic marketing considerations. Reassessment of conventional markets and strategies has become critical in sustaining and enhancing competitiveness of these institutions in the global education landscape. This study aims to investigate marketing and recruitment factors, specifically examining their influence on Thai students' decision to enrol at a regional Australian university. The research approach involved administering a survey of Thai students and recent alumni of regional Australian universities. A principal component analysis (PCA) revealed a multidimensional structure of eight factors. According to the findings, Thai students' decision to enrol was influenced by agents, post-study migration opportunities and country-specific resources. However, due to the perceived low return on investment and delayed enrolment outcomes, regional universities are not investing sufficiently in Thailand. Implications for marketing and recruitment initiatives are discussed.

Keywords

Regional Australia, universities, Thailand, international students, recruitment, marketing

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Introduction

The 2022 reopening of Australia's borders reignited the nation's valued international student recruitment industry. Before the COVID-19 pandemic, international education was Australia's largest services export, contributing up to \$32 billion to the economy in 2018 (ICEF Monitor, 2022). The pandemic halted the industry's momentum and prevented students from commencing degrees in destination countries. Students were offered online study by Australian universities, but many deferred in preference for a full onshore experience. The large enrolment decline caused significant losses for Australia's education exports, with many universities making redundancies and halting capital projects (Marshman & Larkins, 2020) triggering discussions around the futureproofing and sustainability of the international student recruitment industry. With 55% of Australia's international students coming from India and China, analysts urged the further development of alternative markets for risk diversification (Deloitte Access Economics, 2020).

The sustainability of regional Australian universities is significant within this context, as they play a vital role in driving economic regional growth (Gao, 2020). Regional universities – defined as institutions of higher education located outside of the major metropolitan areas of Sydney, Melbourne and Brisbane (Department of Home Affairs, 2020) – are characterised by limited resources and smaller international student recruitment budgets compared to their metropolitan counterparts. Regional universities also cannot rely on the same leverage points as large metropolitan universities, such as destination marketing, global rankings and prestige, to attract students (Forbes & Hamilton, 2004). Therefore, a comprehensive understanding of the sustainability of these institutions' international recruitment operations is essential.

Research covering these operations in Australian universities is scarce (Chin et al., 2022). Most insights are limited to larger metropolitan universities, with sparse consideration for regional universities (Gottlieb & Beatson, 2018; James, 2018). Similarly, the extant literature has focused on operations relating to the traditional source countries of India and China rather than emerging markets. Consequently, little is known about regional universities' recruitment efforts in emerging markets, or how these strategies influence the decisions of prospective students.

To provide insights for future practise and relevant theory, this paper aims to address the literature gap associated with regional universities' approach to international student recruitment in emerging markets by exploring how students from Thailand view the recruitment strategies of regional universities.

Thailand was selected as the study's focus due to an anticipated increase in students coming to Australia. In 2022, Thailand was the sixth-highest source country for students coming to Australia, and various macroeconomic and political factors indicate further growth in demand for overseas education (Austrade, 2023).

By investigating an emerging market, this study offers universities practical insights that diverge from the conventional, high-volume market insights of prior research. Additionally, previous studies examined the

determinants of students' enrolment decisions but lacked universal applicability across Australian universities, particularly regional ones. This research bridges this gap.

From the above-mentioned background, this article's main research question is: *'What marketing and recruitment factors used by regional Australian universities are influential on Thai students' decision to enrol?'* This study proposes a framework that regional universities can use to improve their student recruitment efforts in Thailand. While focused on Thailand, the findings should apply to similar markets.

Literature Review

Extant literature has explored the practise of international student recruitment but offers minimal specific insights addressing this study's guiding research question.

University approach to student recruitment

The literature broadly reveals that within the global student recruitment industry, *agent partnerships* and *country-specific marketing plans* are key strategic investments to ensure success (Chin et al., 2022).

An agent provides advice and enrolment assistance to students; they receive a commission from universities for successful enrolments. Thai students respect the expertise of agents (Ou-Yang et al., 2014). Families and friends play significant roles in the decision to study abroad, especially if they have studied abroad; however, Pimpa (2003b) and Huguan et al. (2020) indicate that agents' professional advice is more trusted regarding destinations, academic programmes and university information. Therefore, the literature stresses that managing agent relationships is imperative to successful recruitment outcomes (Nikula, 2022; Pimpa, 2003b). Nonetheless, there is insufficient research exploring the student-agent relationship within the context of promoting regional universities. Little is known about how much an agent influences students from emerging markets to enrol at regional universities.

The literature also highlights country-specific marketing plans as a key strategic measure. Increased industry competitiveness has perpetuated universities' commercialised approach to student recruitment. According to Yean et al. (2019) and Wadhwa (2016), universities, especially those that cannot rely on rankings or instil reputational factors, have adopted acute market awareness that involves the development of bespoke approaches to different regional markets. Due to inherent cultural nuances, a common theme in the literature is the need for bespoke strategies suiting target markets (Gray et al., 2003; Wadhwa, 2016; Stein, 2018). However, there is insufficient detailed insight into country-specific marketing plans and how they influence students from certain regions. The extant literature has focused on the marketing strategies used by universities without considering whether these directly influenced students' enrolment decisions.

Contextualising regional universities

The extant literature on international student recruitment has focused on larger Australian universities in key metropolitan areas (Gottlieb & Beatson, 2018; Ross, 2009), so there are limited insights relevant to regional

universities. These insights might not apply to regional universities due to the considerable disparity in spending power between these institution types. Larger metropolitan universities can invest in extensive offshore branding, including the establishment of global offices, cross-institutional partnerships with renowned universities and comprehensive social media campaigns. They also often have higher rankings and accreditations that increase their global attractiveness (Butt et al., 2021; Forbes & Hamilton, 2004). Conversely, regional universities rarely place high in global rankings and have low (if any) budgets to compete with their metropolitan counterparts (Wu, 2015). This said, regional universities offer a different value to international students, including better pastoral care and bespoke academic support (Townsend & Huay, 2008).

Regional universities differ from larger metropolitan universities in international student recruitment. As Australian universities are not homogenous, it is valuable to gain insight into regional universities' international student recruitment strategies and students' opinions on them.

Factors influencing Thai students to study abroad

Studies on international student recruitment have focused on this area, with previous studies utilising the concept of *push and pull factors* to conceptualise this. *Push factors* are reasons that a student decides to depart their country, while *pull factors* are reasons in the destination country that influence them to move there (Mazzarol, 2002).

Pimpa (2003a) and Lertjanyakit and Bunchapattanasakda (2015) state that the predominant push and pull factors influencing Thai students were the academic quality available abroad, the influence of family and friends and the opportunity to experience a different culture. Word-of-mouth was also highlighted as a key influencing factor, as Thais who could afford to study overseas usually had an existing network of friends and family who had studied abroad. Compared to their greater Asia counterparts, Thai students were not as easily influenced by institutional rankings (Chanarnupap, 2013) and instead valued insights from those who had previously studied abroad (Ou-Yang et al., 2014). With the increasing number of Thai students studying in Australia (Austrade, 2023), the subsequently larger alumni network provides more word-of-mouth influence. Consequently, further research in this area becomes imperative to capture contemporary insights and trends.

However, rapid developments in macroeconomic and political circumstances in Thailand suggest these factors should be reconsidered (Buasuwan, 2018). Thailand's second global ranking for mobile phone usage and fifth for internet usage (Rattanaburi & Vongurai, 2021) indicates that the Thai higher education recruitment market should be re-examined. With students' increased accessibility to online discussion forums, new insights are needed into this medium's influence on enrolment decisions.

While the literature addresses push and pull factors that might influence Thai students to study abroad, previous insights insufficiently consider the effect of university recruitment initiatives on students' decisions (Asaad et al., 2015; Hemsley-Brown & Oplatka, 2015). Further, the literature does not differentiate between regional and metropolitan universities (Gao, 2020), raising the question of whether these distinct types of institutions might exert varying pull factors on Thai students.

Creating a strategic ambidextrous approach- building trust in newer markets

An organisation's strategic ambidexterity refers to its ability to operate while balancing short-term and long-term goals (Dimitrios et al., 2021). Ideally, organisations should not only focus on exploiting immediate commercial outcomes but also foster the exploration of longer-term sustainability initiatives (Van der Laan & Yap, 2016).

While strategic ambidexterity has been considered within organisational contexts in several industries (Hamel & Prahalad, 2005), there is insufficient research contextualising this concept in the international student recruitment industry. Further research in this area is needed, especially considering recent discussions concerning the sector's sustainability in Australia, where many institutions are over-reliant on China and India (ICEF Monitor, 2022). During the pandemic recovery period, it is reasonable to expect that Australian universities will prioritise larger volume markets in the short term, but potentially at the expense of developing newer markets.

Additionally, research is limited on the strategic approach of regional universities in global markets and whether they balance short-term and long-term goals. This is important to consider because their level of engagement in developing new markets could affect how students view these institutions as potential study destinations. Typically, a university seen as having an ad hoc strategic approach may be perceived as predominantly exploitative, thus damaging its longer-term outlook in a particular market (Cunningham et al., 2022). This is particularly applicable to regional universities that, due to sustaining their local economies, require that their business practises have longevity.

According to Chin et al. (2023), regional universities are conflicted in crafting strategic ambidextrous approaches, suggesting that while these institutions see benefits in developing newer markets, they are pressured by short-term enrolment targets and limited budgets. Although it appears regional universities expressed willingness and know-how in gradually building brand trust in Thailand, they are reluctant to do so at the expense of short-term targets expected by senior management.

If regional universities are reluctant to invest in longer-term explorative efforts to build trust in their brands in emerging markets like Thailand, insights on the effectiveness of their recruitment strategies in terms of factors influencing students' enrolment decisions would be valuable.

Overall, there are research gaps concerning the strategic ambidexterity of universities' international recruitment strategies and associated relationships with the allocation of resources when considering the factors that influence students' decisions to enrol. This is an important consideration within the context of regional universities and their engagement with students in newer recruitment source countries.

Conceptual model

Based on the literature review and the research gaps identified, a tentative structural conceptual model was created to guide the study's line of inquiry. The development of the model was informed by a preceding scoping review and an exploratory qualitative investigation conducted by Chin et al. (2022).

The independent variable (*regional university marketing and recruitment strategy*) is proposed to be positively related to the dependent variable (*decision to enrol*). Variables proposed to moderate this relationship include:

- *Partnering with agents in Thailand*: the relationship between regional universities and their respective agents.
- *Influencing factors on Thai students*: factors influencing Thai students in their decision.
- *Trust in the university brand*: the extent to which students trust the university brand.

This study aimed to identify the underlying factorial structure associated with the conceptual model to assess whether amendments are necessary for the tentative model or if a new one should be developed.

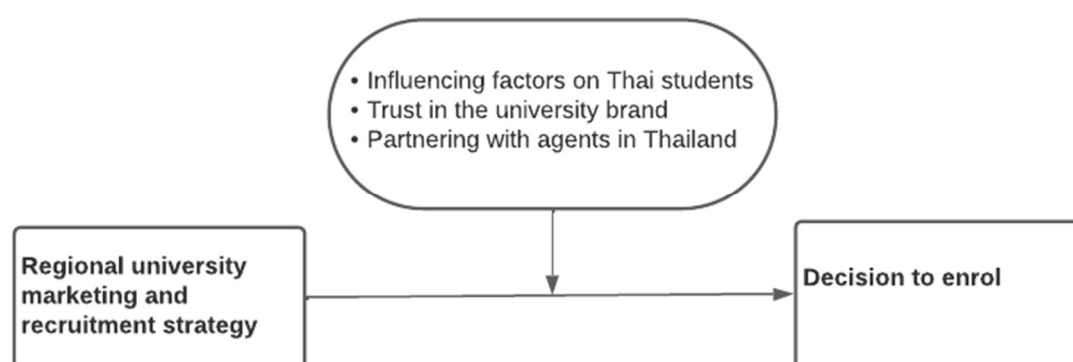


Figure 1: Conceptual Model: Factors influencing Thai students to enrol in Australian regional universities

Methodology

Research context

The study is the secondary phase of an exploratory mixed-methods study of regional universities' recruitment efforts regarding Thai students. Lacking substantial knowledge about this phenomenon, employing an exploratory method enables an understanding of the relevant variables, laying the foundation for in-depth investigations (Hallingberg et al., 2018). The study identifies key variables and develops a phenomenon-associated model. Hair et al. (2014) outlines a structured approach to model building that includes estimating and validating a multivariate model. They note the importance of conceptual model development for initial estimation before multivariate techniques are applied for model validation.

For the development of the conceptual model in Figure 1, initial qualitative research sought to understand regional universities' recruitment strategies when targeting Thai students. This was accomplished through semi-

structured interviews with student recruitment practitioners from regional universities with Thai market expertise.

The themes identified in the qualitative phase provided valuable insights into the challenges and opportunities facing regional universities in Thai student recruitment, including an understanding of cultural nuances, key push and pull factors and university brand trust.

This study's initial objective was to ensure model parsimony aligned with existing literature. Quantitative research had a dual purpose: first, to validate, reject or refine the conceptual model derived from the preceding qualitative phase. This entailed gathering data from a broader sample of Thai students who have or are currently studying at regional Australian universities. Second, to develop a comprehensive understanding of the phenomenon. This led to a tentatively validated multivariate model of Thai student recruitment, with the potential for future insights for research and practise in international student recruitment.

Research design and sampling

This study adopted a quantitative research design by surveying current Thai students and recent alumni of regional Australian universities. The survey sought to assess respondents' perceptions of regional universities' recruitment in Thailand and identify underlying factors influential to their enrolment decisions. In the broader study, this would determine the extent to which the themes identified by recruitment practitioners were reflected in the responses from the Thai students.

The survey used a five-point Likert scale questionnaire and was administered online using QuestionPro for four months in 2022. This platform offered easy distribution to the target population and ensured that collected data was secure and confidential. The survey was distributed with the assistance of Thai education agents, local Thai community groups, the Australian Alumni Association of Thailand and Austrade's Education Attaché in Thailand. To ensure the study's desired demographic, participants were required to meet the following criteria:

- a) Thai national; and
- b) Currently studying (onshore in Australia) at a regional university; or
- c) Graduated since 2015 from an Australian regional university.

The sample included 62 qualified respondents with no missing values. The limited sample size is attributed to the specific nature of the target population, which posed challenges in recruiting individuals meeting the criteria. The data obtained was deemed sufficient for this exploratory study, as it allowed for a representative sample of the target population and met the multivariate analysis assumptions.

Measures

The survey was composed of questions organised to represent the variables of the conceptual model in Figure 1. The questions were formulated as statements that emerged from the literature and qualitative phase of the study. Respondents were asked to indicate their level of agreement or disagreement with each statement. The questions and responses were in Thai and English.

Analysis

The primary objective was an exploratory analysis identifying underlying factors influencing Thai students' decision to enrol at regional Australian university.

To ensure data parsimony, incomplete cases were deleted, resulting in a final sample size of 62 complete responses out of 137 initial respondents. Notably, due to questions forcing a response, no missing values were detected. The data was then checked for normal distribution using skewness and kurtosis statistics as well as PP plots. The results demonstrated no significant normality deviations, thereby providing a strong basis for further analyses. From this finalised data set, frequencies were generated to provide an initial data overview.

For dimension reduction, a PCA was conducted using Kaiser-Meyer-Olkin (KMO) and Bartlett's test of sphericity for sampling adequacy. The PCA adopted a Maximum Likelihood Estimation method with Varimax rotation and Kaiser Normalization. Varimax rotation was selected because it was anticipated that the resultant factors were uncorrelated.

Results

Profile of respondents

Of the 62 respondents, 43.5% were male, 53.2% were female and 3.2% identified as 'other'. Most of the respondents (80%) were 23 to 42 years old. Consistent with the observation that Thailand is primarily a postgraduate student recruitment market for Australian universities (Austrade, 2023), 50% studied a Master's degree, 29% completed a Bachelor's degree and 19.4% did a PhD or postdoctoral degree. Most students studied management and commerce (29%) followed by health (9.7%) and information technology (9.7%). A significant number of responses indicated 'other' as their study field, which is attributed to students studying 'hybrid' (Business and Law), specialised (e.g. cybersecurity) or research degrees that did not fit within the pre-determined responses.

29% of respondents studied in regional New South Wales, followed by the Australian Capital Territory (16.1%) and Western Australia (14.5%). The remaining respondents were linked with universities in regional Queensland, South Australia and Tasmania. Regarding graduation year, 50% of respondents completed their degree from 2015 to 2020, and 50% graduated, or were due to graduate, from 2021 to 2027.

Reliability of instrument

A reliability analysis of the survey instrument yielded a Cronbach's alpha of 0.85 exceeding the 0.70 threshold for acceptable internal consistency reliability (Taber, 2018), indicating a reliable measure of the constructs. The KMO Measure of Sampling Adequacy was 0.535 (above the 0.5 threshold commonly cited as acceptable in exploratory studies) (Shrestha, 2021).

Factor analysis

PCA was employed to reduce the number of dimensions of a dataset (Hair et al., 2014). The statistical analysis seeks to identify optimal groupings of questions into key components and to identify the underlying factorial data structure. This is especially helpful in validating or modifying a conceptual model.

After ten iterations, eight factors emerged from the PCA solution that explained 61.65% of the total variance. These factors were:

1. *University reputation*
2. *Trust-building sources*
3. *Migration and job opportunities*
4. *Enrolment decision*
5. *Country-specific resources*
6. *Agent/university relationship*
7. *Uniqueness and accessibility of course offerings and information*
8. *In-country presence*

Table 1 displays these eight factors and their related variables as per the PCA results and grouping.

Table 1: PCA results

		Factor loadings	Communalities	Eigenvalue	Variance explained (%) (Total variance explained = 61.65)	Mean scores measured on a 5-point Likert scale (1 = Strong Disagree and 5 = Strongly Agree)	Ranking of variables based on mean scores
Factor 1: University reputation				7.14	18.78	3.08	
1A	My chosen Australian university is well-known in Thailand	0.81	0.77			2.79	38
1B	Regional universities have a good presence in online Thai social media platforms.	0.74	0.74			2.84	37
1C	My chosen Australian university has a strong reputation in Thailand	0.67	0.57			3.06	31
1D	Student reviews and testimonials on the university could be easily found online on Thai social media sites.	0.67	0.55			3.21	27
1E	There was enough information available in Thai about the university, to assist me in selecting a university.	0.55	0.57			2.85	36
1F	Education agents had a good understanding of all universities in Australia, not just the large ones.	0.47	0.67			3.44	18
1G	University ranking was an important factor in my selection of university.	0.46	0.58			3.27	20
1H	My university appears to have a long-term strategy to grow their reputation in Thailand.	0.43	0.37			3.18	28
Factor 2: Trust-building sources				3.59	9.46	3.38	
2A	My selection of university was influenced by family members.	0.72	0.62			2.94	33
2B	Education agents promoted regional universities as much as those based in Sydney / Melbourne / Brisbane.	0.65	0.58			3.24	23
2C	My decision to enrol was influenced by family and friends.	0.60	0.59			3.18	28
2D	Education agents are trustworthy and provided information that was in my best interests.	0.59	0.64			4.05	2
2E	Regional universities are well-represented by their agents in Thailand.	0.53	0.70			3.23	25
2F	It was useful to meet a representative directly from the university, as they were able to provide trustworthy advice beyond what was available with the education agent.	0.50	0.65			4.03	3
2G	My university adjusts their marketing strategies to suit local audiences in Thailand.	0.46	0.77			3.06	31
2H	The marketing messaging of regional universities is relatable to Thai students.	0.39	0.75			3.27	20
Factor 3: Migration and job opportunities				2.91	7.66	3.62	

Table 1: PCA results

		Factor loadings	Communalities	Eigenvalue	Variance explained (%) (Total variance explained = 61.65)	Mean scores measured on a 5-point Likert scale (1 = Strong Disagree and 5 = Strongly Agree)		Ranking of variables based on mean scores
3A	The opportunity to migrate away from Thailand was an influencing factor on my decision.	0.79	0.52			3.16		30
3B	I chose my university because there were good job opportunities in the area.	0.70	0.59			3.71		12
3C	I selected a regional university because of their affordability compared to larger universities.	0.65	0.51			3.50		16
3D	Regional universities are an attractive option due to the post-study migration opportunities (e.g. longer duration for post-study work visa, extra migration points).	0.65	0.75			4.10		1
Factor 4: Enrolment decision				2.56	6.75		3.59	
4A	Education agents were influential in my decision to enrol at the university.	0.73	0.57			3.27		20
4B	Education expos are a good way to obtain information on which university to choose.	0.64	0.64			4.00		6
4C	The location of my university was influential in my decision to enrol.	0.59	0.76			3.77		11
4D	The marketing of my university influenced my decision to enrol.	0.53	0.58			2.92		34
4E	My decision to enrol was influenced by the level of trust I had in the university.	0.43	0.53			4.00		6
Factor 5: Country-specific resources				2.15	5.65		3.57	
5A	Alumni testimonials from other Thai students on the university were a trusted source of information during my decision-making.	0.71	0.64			4.03		3
5B	If the university representatives were able to speak Thai, it made them a more trustworthy source of information.	0.68	0.63			3.48		17
5C	Online Thai discussion forums are a valuable source of information on which university to select.	0.66	0.65			3.53		15
5D	Regional universities are doing enough to grow their brand in Thailand.	0.48	0.57			3.24		23
Factor 6: Agent / University relationship				1.97	5.18		3.99	

Table 1: PCA results

		Factor loadings	Communalities	Eigenvalue	Variance explained (%) (Total variance explained = 61.65)	Mean scores measured on a 5-point Likert scale (1 = Strong Disagree and 5 = Strongly Agree)		Ranking of variables based on mean scores
6A	It seemed that education agents have a good relationship with the Australian universities they represent.	0.84	0.63			3.97		9
6B	Education agents seem to be well supported by their Australian university partners.	0.83	0.66			4.00		6
Factor 7: Uniqueness and accessibility of course offerings and information				1.58	4.15	3.51		
7A	I chose my university because they are experts in the field of study I have selected.	0.75	0.71			3.71		12
7B	The marketing strategies of regional Australian universities are different from those used by larger universities.	0.73	0.65			3.42		19
7C	Information on my university was easy to obtain from their website.	0.60	0.51			4.02		5
7D	The course I selected to study is not easily found at universities in Thailand.	0.46	0.57			2.90		35
Factor 8: In-country presence				1.53	4.04	3.62		
8A	Education agents promote the university with integrity.	0.65	0.59			3.65		14
8B	Education agents provided the necessary assistance to help me choose my university.	0.62	0.50			3.97		9
8C	It was challenging to interact with university representatives who were not able to speak Thai.	0.61	0.57			3.23		25

Extraction Method: Principal Component Analysis.
 Rotation Method: Varimax with Kaiser Normalization
 Rotation converged in 10 iterations.

Among the eight factors, factor six, pertaining to the perceived relationship between education agents and represented universities, had the greatest impact on respondents' decision-making. This is consistent with literature that indicates Thai students are more influenced by agents due to their professional field expertise (Pimpa, 2003b). Meanwhile, with recent literature highlighting the relatively passive efforts of regional universities in Thailand to enhance their reputation (Chin et al., 2023), factor one, university reputation, had the least impact on respondents' decision-making. Examining the individual items within the eight factors, the factor loadings and means offer additional insight into the influences on students (James-MacEachern & Yun,

2017). Table 2 illustrates that respondents generally agreed with the four highest considerations when choosing their regional university.

Table 2: Highest considerations

Label	Description	Mean
3D	Regional universities are an attractive option due to post-study migration opportunities	4.10
2D	Education agents are trustworthy and provide information that is in my best interests	4.05
2F	It was useful to meet a representative directly from the university, as they were able to provide trustworthy advice beyond what was available from the education agent	4.03
5A	Alumni testimonials from other Thai students at the university were a trusted source of information during my decision-making	4.03

As seen in 2D, 2F and 5A, ‘trust’ is a common theme across the highest considerations. This reinforces practitioner perspectives that successful recruitment outcomes in Thailand would be reliant on strategies that establish trust among the student audience.

However, one item (3D) deviates from the trust theme and pertains to post-study migration opportunities. This ‘pull factor’ highlights a unique aspect specific to regional universities, emphasising additional benefits to studying in regional locations, such as a longer post-study work visa duration and extra migration points (Department of Home Affairs, 2020). This demonstrates the genuine influence of such advantages on Thai students’ enrolment decisions.

Conversely, respondents expressed disagreement with the four lowest considerations:

Table 3: Lowest considerations

Label	Description	Mean
7D	The course I selected to study is not easily found at universities in Thailand	2.90
1E	There was enough information available in Thai about the university to assist me in selecting a university	2.85
1B	Regional universities have a good presence on online Thai social media platforms	2.84
1A	My chosen Australian university is well-known in Thailand	2.79

These variables indicate that marketing and recruitment efforts from regional universities had a lower influence on the decision to enrol, with the three lowest items (1A, 1B and 1E) all from factor one (university reputation).

Component inter-correlations

Factor four (*enrolment decision*) represents the determinants of the final enrolment decision, prompting an examination of correlations with the other factors. This identified variables displaying positive associations with the enrolment decision, thereby revealing influential factors. The Component Transformation Matrix (Table 4) was employed to depict the relationship and interaction between the factors using PCA. This matrix provided valuable insights into the contribution of the original variables to the newly transformed components.

Table 4: Component Transformation Matrix

Component	1 - Uni reputatio n	2- Trust- buildin g sources	3- Migratio n and job apps	4- Enrolmen t decision	5- Country- specific resource s	6- Agent/uni relationshi p	7- Uniqueness & accessibilit y of course offerings & info	8- In- country presenc e
1 - Uni reputation	0.597	0.529	0.15	0.319	0.229	0.241	0.103	0.345
2- Trust- building sources	-0.458	0.155	0.696	0.189	0.214	-0.118	-0.409	0.14
3- Migration and job apps	-0.007	-0.088	0.597	-0.176	-0.32	0.378	0.573	-0.174
4- Enrolment decision	-0.155	-0.506	-0.108	0.35	0.534	0.542	0.085	0.01
5- Country- specific resources	0.195	-0.236	0.177	-0.611	0.535	-0.295	0.181	0.309
6- Agent/uni relationship	-0.538	0.562	-0.291	-0.346	0.187	0.318	0.205	0.11
7- Uniqueness & accessibilit y of course offerings & info	-0.282	-0.126	-0.092	0.366	-0.207	-0.338	0.479	0.613
8- In- country presence	-0.051	0.213	0.018	0.285	0.388	-0.435	0.427	-0.59

Extraction Method: PCA

Rotation Method: Varimax with Kaiser Normalization

By focusing on values with positive loadings, particularly those exceeding 0.4, correlations associated with the enrolment decision, were determined. These significant correlations are highlighted in blue in the table. The enrolment decision (4) is moderately positively related to country-specific resources (5) and the agent/university relationship (6), further validating earlier findings that these initiatives should be integrated into university marketing and recruitment strategies to influence students' enrolment decisions. Trust-building sources did not score highly due to respondents' view that universities were not investing sufficiently in brand development in Thailand. This explains the lack of a positive relationship between this factor and the enrolment decision.

Other noteworthy findings revealed that:

- *University reputation* (1) and the *agent/university relationship* (6) exhibited positive relationships with *Trust-building sources* (2), suggesting that further strategic focus on developing the university's reputation and agent relationships would build more trust in the university.
- *Trust-building sources* (2) demonstrated a positive relationship with *Migration and job opportunities* (3).
- *Migration and job opportunities* (3) were positively related to the *Uniqueness and accessibility of course offerings and information* (7).

Therefore, this section represents initial exploratory steps in identifying correlations from the PCA, specifically concerning the enrolment decision. Future research should employ a larger sample size to obtain more extensive insights.

Discussion

As per the initial conceptual model, the variables proposed to influence Thai students' decision to enrol in an Australian university programme included university marketing and recruitment strategy, trust in the university brand, partnerships with agents in Thailand and other influencing factors. However, as the aforementioned PCA solution revealed, an underlying factorial solution indicates towards a more detailed model that extends the initial tentative model.

Modified conceptual model

From the PCA results, the initial tentative conceptual model has been modified to incorporate the derived underlying factors. The modified conceptual model (Figure 2) illustrates the PCA components as variables that ultimately influence the decision to enrol.

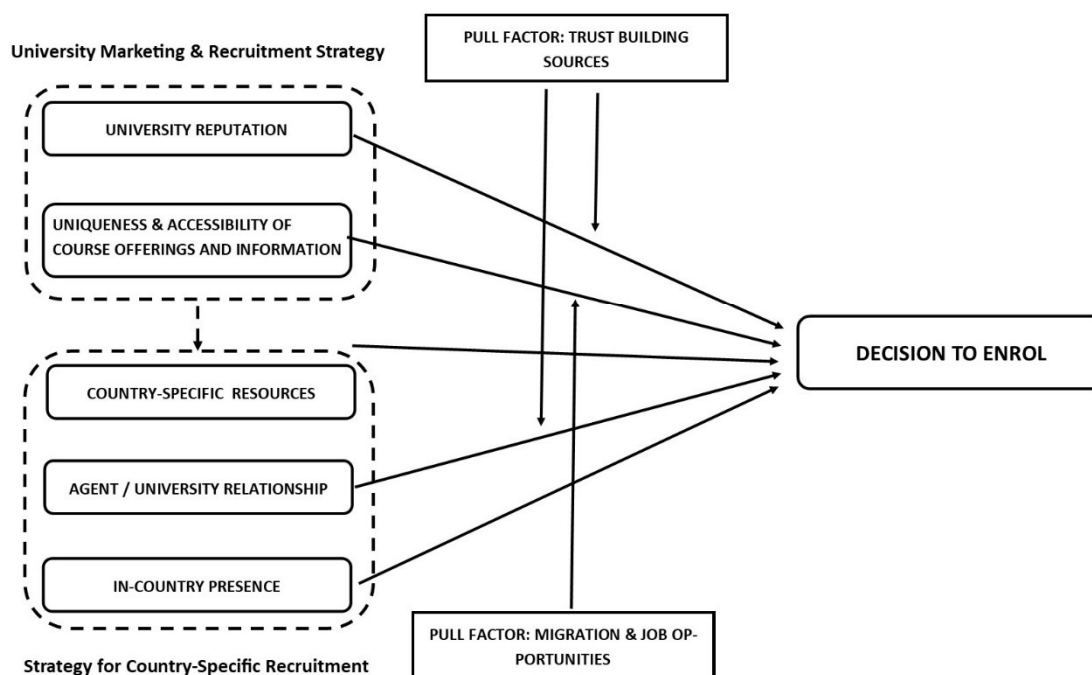


Figure 2: Modified Conceptual Model; Factors influencing international student decision to enrol

Each of the factors from the PCA solution is discussed below:

University reputation

Considering factor one, it becomes apparent that Thai students do not think regional universities have strong reputations in Thailand. This factor highlights that students perceived university marketing and recruitment strategies as weak with minimal influence on their enrolment decision. Specifically, students believed that regional universities lacked a long-term strategy in Thailand (1H). This observation aligns with the perspectives of recruitment practitioners, who also acknowledged their reluctance to engage in a long-term marketing and recruitment strategy in Thailand due to the delayed return on investment (Chin et al., 2023). The fact that students perceive the lack of a long-term strategy indicates that universities should be more attentive to their efforts in Thailand, as this impacts the university's reputation and ultimately students' enrolment decisions.

Similarly, students viewed regional universities' marketing and recruitment strategies as lacking Thailand-relevant campaigns and initiatives (1D and 1E), limiting the reputational strength of the university. This finding aligns with the perspective of practitioners who operate according to short-term targets and do not allocate dedicated strategic efforts to develop their reputation in longer-term markets (Healey, 2023).

Factor one did, however, reveal that students perceived agents as having a good understanding of all universities, not just the larger ones (1F). This highlights the importance for regional universities, due to agents' role in influencing students, to prioritise agent partnerships within their marketing and recruitment strategies for reputational growth.

The lack of specific strategic direction and the associated investment by regional universities to establish a strong reputation in Thailand raises concerns and indicates that Thailand may not be prioritised as a market for regional universities, resulting in the fulfilment of minimum requirements rather than active investment in reputation-building endeavours.

Consequently, Thai students may perceive these universities as less committed and attentive to their needs, affecting their enrolment decisions. According to Nghiêm-Phú and Nguyễn (2020) while universities have limited control over internal personal elements that might influence students' decisions, they have full control over the university's reputation. This underscores the importance of cultivating a strong reputation in emerging markets in order to recruit students.

Uniqueness and accessibility of course offerings and information

The PCA analysis further indicates in factor seven that course information, particularly related to unique programmes, is readily accessible and moderately influential to students. However, it appears that course offerings as part of a marketing and recruitment strategy do not significantly influence students' enrolment decisions. Notably, the survey showed that students assign relatively low importance to selecting a course not easily found in Thai universities (7D). This aligns with existing data indicating that Thai students favour management, commerce and business degrees (Austrade, 2023). Thus, regional universities may need to highlight alternative factors, such as post-study migration opportunities, that could sway Thai students' enrolment decisions.

While promoting course offerings as part of a marketing and recruitment strategy holds significance in other Southeast Asian countries like Malaysia or Singapore (Choi & Nieminen, 2013), it becomes evident that this emphasis is not as relevant in Thailand, highlighting the importance alignment with the target markets' needs.

Country-specific resources

In factor five, country-specific resources accessible to students (particularly alumni testimonials and online discussion forums – 5A and 5C) were influential to students' enrolment decisions.

Prior research identified the significance of family, friends and word-of-mouth as influential factors for Thai students (Pimpa, 2005). Essentially, this paper's findings are a contemporary manifestation of these familial influences, wherein Thai students now have access to online forums and social media platforms, allowing them to engage with alumni testimonials and view discussions to assist their enrolment decisions (Austrade, 2023). These sources predominantly employ the Thai language and often use Thailand-specific platforms, underscoring the necessity for a country-specific recruitment strategy to exert greater influence over students' enrolment decisions.

Although a higher commitment of time and resources may be required to nurture country-specific resources, these results indicate that regional universities should invest further if they seek to influence Thai students. Moreover, as many Thai students are required to complete English preparatory courses before commencing their

degree studies (Wirojchoochut, 2019), increasing Thai language marketing and awareness would align with the needs of the target student demographic.

Practitioners similarly acknowledged the need for country-specific resources to better influence Thai students; however, the challenges in accessing and engaging with these mediums posed utilisation barriers. Again, a reluctance to invest in longer-term initiatives prevented practitioners at regional universities from embracing this type of country-specific recruitment strategy (Chin et al., 2023).

Agent/university relationship

Factor six then highlighted the importance of positive agent–university relationships as part of a country-specific recruitment strategy due to agents' influence on students' decisions. Specifically, the results show that Thai students view regional universities and their agents as aligned in a symbiotic and supportive relationship (6A and 6B). Given the relatively unregulated nature of the education agent industry (Nikula, 2022), the perception that universities are collaboratively engaged with their agents likely holds significant sway for Thai students, which fosters trust in the university and instils confidence in the agent's integrity and track record of faithfully representing the institution. This factor indicates that regional universities are managing their agent relationships sufficiently in Thailand and reinforces the notion that fostering these relationships remains an integral part of universities' country-specific recruitment strategies (Pimpa, 2004).

In-country presence

The agent theme was furthered in factor eight, wherein in-country agent presence and support emerged as influential factors in students' enrolment decisions. Specifically, the results show that Thai students highly valued the integrity and regional enrolment guidance provided by agents (8A and 8B). This finding reinforces observations that Thai students predominantly apply through agents when pursuing their studies in Australia (Huguan et al., 2020). By acting as a reputable extension of Australian universities in Thailand, agents can exert greater influence over students' decisions to enrol (Pimpa, 2003b).

This alignment signifies the importance of an in-country presence as part of a recruitment strategy and highlights the potential for increased collaboration between agents and regional universities.

Migration and job opportunities

From factor three, migration and job opportunities in regional locations were identified as influential to students' enrolment decisions.

Regional locations have favourable post-study migration opportunities for international students, as the Australian government provides longer stay opportunities and extra migration points (Forbes-Mewett et al., 2022). Although the results revealed that Thai students did not consider leaving Thailand as a major influence (3A), they still valued the option to stay if they enjoyed their experience (3D).

Additional influential benefits of studying in a regional location included relatively affordable tuition fees (3C) and job availability (3B). However, from the practitioner's perspective, it appears that regional universities do

not explicitly promote migration and job opportunities (Chin et al., 2023). This could be due to limitations placed on higher education institutions in terms of promotional content regarding these elements; consequently, universities primarily market pull factors such as academic strengths and student support (Nikula, 2022) within their overall and country-specific strategies. Therefore, it may be necessary for the relevant study syndicates, such as Study Toowoomba, Study Gold Coast, Study Adelaide and others, to highlight these pull factors in conjunction with agents. Collectively, these advocates could strengthen the appeal of regional study areas based on migration and job opportunities.

It appears that migration and job opportunities influence students' enrolment decisions, making them significant pull factors for institutions to incorporate into marketing and recruitment strategies. Strategic messaging regarding this factor would give regional universities a distinctive appeal compared with larger metropolitan institutions, and it seems imperative to leverage this pull factor.

Trust-building sources

Factor two, however, suggests that Thailand's universities have not allocated sufficient resources towards the proactive fostering of trust in the university brand. While the analysis revealed that trust in the university was a prominent pull factor in students' enrolment decisions (Table 2), trust-building strategies employed by universities through their marketing and recruitment are not adequately robust. First, students indicated that regional university marketing and recruitment strategies are not tailored to cater to the preferences and relatability of Thai audiences (2G and 2H), indicating a deficiency in adopting tailored approaches to building trust with Thai students and forgoing the strategic utilisation of this significant pull factor. This failure to capitalise on meaningful resonance with the target audience reinforces the previous finding that regional universities are reluctant to utilise country-specific strategies.

Second, there were observed deficiencies in the extent to which agents actively promoted regional universities. While the results showed that agents are trusted sources (2D), students believed that agents did not promote regional universities as extensively as large metropolitan universities (2B). Hence, students would logically regard larger universities with heightened trust, attributing this to the agents' more pronounced advocacy efforts.

This can be attributed to agents having numerous universities to promote and focusing on those with higher recruitment potential, thereby limiting regional universities' trust-building opportunities through this channel. Regional universities may also allocate less marketing funds and resources to Thai agents, as they might prioritise their comparatively smaller budgets on markets yielding more immediate returns (Healey, 2023).

Over time, regional universities could cultivate stronger agent advocacy by dedicating additional time and resources and offering assurance of their long-term commitment and support. This fosters heightened trust from the students' standpoint, effectively optimising the pull factor for regional universities.

Encouragingly, two specific items regarding agent and in-country representation emerged (2D and 2F), underpinning their significance in establishing student trust before enrolment. These findings bolster industry sentiments, highlighting the value of nurturing agent partnerships and organising trust-building in-person engagements in Thailand whenever feasible (Huguan et al., 2020).

In a departure from previous studies, the findings revealed that students' family members and friends no longer hold significant influence as sources of trust (2A and 2C) (Pimpa, 2005). This shift suggests a changing landscape, wherein Thai students might now prefer consulting their peers through online forums. To optimise this pull factor, universities recognise that sources of trust can change.

Overall, the findings revealed that trust plays a crucial role in influencing students' enrolment decisions, but regional universities need to effectively leverage these sources to fully harness this pull factor. The ability of regional universities to grasp and enhance trust-building sources hinges on their capacity for strategic ambidexterity. As a longer-term initiative, they must determine whether they can effectively balance this endeavour while faced with short-term targets and pressures from senior management.

The underlying factors identified through the PCA can be categorised into three organisational types of considerations and their interactions. The typology in Figure 3 indicates the aggregation of factors into each type of consideration and how the interaction may inform the decision to enrol.

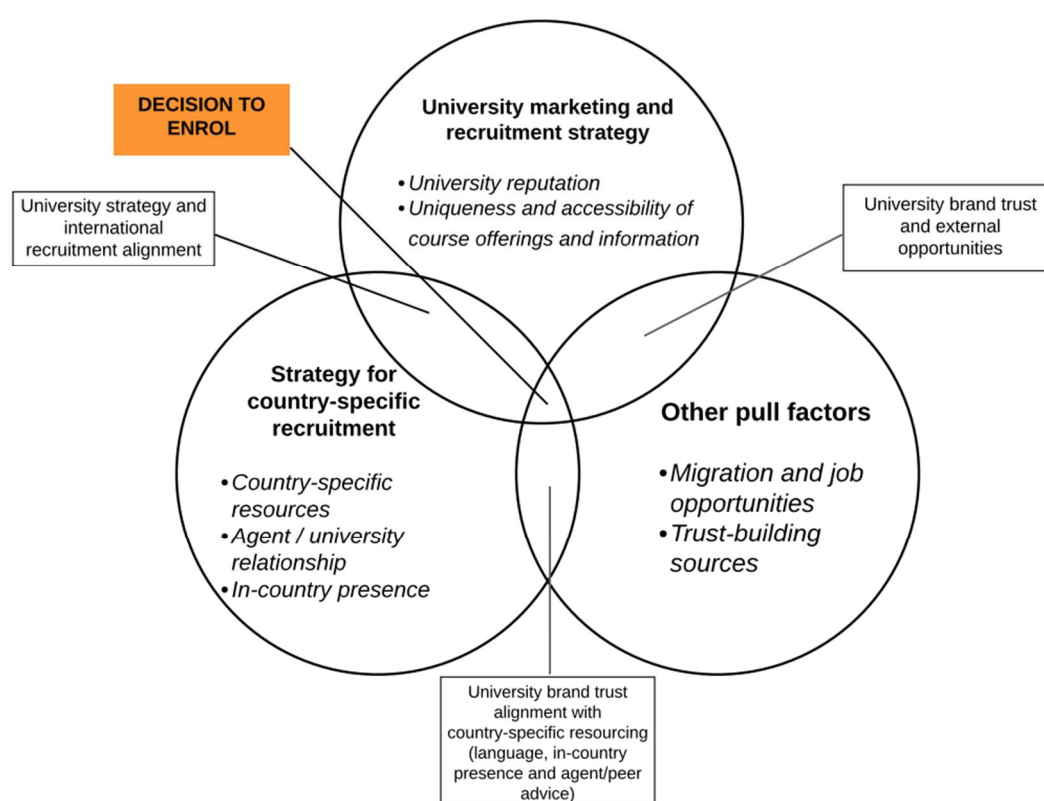


Figure 3: Typology based on the factors identified through the PCA

The typology presented in Figure 3 includes:

- University marketing and recruitment strategy: overarching strategies utilised by regional universities to recruit students.
- Strategy for country-specific recruitment: strategies utilised with more specificity towards recruiting Thai students.
- Other pull factors: additional pull factors not currently directly related to the overall or Thai-specific strategy of regional universities.

Recommendations

The findings imply that regional universities would benefit from a strategic ambidextrous approach when seeking to improve their marketing and recruitment strategies to have more influence over Thai students. While it may be commercially necessary to maintain an exploitative arm that concentrates on short-term gain markets, an exploratory approach is necessary for longer-term outcomes that uphold the sustainability of their strategic approach. The cultivation of emerging markets such as Thailand requires patience and an allocation of resources that may only result in gradual outcomes. This study revealed the potential for regional universities to enhance their reputation and foster greater trust in their university brand within Thailand. Therefore, regional universities should adopt a longer-term outlook that integrates their university marketing and recruitment strategies with country-specific strategic nuances and other pull factors. This way, regional universities can potentially attain first-mover advantages and gradually gain more influence over Thai students' enrolment decisions.

Building on the modified conceptual model and the typology, it is proposed that regional universities require a balanced framework for sustainable growth in recruiting Thai students:

1) Invest in relationships with education agents

The study underscored the role of agents in expanding university reputations in Thailand and cultivating trust. Therefore, agent relationships should be a priority within the Thailand strategy for regional universities. By maintaining open lines of timely and accurate communication, universities can adopt longer-term views with agents instead of pressuring them for immediate results. Establishing mutual trust will likely result in agents' willingness to advocate for regional universities.

2) Provide Thai language marketing resources

To enhance the relatability and visibility of universities to Thai students, regional universities should invest in Thai language marketing resources, including translating promotional materials, websites and social media content into Thai. This tailored approach will increase trust while growing universities' reputations with Thai audiences.

3) Develop long-term marketing strategies for local Thai audiences

To build students' trust, regional universities should develop comprehensive and long-term marketing strategies tailored to the Thai market, such as alumni testimonials, social media platforms and increased in-country presences. Consistent and targeted marketing efforts will help universities lift their reputation in Thailand.

4) Highlight post-study migration opportunities

Regional universities should integrate this significant pull factor into marketing strategies by partnering with study syndicates and agencies and emphasising potential career prospects and pathways unique to regional cities. Specific initiatives could involve showcasing alumni success stories of successfully pursuing post-study migration and using agent channels to highlight relevant information about visas, work permits and employment prospects.

5) Ongoing market research

To ensure adaptability to potential changes in political, economic and societal circumstances, regional universities must conduct research to maintain constant market awareness. By monitoring shifts in push and pull factors, universities can proactively respond to emerging trends.

This framework would foster increased trust and elevate the reputations of regional universities in Thailand. However, it is important that such initiatives be long-term and necessitate universities to embrace exploratory approaches. In essence, to achieve success in Thailand, universities must embrace strategic ambidexterity and acknowledge that longer-term country-specific strategies are necessary for increased trust in regional universities' brands.

To effectively implement these strategies, it may be necessary to involve Thai staff or form closer partnerships with education agents who have country-specific expertise. Regional universities should consider these longer-term market opportunities instead of taking an ad hoc approach, as their continued presence is crucial to supporting local communities.

Limitations and future research

Although this study provides valuable insights into Thai students' regional university enrolment decisions, several limitations should be acknowledged. First, students surveyed may be several years removed from the actual decision, and therefore their recollections of their decision-making process may be inaccurate. To address this, future research could focus on students who have recently finalised their enrolment, providing a timelier capture of their decision-making. Furthermore, with the evolution of digital marketing to engage students (Jain et al., 2022), it is worthwhile to investigate the influences that newer enrollees are exposed to.

Second, this study focused only on regional Australian universities. While the findings provide valuable insights for these institutions, it is advisable to investigate the results' applicability to other university types. The findings are specific to Thailand but may have broader applicability for regional universities seeking expansion into emerging markets. Universities must adopt market-specific approaches to effectively engage with potential students and prioritise factors that meet the preferences of the target audience so that they can achieve success in diverse markets and establish themselves as sustainable study destinations for students worldwide.

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