Three megatrends shaping the future of international student mobility

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Dr. Rahul Choudaha
Rahul@DrEducation.com | DrEducationBlog
USA
Megatrend?

a long-term, transformational process with global reach, broad scope, and a dramatic impact (John Naisbitt, 1982)
Events shaping megatrends

2001
- 9/11
  - Attractiveness of UK and Australia

2007/08
- Global Financial Recession
  - Attractiveness of the US

2016
- ?
  - ?
3 Trends

Strategic Response

Strategy 2020
3 Trends

Shifting Demand/Supply of Global HigherEd

Response
Demand for tertiary education

Gross Enrollment Ratio at Tertiary Level

<table>
<thead>
<tr>
<th>Country</th>
<th>Lower middle income countries</th>
<th>Upper middle income countries</th>
<th>High income countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>14</td>
<td>25</td>
<td>67</td>
</tr>
<tr>
<td>Indonesia</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kenya</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vietnam</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td></td>
<td>74</td>
</tr>
<tr>
<td>China</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Malaysia</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>US</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: UNESCO Institute of Statistics
Concern of meeting enrollment goals

- Very concerned: 47%
- Moderately concerned: 32%
- Not too concerned: 17%
- Not concerned at all: 5%

Source: The 2014 Inside Higher Ed Survey of College and University Admissions Directors, Inside Higher Ed
Demand for international education

Share of international students as a percentage of tertiary level enrollment (%)

Source: OECD Education at a Glance
## Demand by level of education

<table>
<thead>
<tr>
<th>Country</th>
<th>Bachelor’s level</th>
<th>Master’s level</th>
<th>Doctorate level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>13.1</td>
<td>40.2</td>
<td>33.5</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>13.7</td>
<td>36.9</td>
<td>25.0</td>
</tr>
<tr>
<td>New Zealand</td>
<td>14.3</td>
<td>23.0</td>
<td>42.5</td>
</tr>
<tr>
<td>Canada</td>
<td>8.1</td>
<td>14.0</td>
<td>45.4</td>
</tr>
<tr>
<td>United States</td>
<td>3.5</td>
<td>8.8</td>
<td>34.7</td>
</tr>
<tr>
<td>OECD total</td>
<td>4.9</td>
<td>27.4</td>
<td>12.4</td>
</tr>
</tbody>
</table>

Share of international students as a percentage of tertiary enrollment, by level (%)

Source: OECD Education at a Glance
The dragon in the room

Outbound mobility by country of origin

<table>
<thead>
<tr>
<th>Country</th>
<th>1999</th>
<th>2006</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malaysia</td>
<td>54,255</td>
<td>49,000</td>
<td>56,260</td>
</tr>
<tr>
<td>India</td>
<td>55,436</td>
<td>145,539</td>
<td>181,872</td>
</tr>
<tr>
<td>South Korea</td>
<td>68,129</td>
<td>104,763</td>
<td>116,942</td>
</tr>
<tr>
<td>China</td>
<td>123,076</td>
<td>407,280</td>
<td>712,157</td>
</tr>
</tbody>
</table>

Source: UNESCO Institute of Statistics

Asia countries are considered international students, who choose to study in other countries. This includes students from China, India, South Korea, Malaysia, and others.
Economic growth...

Source: Global Economic Outlook 2014–2020, A.T. Kearney
Population growth…

Diversifying with New Markets

Making strategic choices >>>
3 Trends

Response

Shifting Demand/Supply of Global HigherEd

Diversifying with New Markets

Evolving Segments and Needs of Students
Complexity of decision-making processes

Adapted from: Cubillo, et al. (2006)
“Not All International Students Are The Same: Understanding Needs, Mapping Behavior”


<table>
<thead>
<tr>
<th>Financial Resources</th>
<th>High</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>STRUGGLERS Immigration</td>
<td>'Global' - not interested in Transnational Education</td>
<td>STRIVERS Advancement</td>
</tr>
</tbody>
</table>
‘Glocal’ students

‘Glocals’ are expanding segment of students seeking international education experience/credential while staying in the country or region

- One out of five students studying wholly overseas for a UK degree through a distance learning program (HESA, UK)
- 70% of international students in Japan are from China, Korea and Vietnam
- More Malaysian students in branch campuses of UK universities (45,000) than those going to the UK (15,000)
- 21% of all foreign students in OECD countries came from countries that share land or maritime borders
- 11,825 Indian students pursued MBBS from China in 2012-2014 and appeared in test to practice in India
Diverse students-global vs. glocal

Source: Choudaha, R. Know your international student-global or glocal? University World News.
Engaging with New Students

Knowing the customer (student) >>>>
3 Trends

- Shifting Demand/Supply of Global HigherEd
- Evolving Segments and Needs of Students
- Maturing Technology and Educational Delivery

Response

- Diversifying with New Markets
- Engaging with New Students
Transnational Education (TNE)

TNE is broadly defined as: “all types of higher education study programs, or sets of courses of study, or educational services (including those of distance education) in which the learners are located in a country different from the one where the awarding institution is based.”


<table>
<thead>
<tr>
<th>Resources Control Complexity</th>
<th>Type of TNE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Validation</td>
</tr>
<tr>
<td></td>
<td>Franchise</td>
</tr>
<tr>
<td></td>
<td>Twinning program</td>
</tr>
<tr>
<td></td>
<td>Fly-out model</td>
</tr>
<tr>
<td>High</td>
<td>Dual degree program</td>
</tr>
<tr>
<td></td>
<td>Joint degree program</td>
</tr>
<tr>
<td></td>
<td>International branch campus</td>
</tr>
</tbody>
</table>
Issues of Recognition and Quality Assurance

“...in many countries [quality assurance and recognition of qualifications] were still not geared to addressing the challenges of cross-border provision”
Currently we are hosting three US universities and one European university. Furthermore, we are planning to host ten of top universities in the world by 2025.

Please visit our website as often as possible for the latest information.

Korea
Korea Global Campus
GEORGE MASON UNIVERSITY
GHENT UNIVERSITY
THE UNIVERSITY OF UTAH ASIA CAMPUS
“It forecasts a future where education will be unbundled and degrees will be disaggregated ‘into smaller credential units…with the possibility that the credentialing entity may be different from the institution that offers the course”.

Reinventing MIT Education together.

“I believe we can and should take the lead in helping to invent the future of education more broadly — both on our campus and beyond.” – President L. Rafael Reif

The Institute-wide Task Force on the Future of MIT Education has released its preliminary report. Read the full report (PDF) here.
Emergence of new alternative providers

- “A recent and growing sector of higher education composed of companies or organizations that offer higher education experiences operating apart from traditional colleges and universities” (CHEA)

- “If you apply and are accepted into the on-campus or online program that is associated with your MicroMasters program, the MicroMasters credential will count toward the degree.”
Experimenting with New Models

Defining your value proposition >>>
3 Trends

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