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17TH IDP AUSTRALIAN INTERNATIONAL EDUCATION CONFERENCE

*securing the FUTURE for International Education:
Managing growth and Diversity*



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Global Student Mobility Stage II

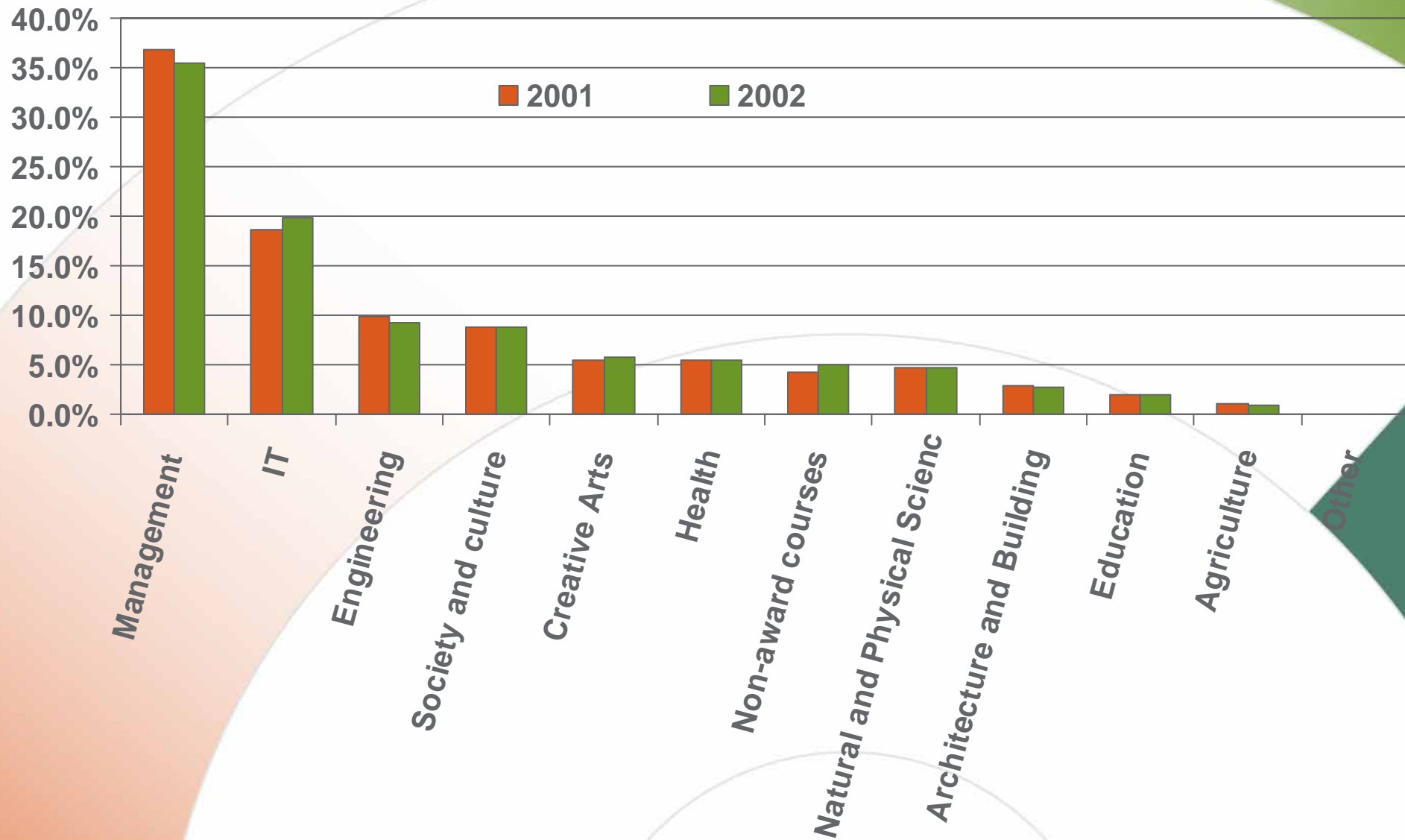
Composition of Demand

Global Trends Influencing Composition of Demand for International Education in MESDCs

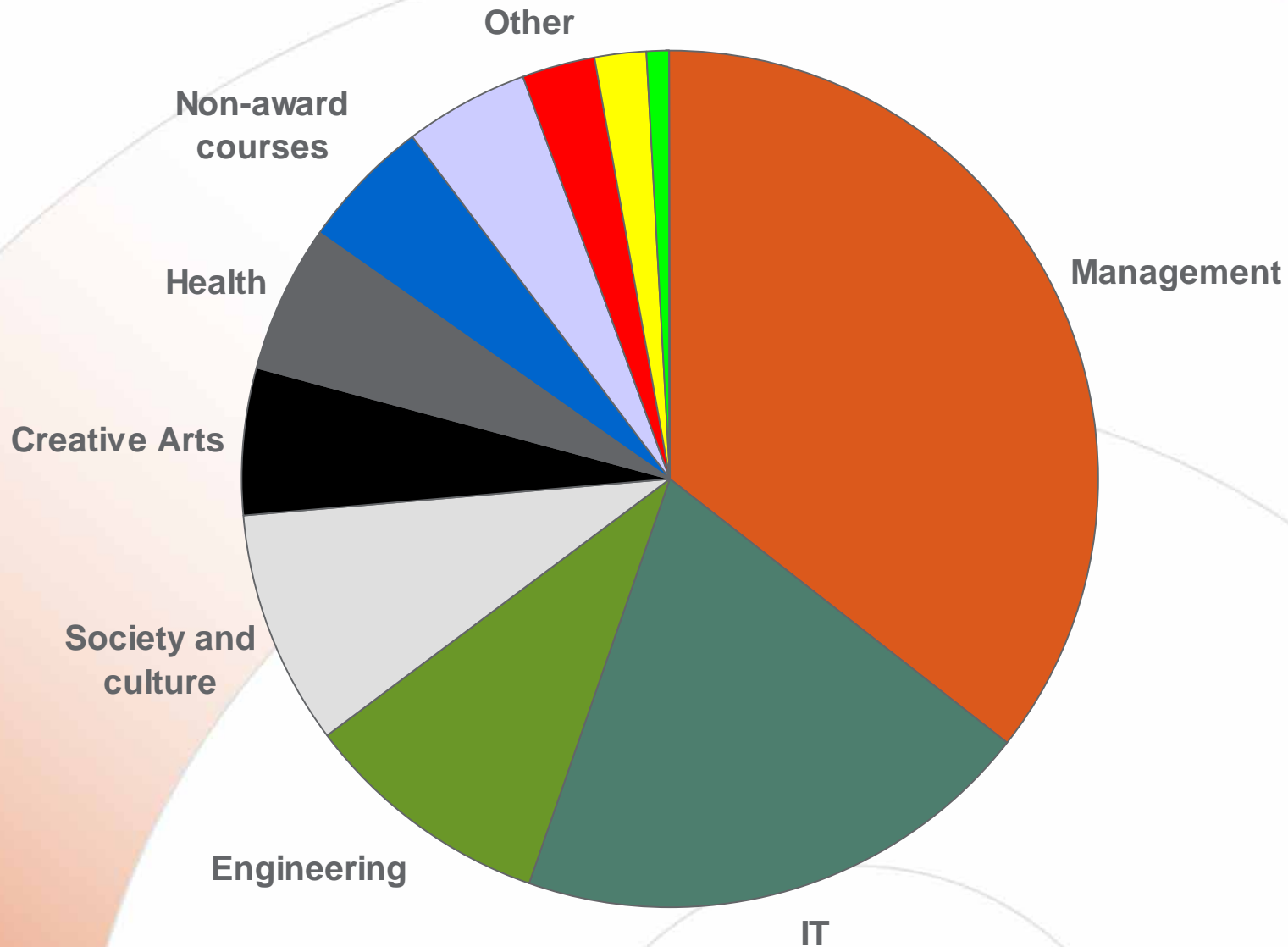
Simon Bush

IDP Education Australia

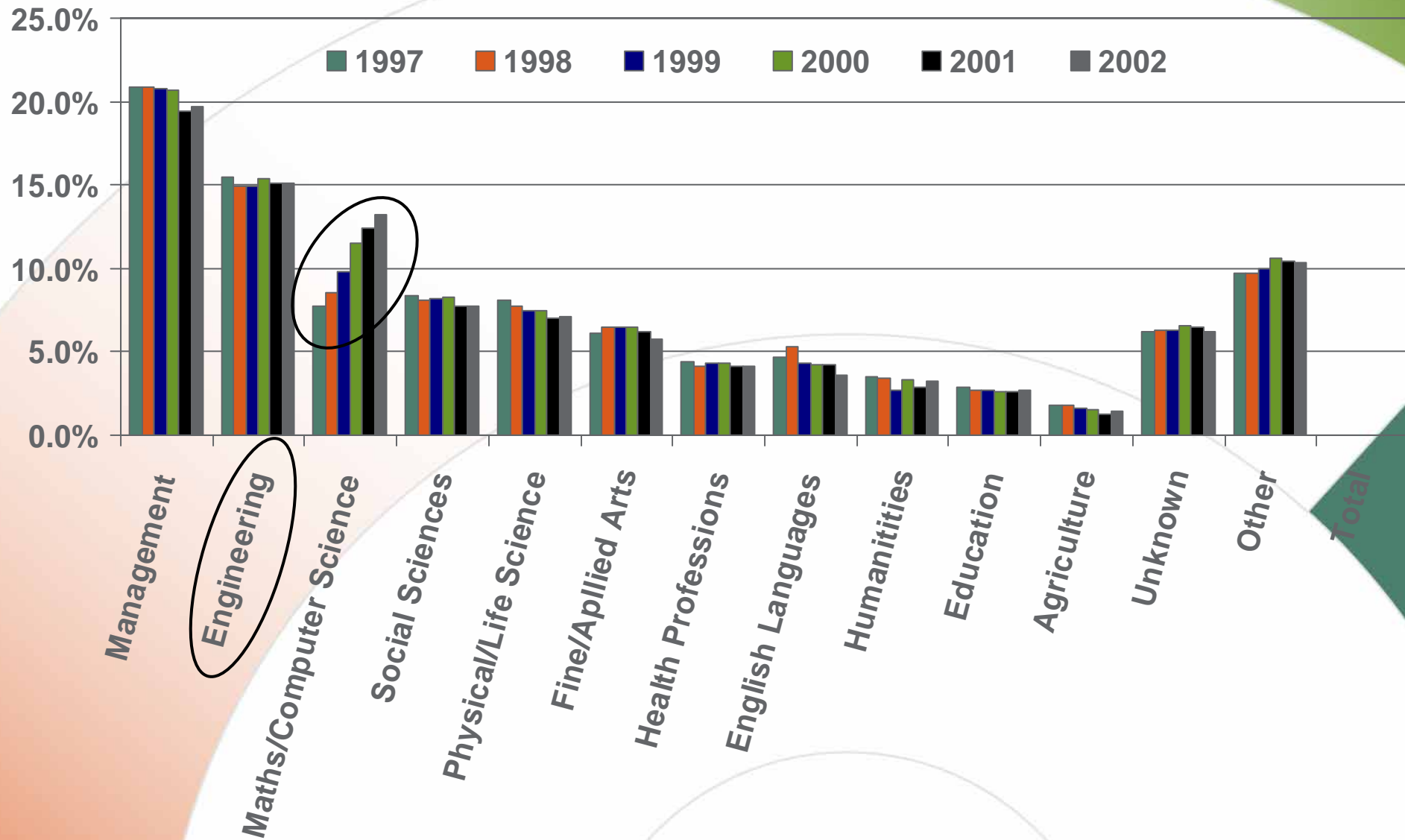
Share of International Students by Field of Study, Australia.



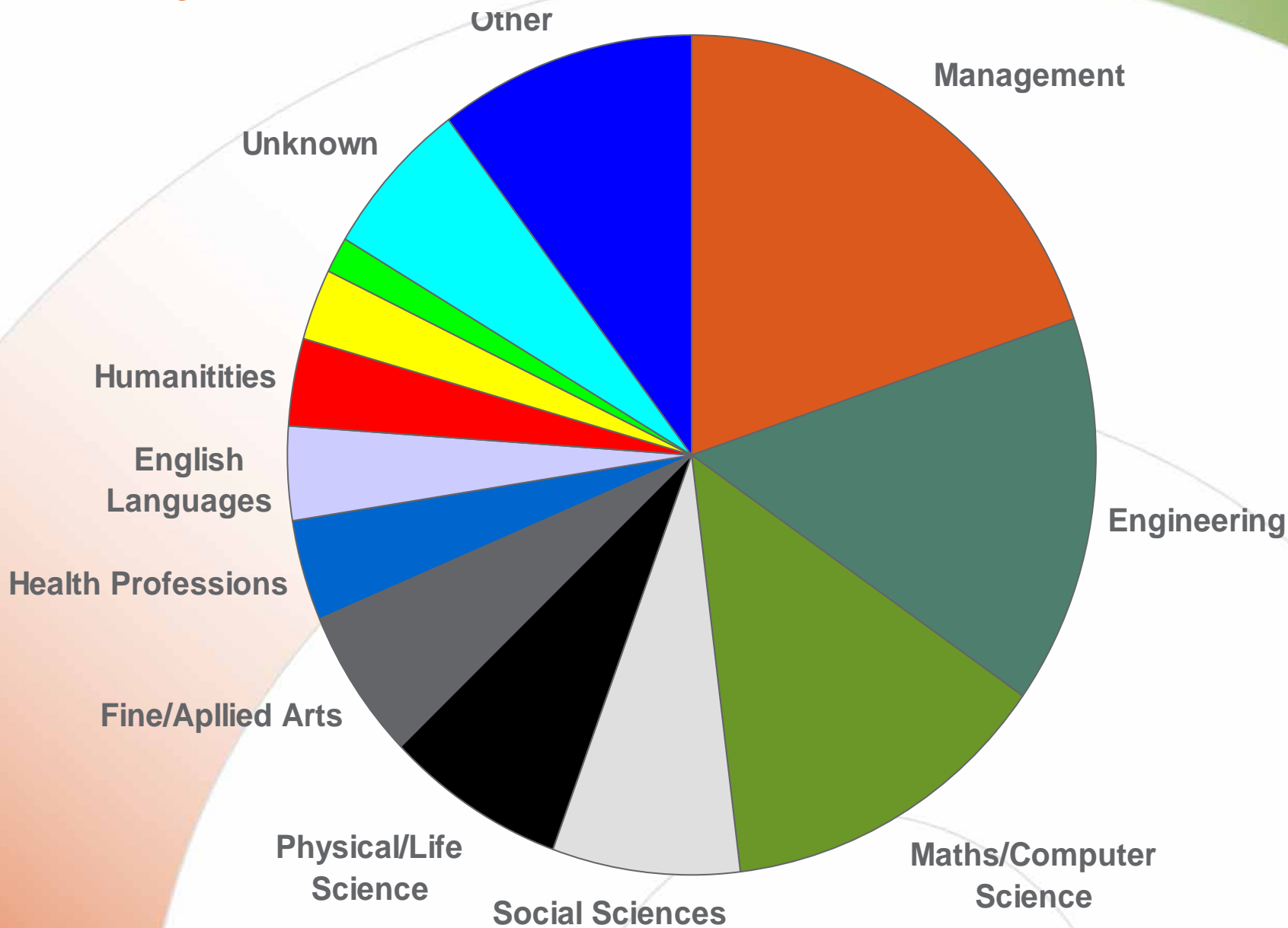
Share of International Students by Field of Study, Australia, 2002



Share of International Students by Field of Study, USA



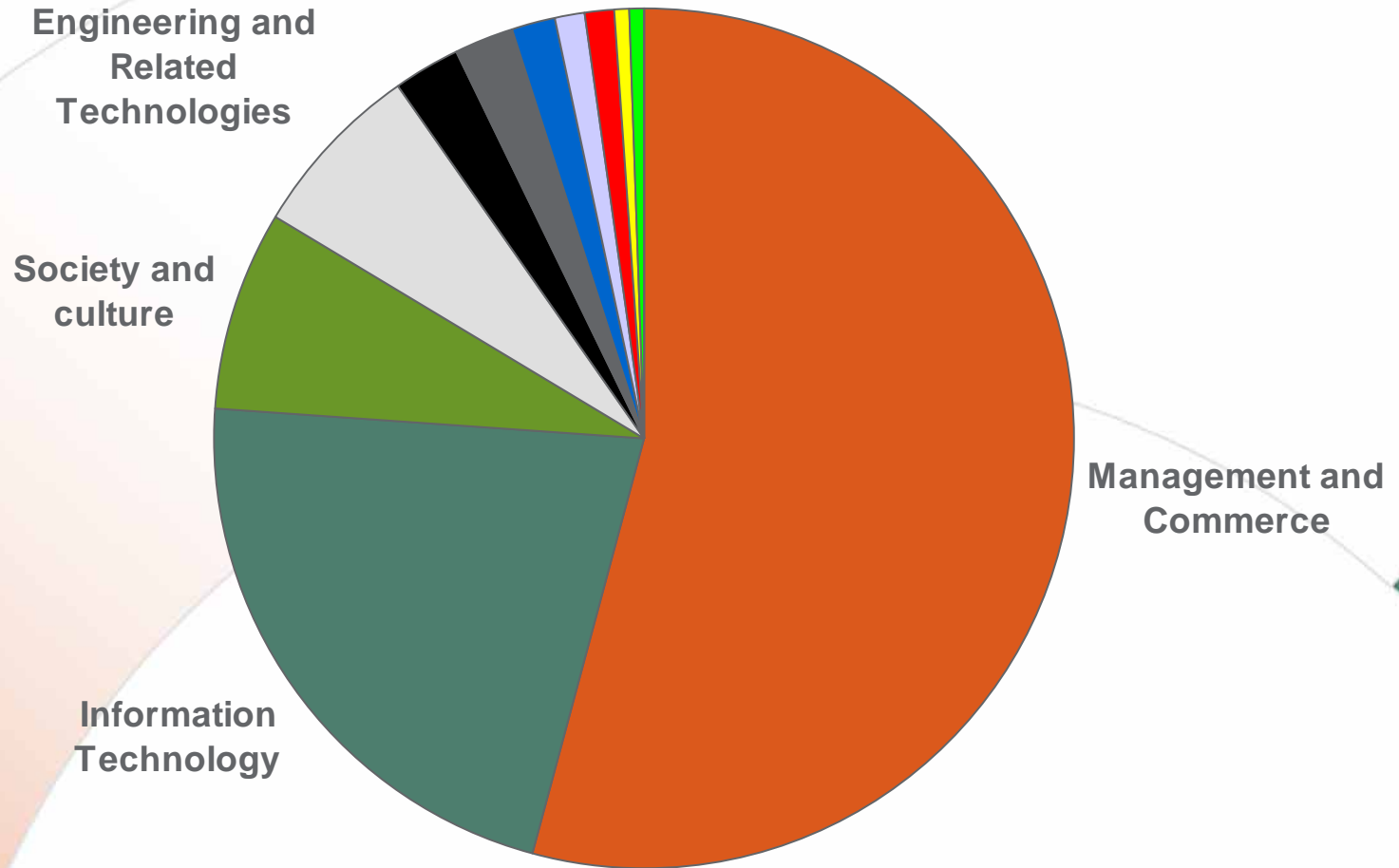
Share of International Students by Field of Study, USA, 2002



Chinese Students in Australia by Field of Study

	2001	Share of Total	2002	Share of Total	pp change
Management and Commerce	3371	53.6%	5590	54.3%	0.7%
Information Technology	1303	20.7%	2255	21.9%	1.2%
Society and culture	448	7.1%	756	7.3%	0.2%
Engineering and Related Technologies	463	7.4%	707	6.9%	-0.5%
Natural and Physical Sciences	210	3.3%	246	2.4%	-1.0%
Health	158	2.5%	218	2.1%	-0.4%
Creative Arts	92	1.5%	177	1.7%	0.3%
Architecture and Building	66	1.0%	115	1.1%	0.1%
Education	78	1.2%	110	1.1%	-0.2%
Non-award courses	41	0.7%	69	0.7%	0.0%
Agriculture, Environmental and Related Studies	55	0.9%	47	0.5%	-0.4%
Food, Hospitality and Personal Services	0	0.0%	0	0.0%	0.0%
Mixed Field Programmes	1	0.0%	0	0.0%	0.0%
Total	6286	100.0%	10290	100.0%	

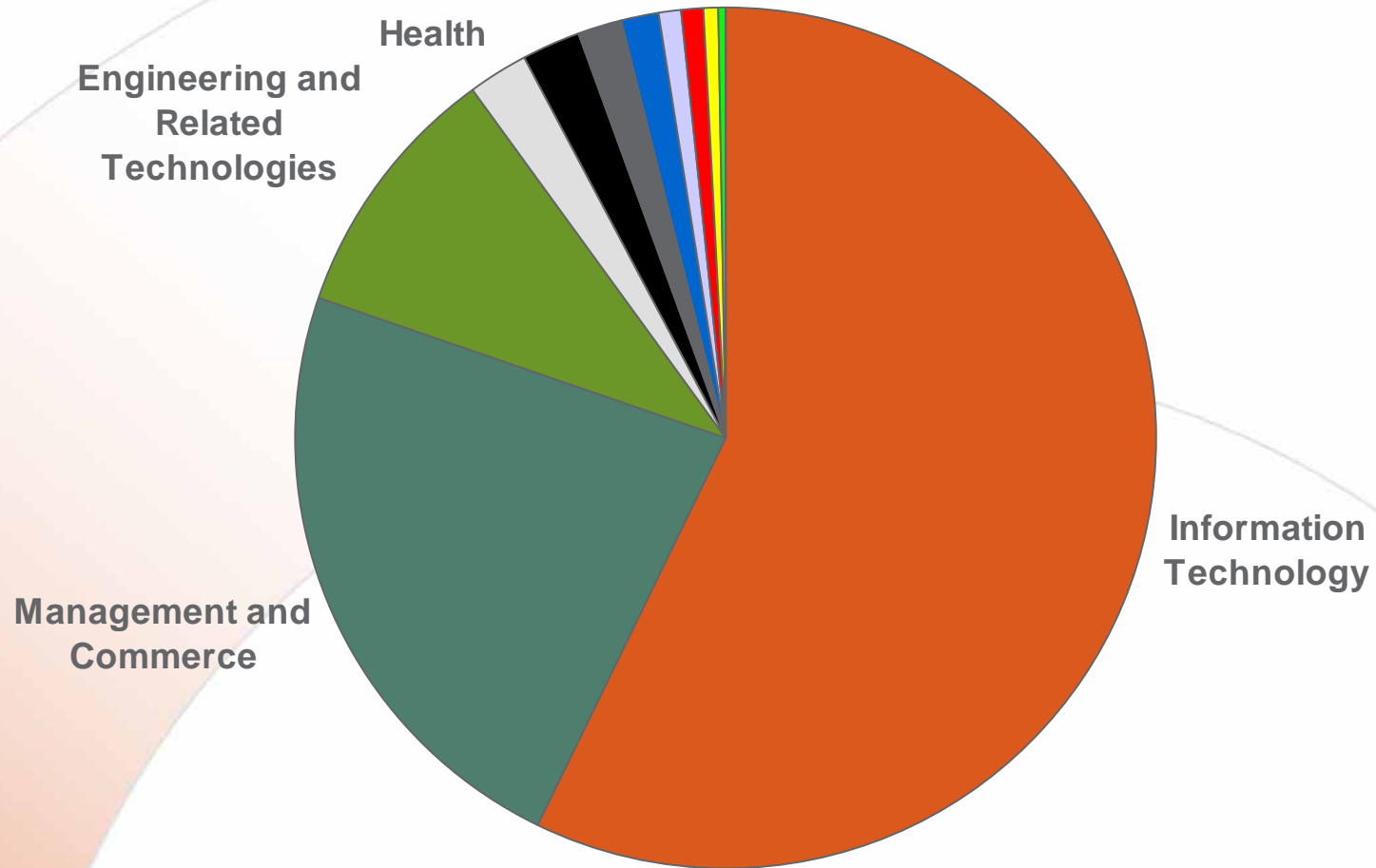
Share of Chinese Students in Australia by Field of Study, 2002



Indian Students in Australia by Field of Study

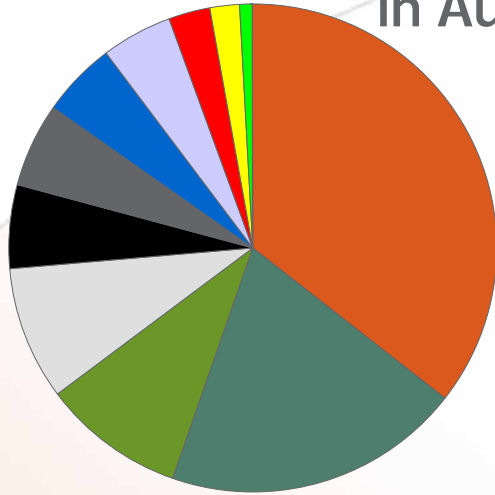
	2001	Share of Total	2002	Share of Total	pp change
Information Technology	3111	55.9%	3441	57.4%	1.5%
Management and Commerce	1371	24.6%	1382	23.0%	-1.6%
Engineering and Related Technologies	509	9.1%	580	9.7%	0.5%
Health	134	2.4%	137	2.3%	-0.1%
Natural and Physical Sciences	135	2.4%	130	2.2%	-0.3%
Society and culture	104	1.9%	96	1.6%	-0.3%
Creative Arts	78	1.4%	86	1.4%	0.0%
Non-award courses	44	0.8%	54	0.9%	0.1%
Agriculture, Environmental and Related Studies	28	0.5%	40	0.7%	0.2%
Architecture and Building	35	0.6%	35	0.6%	0.0%
Education	17	0.3%	18	0.3%	0.0%
Food, Hospitality and Personal Services	2	0.0%	0	0.0%	0.0%
Total	5568	100.0%	5999	100.0%	0.0%

Share of Indian Students in Australia by Field of Study, 2002

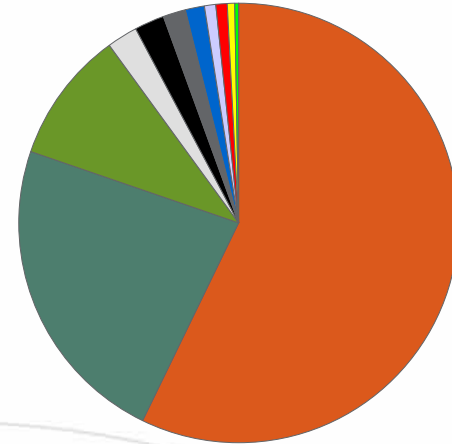


Comparison of Composition of Demand

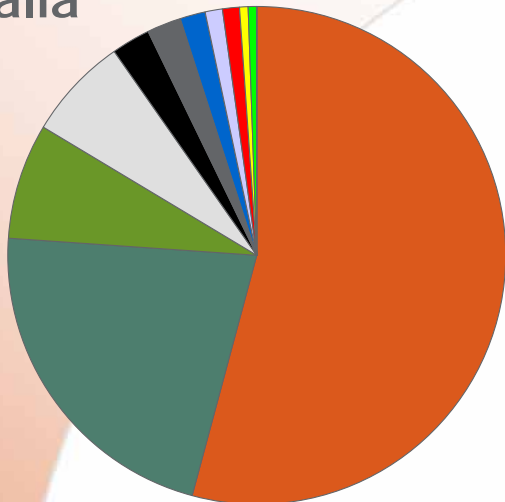
Intl Students
in Australia



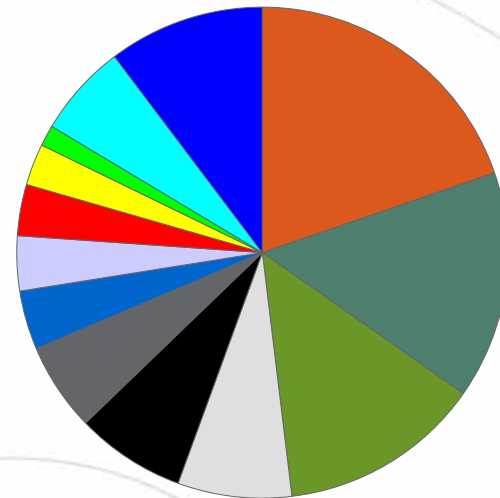
Indians in
Australia



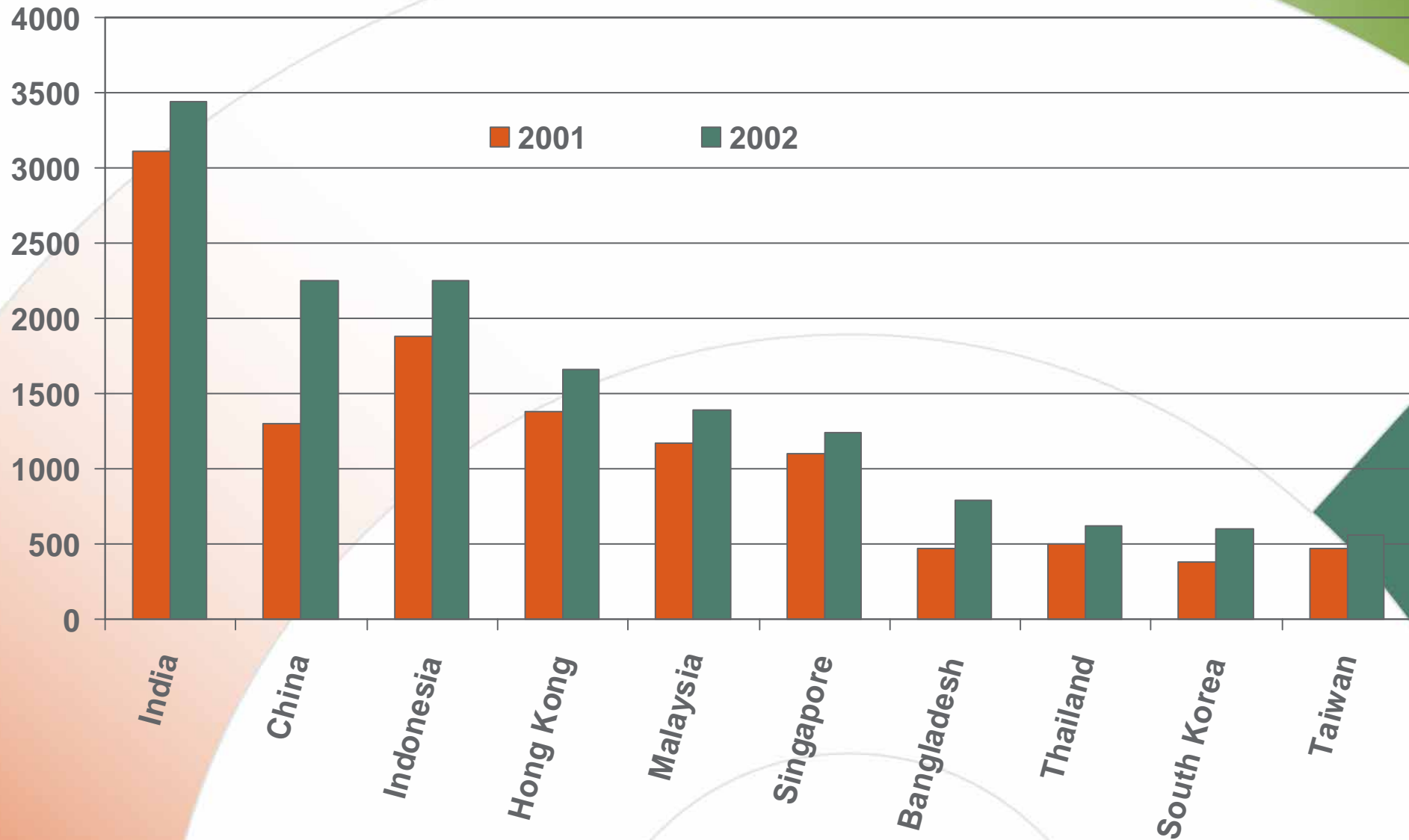
Chinese in
Australia



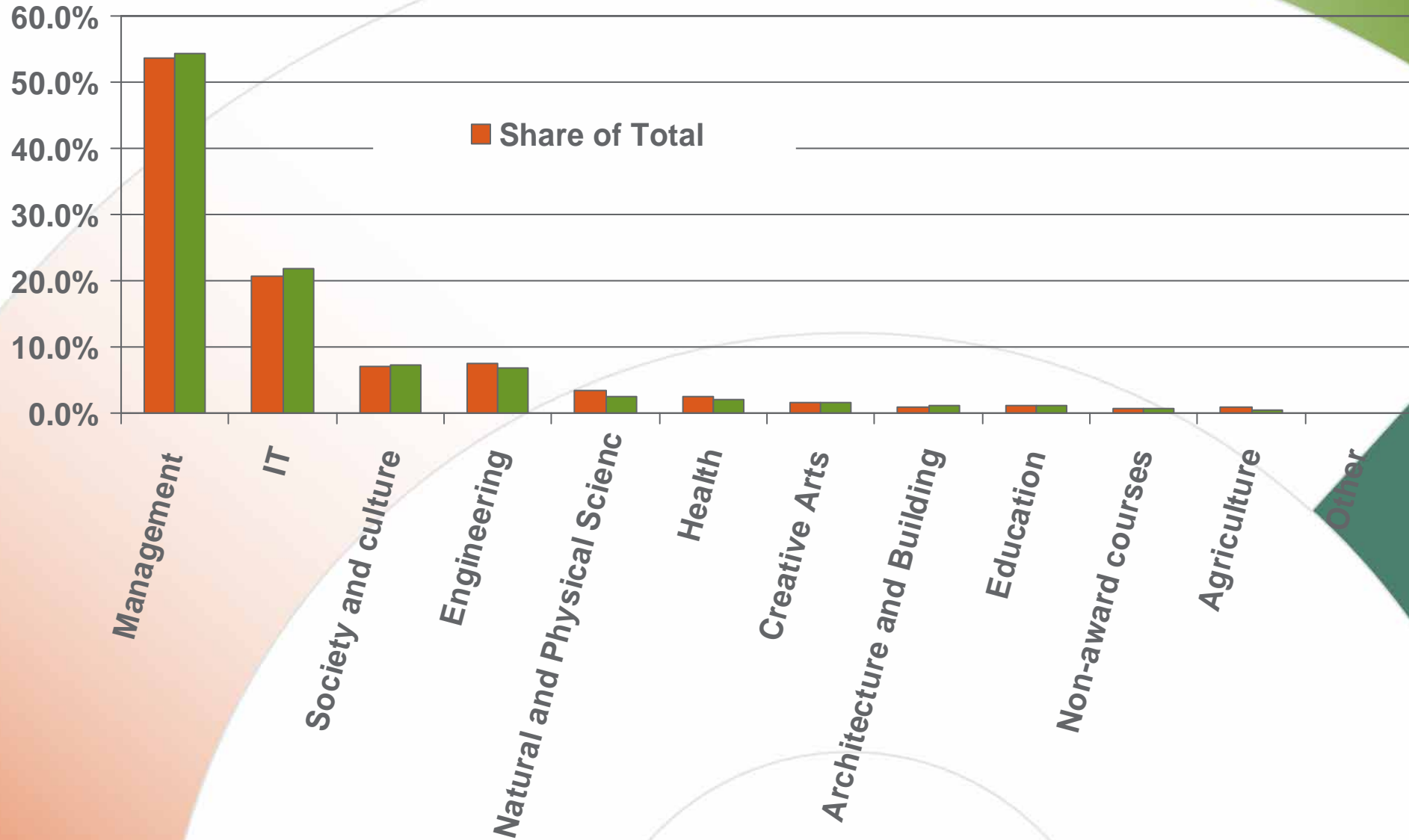
Intl Students
in USA



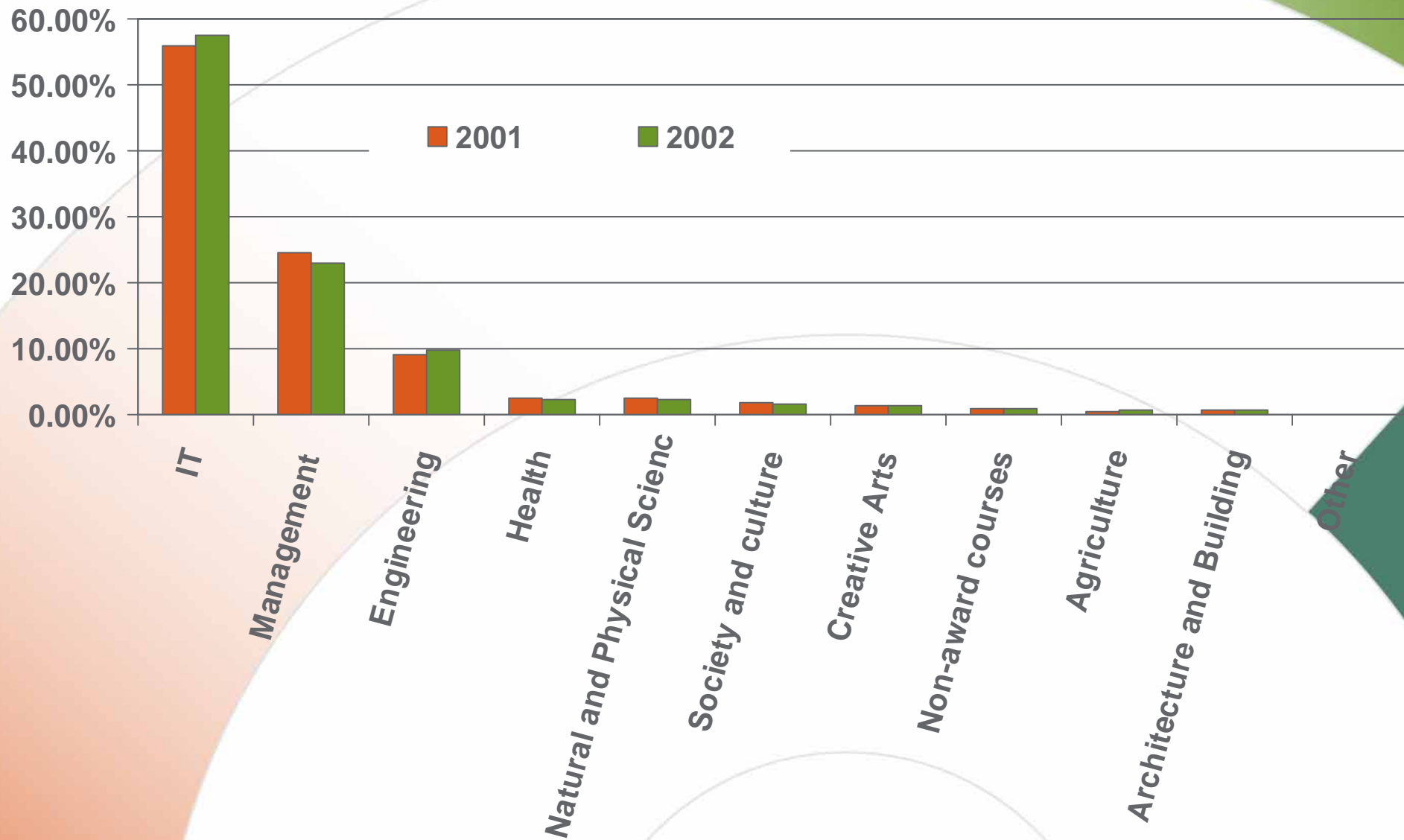
International Students Studying Information Technology



Share of Chinese Students Studying in Australia by Field of Study



Share of Indian Students Studying in Australia by Field of Study





Global Student Mobility Stage II

Composition of Demand

Composition of Demand by Fields of Study
Forecasts to 2025

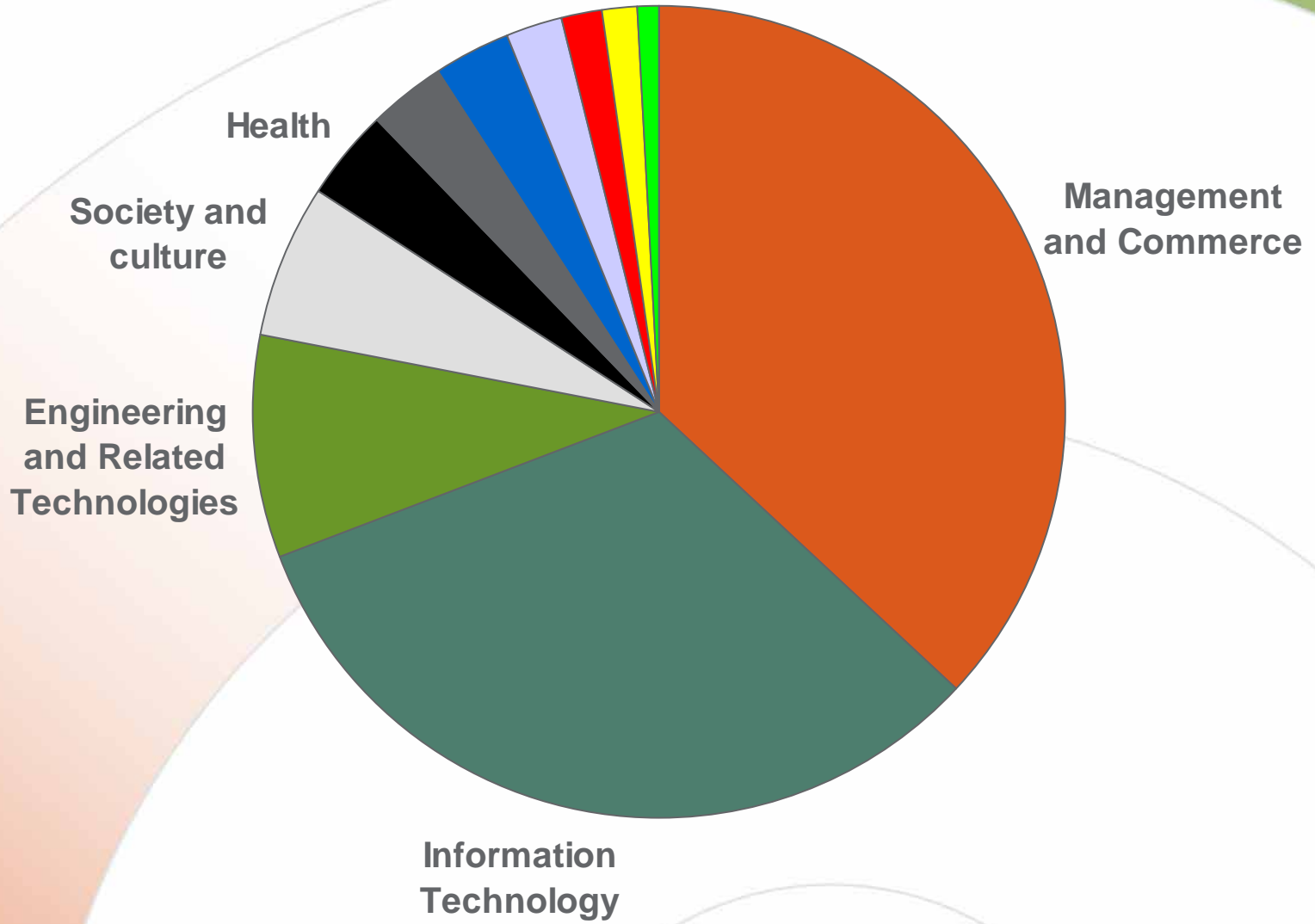
Methodology for the Forecasts of Fields of Study

- Composition of Demand, tied up to GSM Scenarios
 - Base
 - Growth
 - Compositional Effect
 - Quality Shock
- Individual countries' market share kept constant
- Change in field of study numbers due to compositional effect

Composition of Forecasts of Demand for International Students in Australia - Base Scenario

International Students	2005	2010	2015	2020	2025	Growth (%)
Management and Commerce	44,545	70,162	110,024	168,699	243,232	53.3
Information Technology	28,930	53,500	91,614	150,923	212,834	65.3
Engineering and Related Technologies	11,218	17,950	27,758	41,824	57,922	51.1
Society and culture	9,959	13,871	19,903	28,297	39,004	41.1
Health	6,065	8,717	12,566	17,963	24,262	41.8
Natural and Physical Sciences	5,224	7,539	10,864	15,568	21,128	42.2
Creative Arts	6,300	8,366	11,318	15,397	20,145	34.1
Non-award courses	4,890	5,990	8,014	10,651	14,027	30.8
Architecture and Building	2,959	4,250	6,056	8,469	11,511	40.6
Education	2,041	2,812	4,016	5,676	7,795	40.2
Agriculture, Environmental and Related Studies	1,110	1,796	2,828	4,390	6,187	54.2
Food, Hospitality and Personal Services	20	26	33	40	49	24.1
Total	123,262	194,978	304,993	467,897	658,095	52.6

Share of International Students in Australia by Field of Study, 2025



Fields of Study- Management/ Commerce

Base Scenario	2001	2005	2010	2015	2020	2025
Total	30,039	44,544	70,162	110,024	168,699	243,232
Market Share (%)	36.7	36.1	36.0	36.1	36.1	37.0
Growth Scenario						
Total	30,039	47,506	78,091	128,960	206,761	302,705
Market Share (%)	36.7	36.0	35.2	34.7	34.3	35.2
Composition Effect Scenario						
Total	30,039	39,905	58,291	82,528	113,556	154,777
Market Share (%)	36.7	36.2	37.2	38.3	39.3	40.3
Quality Shock Scenario						
Total	30,039	13,960	13,194	14,399	15,202	20,519
Market Share (%)	36.7	36.9	37.9	38.8	39.7	40.4

Forecasts of International Students in Australia Studying Management and Commerce

