

A Study on the



**International Students
Market**

Executive Summary

Global demand for education, training and research is strong and growing.

Global mobility for education is only one part of the unprecedented global mobility of peoples for purposes of migration, political and economic security, trade and business, employment, tourism and for study and research.

The Organization for Economic Cooperation and Development (OECD) estimates that the global population of college students will rise from 97 million last year to 167 million by 2025. This increase will be driven by increased access to and interest in higher education among students in emerging economies, as well as the growing interest among older workers in continuing education.

International students make a significant contribution to Hawaii's society by diversifying and enriching communities, and strengthening Hawaii's global networks. The decision to study in Hawaii also offers many benefits to international students, allowing them to gain a high quality, internationally recognized education, as well as the opportunity to experience life in Hawaii.

In 2011, 4,768 international students contributed more than \$115 million to the Hawaii economy --- a figure that includes only college level students according to the Institute of International Education. (Short term training, specialized educational

International Students	4,768
Direct Spending (only college level students)	\$115 m
Jobs Generated	2,185
State Government Tax Revenue	\$16.8 m
Direct Spending per Student	\$24,119

programs for limited periods, non-accredited classes, etc. are not included in this calculation, so the economic impact from international students studying in Hawaii is much greater than the \$115 million calculated. However, this serves as a base to gauge the economic impact of

international students.) In turn, the \$115 million direct impact generated 2,185 jobs and \$16.8 million in state government tax revenues according to DBEDT calculation.

Hawaii advantage: multicultural atmosphere, wide range of learning opportunities, health, safe and friendly environment, ranked program and close tie with international student source countries.

Hawaii disadvantage: lack of coordination, lack of marketing fund, lack of International ranked universities, perception and isolation.

Hawaii Opportunity: Place on top 15 hosting international students states in the nation.

A Study on the International Student Market

1. Overview: About the International Student Market

Global demand for education, training and research is strong and growing.

Global mobility for education is only one part of the unprecedented global mobility of peoples for purposes of migration, political and economic security, trade and business, employment, tourism and for study and research.

This unprecedented level of people mobility has major implications for the ways in which global economic and political systems work. But in a manner that is equally significant, the movement of people is transforming our social institutions, cultural practices and even our sense of identity and belongingness (Rizvi & Lingard 2010). Global mobility has transformed our cities, creating urban conglomerates at the intersection of global flows of finance and capital. (Sassen, 1991).

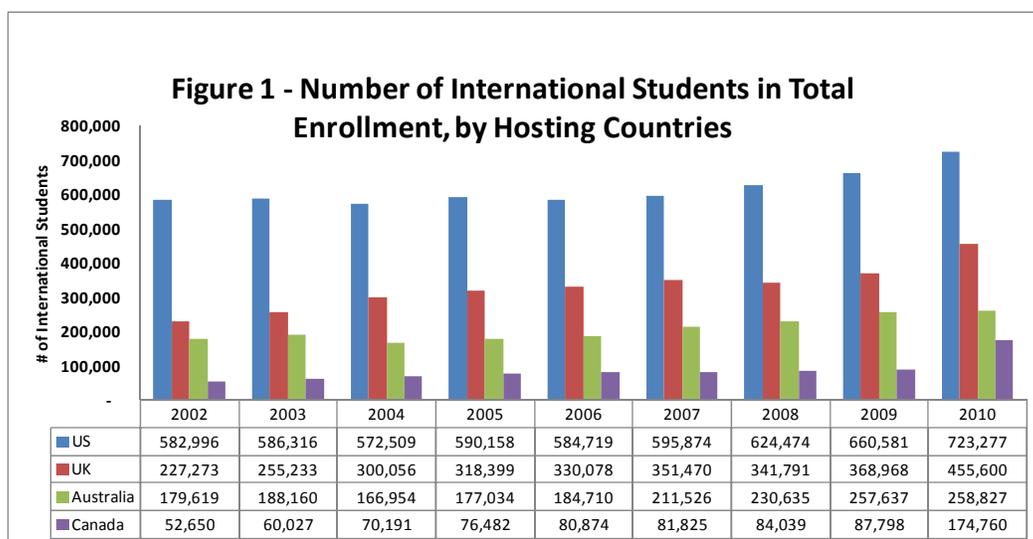
These changes have led to multiple new cross-national, cross-cultural flows and networks that define the global world of the 21st century (Urry, 2000). These transformations require new ways of thinking about movement (Papastergiadis, 2000).

Greater mobility of people has education policy implications, including in the way educational policy has interpreted cultural diversity and responded to its challenges; how the changing demography of campuses, has in particular, and global dynamics, more generally, have led to demands for the internationalization of education (Rizvi and Lingard, 2010).

Worldwide demand for higher education is growing at an exponential rate, driven by demographic trends and increased globalization of economies and societies. Participation rose by 128% from 1990 to 2007 (66.9 to 152.5 million students) (UNESCO, 2009).

The Organization for Economic Cooperation and Development (OECD) estimates that the global population of college students will rise from 97 million last year to 167 million by 2025. This increase will be driven by increased access to and interest in higher education among students in emerging economies, as well as the growing interest among older workers in continuing education. Rising populations, rising incomes and the development of knowledge industries in more nations means we will have a huge demand for higher education across the planet.

According to United Nations Educational, Scientific and Cultural Organization (UNESCO), the number of students studying in higher education institutions outside their home countries is growing rapidly. In 2010, there were 3.7 million mobile students worldwide, up from 1.8 million in 2001 and from 1.68 million in 1999. Figure 1 shows the four leading destination countries United States, United Kingdom, Australia and Canada witnessed sizable growth from 2002 to 2010.



Source: UNESCO and Atlas of Student Mobility

Global Demand for International higher Education

The global demand for international higher education is set to grow enormously. Demand is forecast to increase from 1.8 million international students in 2000 to 7.2 million international students in 2025 according to an IDP study “Global Student Mobility 2025”.

Asia will dominate the global demand for international higher education. According to the IDP study, by 2025, Asia will represent 70 percent of total global demand and increase of 27 percentage points from 2000. Within Asia, China and India will represent the key growth drivers-generating over half of the global demand in international higher education by 2025.

2. GLOBAL COMPETITION FOR STUDENTS IS AT AN ALL-TIME HIGH

Global competition for students is at an all-time high and will intensify in the near future. Many countries that previously only sent students abroad have started to improve the quality of their own higher education and are now seeking to attract international students themselves.

Nuffic (Netherlands organization for international cooperation in higher education) published a report in January 2012 outlining the policies and developments of key recruiting and recruitment countries. Their findings included:

Different Explanations for International Recruitment

- Germany and Canada seek international students to counterbalance their declining and aging populations.
- The UK and Australia treat higher education as an export service and mainly recruit international students for receiving high tuition fees.
- The US and France see international student recruitment primarily as a public diplomacy tool.

Recruiting countries	Recruitment countries
the Netherlands, France, Germany, Switzerland, the United Kingdom, the United States, Canada, Australia, Singapore, Malaysia and China	Brazil, China, India, Indonesia, Mexico, Russia, South Korea, Taiwan, Thailand, Vietnam, Argentina, Chile, Colombia and Egypt

3 out of 10 international students come from one of the recruitment countries listed above

Governments Making International Recruitment a Top Priority

- The Chinese government aims to have 500,000 international students enrolled in Chinese higher education by 2020, twice the number it now hosts and well above the number of students it sends abroad.
- Both Singapore and Malaysia aim at attracting 150,000 international students by 2015, thus doubling their current numbers.
- As the share of the population that is college-aged in South Korea will shrink in the coming decade, the government has made recruitment of international students and scholars a high priority. The country is on schedule to achieve its goal of receiving 100,000 international students in 2012, thus quadrupling its 2005 number.
- The government of Taiwan set a target to attract 95,000 international students by 2014.
- India, Russia, Brazil, Indonesia, Thailand, Mexico, and Columbia are formulating government policies in order to attract more international students to their countries.

3. IMPACT OF INTERNATIONAL STUDENTS IN THE UNITED STATES

According to Association of International Educators, it estimates international students and their dependents contributed approximately \$20.23 billion to the U.S. economy during the 2010-2011 academic years.

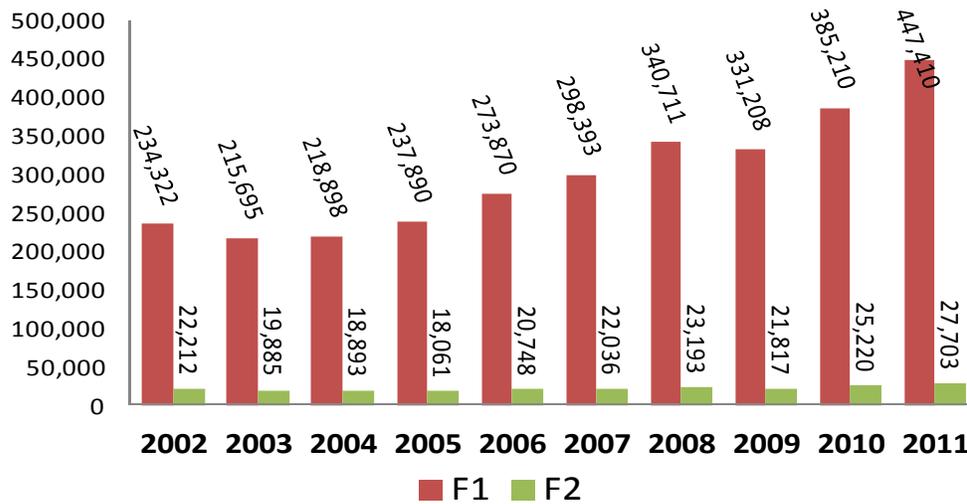
Among the top four host countries, the United States had the weakest growth in international student enrollment from 2002 to 2010. While international student enrollment grew by 25 percent in the United States, it grew 101 percent in United Kingdom, 44 percent in Australia and 232 percent in Canada.

The growth of the international student population in the United States reflects in the broader global trend of the increasing number of students who pursue higher education outside their homelands each year.

Trends in Student (F-1) Visa in U.S. Granted

In the United States, the F visas are a type of non-immigrant student visa that allows foreigners to pursue education (academic studies and/or language training programs) in the United States. F-1 visas are only issued in U.S. embassies and consulates outside the United States. Prospective F-1 students must apply at the schools and receive a form I-20 in order to apply for an F-1 visa. F-1 students must show that they are able to support themselves during their stay in the U.S., as their opportunities for legal employment are quite limited. F-2 visas are given to dependents of an F-1 student. F-2 visa-holders are prohibited from any form of compensated employment. However, minor children may attend public schools.

Figure 2: F-1 and F-2 Visa Granted by U.S.



Source: U.S. Department of State

Student (F-1) Visa applications granted are an excellent leading indicator for future international student enrolments. Student visa applications granted has increased 90.0 percent over the last ten years. In 2011, there were 447,410 student visa applications granted. This is an increase of 16.1 percent compared to 2010.

The F-1 visa is granted for up to five years in most cases and may be extended further for the duration of study.

Where are student visa applications coming from?

International trends in Visa Grants are a lead indicator for future enrollments. In recent years, China continues as the largest single nation contributor to the international student population in the U.S.. In 2011, 34.2% of all student visa applications granted were from China, followed by South Korea (10.2%), and Saudi Arabia (6.2%), India (5.7%) and Japan (3.8%).

Brazil increased the most compared to last year at +36.8 percent followed by China (+34.5%), Saudi Arabia (+31.5%), Mexico (+18.2%), and Japan (+12.0%).

Table 1: Top Ten Visa Granted Countries by U.S.

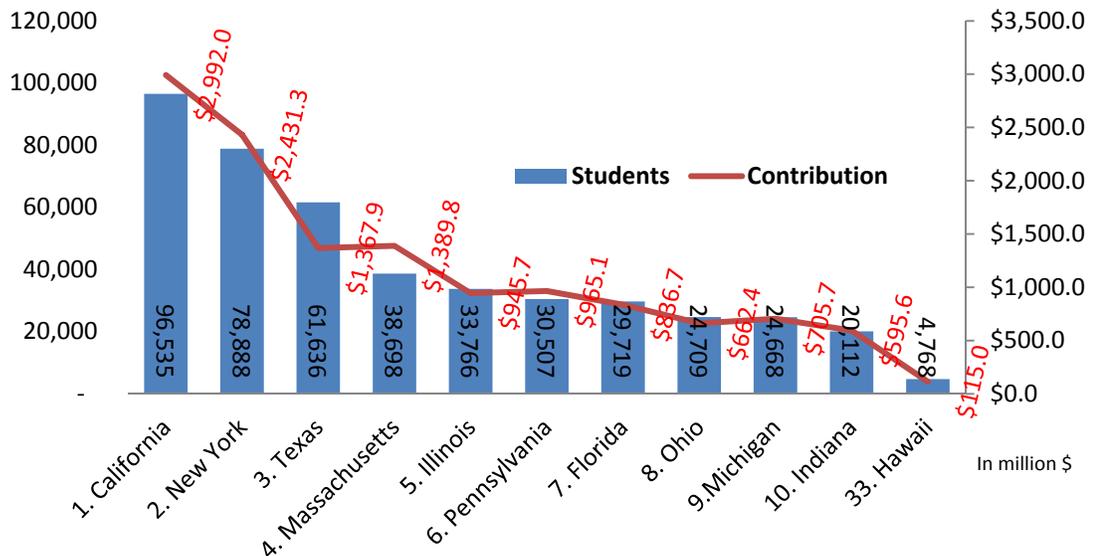
F-1 Visa		2011	2010	% Change	Share of ToT (2011)
1	China - mainland	153,026	113,772	34.5%	34.2%
2	Korea, South	45,638	44,328	3.0%	10.2%
3	Saudi Arabia	27,738	21,101	31.5%	6.2%
4	India	25,649	25,783	-0.5%	5.7%
5	Japan	16,811	15,014	12.0%	3.8%
6	Brazil	14,408	10,532	36.8%	3.2%
7	China - Taiwan	11,200	10,785	3.8%	2.5%
8	Vietnam	9,456	8,681	8.9%	2.1%
9	Mexico	8,464	7,158	18.2%	1.9%
10	Germany	7,180	7,243	-0.9%	1.6%
Total		447,410	385,210	16.1%	100.0%

Source: U.S. Department of State

4. THE IMPACT OF INTERNATIONAL STUDY IN HAWAII

International students make a significant contribution to Hawaii’s society by diversifying and enriching communities, and strengthening Hawaii’s global networks. The decision to study in Hawaii also offers many benefits to international students, allowing them to gain a high quality, internationally recognized education, as well as the opportunity to experience life in Hawaii.

Figure 3: International Student Contribution Trend



Source: Institute of International Education

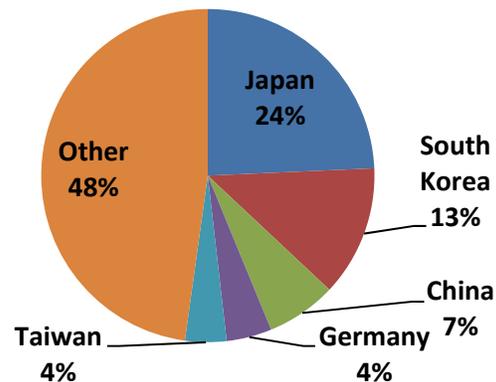
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Source: Institute of International Education and DBEDT

Hawaii ranked #33 in terms of the dollar contribution among the fifty states and # 34 in terms of the number of international students.

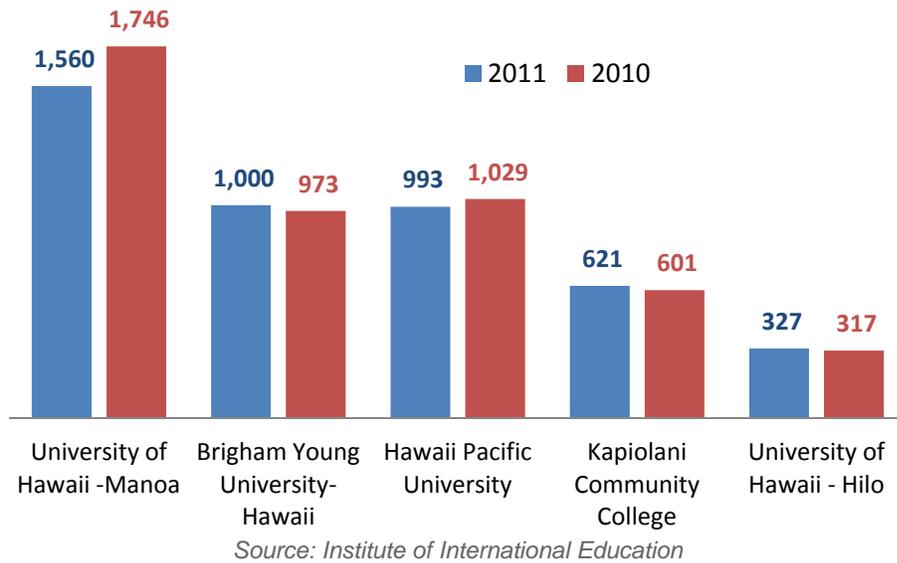
Figure 4: Leading Source Country for International Students in Hawaii



Source: Institute of International Education

52 percent of the international students came from five countries according to the Institute of International Education. ---led by Japan at 24 percent, South Korea at 13 percent, China at 7 percent, Germany at 4 percent and Taiwan at 4 percent.

Figure 5: Institutions with Highest Number International Students



Five institutions hosted more than 90 percent of international students in Hawaii. University of Hawaii-Manoa hosted 32.7 percent of international students in Hawaii, followed by Brigham Young University-Hawaii with 21 percent, Hawaii Pacific University with 20.8 percent, Kapiolani Community College 13 percent and University of Hawaii – Hilo 6.9 percent. Brigham Young University-Hawaii and Kapiolani Community College were the only two institutions with increases compared to previous years within the top five host institutions in Hawaii.

According to a 2009 DBEDT survey on Hawaii International Education, Hawaii brought in 13,124 foreign students and scholars including short-term training, for all educational levels, contributing \$160 million to the economy, including spending of family members of the students and scholars.

The top five countries of origin represented by international students in Hawaii are Japan, South Korea, Switzerland, Taiwan and the People's Republic of China.

The Open Doors 2011 report shows University of Hawaii-Manoa as the leading institution in the state with 1,560 international students or 32.7 percent of the state total international students.

According to 2010-2011 Annual Report for International Education, over 62 percent of the international students in Hawaii are studying for graduate degrees at the University of Hawaii Manoa with 30.4 percent studying in the undergraduate programs.

Top Five Counties	Bachelors	Masters	Doctorate	Other	Total
Japan	198	59	73	26	356
South Korea	54	37	61	15	167
China	11	71	66	7	155
Taiwan	17	15	36		68
Canada	27	10	24	1	62

Source: University of Hawaii Manoa -2010-2011 Annual Report for International Education

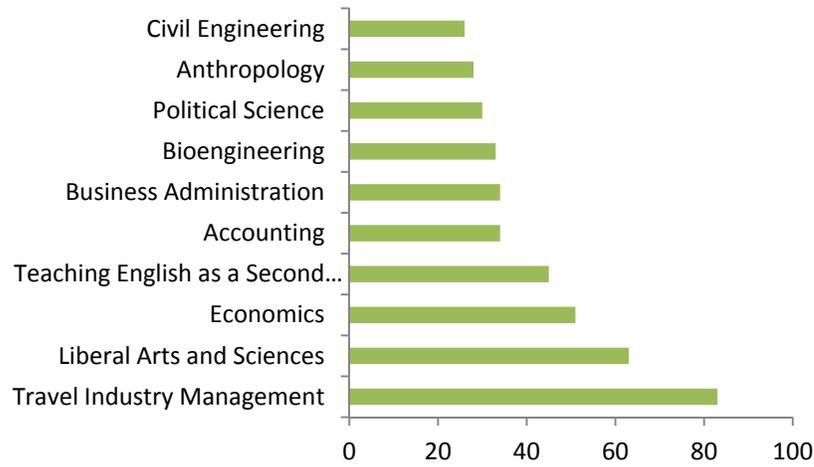
The top five countries contributed 51.8 percent of total UHM international student population in 2011. Japan was the number one place of origin of international students studying in at the University of Hawaii-Manoa in 2011 with 356 students or 22.8 percent of the total UHM international student population. 56 percent of the Japanese students were studying for bachelors degrees, followed by 21 percent in doctorates programs and 17 percent in masters programs.

South Korea is the second leading place of origin, with 167 students or 10.7 percent of the total UHM international student population in 2011. 37 percent of South Koreans were studying for doctorates degrees at UHM, followed by 32 percent in bachelors and 22 percent in masters.

There were 155 students or 9.9 percent of the total UHM international student population from China studying in at UHM in 2011. 46 percent were studying for masters degrees, 43 percent enrolled in doctorate programs and 7 percent in bachelors programs.

Taiwan was the fourth leading pale of origin in 2011, with 68 students studying in UHM.

Figure 6: Top Ten Majors in UHM by International Students



Source: University of Hawaii Manoa -2010-2011 Annual Report for International Education

The leading majors of study are varying by institution. Travel Industry management is the leading major of study in UHM followed by liberal arts and sciences, economic and etc (figure 6.)

BYU-Hawaii is the second leading institution welcomed international students in the state with 21 percent of the total state international students according to *the Open Doors 2011 report*.

South Korea is the top place of origin of international students, with 11 percent of the total BYU-Hawaii international student population according to BYU-Hawaii. Japan is second with 10 percent, Hong Kong with 9 percent, Tonga with 7 percent, and Taiwan with 6 percent and China with 6 percent.

Business management is the most popular major among the top source countries in BYU- Hawaii (*see table below*)

1	Korea, Republic of	120
	Business Management	27
	Accounting	18
	TESOL	13
	Hospitality and Tourism Management	13
2	Japan	107
	TESOL	15
	Accounting	12
	Business Management	10
3	Hong Kong, P.R.C	106
	Accounting	18
	Business Management	17
	International Cultural Studies	8
	Hospitality and Tourism Management	8
4	Tonga	78
	Computer & Information Science	19
	Accounting	13
	Secondary Education	8
5	Taiwan	67
	Business Management	11
	Hospitality and Tourism Management	10
	Accounting	7
6	China P. R.	65
	Accounting	15
	Business Management	14
	Exercise & Sport Science	6

Source: BYU-Hawaii

Hawaii Pacific University is the third largest institution in term of brings in international students. Hawaii Pacific University welcomed 993 international students in 2011 according to *Institute of International Education*.

According to Hawaii Pacific University in fall 2011, the top ten countries at Hawaii Pacific University graduate program are Norway, Germany Taiwan China, Japan, Denmark, South Korea, Vietnam, Canada and Thailand.

The top ten countries at Hawaii Pacific University undergraduate program are Norway, Germany, Sweden, Japan, South Korea, Denmark, Canada, Taiwan, France, and China.

The top ten area of study at Hawaii Pacific University at the graduate programs are MBA, Communication, TESOL, Human Resource Management and Global leadership & Sustainable development.

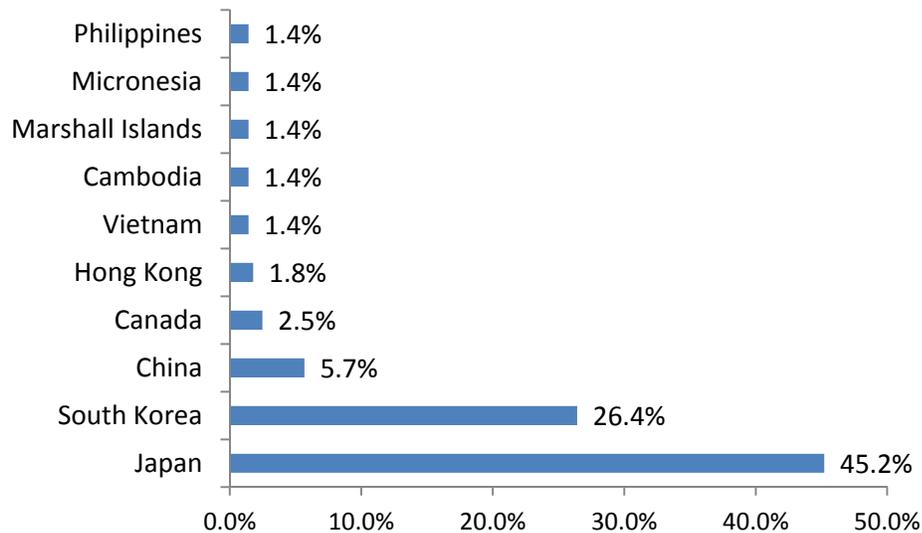
The top nine majors studied at Hawaii Pacific University by the international students are:

Travel Industry Management	International Business	Psychology	Advertising /PR	Management
Marketing	Nursing	Communication	Finance	

Source: Hawaii Pacific University

Kapiolani Community College welcomed more than 620 international students or 13 percent of total international student to the state. Kapiolani Community College ranked 36 among the U.S. community college according to the *Open Door report*.

Figure 7: Leading Source Country for International Students in KCC

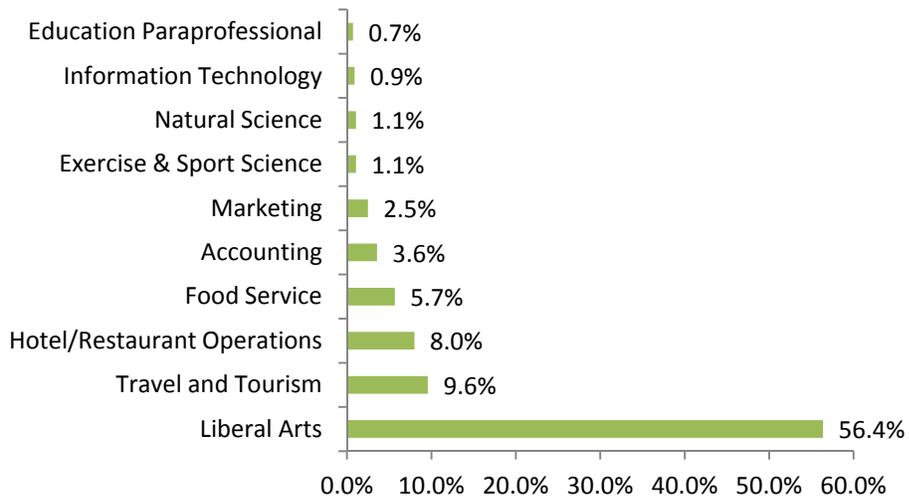


Source: Kapiolani Community College - 2011 Annual Report – International Education

Japan was the number one place of origin for international students at Kapiolani Community College (KCC) in 2011. Close to 255 international students or over 45 percent of the total number of international students in at KCC were from Japan.

South Korea is the second leading place of origin, with over 26 percent of total number of international students in enrolled at KCC, follow by China at 5.7 percent, Canada at 2.5 percent, Hong Kong at 1.8 percent, and Vietnam, Cambodia, Marshall Islands, Micronesia and Philippines each with 1.4 percent.

Figure 8: Top Ten Majors in KCC by International Students

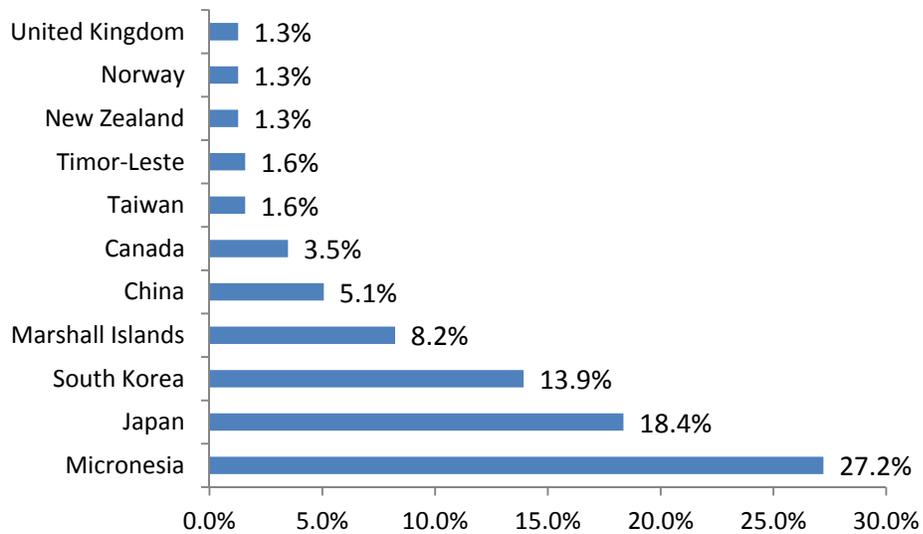


Source: Kapiolani Community College - 2011 Annual Report – International Education

Liberal arts is the leading major of study in KCC with over 56.4 percent followed by 9.6 percent in travel and tourism, 8 percent in hotel/restaurant operations, 5.7 percent in food service, 3.6 percent in accounting, 2.5 percent in marketing, 1.1% in exercise & sport science, 0.9 percent in information technology and 0.7 percent in education paraprofessional.

Marketing strategy: multilingual staff, recruitment service provider, alumni and word of mouth.

Figure 9: Leading Source Country for International Students in UH-Hilo



Source: <http://hilo.hawaii.edu/studentaffairs/international/statistics.php>

University of Hawaii – Hilo is the fifth leading institution hosting international students in Hawaii. UH-Hilo hosted more than 300 international students in 2011 with a 3.1 decreased compared to the previous year.

Micronesia is the top place of origin of international students, with 27.2 percent of the total UH-Hilo international student population. Japan is second with 18.4 percent, South Korea with 13.9 percent, the Marshall Islands with 8.2 percent, China with 5.1 percent, Canada 3.5 percent, Taiwan and Timor-Leste each with 1.6 percent, and 1.3 percent each for New Zealand, Norway and the United Kingdom.

5. BENEFITS OF INTERNATIONAL STUDENTS

Benefits for institutions

- ◆ Contributions to institutional finances – international student fees subsidize the education of Hawaii students. Without revenue from international student fees millions of new domestic funding, either from government (i.e. from the Hawaii taxpayer) or from fees for Hawaii students (i.e. direct from Hawaiian families) would be needed for Hawaii universities to operate at the standard they do.
- ◆ International student fees allow universities to provide things that they otherwise couldn't provide:
 - ◆ Critical infrastructure (staff, classrooms, laboratories, equipment, libraries, buildings, etc)
 - ◆ More courses and a wider range of subjects for Hawaii students.
- ◆ The ability to attract students from across the globe enhances the reputation as well as cultural life of universities --- to the benefit of all students and staff.
- ◆ International research students are some of the best and brightest in the world and help Hawaii institutions to be world class in research. Hawaii's research and capacity for invention, innovation and entrepreneurship depends on attracting the best minds in the world. The research strength and reputation of the US mainland is driven largely by international research students and researchers. Hawaii is capable of competing at a similar level.
- ◆ Some of the best international research students go on to be appointed as staff of Hawaii universities, especially in disciplines where shortages are most acute. They bring new perspectives and help replenish the Hawaii academic and teaching workforce.
- ◆ Internationalization of curriculum; wider cultural understanding; languages, culture and society.
- ◆ Teaching international students offshore in their own country ("transnational education") means that Hawaii institutions and their staff are able to gain a close and deeper understanding of overseas countries and their education systems and communities. This scenario provides benefits for the local Hawaii institution-in terms of the internationalization of their staff and their curricula.

Benefits for students

- ◆ International students bring wider global perspectives, providing Hawaii students with a diverse, intercultural learning environment which will enable them to function effectively in the globalized world of work.
- ◆ Hawaii can serve as transitional location for education prior to continuing on to colleges and universities on the mainland

BENEFITS FOR CONVENTIONAL DIPLOMACY AND TRADE LINKS

- ◆ Thousands of international students are Hawaii graduates, many of whom ~~are~~ become political, business and community leaders, as well as internationally recognized scholars and researchers, in their own country or internationally. They are Hawaii's best ambassadors. They strengthen Hawaii's position as an international player in a broader sense.
- ◆ International students attract their families to Hawaii for visits, thereby increasing tourists.
- ◆ Parents of students visiting Hawaii may be inclined to invest in Hawaii.

PUBLIC DIPLOMACY BENEFITS

- ◆ Education contributes to the image of Hawaii as a modern, advanced society and economy, with high quality education, and research capability, facilities and staff, and enhances Hawaii's appeal as an attractive site for foreign investment.
- ◆ Education is central to the international image of Hawaii as an "aloha" state.
- ◆ Education demonstrates that Hawaii is "more than tourism with a view".

CULTURAL BENEFITS

- ◆ International graduates gain a better understanding of Hawaii, its culture and people, by living and studying here. When they graduate they frequently remain connected with Hawaii, through friends, family and business relationships, or as tourists. Their unique understanding of and empathy towards Hawaii means that they frequently act as intermediaries between Hawaii and their own country. Many actively assist Hawaii to navigate and conduct business successfully overseas.
- ◆ International students are a resource to educational institutions and the broader community for intercultural understanding. International students frequently comment on and praise Hawaii as an open, multicultural society. They are keen to participate in multicultural events and showcase their unique communities and cultures.

ECONOMIC BENEFITS

- ◆ International students are credited for \$115 million direct impact to the Hawaii economy that includes only college level students according *Open Door report*.

- ◆ International students are credited for 2,185 jobs and generated \$16.8 million state government tax revenue according to DBEDT calculation.
- ◆ International education contributes substantially to: the diversification of Hawaii's economy from tourism; diversification of and increased funding to Hawaii's educational institutions; closer regional relationships including regional trade; better governance and economic development in developing countries through well trained graduates; and Hawaii's economic productivity gains by providing local companies access to skilled domestically trained graduates.
- ◆ A 10% increase in the number of international graduate students has been estimated as raising patent applications by 3.3% in the U.S. according to a study by the World Bank " *The Contribution of Skilled Immigration and International Graduate Students to US Innovation*".

LABOR MARKET BENEFITS

- ◆ International students provide a fast track toward diversification of the labor market especially in the Science, Technology, Engineering, and Mathematics (STEM). Most international students studied in fields of STEM.

6. ADVANTAGE AND DISADVANTAGES OF STUDING IN HAWAII

Advantages

1. A wide range of learning opportunities - Hawaii offers K-12 private schools, English language schools, community colleges, and private and public universities, all providing a wide range of programs and learning opportunities.
2. A multicultural atmosphere – Hawaii has always welcomed people from all over the globe, producing a multicultural society in a familiar, comfortable environment conducive to learning. Almost 73 percent of Hawaii's population traces their ancestry to Asia and the Pacific, while approximately 42 percent have roots in Europe and the Americas. Today, a large percentage of Hawaii's population is mixed ancestry.
3. A healthy, safe and friendly environment – Hawaii consistently ranks as one of the healthiest states in the U.S. in which to live. Hawaii is blessed with safe neighborhoods, a temperate climate and weather which encourages year-round outdoor recreation.
4. In 2011, Honolulu ranked third safest of large cities in America according to Forbes Magazine.
5. The University of Hawai'i at Manoa - Shidler College of Business graduate program ranked in the top 25 for International Business in the U.S. News & World Report issue of "America's Best Graduate School."
6. U.S. News & World Report ranked the UH Manoa - Shidler College of Business 13th in the nation for its undergraduate international business programs.
7. U.S. News & World Report ranked the UH Manoa School Library Media program 8th in the nation.
8. Ranking the top 50 Competitive Private Colleges according to Sperling's Best Places - Brigham Young University-Hawaii Campus (#45)
9. Hawaii is ranked #2 of Most Affordable Colleges by Sperling Best Places

- 10. Honolulu is ranked third best city by BusinessWeek
- 11. Kapiolani Community is ranked #3 among community colleges in the U.S according to Institute of International Education *Open Doors report*.

Disadvantages

- 1. Lack of coordination
- 2. Lack of international recognized/ranked universities or programs of study.
- 3. Perception that Hawaii is not a place for serious study but for leisure.
- 4. Isolation from metropolis/large cities for jobs
- 5. Lack of marketing fund

7. STRATEGIC RECRUITMENT

Given increasing competition in the market and changes in mobility patterns, many countries have started to consider how they might implement or strengthen their strategic approaches to international recruitment. Strategic recruitment is a key element of successful of recruitment in this competitive world, particularly with limited resources. Hawaii needs to have a strategic plan for the state not individually institution for international recruitment with a Hawaii brand that recognize.

With a central strategic marketing plan effort, Hawaii will be able to maximize the benefits, even with limited resources, to promote Hawaii as international study destination. Hawaii will easily place on top 15 states hosting international students in the nation.

Rank	State	Students	Contribution	Population	Pop/Std
1	California	96,535	\$2,992.0	33,871,648	350.87
2	New York	78,888	\$2,431.3	18,976,457	240.55
3	Texas	61,636	\$1,367.9	20,851,820	338.31
4	Massachusetts	38,698	\$1,389.8	6,349,097	164.07
5	Illinois	33,766	\$945.7	12,419,293	367.80
6	Pennsylvania	30,507	\$965.1	12,281,054	402.57
7	Florida	29,719	\$836.7	15,982,378	537.78
8	Ohio	24,709	\$662.4	11,353,140	459.47
9	Michigan	24,668	\$705.7	9,938,444	402.89
10	Indiana	20,112	\$595.6	6,080,485	302.33
11	Washington	17,811	\$463.7	5,894,121	330.93
12	Georgia	15,359	\$429.8	8,186,453	533.01
13	Missouri	15,114	\$383.3	5,595,211	370.20
14	Virginia	15,056	\$387.2	7,078,515	470.15
15	New Jersey	13,844	\$409.3	8,414,350	607.80
33	Hawaii	4,768	\$115.0	1,375,000	288.38

Most of the international students did not attend the top 20 universities in the U.S.. Huge amount of international students attended the unranked universities or community college. e.g #3 hosting international student Texas state, #1 ranked institution is Houston Community College with more than 10 percent (6,261) of Texas's international students.

Top 15 state with Source of International Students Countries

State	#1	#2	#3	#4	#5
California	China	South Korea	India	Taiwan	Japan
New York	China	India	South Korea	Canada	Taiwan
Texas	India	China	Mexico	South Korea	Vietnam
Massachusetts	China	India	South Korea	Canada	Taiwan
Illinois	China	India	South Korea	Taiwan	Canada
Pennsylvania	China	India	South Korea	Saudi Arabia	Taiwan
Florida	China	India	Venzuela	Saudi Arabia	south Korea
Ohio	China	India	South Korea	Saudi Arabia	Taiwan
Michigan	China	India	South Korea	Canada	Saudi Arabia
Indiana	China	India	South Korea	Saudi Arabia	Taiwan
Washington	China	South Korea	Vietnam	Japan	Hong Kong
Georgia	China	India	South Korea	Taiwan	France
Missouri	China	India	South Korea	Saudi Arabia	Taiwan
Virginia	China	India	South Korea	Canada	Saudi Arabia
New Jersey	India	China	South Korea	Canada	Taiwan
Hawaii	Japan	South Korea	China	German	Taiwan

Target Markets:

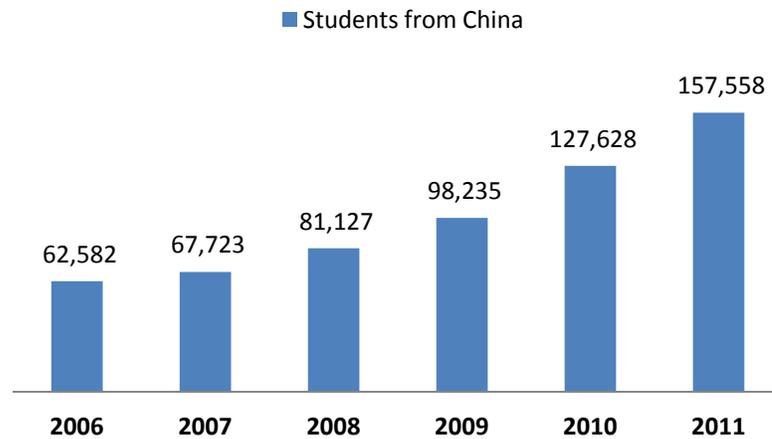
China is the leading place of origin for international students in the United States with 157,558 in 2011 (an increase of 23 percent from the previous year), followed by #2 India (103,895, down 1 percent), #3 South Korea (73,351, up 2 percent), #4 Canada (27,546, down 2 percent), #5 Taiwan (24,818 down 7 percent), #6 Saudi Arabia (22,704, up 44 percent), #7 Japan (21,290 down 14 percent), #8 Vietnam (14,888, up 14 percent) according to Institute of International Education.

China

China is the world's fastest-growing major economy, with an average growth rate of 10% for the past three decades. China has the second largest economy in the world, following the United States. The Chinese real GDP is expected to grow more than 8.5% over the next five years according to the IMF.

With more than 157,000 students from China enrolled in the US, many American institutions are over-reliant on the China market for meeting international student recruitment goals. With the budget cuts, self-financed students are becoming

increasingly important, and Chinese undergraduate students are a lucrative and fast-growing segment. However, there are already concerns about concentration of Chinese students on some campuses.



Source: Institute of International Education

Increased numbers of students from China, particularly at the undergraduate level, largely account for the growth this past year.

While the majority of Chinese students study at the graduate level, the U.S. continues to experience an upsurge in the number of undergraduate students coming from China. In 2011, their breakdown was as follows: 36.2 percent undergraduate, 48.8 percent graduate, 6.7 percent other and 8.4 percent in Optional Practical Training.

Currently, U.S. immigration rules call for granting student visas only to people likely to return to China. With the growth in China's economic clout, and the increasing rates of return by Chinese overseas scholars, the numbers of visas issued by the U.S. State Department to Chinese is on the rise.

China's Ministry of Human Resources and Social Security recently reported that a total of 497,400 overseas Chinese students have returned to China between 1978 and 2009; of this number, more than 100,000 Chinese students returned in 2009, an increase of 56 percent over the previous year.

China is a huge country to be targeted with limited resources. Hawaii should target the provinces with close connections with Hawaii, and second tier cities. Also we should not directly compete against first tier universities such as Stanford, MIT...etc.

Targeted provinces:

Province	Guangdong	Zhejiang	Yunan	Hubei	Shangdong	Shanghai	Jiangsu
Population (million)	104	54	46	57	96	23	79
GDP (billion \$)	839	495	138	311	711	297	750



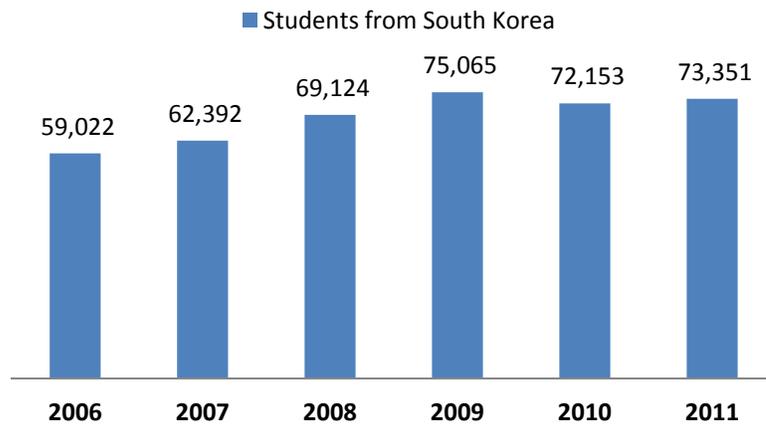
Study abroad programs are increasingly popular as Chinese businesses grow from simple production to managing their own global ventures. This requires skills and experiences only attainable through experience abroad, as Chinese institutions of higher learning are rated relatively low compared to the West.

Online learning is a quickly growing market. China already possesses the second largest Internet-based market in the world. Companies such as Microsoft are heavily investing in necessary infrastructure to facilitate the Chinese government's attempts to connect rural schools to the Internet. Private consumption of distance learning is also on a steady rise, with Korean companies most highly regarded by the Chinese in terms of quality for primary and secondary education. Australia is making considerable progress in distance learning for professional skills and services.

While the study abroad and distance learning markets as a whole are growing, fresh markets might be found in such places as Dongguan, Shenzhen, Wuhan, and Zhuhai. These areas, while still in South China, are untapped compared to greater Guangzhou.

South Korea

In the 2011 academic year, 73,351 students from South Korea were studying in the United States (up 2% from the previous year). South Korea is the third leading place of origin for students coming to the United States.



Source: Institute of International Education

South Korean student numbers have increased significantly since 1999. In 2011, South Korea moved from the fourth-leading place of origin to third, after China and India, and continues to hold that spot.

The majority of Korean students study at the undergraduate level of 51.7 percent, graduate students 30.7%, other 9.4 percent and Optional Practical Training 8.2 percent.

U.S. academic institutions will find tremendous opportunities to attract South Korean students, thanks to the nation's liberalization of its educational system. Consequently, Koreans are permitted to attend overseas elementary, middle and high schools. This decision has greatly increased the number of younger students at overseas primary and secondary schools, preparatory academies, ESL programs and, ultimately, colleges and universities. Continued double-digit growth in Korean visa applications is anticipated.

According to the Bank of Korea, tuition payments to all countries are expected to increase significantly over the next few years. The Korean government has modified its Foreign Exchange Control Act, which restricted money transfers to \$10,000. This liberalization of foreign exchange transactions has made studying in the U.S. more convenient and viable.

The Korean market looks especially promising not only for primary and secondary schools, but also for educational training in the fields of language courses, business administration, fashion, art and technical programs. Including tuition and living expenses, the average annual expenditure per Korean student attending overseas institutions is estimated at more than \$30,000, according to the U.S. State Department.

Additional opportunities exist for U.S. academic institutions in Korea. The trend of Koreans to favor U.S. degrees was on the minds of the developers of the Incheon Free Economic Zone (IFEZ), which is based in the reclaimed city of Songdo, southwest of Incheon. A number of U.S. institutions have already begun to set up research centers or branch campuses at the Songdo Global University Campus.

South Korean students are primarily attracted to degree programs in the U.S.

- a. Long-term undergraduate and graduate programs are considered the best value.
- b. Short-term programs are more commonly desired for English language programs and professional training.
- c. Overseas professional training can range from 2 -12 months

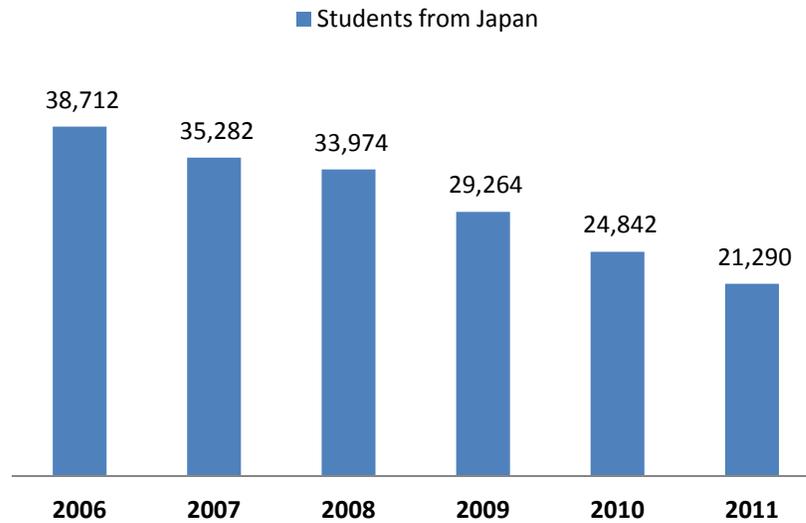
At the same time, Korea's economy is rebounding at real GDP 4% for the next 5 years according to the IMF. As a result, consumer spending has surged, and parents' enthusiasm for their children attending international schools has sharply risen as well.

Japan

In the 2011 academic year, 21,290 students from Japan were studying in the United States (down 14% from the previous year). Japan is the seventh leading place of origin for students coming to the United States. Japan is the third largest national economy in the world, after the United States and China, in terms of nominal GDP. Japan's economy is rebounding at real GDP 1% for the next five years according to the IMF.

The number of college age individuals in Japan is steadily declining due to the decreasing birth rate. The number of students studying in the U.S. declined 4 percent in 2011 compared to the previous year. Although these figures seem discouraging, the U.S. is still the most popular international destination for students from Japan and is an important market for the U.S. education sector.

The majority of Japanese students study at the undergraduate level (49.5 %), graduate students 21.8%, other 20.1 percent and Optional Practical Training 8.5 percent. The most popular areas of study for these students are: Business, Social Science, and Humanities.



Source: Institute of International Education

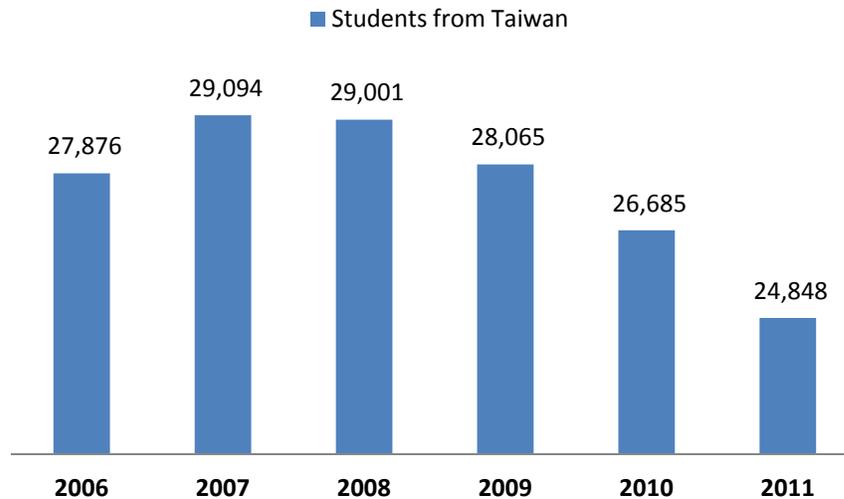
The number of Japanese students on U.S. campuses decreased by 14 percent in 2011 following a general trend of decline. Japan was the leading sender of students to the U.S. but has since fallen to seventh due to surges in students from India, China, South Korea and Saudi Arabia, the effects of a rapidly aging Japanese population and other factors including the global economy and the recruiting cycle of Japanese companies.

The economic downturn has changed the pace of travel and study abroad for Japan. Shorter programs are becoming more attractive to the Japanese market in contrast to long-term degree programs. Summer programs, semester programs, intensive language programs, and even graduate programs are more becoming more attractive and are a great opportunity for Hawaii institutions.

Taiwan

In the 2011 academic year, 24,818 students from Taiwan were studying in the United States (down 7% from the previous year). Taiwan is the fifth leading place of origin for students coming to the United States.

The majority of Taiwanese students study at the undergraduate level (24.2 %), graduate students 53.5 percent, other 7.3 percent and Optional Practical Training 15.1 percent.



Source: Institute of International Education

The number of Taiwanese students on U.S. campuses decreased by 7 percent in 2011 following a general trend of decline. In 2011, 366 Taiwanese students were studying in Hawaii.

In recent years, Taiwan's ministry of education has significantly liberalized study abroad requirements for middle & high school students.

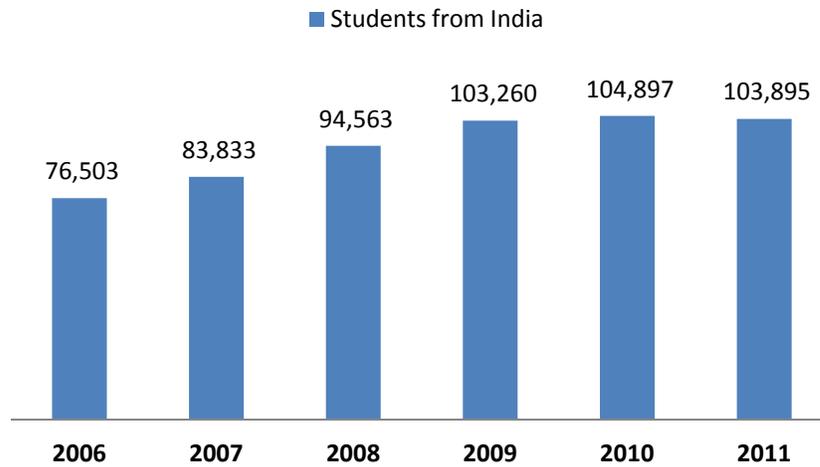
There are opportunities for Hawaii. Institutions that are interested in developing collaborative arrangements with Taiwan universities, mainly joint degree programs and language exchange programs. Hawaii schools should take advantage of this opportunity as this market segment is becoming increasingly competitive with many other countries aggressively marketing and providing financial incentives to partner with Taiwan schools. Some of the main factors that Taiwan schools take into account when forming partnerships are the partner schools' ranking and competitiveness in specific areas. The availability of scholarships or low tuition is crucial in their decision-making process. Popular areas of study are business management, information management, engineering, computer science and finance.

Taiwan has weathered Asia's economic crisis relatively unscathed. The region's wealth is built primarily on small, private businesses rather than large corporations. For this reason, many families can afford an American education for their children. As the same time, the Taiwan real GDP is expected to grow more than 4.8% over the next five years according to the IMF.

India

While the number of students studying abroad from India are increasing, their enrollment patterns and preferences vary considerably by pace of growth, destination, field of study and level of study.

In the 2011 academic year, 103,895 students from India were studying in the United States (down 1% from the previous year). India is the second leading place of origin for students coming to the United States.



Source: Institute of International Education

The majority of Indian students study at the graduate level. In 2011, their breakdown was as follows: 13.5 percent undergraduate, 61.2 percent graduate, 1.5 percent other and 23.7 percent Optional Practical Training.

The number of Indian students in the U.S. in 2011 remained relatively flat compared to the previous year. India had been the leading place of origin for international students in the U.S. from 2002 through 2009.

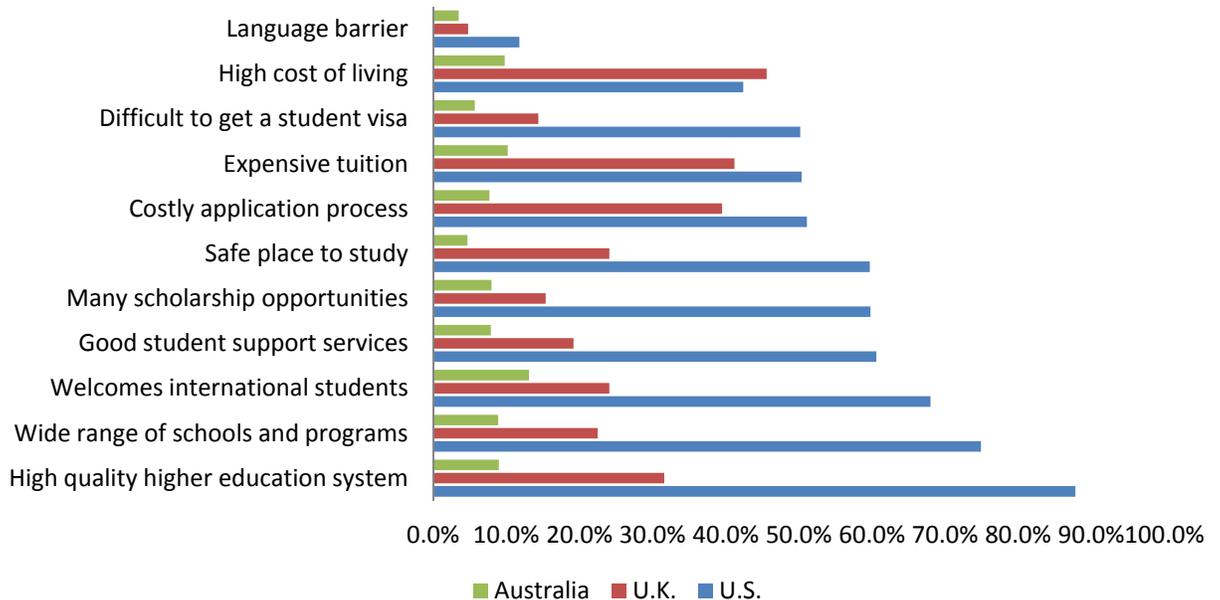
Indian students are heavily concentrated in Engineering or Computer Science. Nearly 57% of all Indian students are enrolled in Engineering and Computer Science as compared to 25% for Chinese (NSF).

Graduate education has proven to be popular among students from India in past years.

Undergraduate Education is forecasted to experience future growth. Addressing specific barriers to enrollment will help to increase the number of Indian students in undergraduate programs. Barriers are issues such as academic credit transfer, and limited scholarships for foreign students.

The economy of India is the eleventh largest in the world by nominal GDP and is the second largest country in the world in term of population. India's economic expect to grow at least 7.3 percent for the next five years according to IMF.

Figure 10: Percent of Students in India Who Agree the Statement Applies to the Study Destination



Source: Institute of International Education

The U.S. was perceived to have an excellent higher education system by 87.8 percent responding students in India, a much higher percentage than for U.K. (31.6 percent) and Australia (9.0 percent). Most responding students felt that the U.S. has good student support services (60.6 percent), many scholarship opportunities (59.8 percent) and is a safe place to study (59.7 percent).

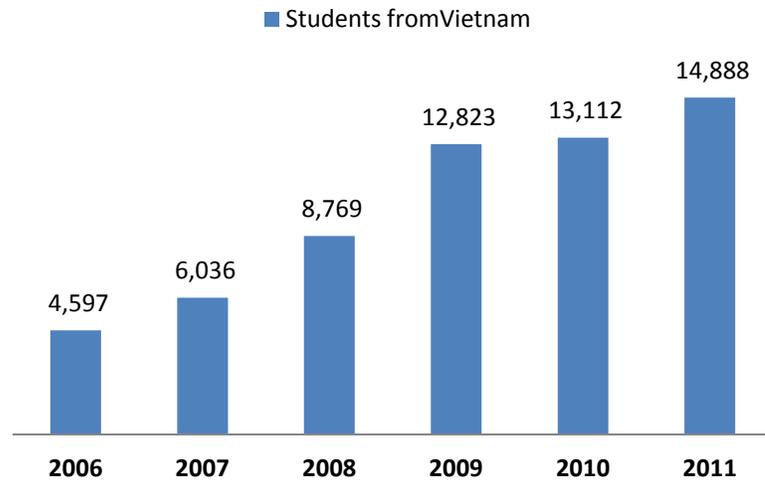
However, 51.1 percent of responding students perceived that the U.S. has a costly school application process, has expensive tuition (50.4 percent) and that it is difficult to obtain a visa to study in the U.S. (50.2 percent).

Vietnam

Vietnamese students in the US have grown by more than six times over the last decade. Even Australia gained from the demand of Vietnamese students by 167% in four years from 9,634 in 2007 to 25,788 in 2010.

In the 2011 academic year, 14,888 students from Vietnam were studying in the United States (up 14% from the previous year). Vietnam is the eighth leading place of origin for students coming to the United States.

The majority of Vietnamese students study at the graduate level. In 2011, their breakdown was as follows: 74.2 percent undergraduate, 16.3 percent graduate, 6 percent other and 3.5 percent Optional Practical Training.



Source: Institute of International Education

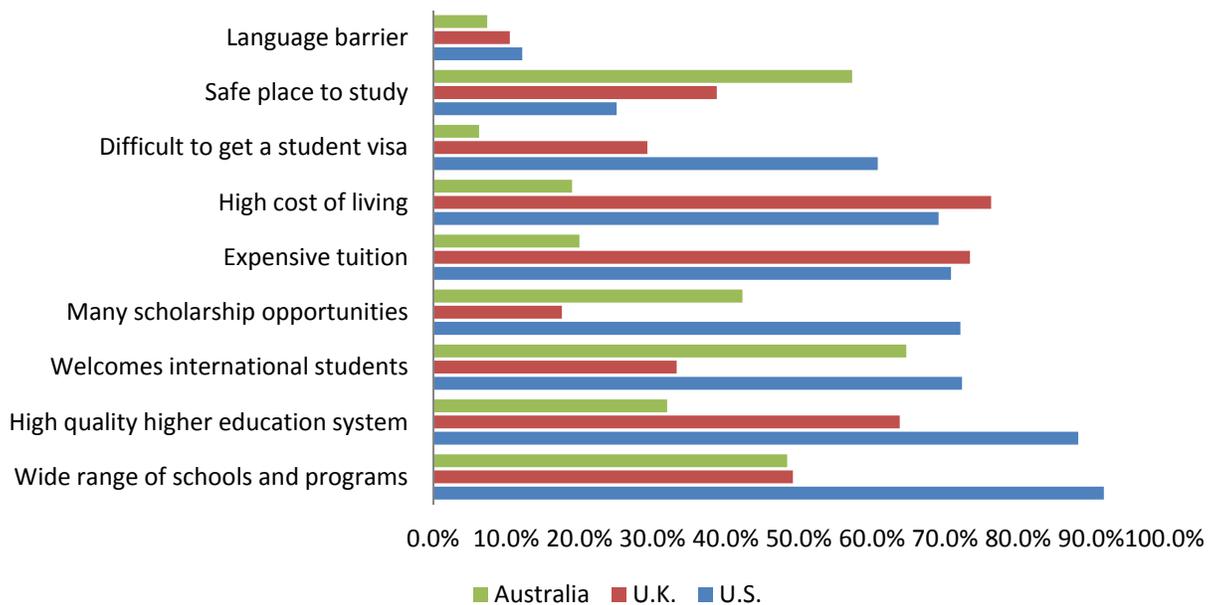
Vietnam has been a top 20 place of origin since 2007 and is now a top 10 place of origin for international students in the United States.

This growth in internationally mobile students from Vietnam is primarily driven by growing aspirations of expanding educated classes which in turn are supported by economic development. Vietnam saw their GDPs grow by nearly three-times in a decade.

Currently the United States is the most popular destination for Vietnamese students abroad. English proficiency is one of the three most important factors of a strong Vietnamese resume, including level of education and skill with computers. Vietnamese are increasingly electing to spend years at a time in full-time schooling abroad, with some students acquiring 4 year degrees from American Universities.

The online learning market is still fresh as the country is beginning to become connected by the internet, and distance learning tools may become quite successful if they are affordable. Vocational schooling is a field with particular potential, as Vietnamese industry requires more skilled laborers than the current home-grown vocational schools can produce.

Figure 10: Percent of Students in Vietnam Who Agree the Statement Applies to the Study Destination



Source: Institute of International Education

The U.S. was perceived by 92 percent responding students to have a wide range of school and programs compared to U.K. (49.2%) and Australia (48.4%). 88 percent of respondents perceived U.S. institutions had a high quality higher education system, welcomed international students and have many scholarships opportunities.

However, many responding students also felt that the U.S. was an expensive place to study, with high tuition costs (70.8 percent) and a high cost of living (69.1 percent). They indicated that they felt the U.S. had difficult procedures for obtaining a student visa compare to U.K. and Australia.

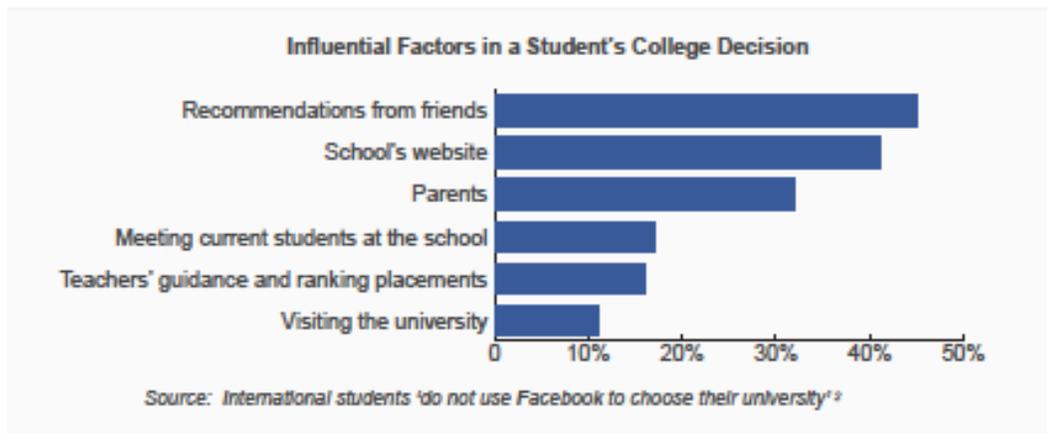
The most popular fields of study by international students

The top 10 most popular fields of study for international students in the United States in 2009/2010 were Business and Management (22 percent of total), Engineering (19 percent), Mathematics and Computer Science (9 percent), Physical and Life Sciences (9 percent), Social Sciences (9 percent), Fine & Applied Arts (5 percent), Health Professions (5 percent), Intensive English Language (5 percent), Education (2 percent), Humanities (2 percent), and Agriculture (1 percent). Undeclared majors are excluded from the rankings of top fields of study.

8. GENERAL STRATEGY

The number of international students enrolled in Hawaii's institutions of higher education is relatively low as a percentage of overall enrollments, however, there continues to be an opportunity to leverage the attractiveness of the Hawaii brand. This means that many institutions are facing pressure to become more efficient in achieving their recruitment goals. In this context, the following international recruitment model may be considered.

When students choose a college, a number of factors come into play. Below is a breakdown of which sources were most influential.



a) Target recruitment service providers

The international education agent industry is highly competitive and working with a good agent can be very lucrative for an institution. The following are the benefits of using an agent (Overseas Office):

- ◆ Agents can provide innovative marketing and promotional ideas that are highly relevant in the target country.
- ◆ Agents with offices or contacts in offshore markets can provide first-hand information on trends and opportunities.
- ◆ Agents with offshore offices can provide on-ground support and thus reduce the need to travel as frequently to markets reducing the overall business development costs and increasing profitability
- ◆ Agents provide local expertise and have local language and cultural understanding and knowledge.
- ◆ Agents can provide a one-stop-shop for students, which will result in students' overall satisfaction with the experience.

Institutional Case Study

The University of South Florida set up a joint venture with INTO corporation in the hopes of increasing international enrollment and has reported to the exceeded original plan targets by 16 percent. A record 590 students from 33 countries are enrolled for Fall 2011 at the INTO USF center on the university's Tampa campus, a 27 percent increase over Fall 2010 enrollment.

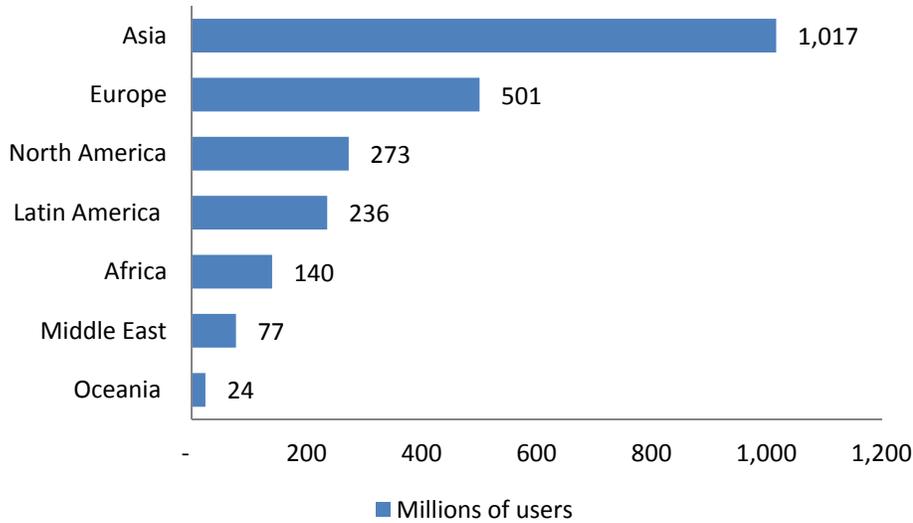
Source: INTO and University of South Florida & World Education Services.

b) Social Media and Alumni Engagement

While every country has their own social networks and adoption trends, one network continues to be the 800 lb gorilla in the room: Facebook, about 70 percent of Facebook's over 835 million users are outside the U.S. according to internet World States.

- ◆ Social media offers a more credible and cost-effective connectivity with prospective students with advantages: relevance, speed, cost and personalization.
- ◆ International alumni also provide an excellent resource for student recruitment through referrals.
- ◆ Like any new practice, the use of social media in international recruitment poses challenges and opportunities. However, institutions that embrace it can realize a significant competitive advantage.
- ◆ Allow prospective students to connect with current students, faculty, and administrators before they set foot on campus.

Figure 11: Internet Users in the World by Region -2011



Source: Internetworldstats.com

Institutional Case Study

Brock University illustrated a skillful use of social media in international student recruitment. It reported that “since September 2011, 44 QQ user (popular China-based instant messaging) have been interested in Brock, while 1,149 are interested in Brock on Renren (Facebook of China). In March, Brock went from a personal to a public page on Renren, which allow it validation and a broader reach. Students seem to appreciate Brock’s accessibility and its ability to communicate with them in their own language.”

Source: *The Brock News* “Brock uses China’s vast social media to recruit students.”

North Carolina State University makes a fascinating case study because of the high level at which the institution has integrated social media technologies into its existing efforts, without any separate budget or staff dedicated to social media.

“In December 2010 at North Carolina State University, it implemented a multi-channel recruitment campaign targeting admitted out-of-state students. We employed several different communication channels, including email messaging, printed invitations, campus events, a custom page accessed via the university’s official Facebook page, and a recruitment landing page. An HTML email provided the initial touch, directing students to complete their online applications, join the Wolfpack, or visit the custom admissions landing page for more information. We promoted the custom Facebook tab in several places, including direct email, admissions landing page, university homepage and several other online locations. The Facebook tab was built in-house using free tools and basic Web code, but provided a nice, vibrant, stylized, on-brand presence inside of Facebook, with clear, direct calls to

action.”

What North Carolina State University achieved in this example was a thoughtful and well-planned integration of Facebook into its broader recruitment strategy – as one of multiple channels for reaching prospective students. Because NCSU was able to align one message across these varied channels, the institution was able to maximize its reach and the response:

- Mailed invitations contributed to a 125 percent increase in traffic on the Facebook tab
- Email invitations saw a click-through rate of just over 60 percent

The end result of this strategy was a 44 percent increase in the number of early-action, out-of-state students intending to enroll at NCSU.

Source :Academic Impressions “Social Media and Student Recruitment”

c) State Consortia Marketing

- ◆ Collaborative marketing through a consortium of states or universities is also emerging as an effective approach.
- ◆ State-wide initiatives can be a cost effective way for institutions to pool their resources and efforts, and enable even smaller or lesser known colleges to reach students around the world.
- ◆ With state level recruitment strategies, e.g. Ohio saw a 10.5 percent increase in international enrollment.
- ◆ Partnerships with Hawaii educational institutions, Study Hawaii, NAFSA, US Commercial Service and Hawaii Tourism Authority to brand and market Hawaii as the place for international students.

Institutional Case Study

Since 2002, StudyIowa, a consortium of universities promoting higher education in Iowa abroad, has led many recruitment initiatives to countries such as Brazil, Colombia, and Venezuela. The University of Iowa, one of the consortium members, reported that international student enrollment soared by 58 percent (from 2,189 in 2006 to 3,465 in Fall 2011); Iowa State University, another member of the consortium, reported its international enrollment increased from 3,327 in 2010 to 3,424 in 2011.

Source: World Education Services.

Student and Exchange Visitor Program (SEVP) Approved Hawaii Schools:

SEVIS approved schools allow international students to study in the USA

1	Above It All, Inc	44	Kapi`olani Community College
2	Academia Language School	45	Kauai Community College
3	Academy Of The Pacific	46	La Pietra Hawaii School For Girls
4	American Renaissance Academy	47	Leeward Community College
5	Ampy's Institute Of Advanced Aesthetics	48	Lutheran High School Of Hawaii
6	Anderson Aviation	49	Makana Esthetics Wellness Academy
7	Argosy University/Honolulu	50	Makua Lani Christian School
8	Brigham Young University-Hawaii	51	Maryknoll School
9	Central Pacific College	52	Maui Academy Of Healing Arts
10	Chaminade University Of Honolulu	53	Maui Preparatory Academy
11	Christian Academy	54	Maui School Of Therapeutic Massage
12	EF International Language Schools, Inc.	55	Mauna Loa Helicopters
13	Elite Massage Academy LLC	56	Mid-Pacific Institute
14	ELS Language Centers/Honolulu	57	Moore Air, Inc.
15	Global Village Hawaii	58	Our Redeemer Lutheran School
16	Hanahau`oli School	59	Pacific International Language School
17	Hanalani Schools	60	Pacific Rim Christian College
18	Hawaii Baptist Academy	61	Le Jardin Windward Oahu Academy
19	Hawaii Catholic School	62	Punahou School
20	Hawaii Community College	63	Sacred Hearts Academy
21	Hawaii Healing Arts College	64	Saint Anthony School
22	Hawaii Massage Academy	65	Saint Francis School
23	Hawai'i Montessori, Inc.	66	Saint Louis School
24	Hawaii Pacific University	67	Seabury Hall
25	Hawai'i Preparatory Academy	68	Spa Luna Holistic School
26	Hawaii Tokai International College	69	St. Andrew's Priory School
27	Hawaiian Mission Academy	70	St. Joseph School Of Hilo
28	Heald College	71	St. Mark Lutheran School
29	High School Of The Pacific	72	St. Theresa Catholic School
30	Hongwanji Mission School	73	Star Of The Sea
31	Honolulu Nail Academy, Llc	74	The Center For Asia-Pacific Exchange
32	Honolulu Waldorf School	75	Traditional Chinese Medical College Of Hawaii
33	Hualalai Academy	76	Travel Institute Of The Pacific
34	Institute Of Clinical Acupuncture And Oriental Medicine	77	Windward Community College
35	Institute Of Intensive English, Ltd.	78	University Of Hawaii At Hilo
36	Intercultural Communications College	79	University Of Hawaii At Manoa
37	International Mid Pac College	80	University Of Hawaii Maui College
38	International School Of Beauty & Esthetique	81	University Of Hawai'i--West O'ahu
39	Iolani School	82	University Of The Nations
40	Island Pacific Academy	83	Varsity International School
41	Island School	84	Wayland Baptist University
42	Japan-America Institute Of Management Science	85	World Medicine Institute
43	Ka'ahumanu Hou Christian School		

Appendix A: Definitions of International Study

The following definitions are specific to national education systems:

- Australia:** “International students’ are defined as those studying onshore only with visa subclasses 570 to 575, excluding students on Australian funded scholarships or sponsorships or students undertaking study while in possession of other temporary visa.
- Canada:** “Foreign students’ are defined as temporary residents who have been approved by an immigration officer to study in Canada.
- France:** “Foreign students’ are defined as foreign nationals who travel to France for the purpose of study or long-term or permanent residents in possession of French secondary qualifications and who likely have French residency status.
- Germany:** “Foreign students’ are defined as mobile foreign student, those who travel to Germany specifically for study, and non-mobile foreign students, those in possession of German secondary school qualifications and who likely have German residency status.
- Japan:** “International students’ are defined as foreign nationals who study at any Japanese university, graduate school, junior college, college of technology, profession training college or university preparatory course on a college student visa, as defined by the Immigration Control and Refugee Recognition Act.
- New Zealand:** “International students’ are foreign nationals who travel to New Zealand for the purposes of education, and/or are currently studying on a student permit or domestic passport.
- United Kingdom:** “International students” are defined as students who are not UK domiciled, and whose normal residence is either in countries which were European Union members as 1 December of the reporting period or whose normal residence prior to commencing their programs of study was outside in EU.
- United State:** “Foreign students” are defined as students who are enrolled at institutions of higher education in the US who are not citizens of the US, immigrants or refugees. These may include holders of F visas, H visas, J visas and M visas.

Source:

<http://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/4102.0Main+Features20Dec+2011>

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