

# **INTERNATIONAL PERSPECTIVES ON UNIVERSITY TEACHING AND LEARNING SYMPOSIUM**

**Global, National, and University Trends**

- **This presentation was delivered by ICG at the Auburn University Symposium on International Perspectives on University Teaching and Learning in Orlando on 1 June 2018.**
- **The presentation shall be considered incomplete without oral clarification.**
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## **Introduction and Housekeeping**

**A Brief Timeline of International Education**

**A Perspective on Global Student Mobility Trends and Drivers**

**International Students Accessing the U.S.**

**U.S. University Perspectives: Rankings, Reputation, and Talent Attraction**

**Implications**

**Discussion**

## Housekeeping

- **This presentation is geared towards 40 minutes of presentation time, with additional time allotted for discussion.**
- **The presentation will be made available as a PDF file through the Symposium / Auburn University, as well as ICG.**

## A Few Questions to Get Started

- **Who has an international background?**
- **Who has studied, taught, or researched outside of the U.S.?**
- **Who deals with international issues – students, faculty, or programs – at their institution?**
- **Who do you think are leaders in international education – at a national and institutional level?**
- **Do you think internationalization themes are fully understood and implemented in your institution?**
- **Bonus question: Who do you think was the most helpful U.S. President for international education over the last 30 years?**

## Seven Numbers

- **1974**      **John Wayne**
- **1981**      **Go west or bust**
- **1987**      **Corner of Oxford and Kirkland**
- **1991**      **Harvard**
- **1999**      **San Francisco**
- **2002**      **ICG**
- **2017**      **Vancouver**

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## A Brief Timeline of International Education

- **1945** Post-WW II order commences led by the U.S.
- **1950s** Tail end of U.S.-bound migration of European scientists who had fled to the UK until 1945
- **1960s** Roll-out of technology and modern management concepts solidifies U.S. dominance as science and talent destination
- **1970s** U.S. continues its dominance, leaden silence otherwise
- **1980s** First stirrings of European mobility and research strategy
- **1990s** Major disruptions: Collapse of the East Bloc, emergence of the Internet, sprouts of Asian wealth creation
- **2000s** Rapidly emerging commercialization of IE results in real market dynamics, Australia leads the way. 9/11 generates a shock to the U.S. IE landscape
- **2010s** U.S. dominance is waning, global policy disruptions emerge, technology is upending past rules, China fully emerges, ...



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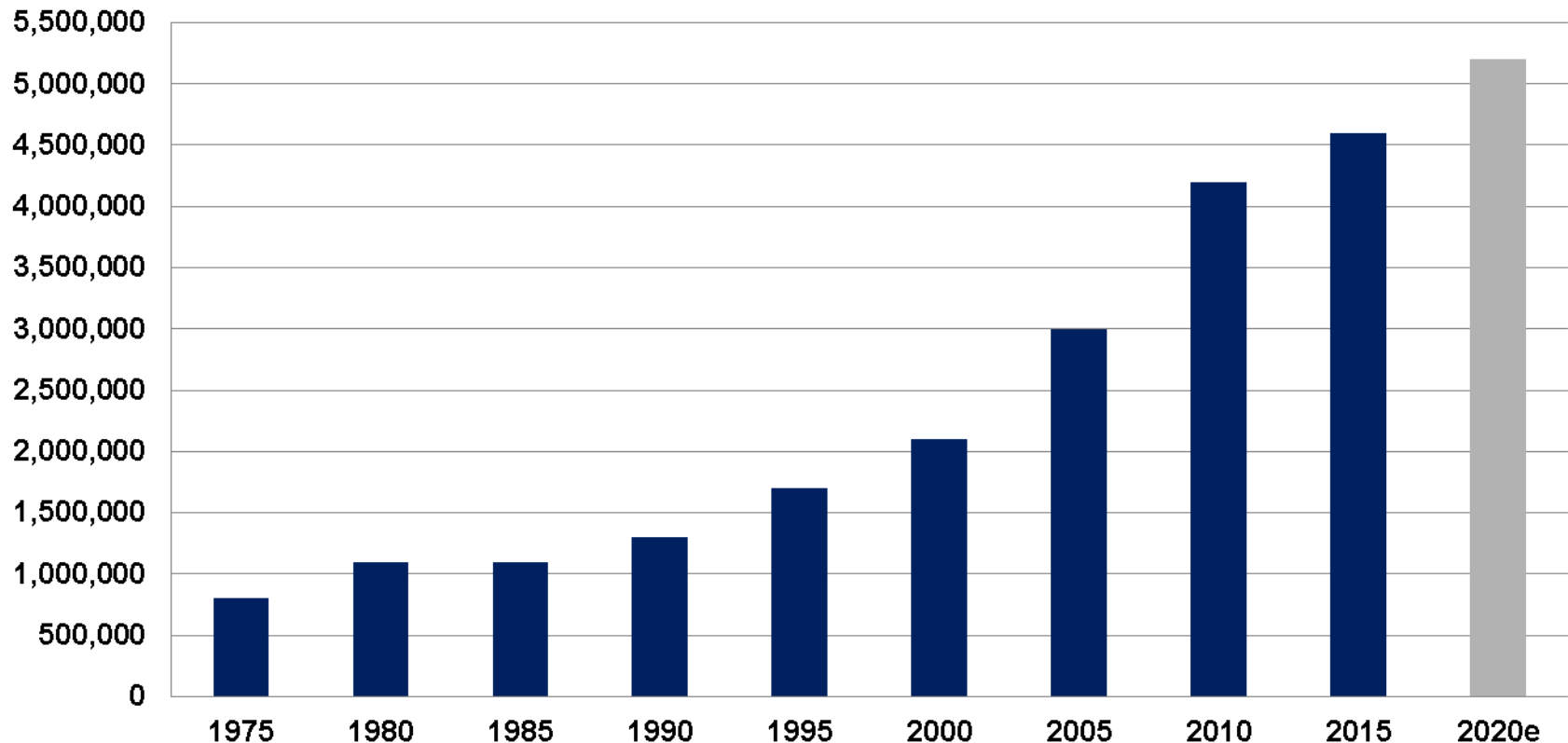
## Introduction

- The following discussion centers on elements of international education that have been measured for decades, students.
- Global student mobility data is of moderate quality at best – often delayed and incomplete, and sometimes meaningless.
- In fact, no agreed-on unit definition of “one international student” exists.
- Still, student data is more complete than faculty data, and more concise than revenue data if one accepts geographic gaps (e.g., Africa) and conceptual misalignments (e.g., student status).
- The following data discussions should thus be treated as indicative rather than definitive.

# INTERNATIONAL STUDENT MOBILITY TRENDS

## Total International Higher Education (Tertiary) Students

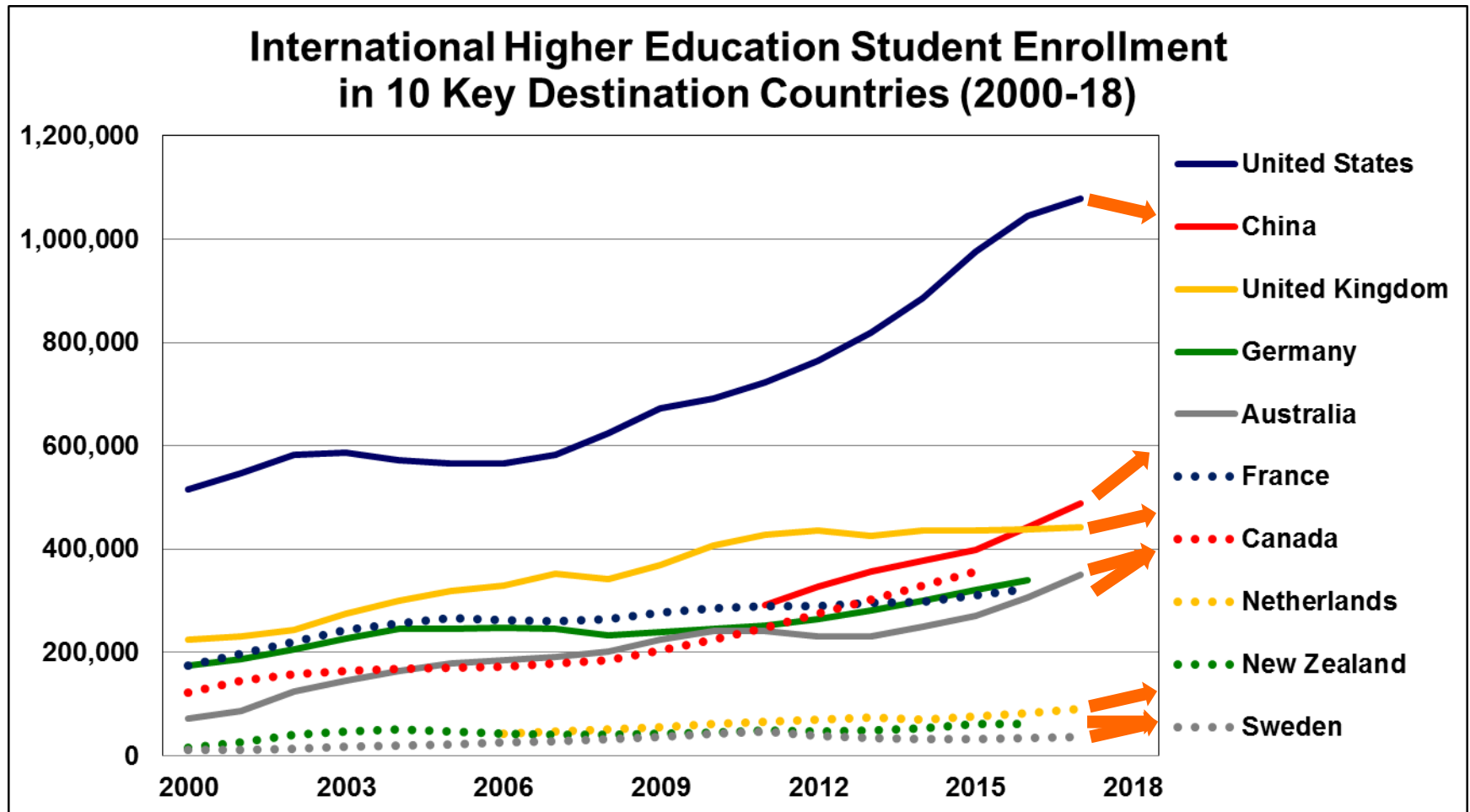
**Foreign Students Enrolled in Tertiary Education  
Outside their Country of Origin (Worldwide, 1975-2020e)**



**Strong growth acceleration since the early 2000s**

# INTERNATIONAL STUDENT MOBILITY TRENDS

## Ten Key Destination Countries: Data



**Overall, sustained growth but trajectories differ**

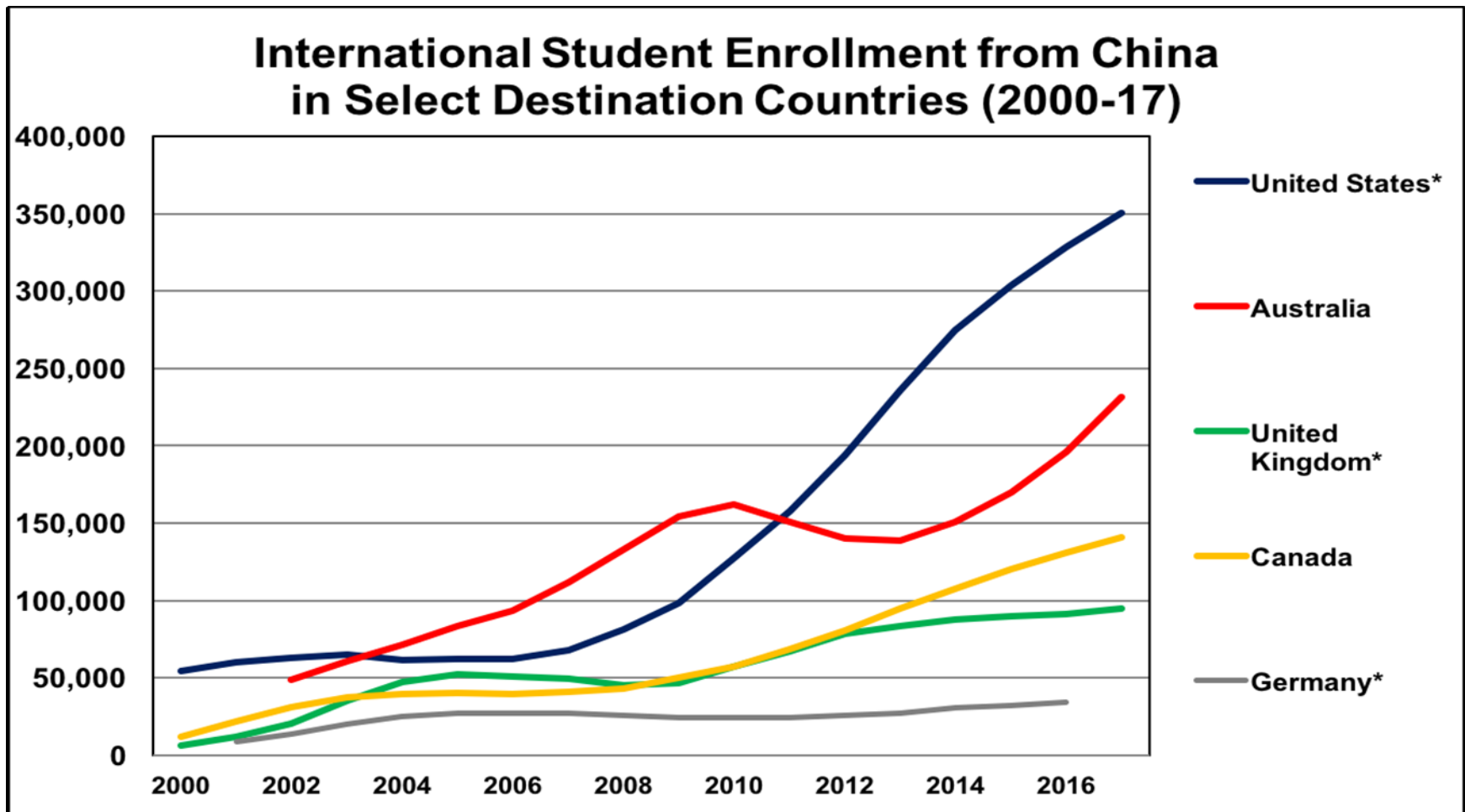
### **Top Five Destination Countries Trends**

- **USA:** Strong recovery from post 9/11 enrollment losses starting in 2007. Recent growth was driven by China (Saudi Arabia). Declines kicked in in 2017.
- **China:** Rapid emergence as a destination with a target of 1,000,000 students. Shift into full-degree students, supported by 58,600 scholarships in 2017.
- **UK:** Balanced recruiting operations produced strong enrollment gains in the past. Flat enrollments since 2013 owing to policy crack downs and Brexit.
- **Germany:** Flat enrollment in mid-2000s but strong growth lately – much driven by (Eastern) European mobility patterns, and no fees (except BW & NRW).
- **Australia:** After two decades of growth, Australia experienced a reversal across most sectors half a decade ago. A five year recovery is running its course now.

**International student enrollment: There is no perpetual growth**

# INTERNATIONAL STUDENT MOBILITY TRENDS

## Key Sending Countries: Data



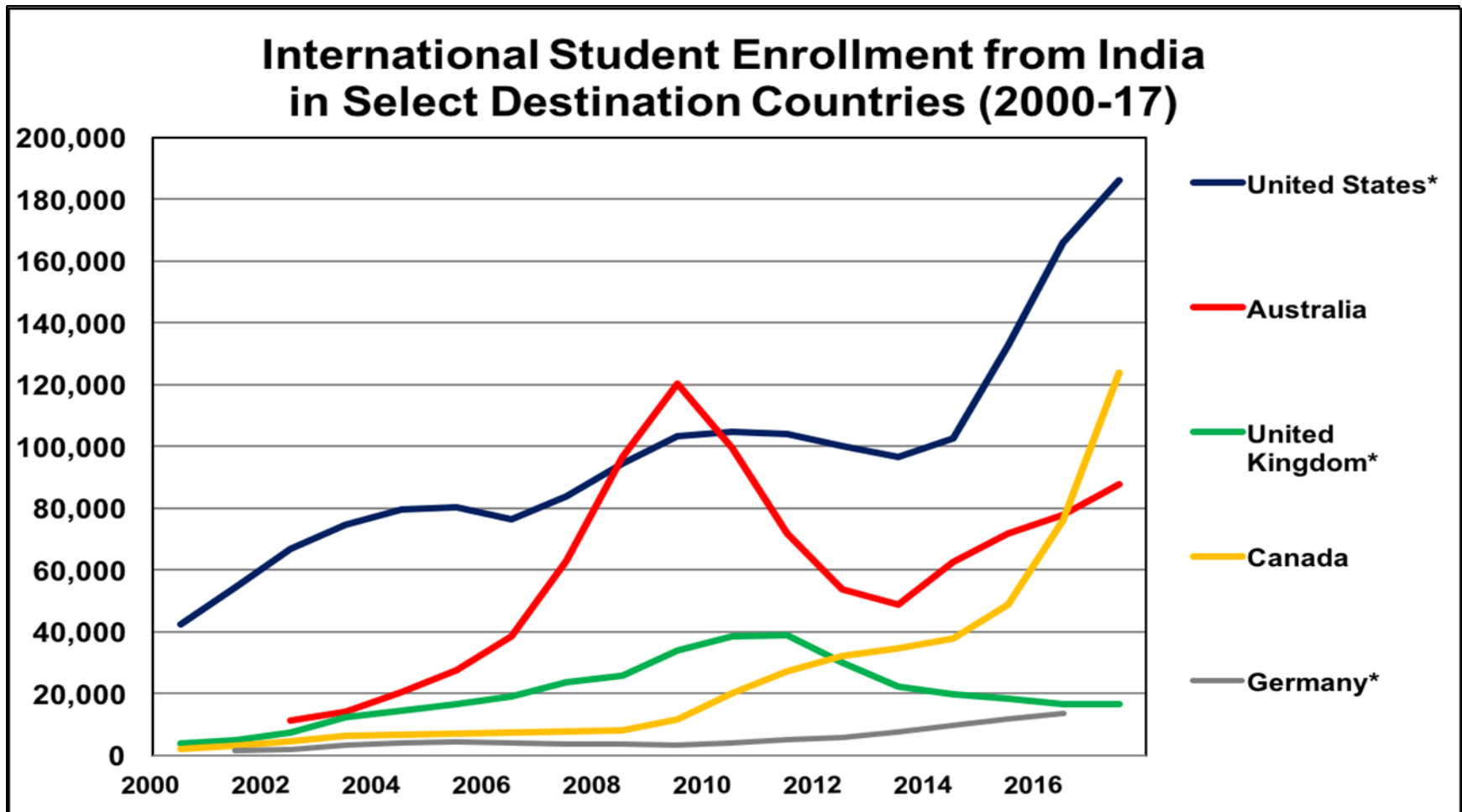
**Strong overall growth with the U.S. and Australia as key destinations**

Note: For countries marked with an asterisk (\*), data includes only enrollments in higher education institutions.

Source: AEI, HESA, HIS, IIE, IRCC.

# INTERNATIONAL STUDENT MOBILITY TRENDS

## Key Sending Countries: Data



**Heavily volatile trends owing to acute ROI-driven behavior**

Note: For countries marked with an asterisk (\*), data includes only enrollments in higher education institutions.

Source: AEI, HESA, HIS, IIE, IRCC.

### Top Two Sending Countries Trends

- **China:** Chinese students have powered international education enrollments in many key destination countries, including the U.S. About 90 percent are self-paying, and a majority are enrolled at an undergraduate level. These students' level of academic capability and arguably interest in socio-cultural integration has dropped notably compared to Chinese students from decades ago.
- **India:** Indian students are often driven by work and/or immigration considerations which have shaped their choice of subjects, regional preferences, and transactional approach to their studies. Their ROI-driven behavior can serve as an acute test of institutional and national attraction strength .

No real number three is in sight at this time



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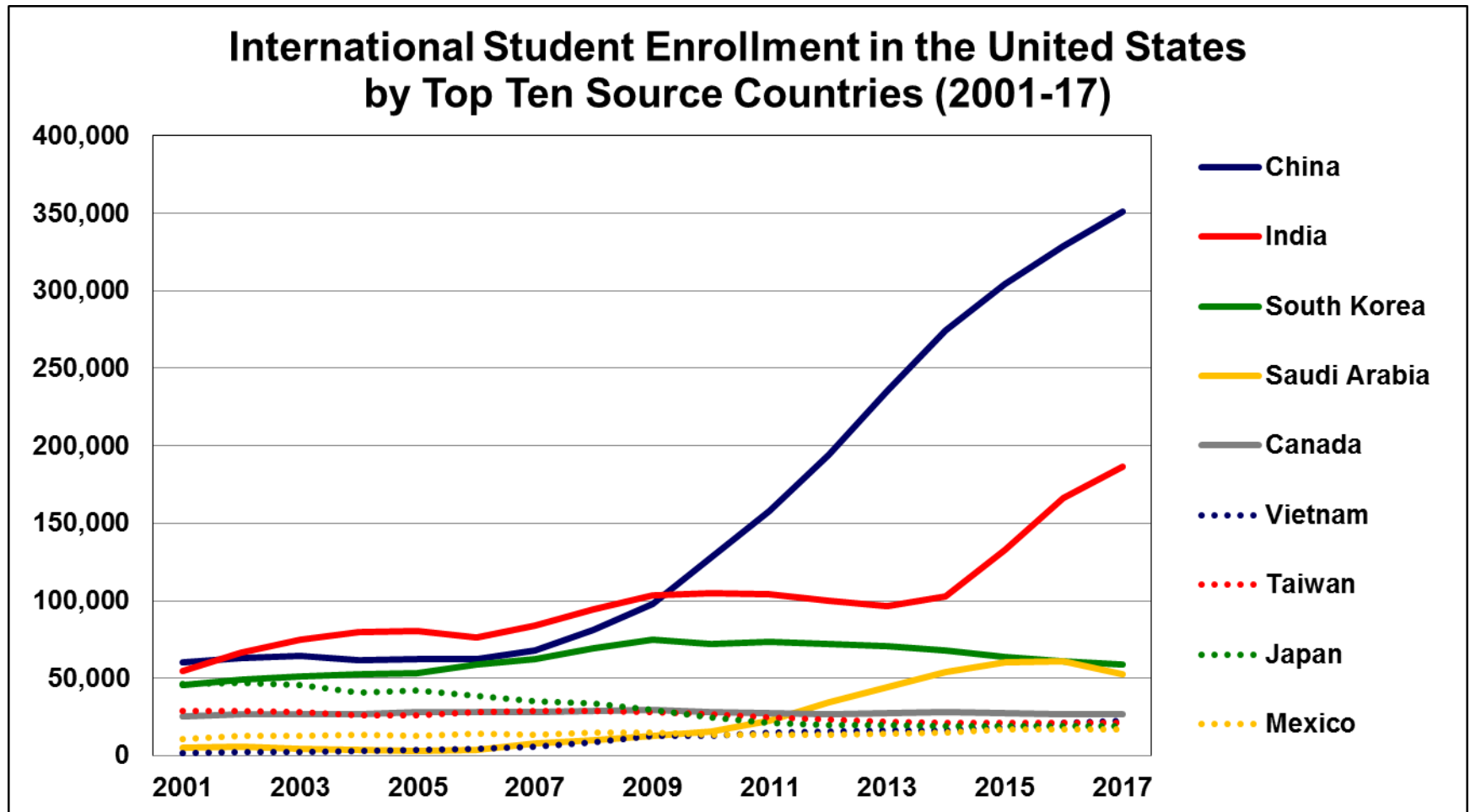
**Discussion**

## Introduction

- **International student enrollments in the U.S. have undergone multiple large scale shifts:**
  - **For one, simple sustained growth with total enrollments topping one million (includes OPT).**
  - **Second, from graduate towards undergraduate, and from exchange / scholarship to self-paying students.**
  - **Third, from a somewhat balanced portfolio to one driven by demand surges from countries such as China, India, and Saudi Arabia.**
  - **Fourth, from an above-average talent pool to a rather “differentiated” group of international students**
- **Perceptions matter – by late 2016, the attraction of the U.S. started to wane. By 2017, numbers have borne out this trend.**

# INTERNATIONAL STUDENTS IN THE UNITED STATES

## International Higher Education Students by Top Ten Source Countries



**China, then a big gap, then India, and another big gap**

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

Source: IIE.

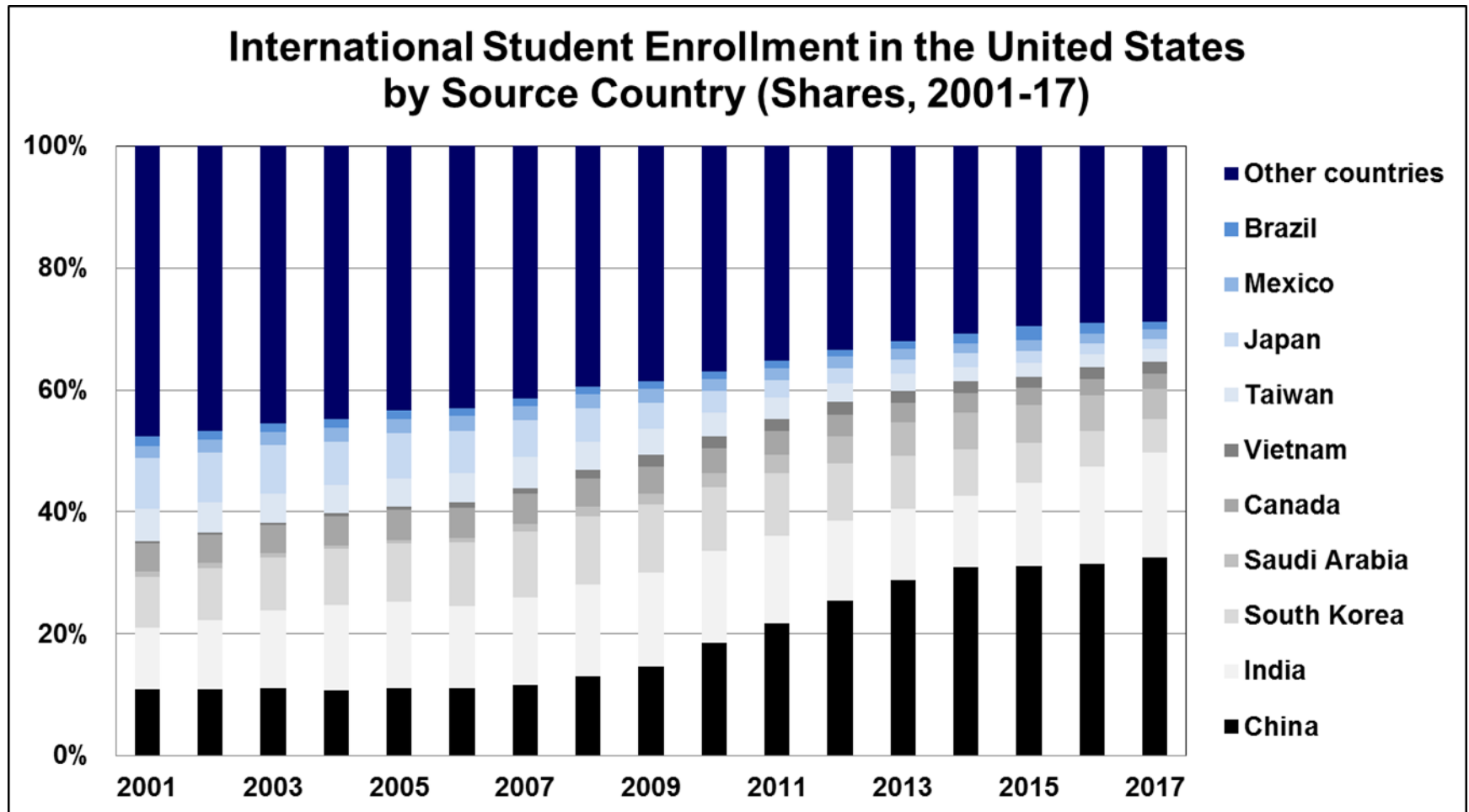
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# INTERNATIONAL STUDENTS IN THE UNITED STATES

## International Higher Education Students by Top Ten Source Countries



**China and India account for a full half of all international students**

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

Source: IIE.

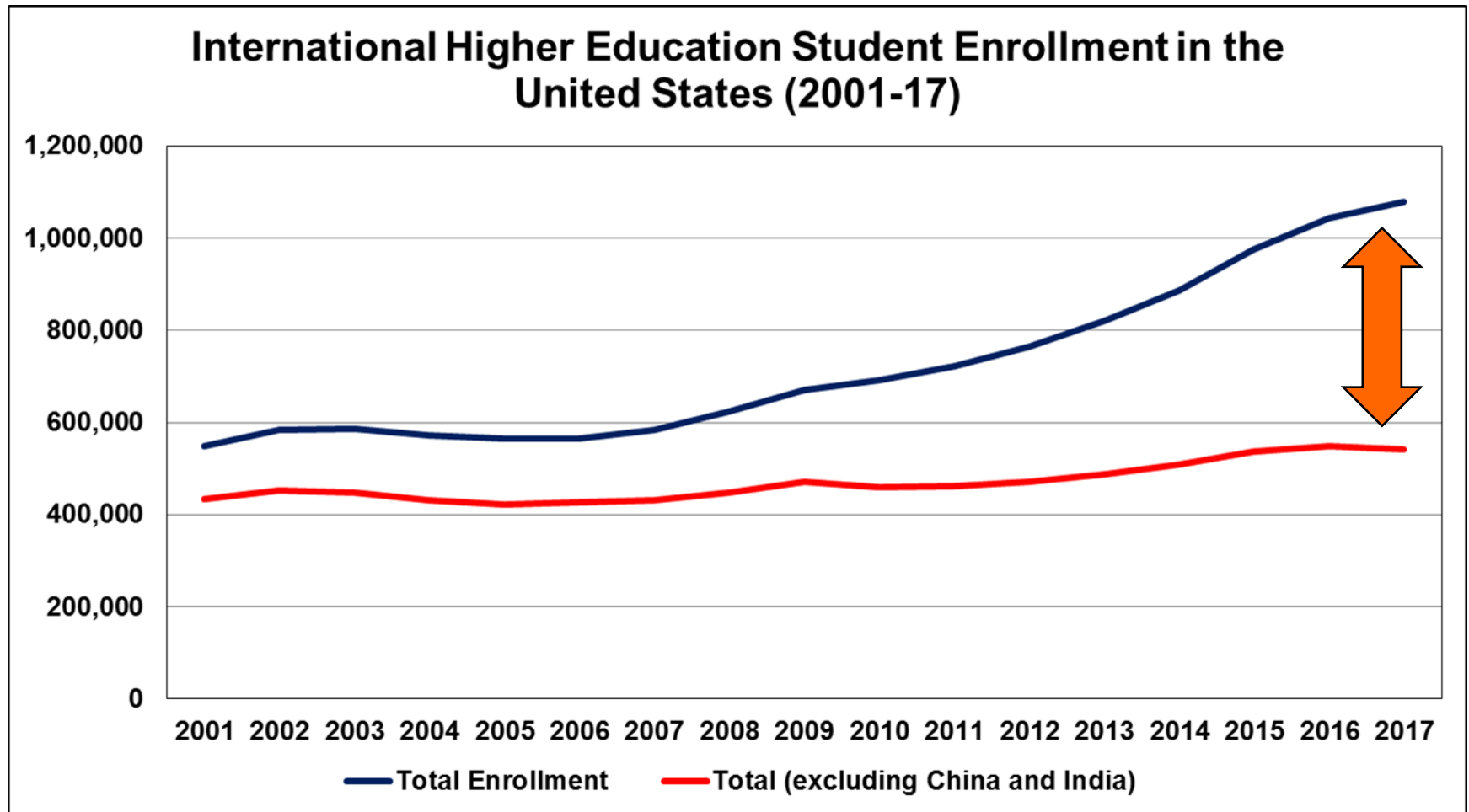
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# INTERNATIONAL STUDENTS IN THE UNITED STATES

## The U.S. Juggernaut is a Mirage



**IE in the U.S. has grown and become less international at the same time**

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

Source: IIE.

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## **Section Overview**

- **Rankings**

- From U.S. News to international rankings
- What international rankings measure
- Performance of U.S. universities in international rankings

- **Reputation**

- What does “reputation” mean?
- How is reputation measured?
- Performance of U.S. universities in international reputation surveys

- **Talent Attraction**

- Rankings, reputation and talent attraction in institutional perspective

### **Rankings: Introduction**

- **In the U.S., one domestic ranking is fairly dominant – U.S. News.**
- **Other U.S. rankings include:**
  - **Business Insider; Council for Aid to Education; The Daily Beast's Guide to the Best Colleges; The Economist's "America's Best Colleges. The Value of University"; Educate to Career rankings; Faculty Scholarly Productivity rankings; Forbes; Money's "Best Colleges"; The Princeton Review Dream Colleges; Niche; Parchment et al; Social Mobility Index (SMI); The Top American Research Universities; TrendTopper MediaBuzz College Guide; UniversityBenchmarks Academic Rankings; University Entrepreneur Report; The Wall Street Journal / Times Higher Education College Rankings; Washington Monthly national universities rankings; and "What will they Learn?" Report - American Council of Trustees and Alumni.**

**Outside of the U.S., the above matter little or, actually, not at all**



# RANKINGS, REPUTATION, AND TALENT ATTRACTION

## Rankings: 21 International University Rankings

	'03	'04	'05	'06	'07	'08	'09	'10	'11	'12	'13	'14	'15	'16	'17
Academic Ranking of World Universities (ARWU, aka Shanghai Ranking)															
Ranking Web of Universities (Webometrics Ranking)															
World University Rankings (Quacquarelli Symonds (QS))															
University Web Rankings & Reviews (4 International Colleges & Universities (4ICU))															
Performance Ranking of Scientific Papers for World Universities (NTU (formerly HEEACT))															
CWTS Leiden Ranking															
University Ranking by Academic Performance (URAP)															
SCImago Institutions Rankings (new version)							R	R	R	R	R	R	R		
World University Rankings (Times Higher Education (THE))															
Global Employability Rankings (Emerging/Trendence)															
Round University Rankings (RUR)								R	R	R					
U-Multirank (Universities Compared. Your Way)															
UI GreenMetric World University Ranking										E	E	E	E	E	
Center for World University Rankings (CWUR)															
Global University Ranking (Youth Inc. / Education Times of India)															
nature INDEX															
Worldwide Professional University Rankings (RankPro)															
Best Global Universities Rankings (U.S. News & World Report)															
Reuters Top 100 Most Innovative Universities													I	I	
In4M															
Moscow International University Ranking (2018)															

Acad. performance w/ league table
  Academic performance w/o league table
  Broad-based league table
  Multi-indicator ranking
  Employability-based league table
  Web presence league table

Notes: "R" denotes retroactive. "E" denotes environmental focus. "I" denotes innovation.

Source: Rankings agencies, ICG.

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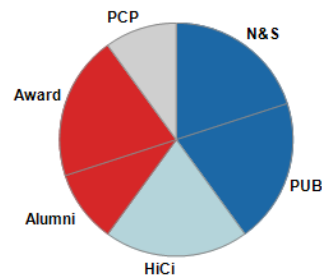
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# RANKINGS, REPUTATION, AND TALENT ATTRACTION

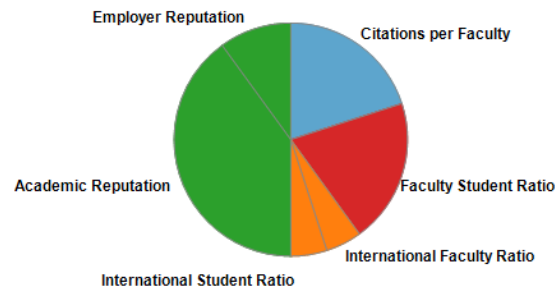
## Rankings: Key Rankings by Indicator Type and Weight

### Breakdown of Covered Rankings by Indicator Type and Weight

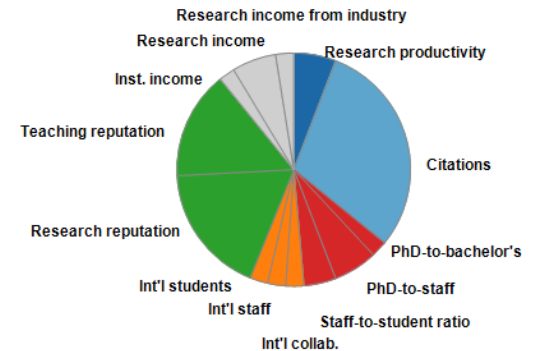
ARWU



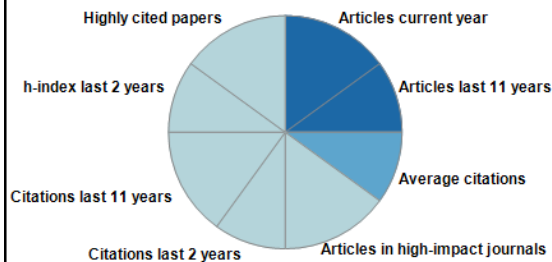
QS



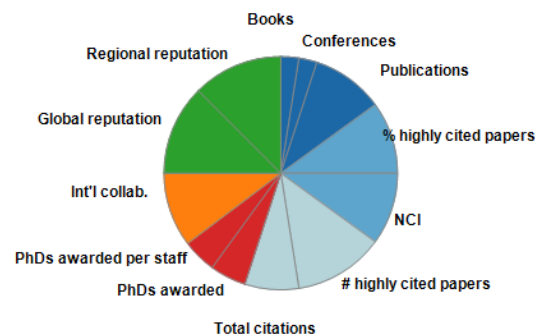
THE



NTU



USNWR



#### Indicator Type

Research Output

Research Impact (size independent)

Research Impact (size dependent)

Teaching-related

Internationalization

Reputation

Other

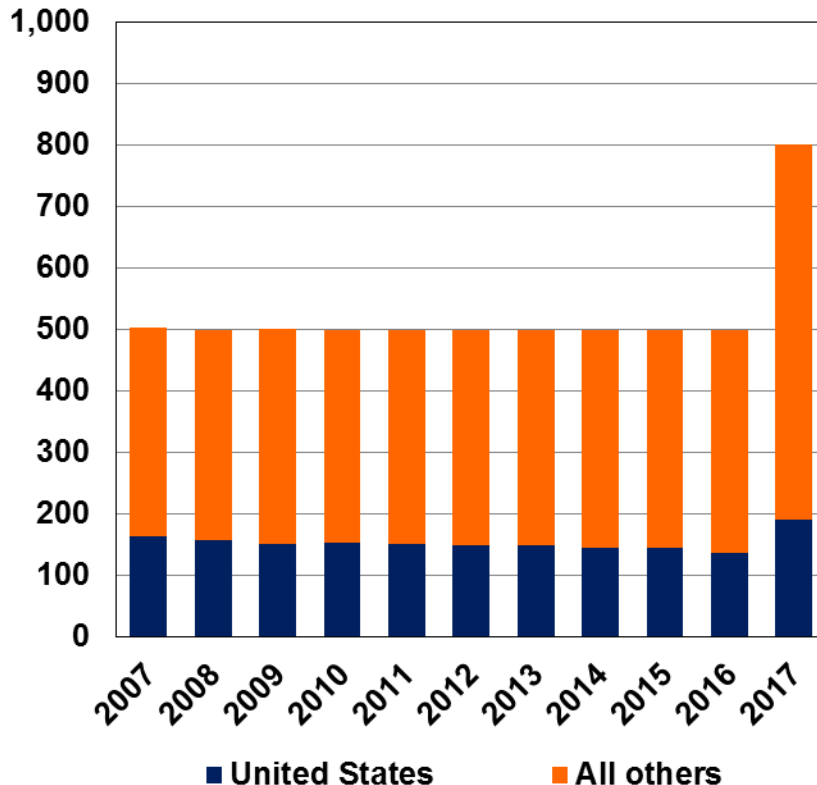


A very different approach from U.S. News

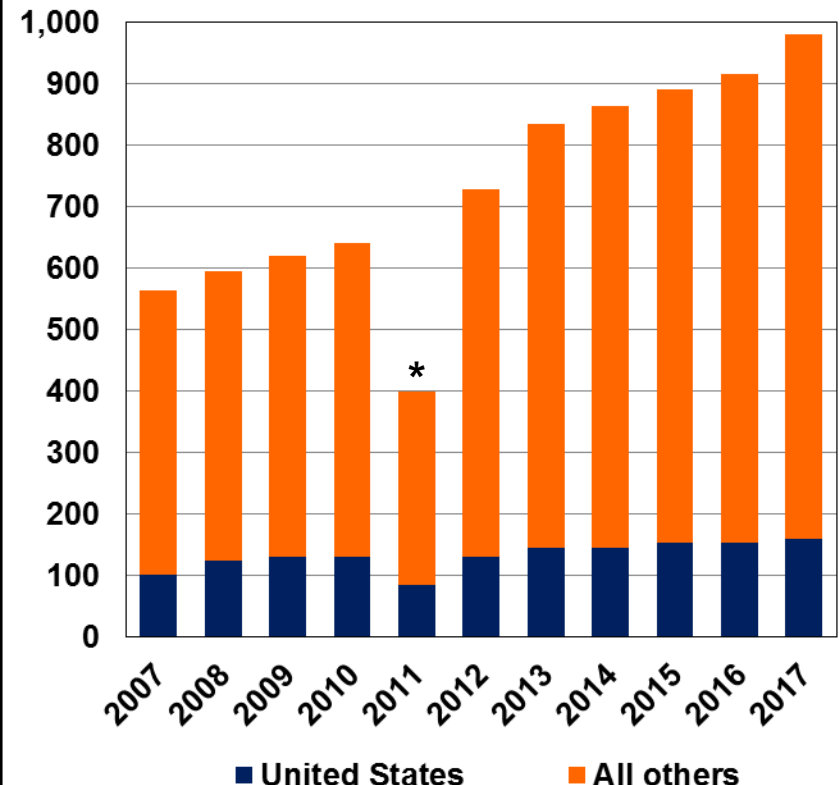
# RANKINGS, REPUTATION, AND TALENT ATTRACTION

## Rankings: U.S. versus World in ARWU and QS

### ARWU: Ranked Institutions by Country (2007-17)



### QS: Ranked Institutions by Country (2007-17)



**The U.S. – ARWU: From 32.4 to 23.9%. QS: From 18.1 to 16.2%**

Notes: \* No complete data available.

Sources: ARWU, QS.

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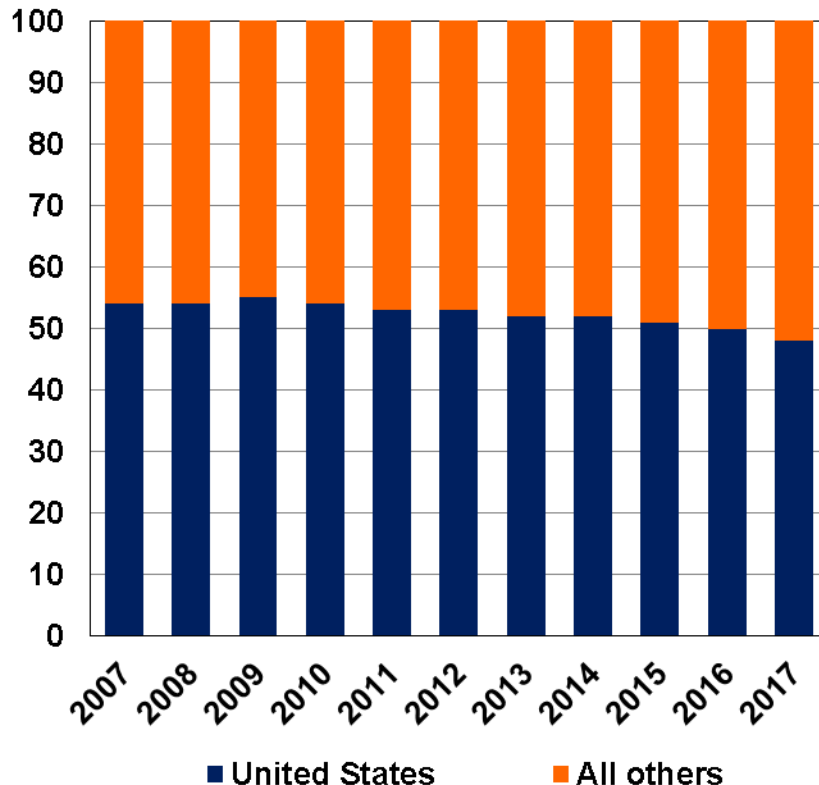
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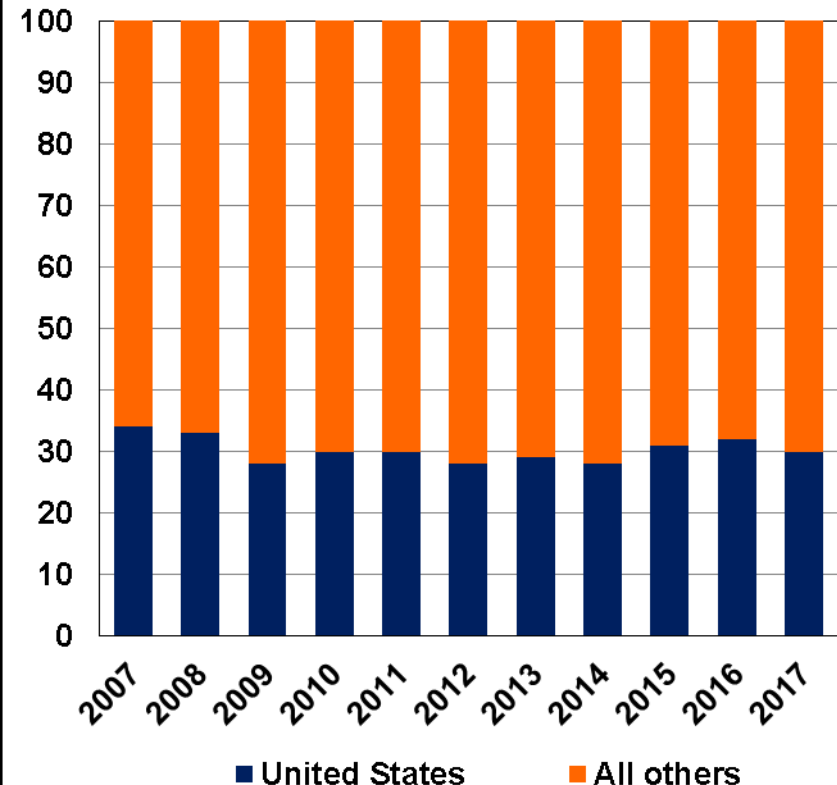
# RANKINGS, REPUTATION, AND TALENT ATTRACTION

## Rankings: U.S. versus World in ARWU and QS (II)

**ARWU: Top 100 Institutions by Country (2007-17)**



**QS: Top 100 Institutions by Country (2007-17)**



**The U.S. – ARWU: From 54.0 to 48.0%. QS: From 34.0 to 30.0%**

## Reputation: Introduction

- **QS Definition**
  - **Academic Reputation:** “The highest weighting of any metric is allotted to an institution’s Academic Reputation score. Based on our Academic Survey, it collates the expert **opinions of over 70,000 individuals in the higher education space regarding teaching and research quality** at the world’s universities. In doing so, it has grown to become the world’s largest survey of academic opinion, and, in terms of size and scope, is an unparalleled means of measuring sentiment in the academic community.”
  - **Employer Reputation:** “Students will continue to perceive a university education as a means by which they can receive valuable preparation for the employment market. It follows that assessing how successful institutions are at providing that preparation is essential for a ranking whose primary audience is the global student community.”

**Reputation is both a subjective and an objective metric**

## Reputation: Introduction

- Clarivate Definition
  - “The survey was designed with the help of many experts in the field and aims to be the most comprehensive snapshot of academics’ opinion of the world’s universities... The primary purpose of the survey was to **quantify academics’ opinions regarding both the research and teaching reputations of global academic institutions** within the disciplinary programs with which they were familiar”
- THE Definition:
  - “In the survey, scholars are questioned at the level of their specific subject discipline. They are not asked to create a ranking themselves or to list a large range of institutions, but **to name no more than 15 universities that they believe are the best in each category (research and teaching)**, based on their own experience.”

**Reputation is both a subjective and an objective metric**

### **Survey-based Reputation Metrics**

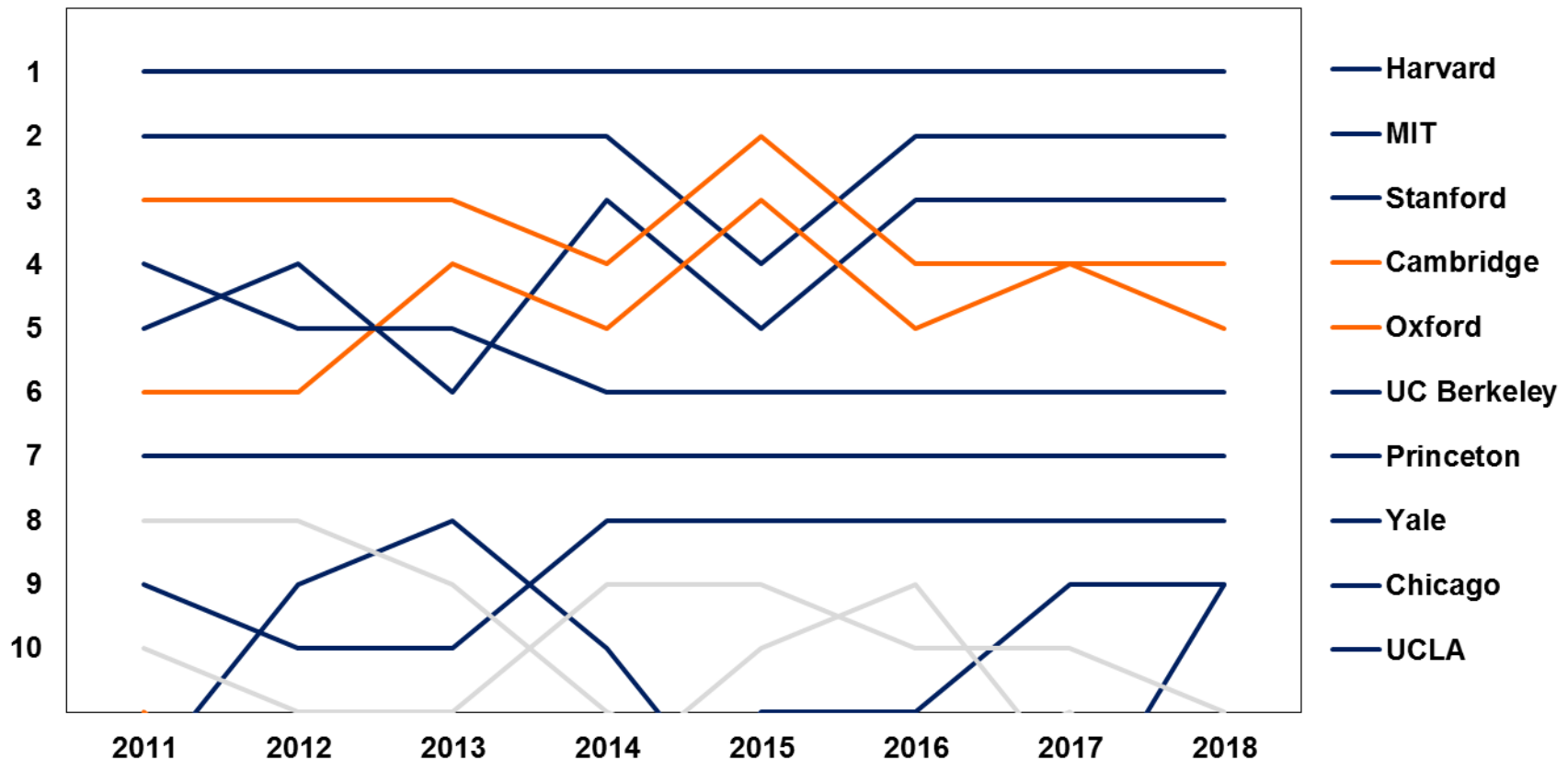
- **QS Survey**
  - Academic survey: 75,015 voters (5 years)
  - Employer survey: 40,455 voters (5 years)
  - Online survey probing for lists of up to 30 “best” universities
- **Clarivate Survey**
  - Academic survey: 3,945 voters (1 year)
  - Online survey targeting academics for lists of up to 15 “best” universities based on research and teaching
- **THE Survey:**
  - Academic survey: 10,500 voters (1 year)
  - Online survey targeting academics for lists of up to 15 “best” universities based on research and teaching

**Surveys differ in size, scope, and composition of respondents**

# RANKINGS, REPUTATION, AND TALENT ATTRACTION

## Rankings: U.S. versus World in THE

### THE World Reputation: Top 10 Universities (2011-18)



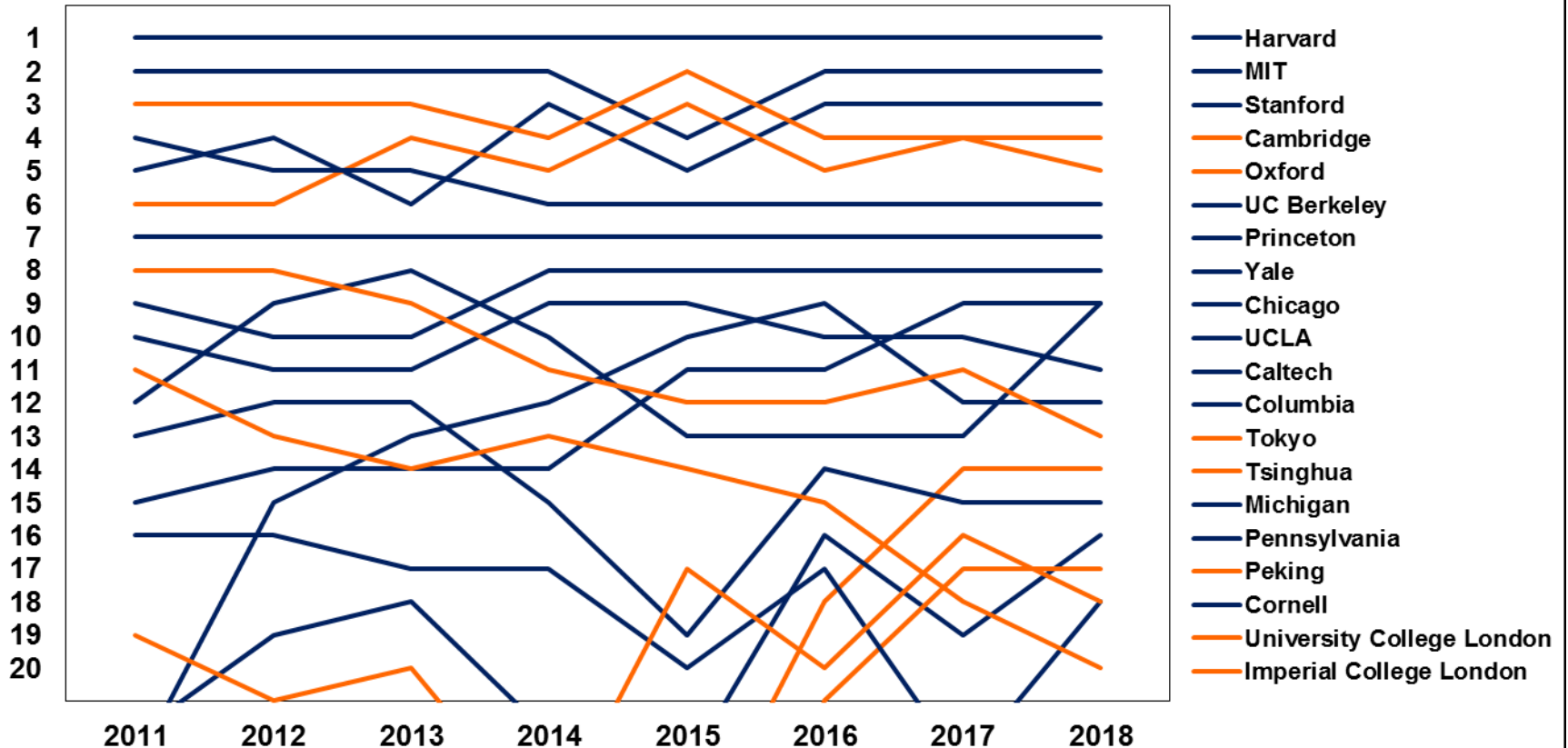
**The U.S. has maintained its dominant position in the Top 10, but...**



# RANKINGS, REPUTATION, AND TALENT ATTRACTION

## Reputation: U.S. University Performance in the THE Ranking

### THE World Reputation: Top 20 Universities (2011-18)



... much less so for the Top 11-20

# RANKINGS, REPUTATION, AND TALENT ATTRACTION

## Reputation: U.S. University Performance in the QS Ranking

University	QS Academic Reputation Rank										
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Harvard University	2	2	2	2	1	1	1	2	1	1	1
University of Cambridge	3	3	1	1	2	2	2	1	2	2	2
University of California, Berkeley	1	1	3	4	4	3	4	4	4	4	3
University of Oxford	5	6	4	3	3	4	3	3	3	3	4
Stanford University	4	4	5	5	5	5	5	5	5	5	5
Massachusetts Institute of Technology	6	5	6	6	6	6	6	6	6	6	6
University of Tokyo	14	14	7	8	7	7	7	7	7	8	7
University of California, Los Angeles	10	10	11	7	8	8	8	8	8	7	8
Princeton University	7	7	8	9	9	11	11	11	11	10	9
Yale University	8	8	10	10	10	10	10	10	10	9	10
National University of Singapore	17	18	19	12	11	9	9	9	9	11	11
Columbia University	13	16	21	14	13	12	12	12	12	12	12
University of Chicago	15	15	16	13	14	13	15	18	13	13	13
Peking University	19	19	17	22	18	19	19	19	16	14	14
University of Melbourne	20	21	20	19	16	16	21	20	22	17	15
University College London	34	34	28	23	24	22	16	15	15	16	16
University of Toronto	9	9	9	11	12	14	13	13	14	15	17
Kyoto University	26	22	14	20	19	18	17	16	18	61	18
University of Michigan	22	23	28	21	21	17	20	22	20	19	19
Cornell University	11	12	18	15	17	20	22	23	21	21	20
Swiss Federal Institute of Technology Zurich	43	38	32	27	25	25	18	17	19	22	21
California Institute of Technology	21	20	23	26	26	26	26	26	23	23	22
Imperial College London	23	25	22	16	15	15	14	14	17	20	23
Australian National University	16	17	13	18	20	21	23	25	26	25	24
University of Sydney	25	26	24	24	23	23	27	28	29	26	25
Tsinghua University	36	31	29	30	30	30	29	27	27	28	26
University of Hong Kong	40	43	36	34	27	24	28	30	28	29	27
University of Edinburgh	33	36	33	28	28	27	24	21	24	24	28
University of British Columbia	18	13	12	17	22	26	26	24	25	27	29
Seoul National University	44	33	25	33	33	29	32	32	31	30	30
New York University	35	36	39	45	37	35	35	35	34	35	31
University of Texas at Austin	39	40	46	37	36	37	33	34	35	32	32
University of Manchester	50	51	40	32	32	31	30	29	30	31	33
University of Pennsylvania	30	33	35	31	31	33	36	33	33	33	34
McGill University	12	11	15	25	29	33	31	31	32	34	35
University of New South Wales	31	29	34	40	41	44	42	40	42	39	36
University of California, San Diego	27	27	31	28	34	36	37	38	38	37	37
Ludwig Maximilian University of Munich	79	79	69	44	44	40	34	36	36	36	38
National Autonomous University of Mexico	99	87	130	134	88	61	48	55	45	43	39
National Taiwan University	59	66	45	46	38	38	39	37	37	38	40
University of Illinois, Urbana-Champaign	41	42	48	35	35	34	38	39	39	40	41
University of São Paulo	134	102	120	153	102	65	51	54	51	47	42
University of Queensland	36	41	43	54	45	42	46	44	47	69	43
University of Buenos Aires	220	144	214	202	124	78	63	52	46	48	44
Johns Hopkins University	24	24	27	36	42	45	45	45	41	41	45
Chinese University of Hong Kong	68	74	63	58	52	48	50	49	50	49	46
Duke University	32	38	37	38	43	43	44	48	44	44	47
Humboldt University of Berlin	114	92	79	51	49	46	41	42	43	45	48
University of Wisconsin - Madison	42	45	51	42	40	39	40	41	40	42	49
Nanyang Technological University	74	68	70	76	64	59	60	62	52	53	50

As of 2017, only 19 / 50 universities by reputation are from the U.S.

### **The Nexus of Rankings, Reputation and Attraction**

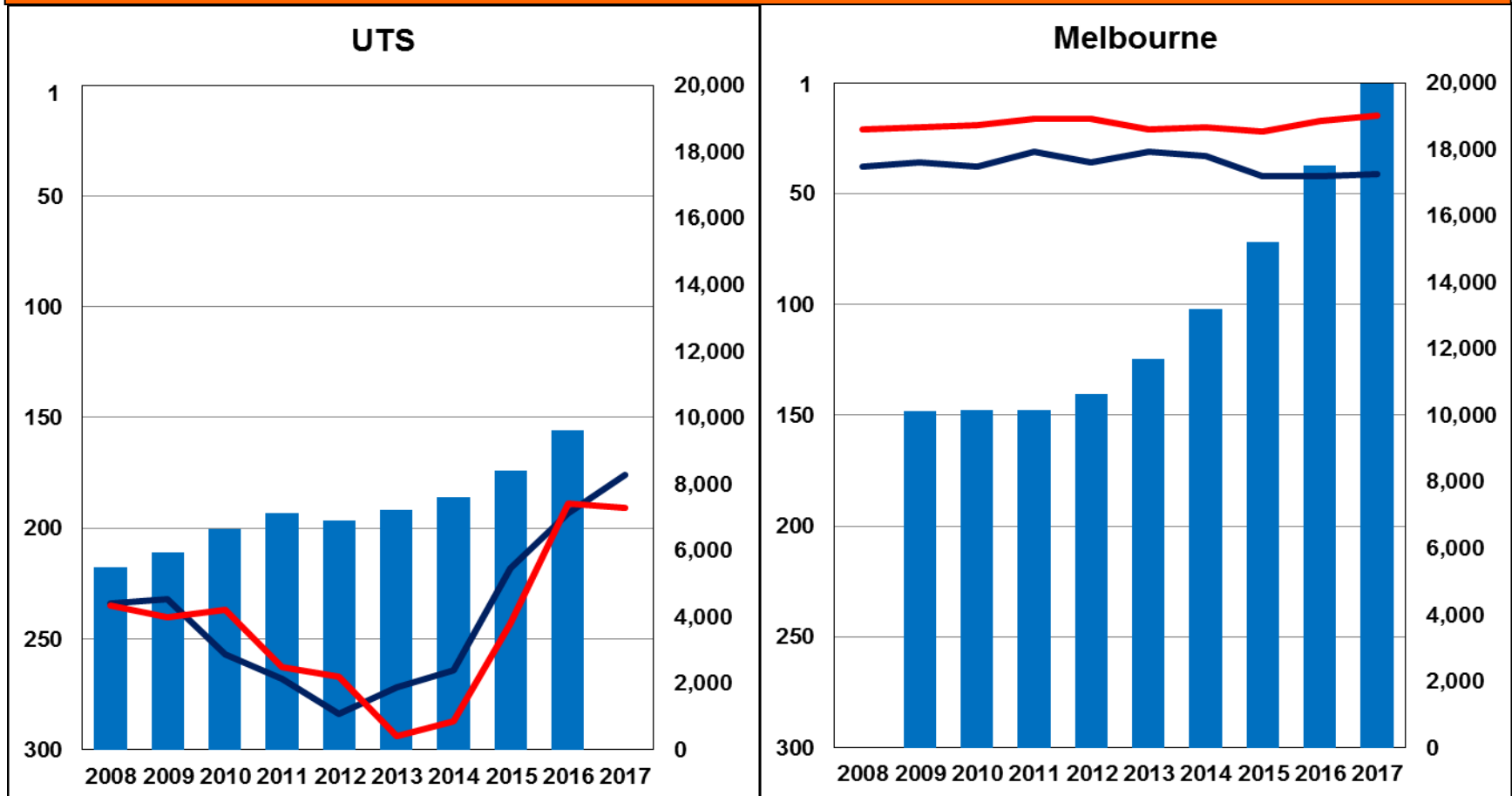
- **Stakeholders use rankings and their closely related function of reputation indicator to make decisions – about which country, institution, and program to access.**
- **Rankings have become key arbiters because they offer an “unbiased”, and global perspective no domestic ranking can offer. In addition, they capture salient metrics better.**
- **Rankings direct students at the front end, but also influence the back end – hiring – through employability rankings and by shaping hiring practices.**
- **Hundreds of universities engage with international rankings.**

**International rankings have become a veritable battle ground**

# RANKINGS, REPUTATION, AND TALENT ATTRACTION

## Talent Attraction: Institutional Perspectives (I)

Red Line: QS Reputation / Blue Line: QS Rank / Bars: International Students

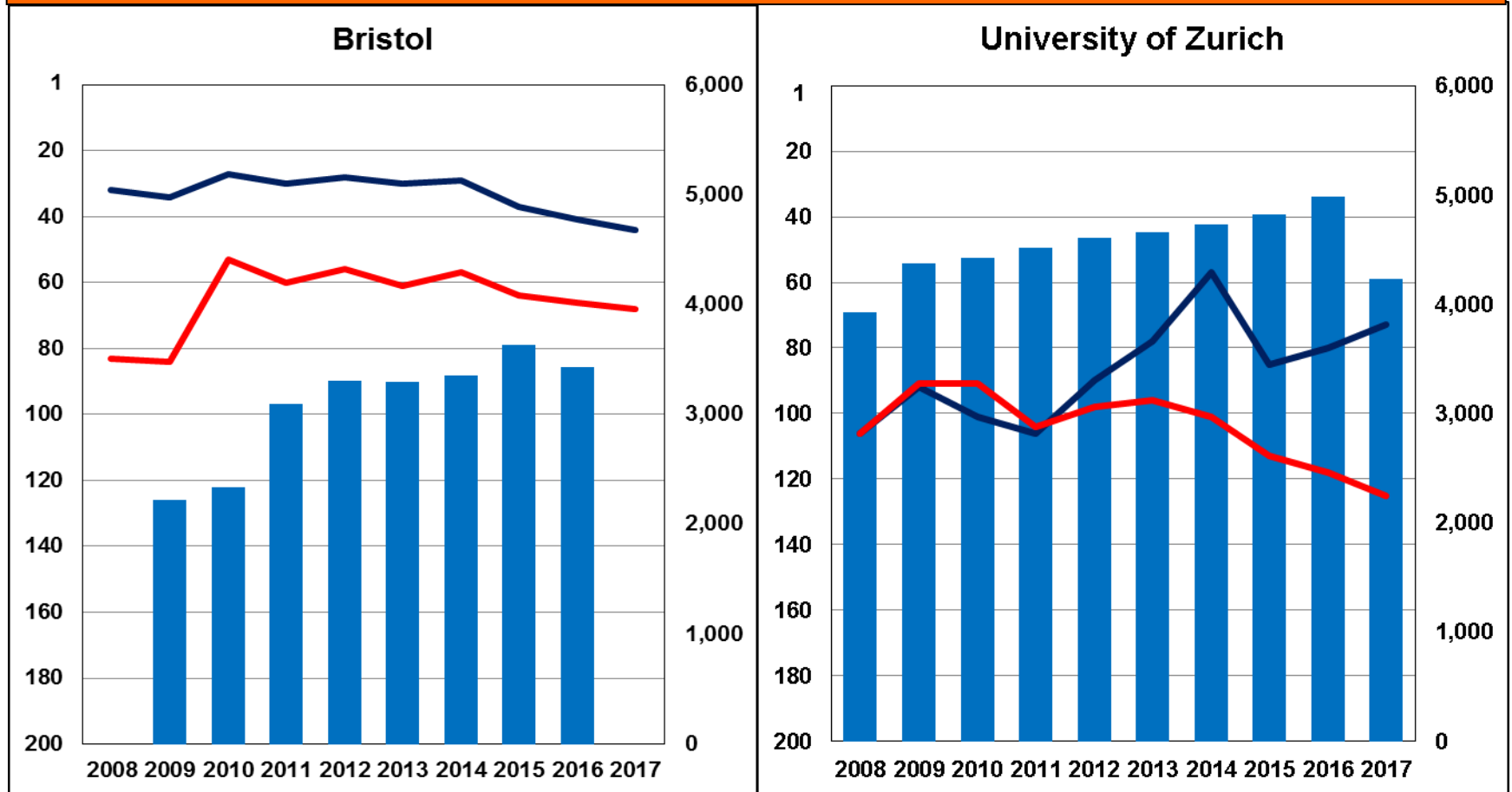


High performance or improving performance drive attraction

# RANKINGS, REPUTATION, AND TALENT ATTRACTION

## Talent Attraction: Institutional Perspectives (I)

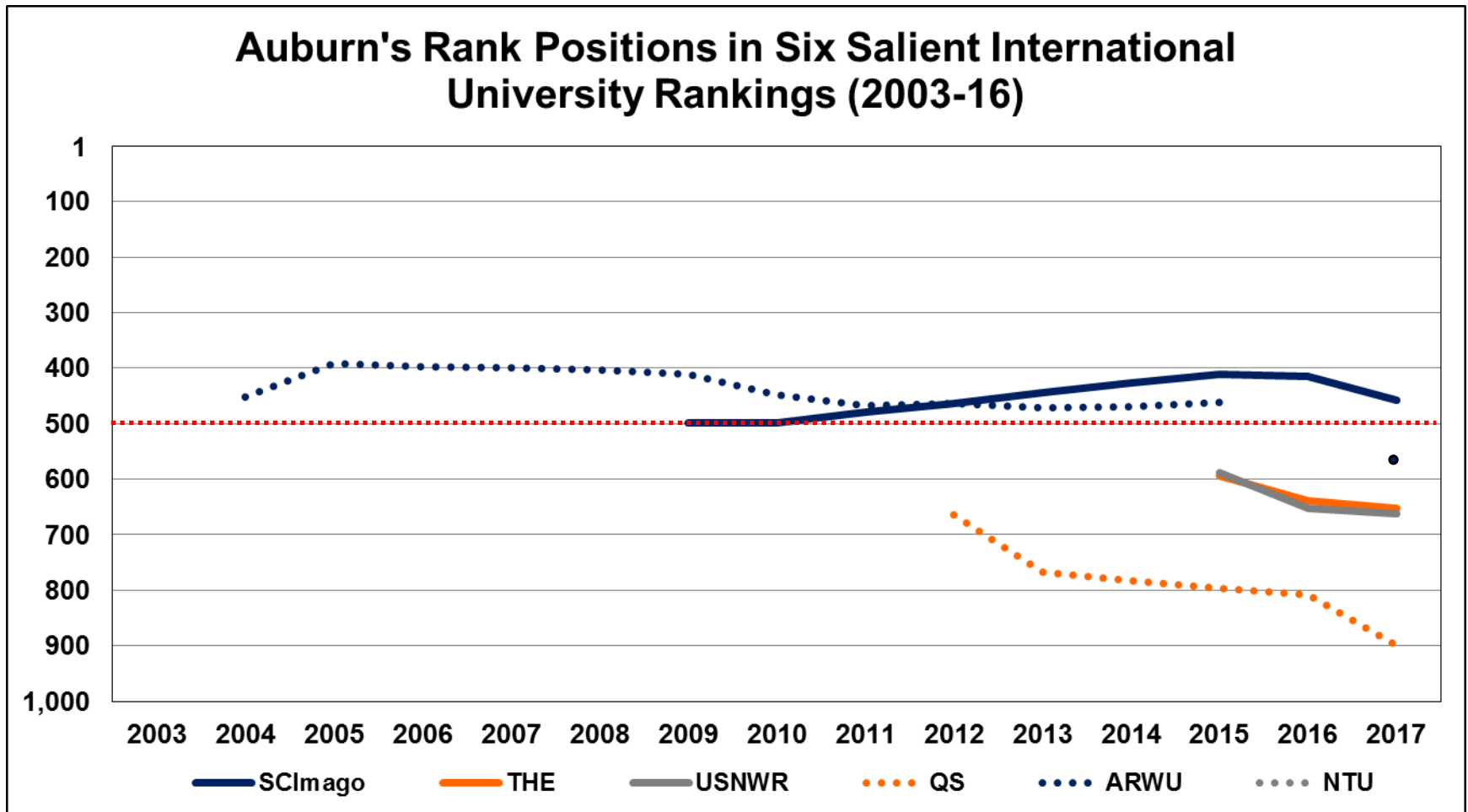
Red Line: QS Reputation / Blue Line: QS Rank / Bars: International Students



**Sliding performance depresses growth**

# RANKINGS, REPUTATION, AND TALENT ATTRACTION

## Rankings: Auburn in World University Rankings



**Auburn dropped out of the Top 500 in the Big Three: ARWU, QS & THE**

Notes: Auburn has not been ranked by NTU (Top 500). Auburn dropped out of the ARWU Top 500 in 2016 (now Top 800).

Sources: ARWU, NTU, SCImago, THE, USNWR, QS.

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**Discussion**

## Implications

- **The period of U.S. dominance is gone.**
- **We are slowly entering a multi-polar university landscape (with the exception of Ivy Plus).**
- **Talent will follow attraction drivers – with international rankings having emerged as a key decision and preference tool. Rankings also drive pricing power (tuition fees levels).**
- **Doing well in rankings and being held in high esteem are useful. Even better, understanding what, why, and how will allow an institution to position itself in front of a global audience.**
- **What matters most: How the world is looking at the U.S. from the outside-in.**



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## Discussion

- **What questions do you have?**
- **Where do you see the role of the United States and your institution in international education going forward?**
- **How attractive do you think is your institution for international talent?**
- **What challenges and opportunities do you perceive?**

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