THE GLOBAL INTERNATIONAL STUDENT LANDSCAPE: OHIO UNIVERSITY IN COMPARATIVE PERSPECTIVE

Ohio University
• This presentation was delivered by ICG at Ohio University on 29 April 2015.

• The presentation shall be considered incomplete without oral clarification.

• The opinions expressed in this presentation are those of the authors alone.

• International student enrollment data was sourced from a variety of national-level sources. ICG cannot vouch for the accuracy of the underlying data collection and reporting methods.

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Introduction and Housekeeping

International Student Mobility: A Global Perspective

International Student Enrollment in the United States

International Students at Ohio University

Comparative Perspectives

Looking Forward

Discussion
• This session will provide a data-driven overview of the competitive landscape of international student recruitment.

• A discussion of international student mobility trends in and out of major destination countries including Australia, Canada, China, Germany, and the UK will provide context for Ohio University’s international student recruiting efforts.

• The session will highlight key international enrollment trends in the U.S., with a particular focus on the Midwest region and Ohio specifically.

• Data on international student enrollment at Ohio University will be analyzed to identify key factors that attract international students and opportunities to support growth.
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Discussion
• This section will provide an introductory perspective on the global demand for international study opportunities.

• Data presented will focus on international student enrollment levels in select leading student destination countries.
The U.S. has remained the most attractive destination by far

Notes: Methodology revised for Australia between 2001 and 2002 and for the UK between 2007 and 2008.
Source: AEI, CIC, DAAD-DZHW, HESA, IIE.
Different growth trajectories are evident

Notes: Full-degree students only (i.e., excluding exchange students). Data not available for all countries for all years.
Source: CIMO, Education in Ireland, Nuffic, NZ MoE, SIU, UFM, UKA.
International Student Enrollment in Australia by Sector (2002-13)

Enrollments: VET and Schools are still declining, ELICOS and Higher Ed recovering

Note: VET is Vocational Education and Training. ELICOS are English Language Intensive Courses for Overseas Students.
Source: AEI.
India and China have driven growth dynamics – up and down
International Student Enrollment in Canada
All Sectors (Total, 2000-13)

Enrollment growth markedly accelerated after 2008; 10.6% growth from 2012 to 2013

Source: CIC.
China’s enrollment share has increased from 9.7 to 30.4 percent

Notes: 2013 enrollment data by country not yet available.
Source: CIC.
INTERNATIONAL STUDENTS IN GERMANY
International Higher Education Students by Top Ten Source Countries

International Higher Education Student Enrollment in Germany by Sector (2000-13)

Universities are the main attractor of international students

Notes: Includes Bildungsausländer and Bildungsinländer.
Source: DAAD-DZHW.
European countries drive enrollments

Notes: Includes Bildungsausländer and Bildungslnländer.
Source: DAAD-DZHW.

Strong growth from China since 2009, but 2013 saw an overall decline
Downturns from a few key markets beginning in 2011

Source: HESA.
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Discussion
• This section will break down trends in international student mobility into the United States.

• Discussion will center on trends from key source countries; at different levels of study; and in different fields of study.

• High-level context will be shared on international enrollment dynamics in the Midwest states and in the state of Ohio.
Enrollments are up, but…

Notes: Includes non-degree (e.g., language students) and OPT.
Source: IIE.

INTERNATIONAL STUDENTS IN THE UNITED STATES
International Higher Education Students by Top Ten Source Countries
International Higher Education Student Enrollment in the United States (2001-14)

... essentially being driven by two countries.

Notes: Includes non-degree (e.g., language students) and OPT.
Source: IIE.
International Students in the United States by Academic Level (2000-2014)

Growth at the undergrad level, but also much more non-degree and OPT

Notes: Includes non-degree (e.g., language students) and OPT.
Source: IIE.
Chinese students account for nearly 40% of undergraduates

Source: IIE.
Indian students largely study at the graduate level

Source: IIE.
International Student Enrollment in the United States by Field of Study (2009-2014)

Business and Engineering most popular by far

Notes: Includes non-degree (e.g., language students) and OPT. Study field data reported prior to 2009 not comparable to current data.

Source: IIE.
International Student Enrollment in the United States by Primary Source of Funding (2001-2014)

Growth in self-funded students since 2010 largely from China

Notes: Includes non-degree (e.g., language students) and OPT.
Source: IIE.
Ohio hosts the 8th largest international population among U.S. states

Notes: Includes non-degree (e.g., language students) and OPT.
Source: IIE.
International Student Enrollment in the Midwest States
(Indexed, 2010 = 100)

Most growth among Midwest in Ohio since 2010, but others not far behind

Notes: Includes non-degree (e.g., language students) and OPT.
Source: IIE.
Nearly 75% of international students in Ohio come from only 4 countries.

Notes: Includes non-degree (e.g., language students) and OPT.
Source: IIE.
International enrollment in the state is increasingly concentrated

Notes: Includes non-degree (e.g., language students) and OPT.
Source: IIE.
Focus on international student enrollment growth and retention: Emphasis on economic impact during and after study, contribution to innovation in the state, intercultural benefits for the Ohio population.

Recommends the creation of a statewide consortium to support talent attraction: Ohio Global Reach to Engage Academic Talent (G.R.E.A.T.)

Three-pronged policy framework:

1) “Promote Ohio as a postsecondary destination globally”
2) “Encourage international postsecondary students to remain in the state beyond their study”
3) “Enhance global economic competitiveness for native Ohio students”

What will the role and contribution of Ohio University be in a state-level effort?

How can Ohio University leverage the state effort while distinguishing itself as an institutional destination?
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Discussion
• This section will provide an overview of international student enrollment trends at Ohio University.

• Discussion will highlight opportunities for the University to diversify its international student recruitment at the undergraduate and graduate levels, and in different fields of study.
Overall enrollment increased by more than 30% from 2008 to 2014

Notes: Headcount as of fall term of each year. Includes undergraduate and graduate students.
Source: Ohio University.

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Ohio University: The Global International Student Landscape – 29 April 2015
International enrollment decreased slightly from 2013 to 2014...

Notes: Headcount as of fall term of each year. Includes undergraduate and graduate students.
Source: Ohio University.
INTERNATIONAL STUDENTS AT OHIO UNIVERSITY
International Student Enrollment at Ohio University

International Student Enrollment at OHIO by Top Ten Source Countries (2008-14)

- China
- Saudi Arabia
- India
- Brazil
- Ghana
- Oman
- Iran
- Canada
- Turkey
- Nepal

...due to declining Chinese and Saudi enrollments

Notes: Headcount as of fall term of each year. Includes undergraduate and graduate students.
Source: Ohio University.
China and Saudi Arabia account for half of OHIO’s international students

Notes: Headcount as of fall term of each year. Includes undergraduate and graduate students.
Source: Ohio University.

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International Student Enrollment at OHIO by Level of Study (2008-14)

Disparate enrollment trends

Notes: Headcount as of fall term of each year.
Source: Ohio University.
International Undergraduate Student Enrollment at OHIO by Source Country (2008-14)

Consistent growth from 2009 to 2013, but drop in 2014

Notes: Headcount as of fall term of each year.
Source: Ohio University.
China down notably – few countries rising quickly enough to offset
International Undergraduate Student Enrollment at OHIO Concentration Level by Source Country (2012)

Top 2: 67.1%  
Top 5: 83.7%  
Top 10: 89.7%

Notes: Headcount as of fall term of each year.  
Source: Ohio University.
Graduate student enrollment recovering, but still below 2008 level

Notes: Headcount as of fall term of each year.
Source: Ohio University.

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Indian students – rapidly changing decision patterns

Notes: Headcount as of fall term of each year.
Source: Ohio University.
Graduate population more balanced – how to maintain by design?

Notes: Headcount as of fall term of each year.
Source: Ohio University.
INTERNATIONAL STUDENTS AT OHIO UNIVERSITY
International Undergraduate Student Enrollment by College

International Undergraduate Student Enrollment at OHIO by College (2008-14)

Notes: Headcount as of fall term of each year.
Source: Ohio University.

Enrollment trends differ across Colleges
INTERNATIONAL STUDENTS AT OHIO UNIVERSITY
International Graduate Student Enrollment by College

International Graduate Student Enrollment at OHIO by College (2008-14)

Notes: Headcount as of fall term of each year.
Source: Ohio University.

Significant decline in Business enrollments
• What international student segments are attracted to Ohio University?
  A combination of:
  • Country of origin
  • Academic background and capability
  • Language proficiency
  • Desired outcomes (workforce entry, immigration, etc.)
  • Ability to pay
  • Social and cultural expectations
  • Professional experience (largely at the graduate level)

• What programs and activities have been oriented to prepare students
  (domestic and international) for a global market? How have these
  reached international students?
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Significant growth at Ohio State in recent years

Notes: Data as of fall term of each year.
Source: Universities.
2008: Chinese students account for much higher share of international students at OHIO, more varied source country distribution for OSU

Notes: Data as of fall term of each year.
Source: Universities.
2014: Chinese student enrollment grew fourfold at OSU since 2008, accounting for 60% of its international students.
10-20% international student enrollments are not uncommon

Source: Universities.
Notes: Includes undergraduate and graduate students.
Source: University of British Columbia.

Sizable U.S. contingent, strong growth from China
International Student Enrollment at UBC
Concentration Level by Source Country (2014)

Top 2: 42.6%
Top 5: 54.4%
Top 10: 65.9%

China
United States
India
South Korea
Japan
United Kingdom
Iran
Hong Kong
Brazil
Malaysia

Diversified recruiting pipelines offset Chinese student concentration

Notes: Includes undergraduate and graduate students.
Source: University of British Columbia.
Several countries account for more than 500 students each

Notes: Includes undergraduate and graduate students.
Source: University College London.
### International Student Enrollment at UCL

#### Concentration Level by Source Country (2014)

<table>
<thead>
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<th>Country</th>
<th>Enrollment</th>
<th>Top 2: 24.2%</th>
<th>Top 5: 39.3%</th>
<th>Top 10: 55.3%</th>
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</table>

Notes: Includes undergraduate and graduate students.
Source: University College London.
• Increase share of international students relative to total student body.

• Diversify the international student population (risk management).

• Develop a multi-channel recruiting portfolio to support the above goals:
  • Direct recruiting (fairs and events)
  • Partnerships with governments/government agencies (sponsored students)
  • Partnerships with feeder schools and foreign universities
  • Faculty-based connections and activities
  • Agents
  • Alumni networks
  • Others…
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Where will growth in international student mobility come from in the next five years? Beyond?

How will the globally mobile student pool change? Education background? Language proficiency? Ability to pay?

What kinds of experiences and outcomes will international students be looking for?

Is Ohio University prepared to attract and support a growing and more diverse population of international students?

What is Ohio University’s value proposition for international students? How will this change?
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Discussion
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