



idp



17TH IDP AUSTRALIAN INTERNATIONAL EDUCATION CONFERENCE

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

First Look at US Mobility Statistics

17th AIEC

Melbourne, Victoria Australia

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Senior Scholar

Institute of International Education

INSTITUTE OF INTERNATIONAL EDUCATION

- Is the leading exchange agency in the United States
- Administers on behalf of the US Department of State the Fulbright Program
- USAID Training Programs
- Corporate Programs
- Research Programs



<http://www.opendoors.iienetwork.org/>

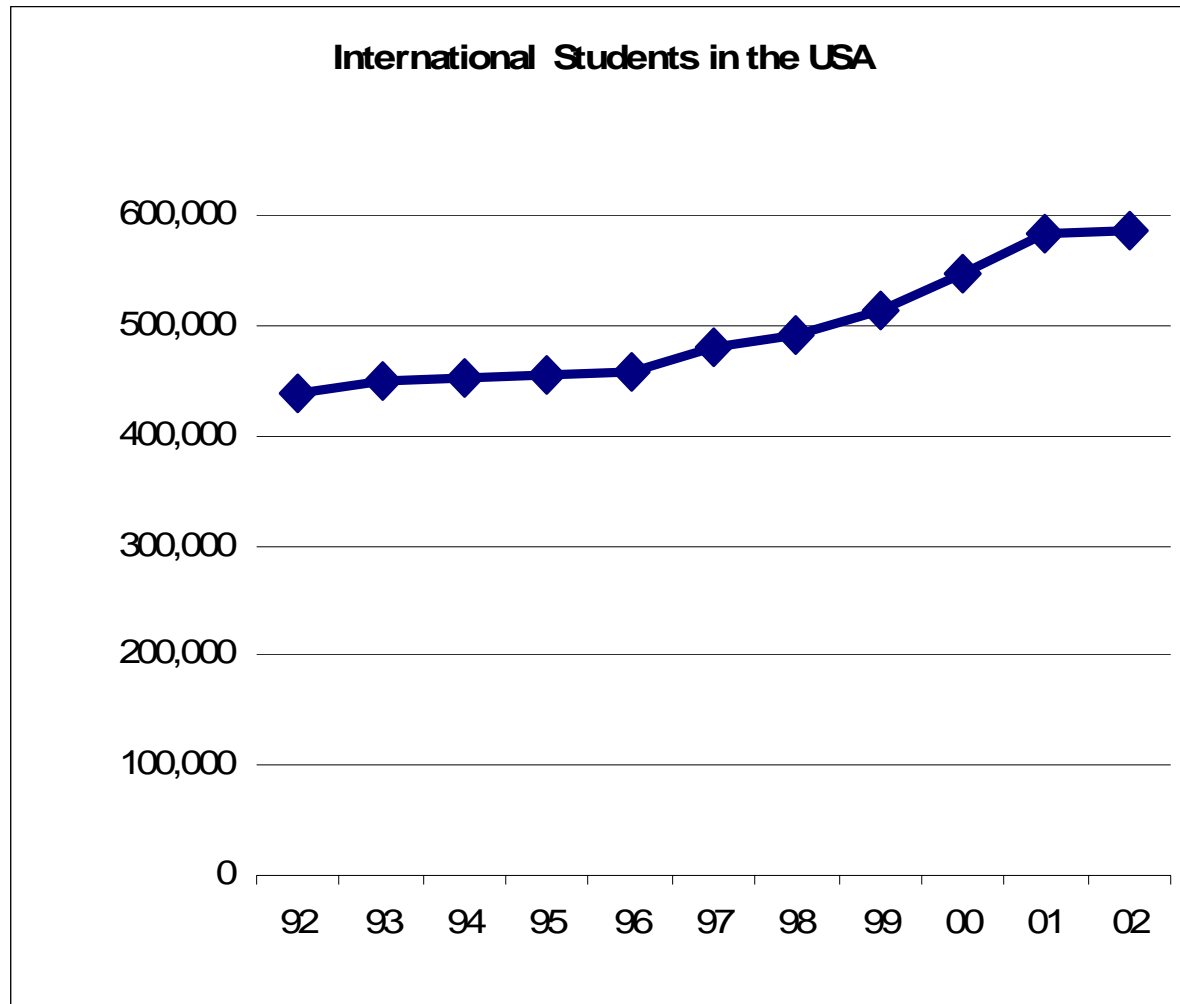
Open
Doors
Report



About The Open Doors Project...

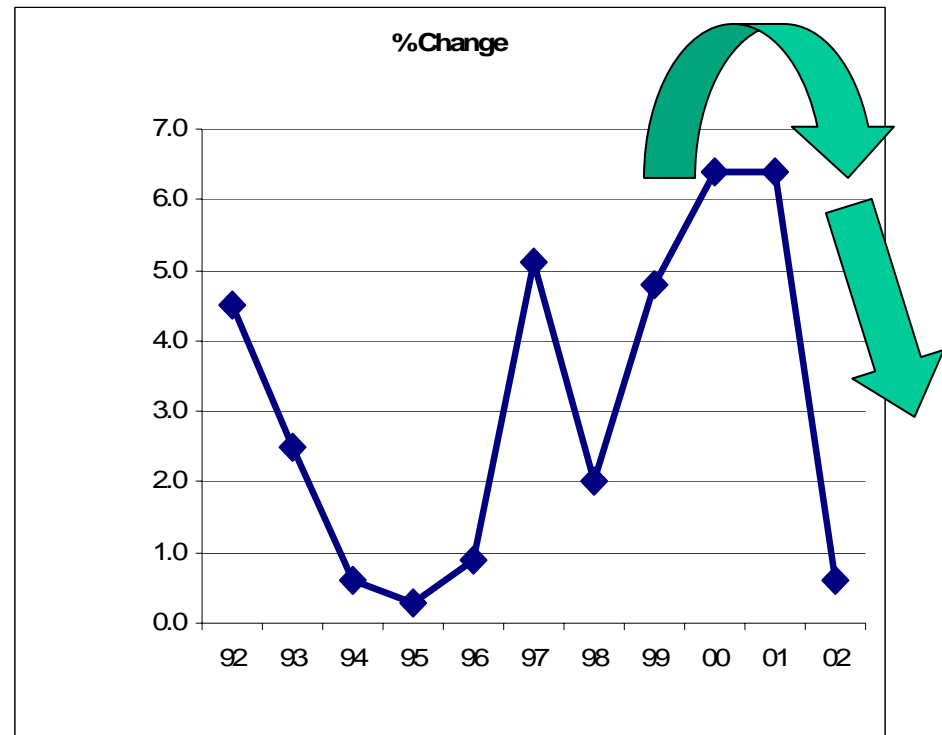
- IIE has collected mobility data since 1919
- Open Doors first published in 1948
- With the support of the USG since 1972
- Survey of over 2,700 colleges and universities
- Response rate above 90%
- Currently the only national data source of mobility in the USA...
- SEVIS data expected fall 2003

Unofficially: 586,000 international students studied in the U.S. in 2002... enrollments level comparable with the previous year

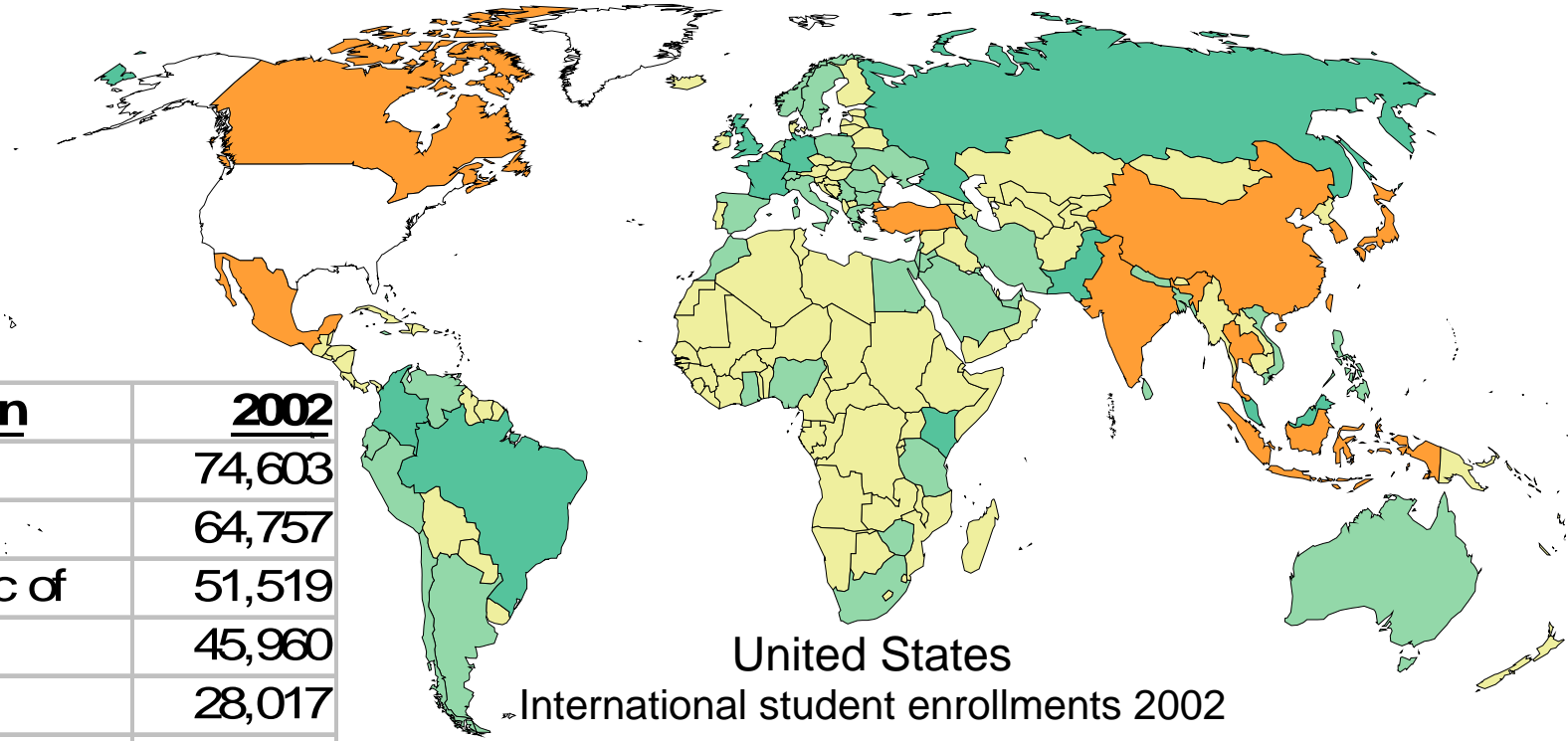


But... the overall total masks the greatest deceleration in enrollments in the past ten years

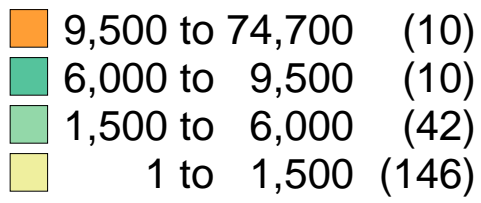
	Change	Period
Last 10 years	3.1	92 to 02
Last 4 years	4.6	99 to 02
Last year	6.4	01
This year	0.6	02



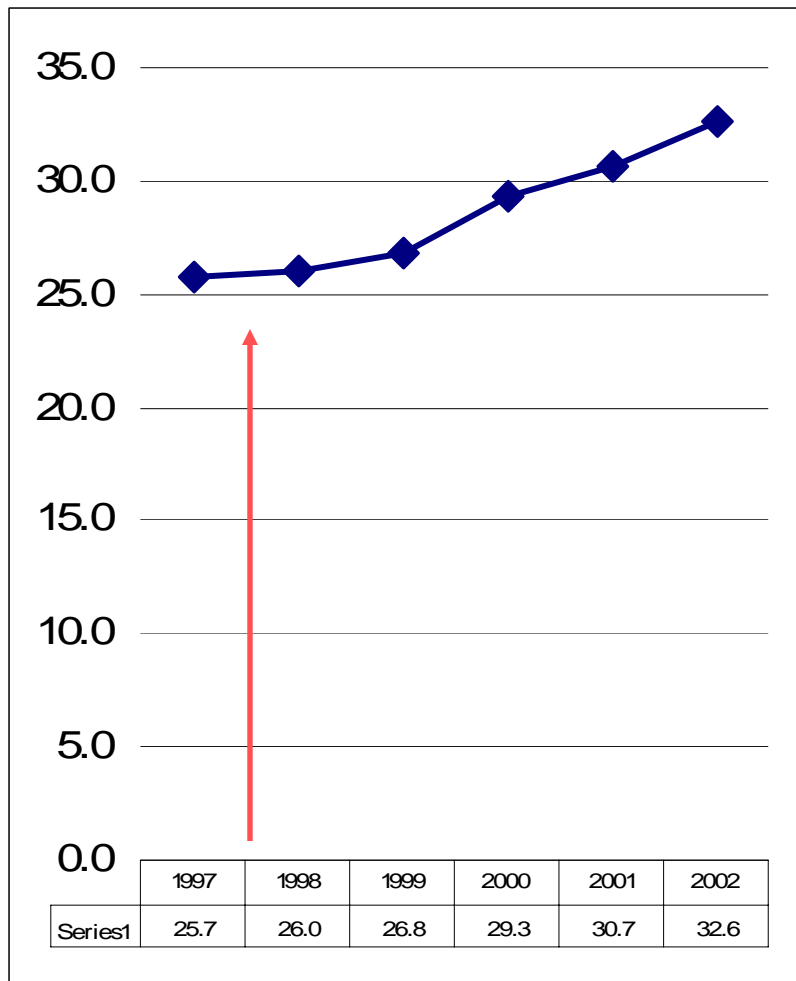
India is #1 with a 11.6% increase
 China is #2 with a 2.4% increase
 Korea is #3 with a 5.0% increase



<u>Place of Origin</u>	<u>2002</u>
India	74,603
China	64,757
Korea, Republic of	51,519
Japan	45,960
Taiwan	28,017
Canada	26,513
Mexico	12,801
Turkey	11,601
Indonesia	10,432
Thailand	9,982

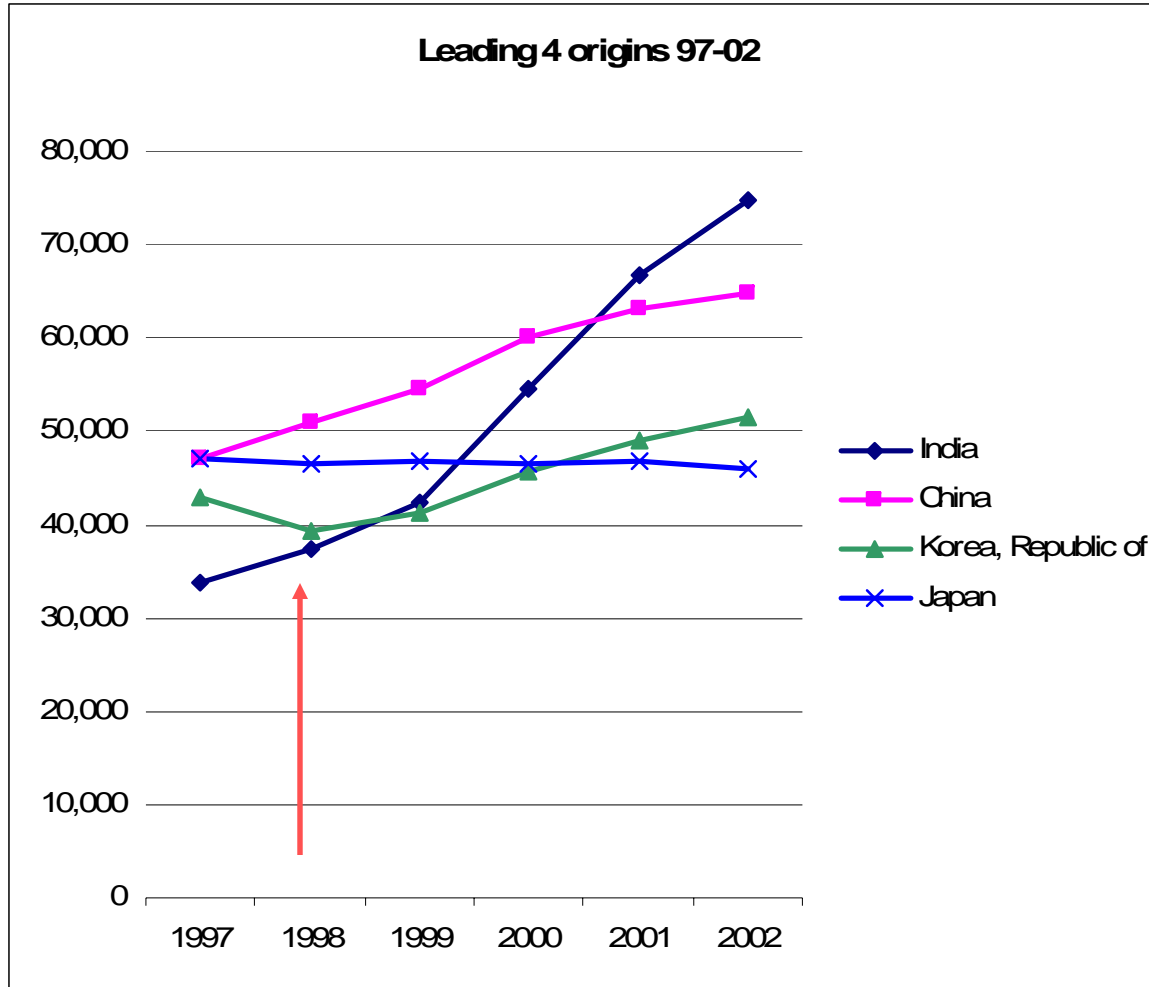


But... increases in the big three have lead to...
 a reliance on these leading places for overall
 enrollment stability



2002	Year
190,879	Leading 3
586,323	Total
32.6	Leading 3
45.2	Leading 5
57.3	Leading 10

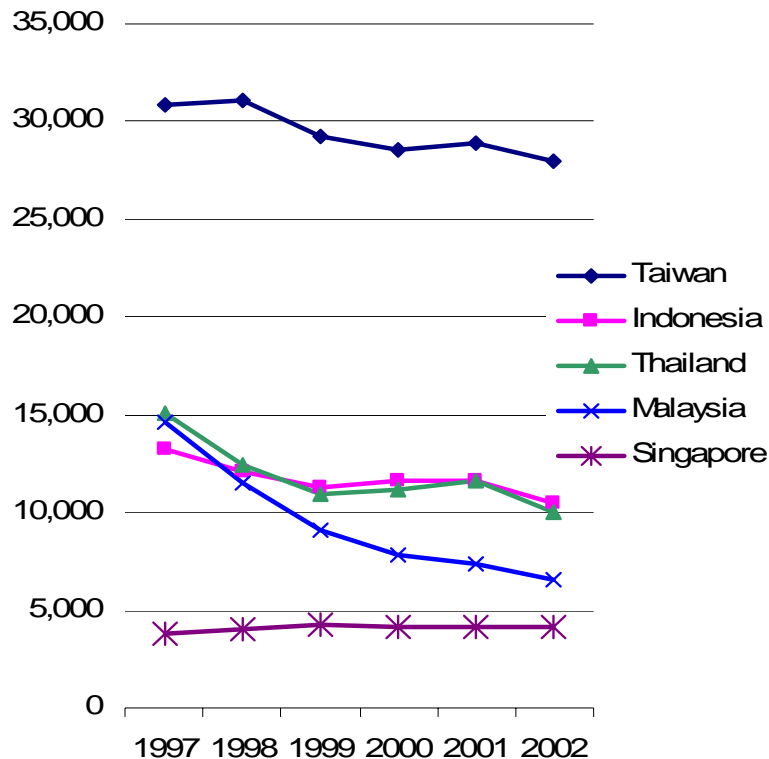
Changes... 1997-2002 for the leading origins



Origin	%Change
India	120.6
China	37.9
Korea	20.1
Japan	-2.4
World	21.8

Changes... 1997-2002 for other leading Asian origins

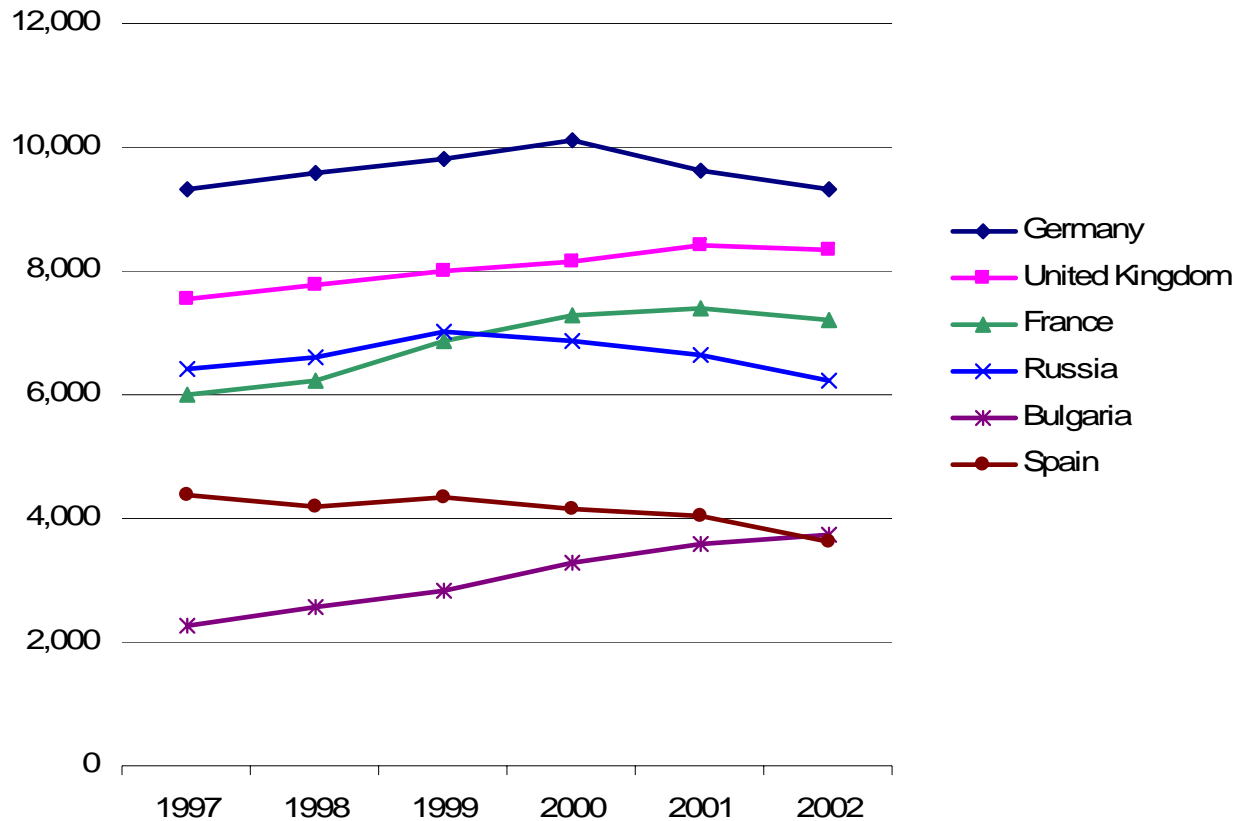
Other leading Asian origins 97-02



Origin	%Change
Taiwan	-9.2
Indonesia	-21.5
Thailand	-33.9
Malaysia	-54.8
Singapore	9.0
World	21.8

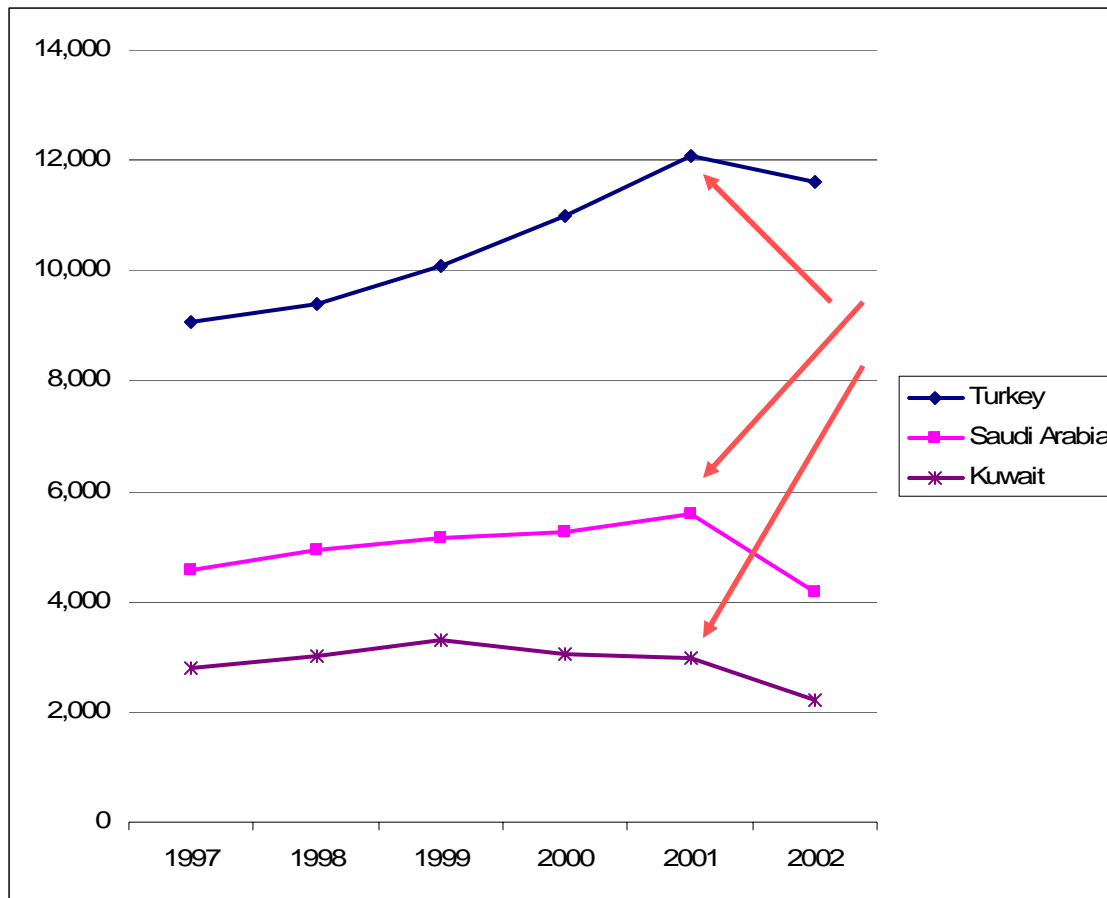
Changes... 1997-2002 for leading European origins

Leading European origins 97-02



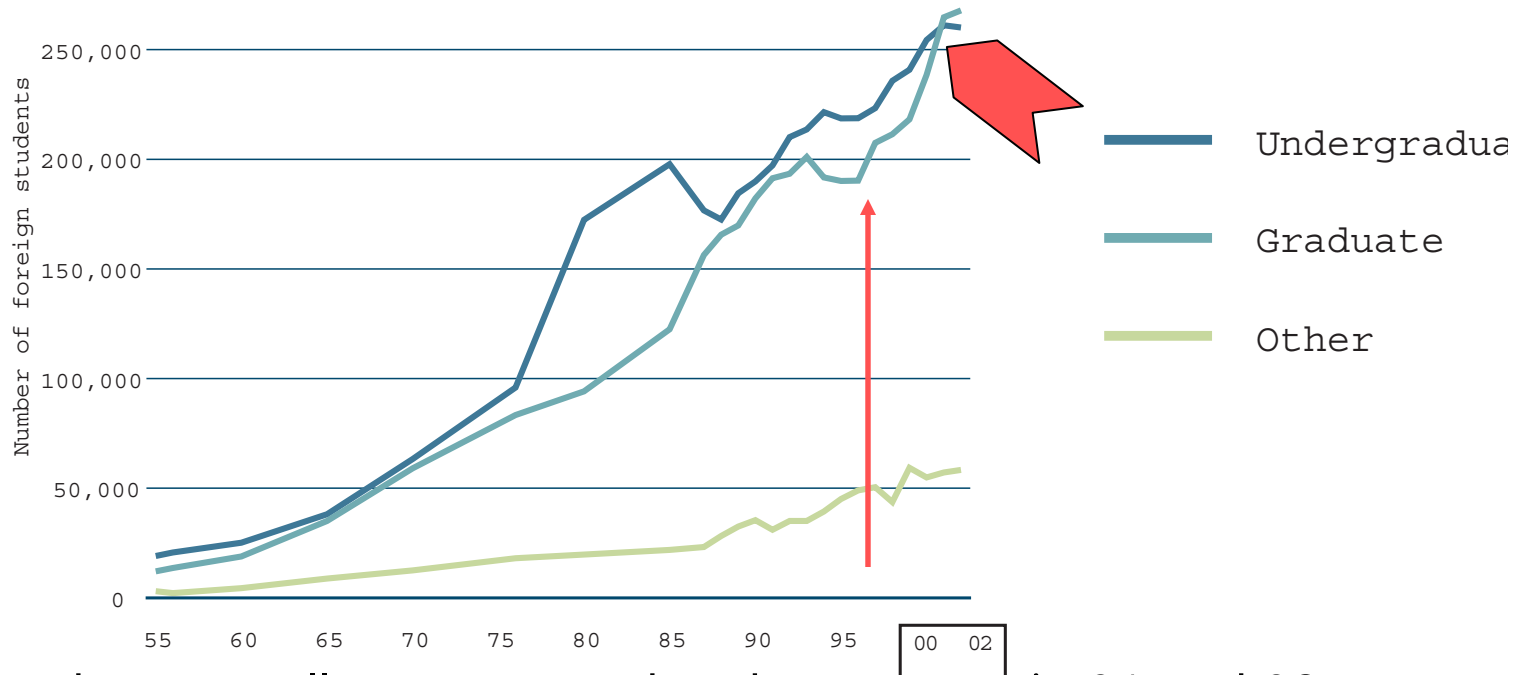
Origin	%Change
Germany	-0.1
United Kingdom	10.5
France	20.5
Russia	-2.9
Bulgaria	64.5
Spain	-16.9
World	21.8

Changes... 1997-2002 for leading Middle East origins



Origin	%Change
Turkey	27.8
Saudi Arabia	-8.7
Kuwait	-21.3
World	21.8

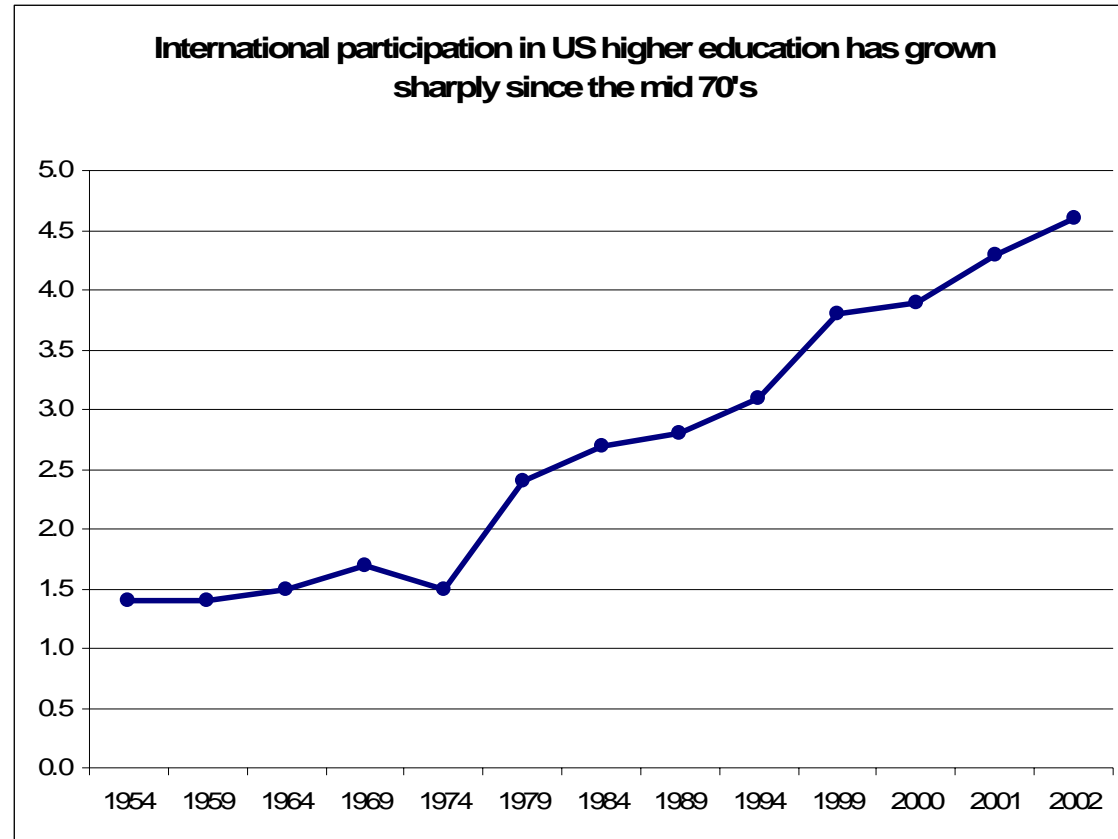
Graduate enrolments exceed undergraduate enrolments



- Graduate enrollments exceed undergraduate in 01 and 02
- Graduate and Undergraduate equally split with the exception of the **oil undergraduates '75 to the early 80's**
- Since the mid 90's: the recovery of Indian and Chinese enrollments and of students in the H1-B visa program
- Up 27.6% in 5 years and up 38.4% in 10 years

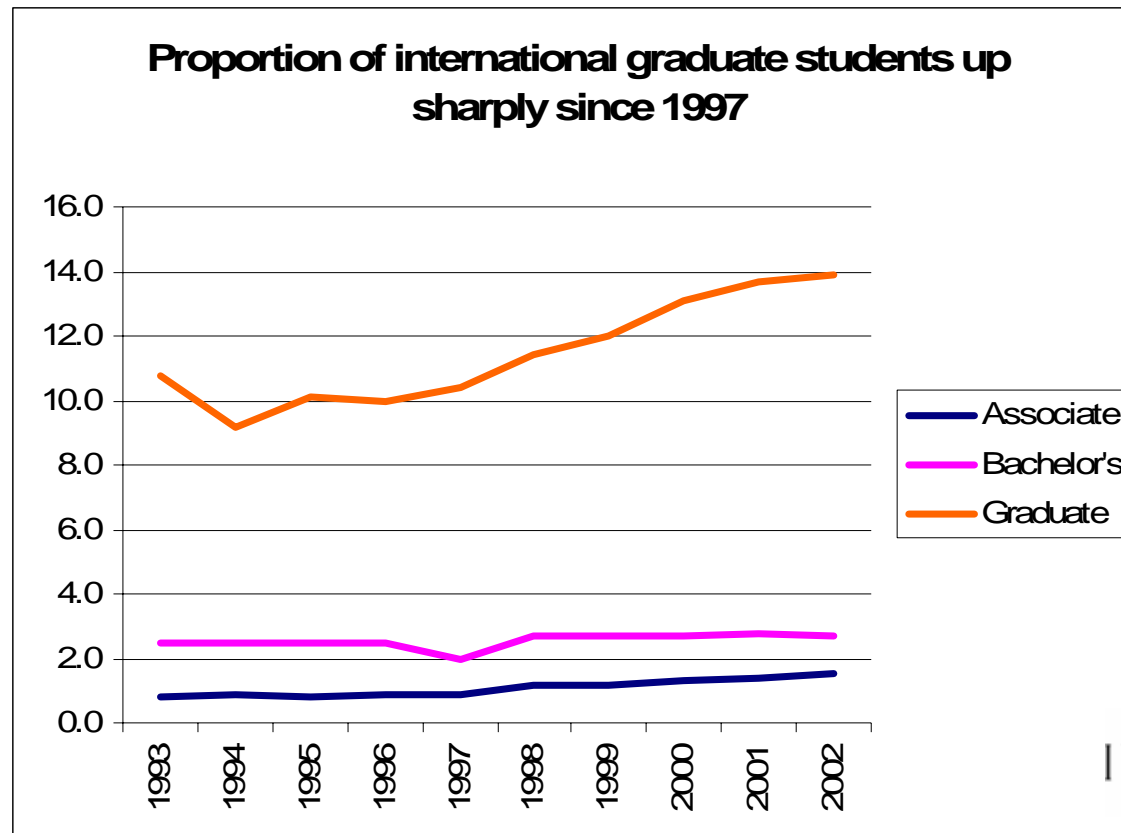
International participation in US higher education is also on the rise

Year	Foreign Students	Total US Enrollment	% Foreign
1954	34,232	2.4 M	1.4
1959	48,486	3.4 M	1.4
1964	82,045	5.3 M	1.5
1969	134,959	7.9 M	1.7
1974	154,580	10.3 M	1.5
1979	286,343	11.7 M	2.4
1984	342,113	12.4 M	2.7
1989	386,851	13.8 M	2.8
1994	452,653	14.5 M	3.1
1999	514,723	13.5 M	3.8
2000	547,867	14.0 M	3.9
2001	582,996	13.5 M	4.3
2002	586,322	13.4 M	4.6



...Especially so at the graduate level

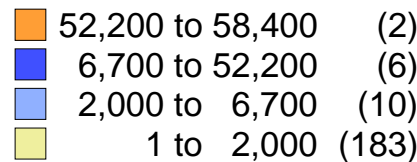
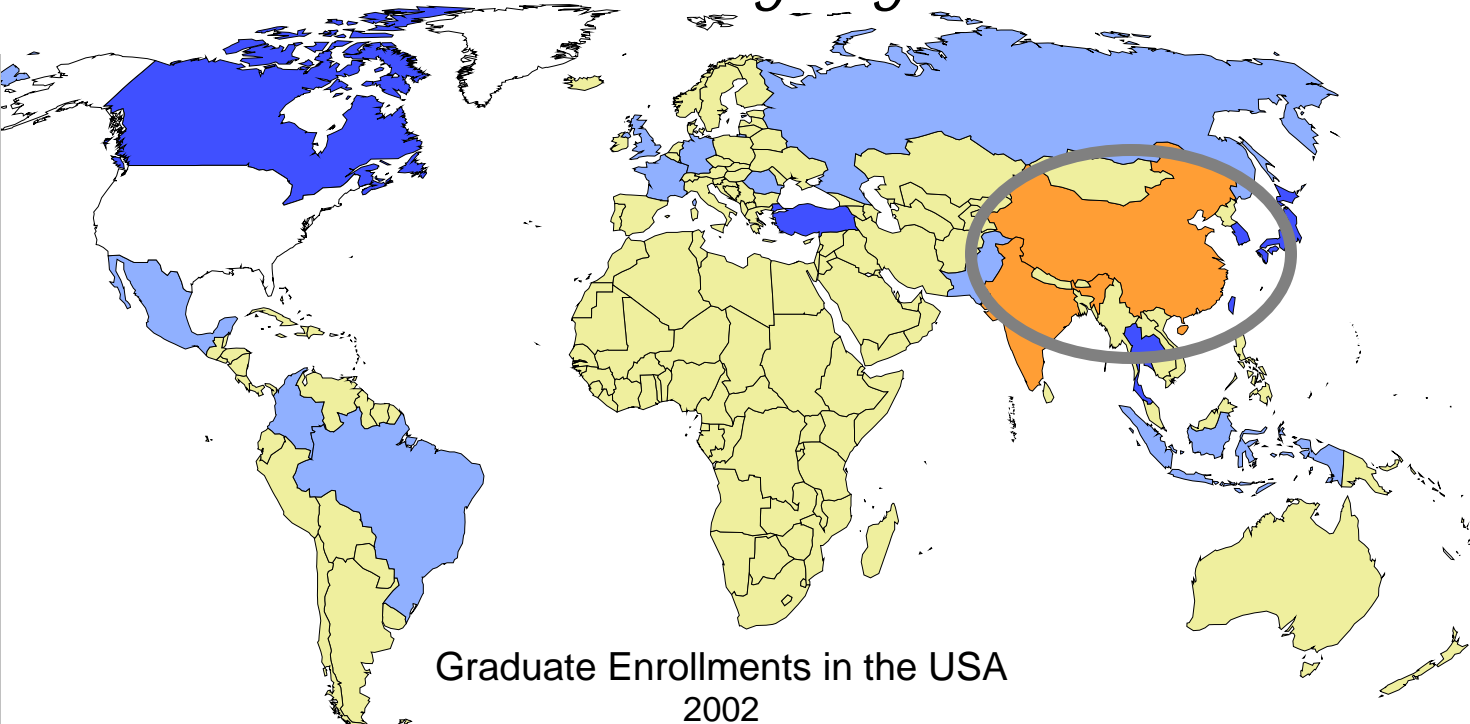
Academic Level	International Students	U.S. Total Students*	% of U.S. Enrollment
Associate	72,494	4.7 M	1.5
Bachelor's	187,609	6.8 M	2.7
Graduate**	267,876	1.9 M	13.9



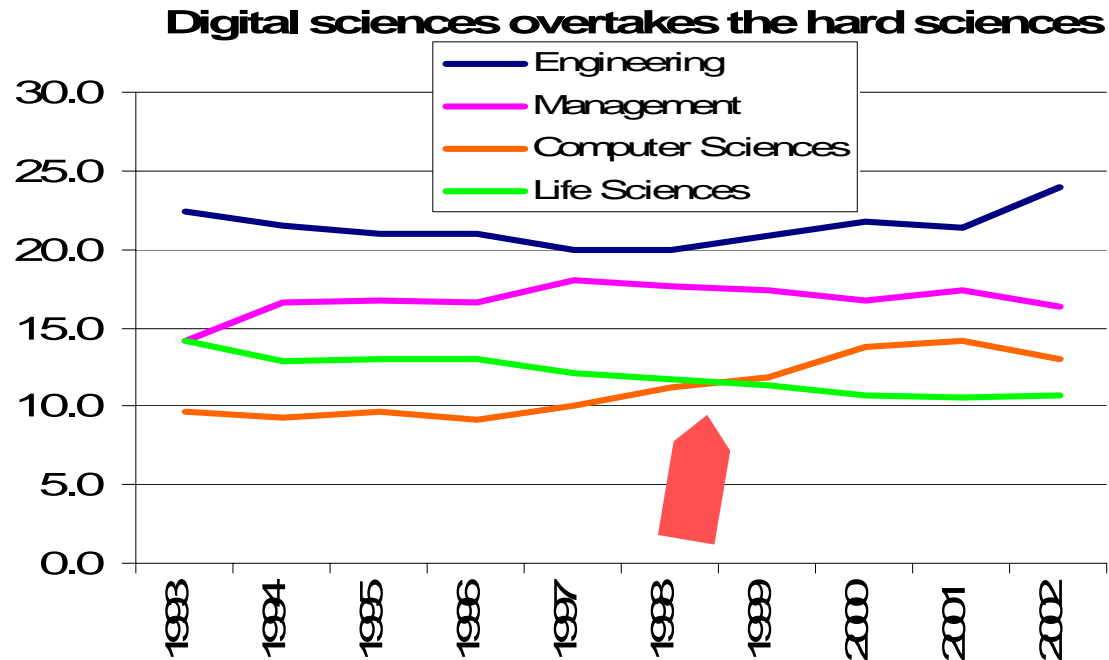
China and India send 40% of all foreign graduate students to the U.S.

77% come from 18 leading origins

Origin	Graduate
India	58,322
China	52,235
South Korea	24,616
Taiwan	15,479
Canada	11,252
Japan	9,516
Turkey	7,003
Thailand	6,706
Mexico	4,328
Germany	4,091
France	3,376
Brazil	3,255
Russia	3,153
Pakistan	2,810
Colombia	2,784
United Kingdom	2,667
Indonesia	2,519
Romania	2,315
Leading 18	216,427
World	280,630



Graduate fields of study

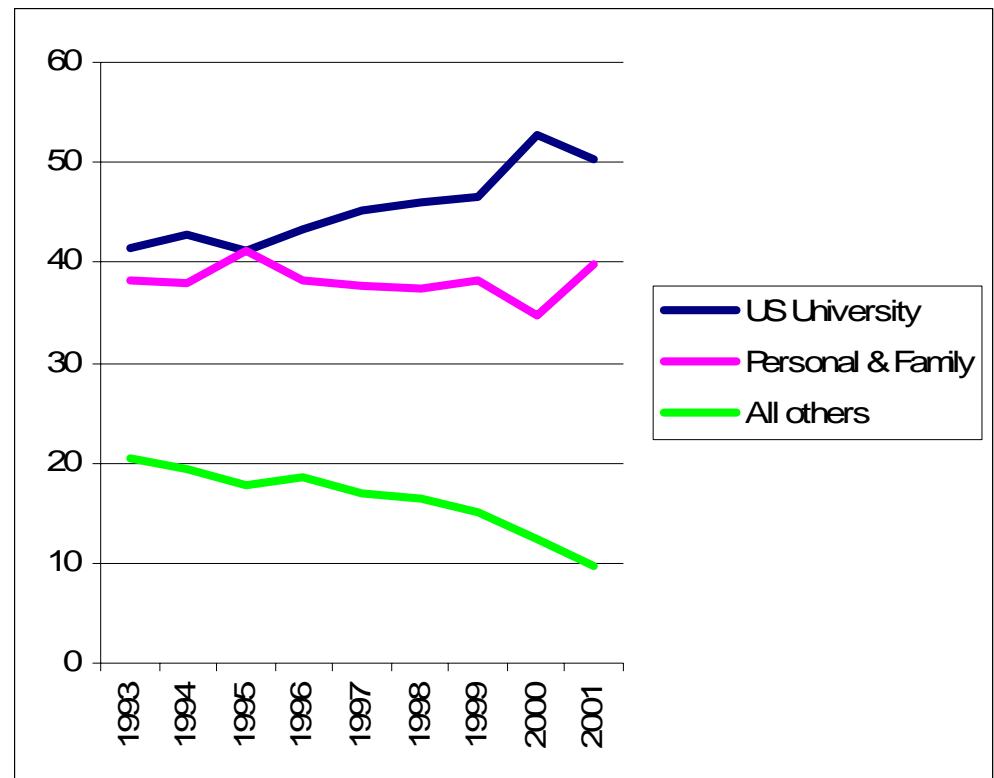


Year	Engineering	Business & Management	Math & Computer Sciences	Physical & Life Sciences
1993	22.4	14.2	9.7	14.2
1994	21.5	16.6	9.3	12.9
1995	21.0	16.8	9.6	13.0
1996	21.0	16.6	9.2	13.0
1997	20.0	18.0	10.0	12.1
1998	20.0	17.7	11.2	11.7
1999	20.8	17.4	11.9	11.3
2000	21.7	16.8	13.8	10.7
2001	21.4	17.4	14.1	10.6
2002	23.9	16.4	13.0	10.7

50.4% of all graduate students at research institutions receive their primary support from their institution, 2001

Including all others:

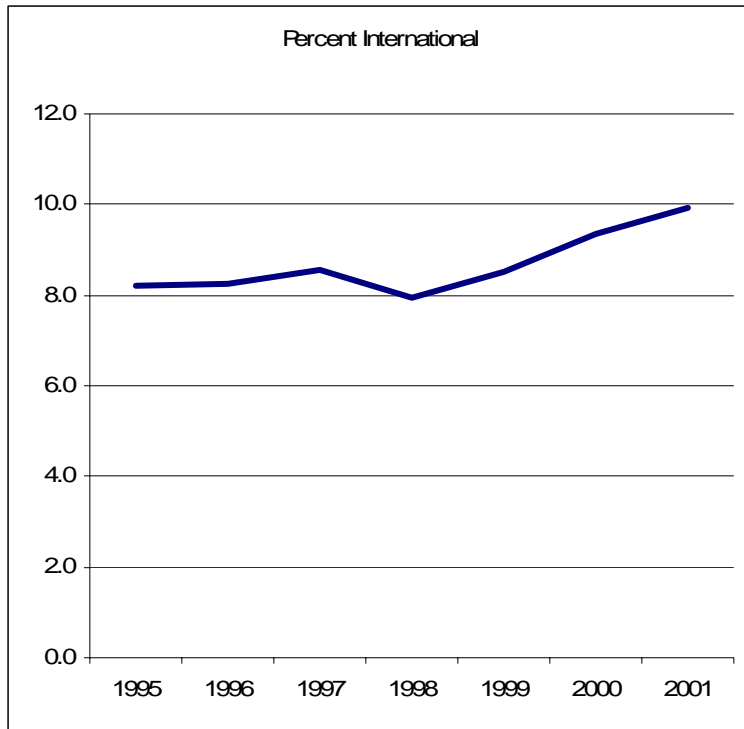
- > Home government
- > US private sponsor
- > Foreign private sponsor
- > Current employment
- > US government
- > International organizations



	1993	2001
US University	41.4	50.4
Personal & Family	38.2	39.8
All others	20.4	9.8

Absorptive Capacity?

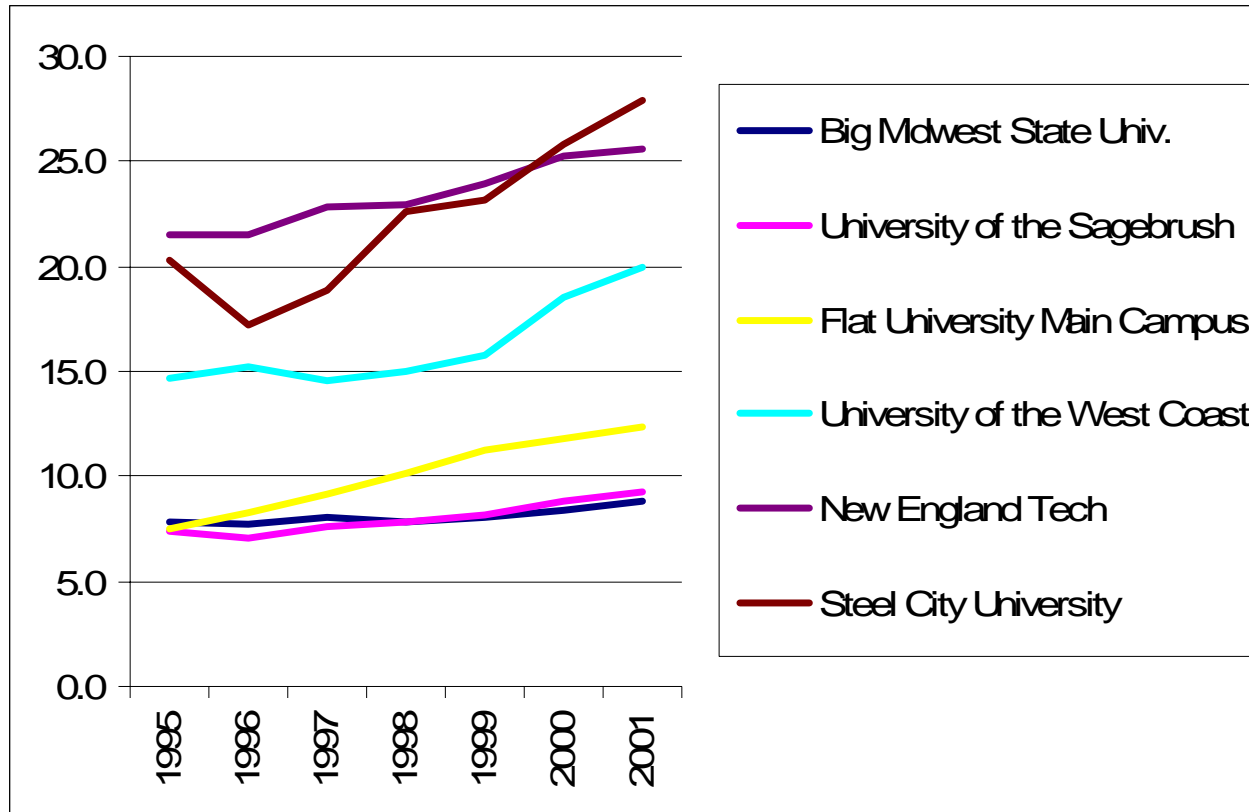
43% of all international students are enrolled in just 100 institutions



Leading 100 Institutions	
Year	2001
Total Foreign Students	250,841
Total Enrollment	2,525,390
Percent International	9.9
Total Foreign, Nationally	582,996
Percent of all International Students	43.0

8.2	8.2	8.6	7.9	8.5	9.4	9.9
1995	1996	1997	1998	1999	2000	2001

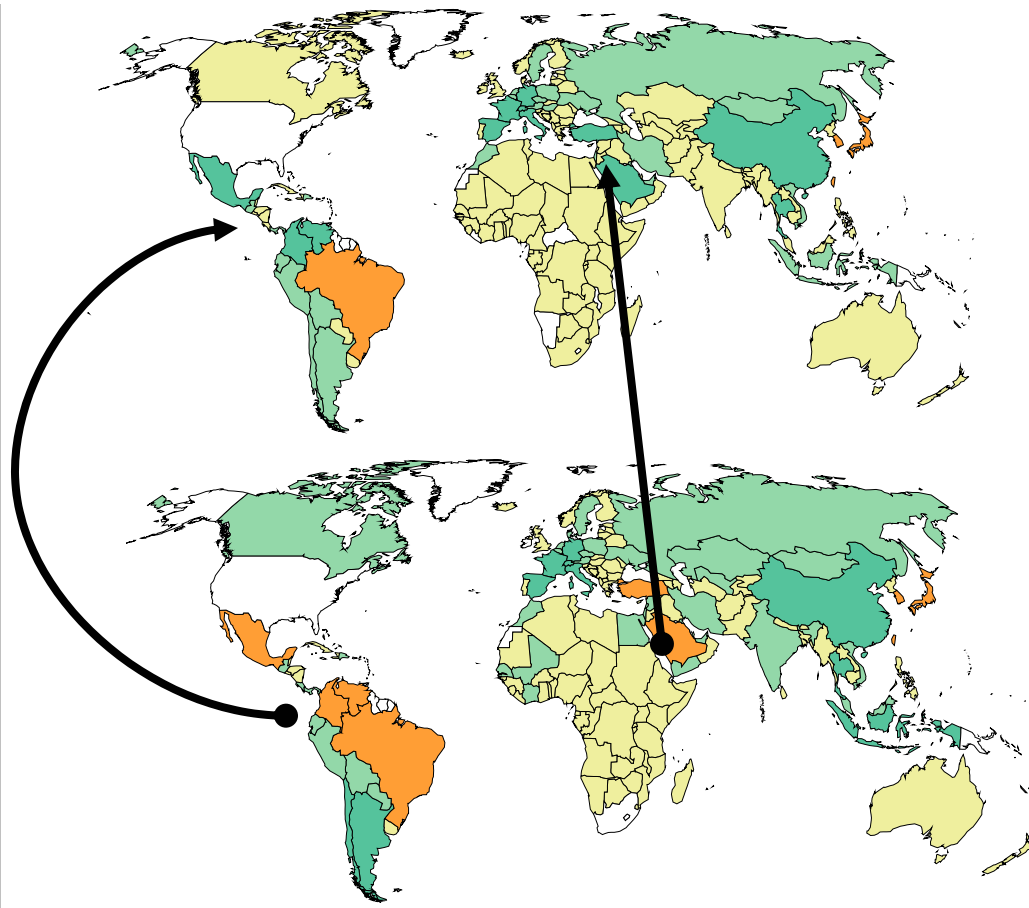
Enrollment Compression



Institution	1995	2001
Big Midwest State Univ.	7.8	8.9
University of the Sagebrush	7.4	9.2
Flat University Main Campus	7.4	12.4
University of the West Coast	14.7	20.0
New England Tech	21.5	25.6
Steel City University	20.3	27.9

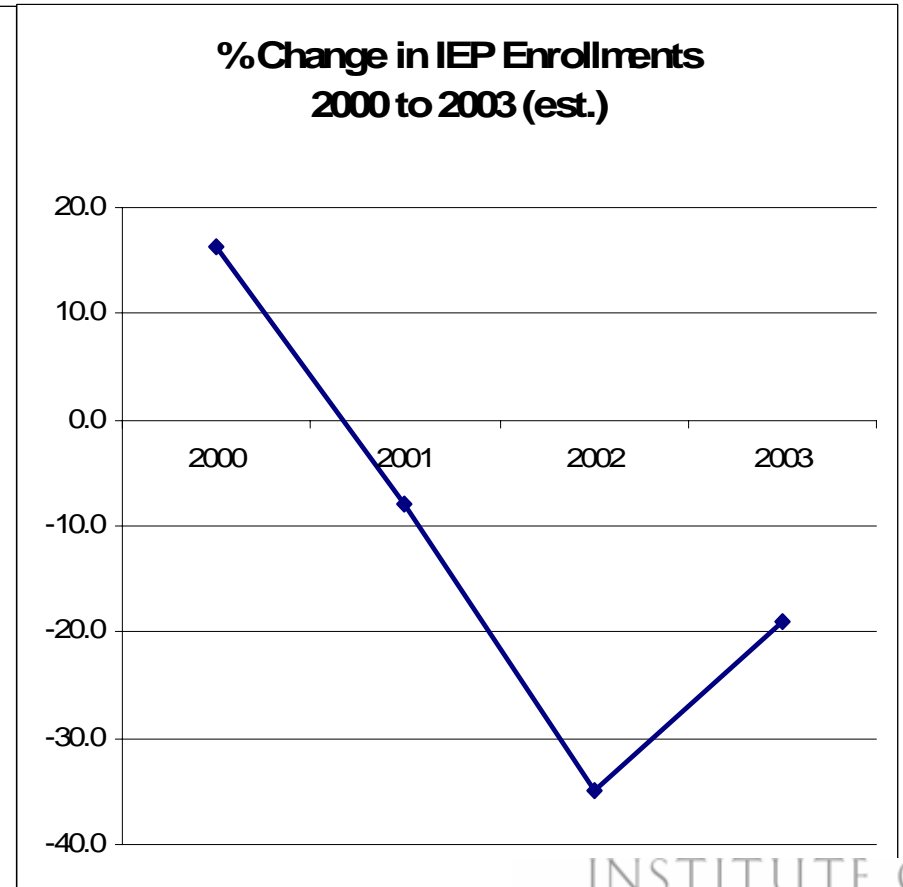
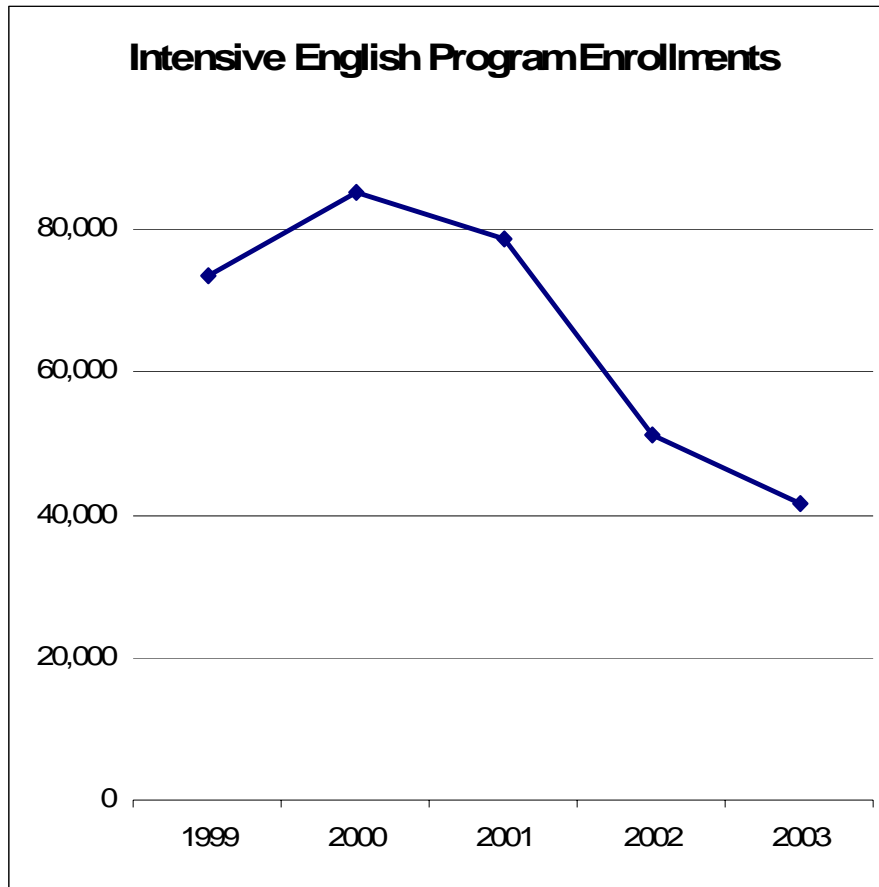
51,179 enrollments in IEP's in 2002... a drop of 40% from 2000

Origin	2000	2001	2002	%Change 2000-2002
WORLD	85,238	78,521	51,179	-40.0
Japan	19,585	16,470	13,047	-33.4
Korea	12,772	13,110	10,000	-21.7
Taiwan	9,325	7,605	5,919	-36.5
Brazil	6,020	5,253	2,363	-60.7
Switzerland	1,494	1,584	1,564	4.7
Thailand	2,009	1,929	1,245	-38.0
France	1,683	1,587	1,231	-26.9
Venezuela	2,614	2,487	1,216	-53.5
Germany	1,332	1,396	1,199	-10.0
Italy	2,471	1,924	1,171	-52.6
Turkey	2,118	2,254	1,102	-48.0
Colombia	2,549	2,255	1,089	-57.3
China	1,839	1,760	1,048	-43.0
Mexico	2,797	4,369	936	-66.5
Saudi Arabia	2,458	2,191	756	-69.2

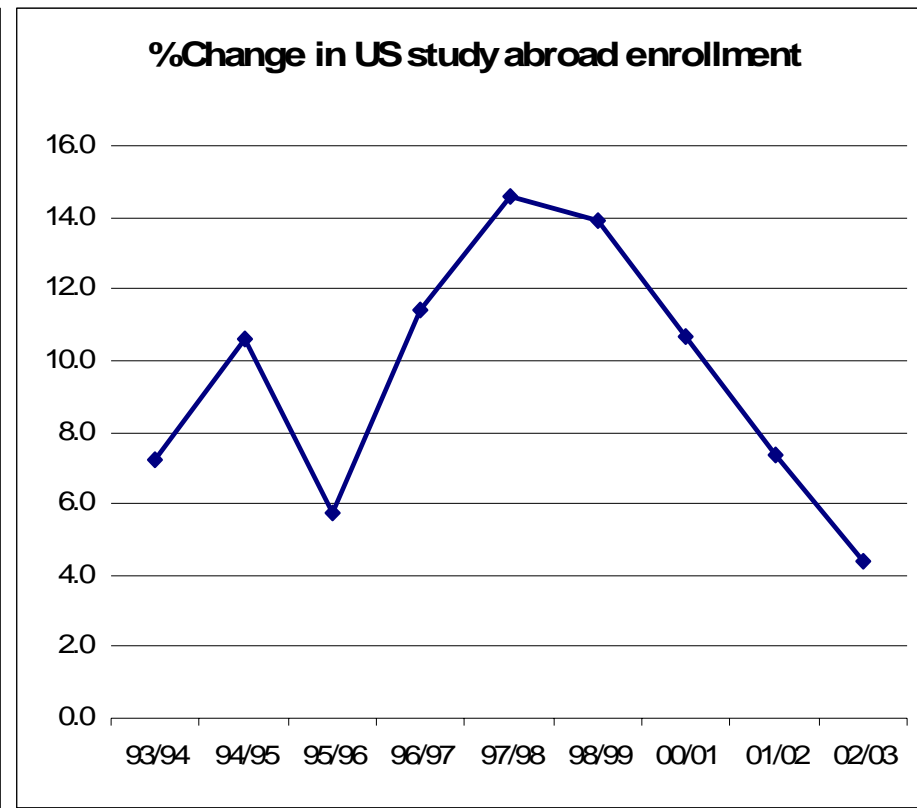
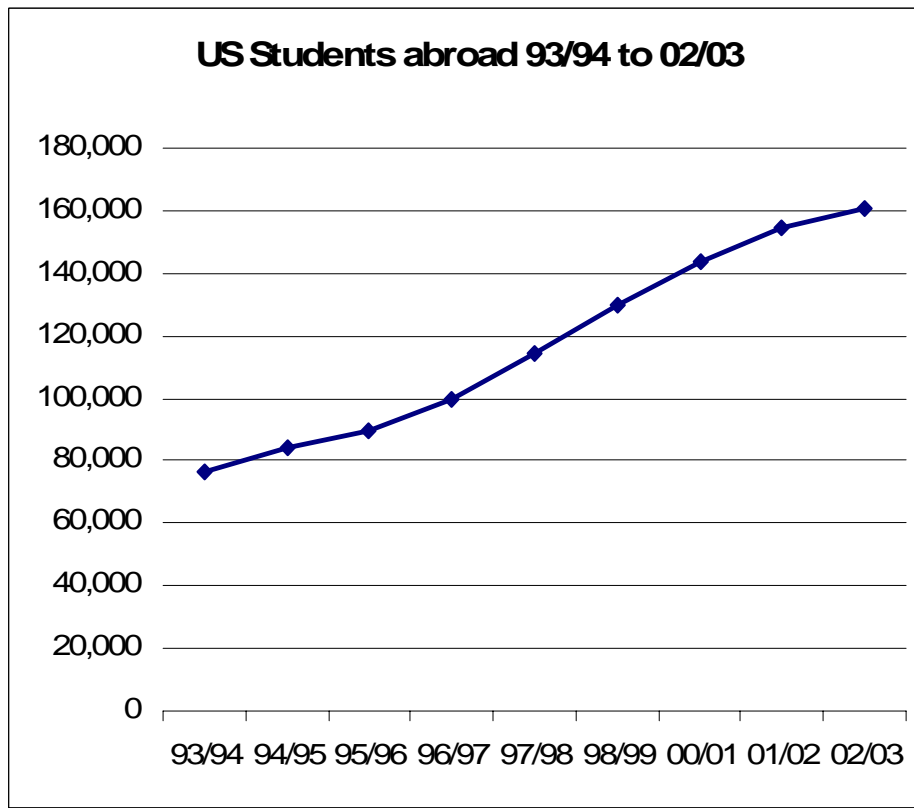


Battered... USA IEP Enrollments

Year	Programs	Students	%Change
1999	158	73,357	-
2000	185	85,238	16.2
2001	196	78,521	-7.9
2002	174	51,179	-34.8
2003	Estimate	41,400	-19.1

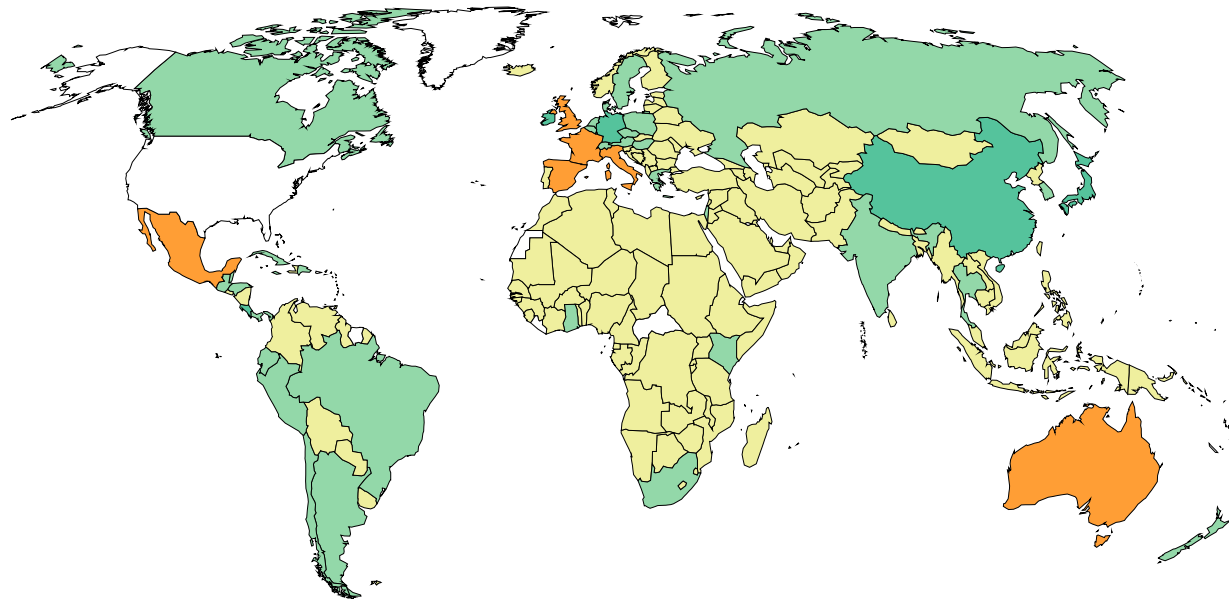


During the 2001/02 academic year 160,000 U.S. students studied abroad for academic credit



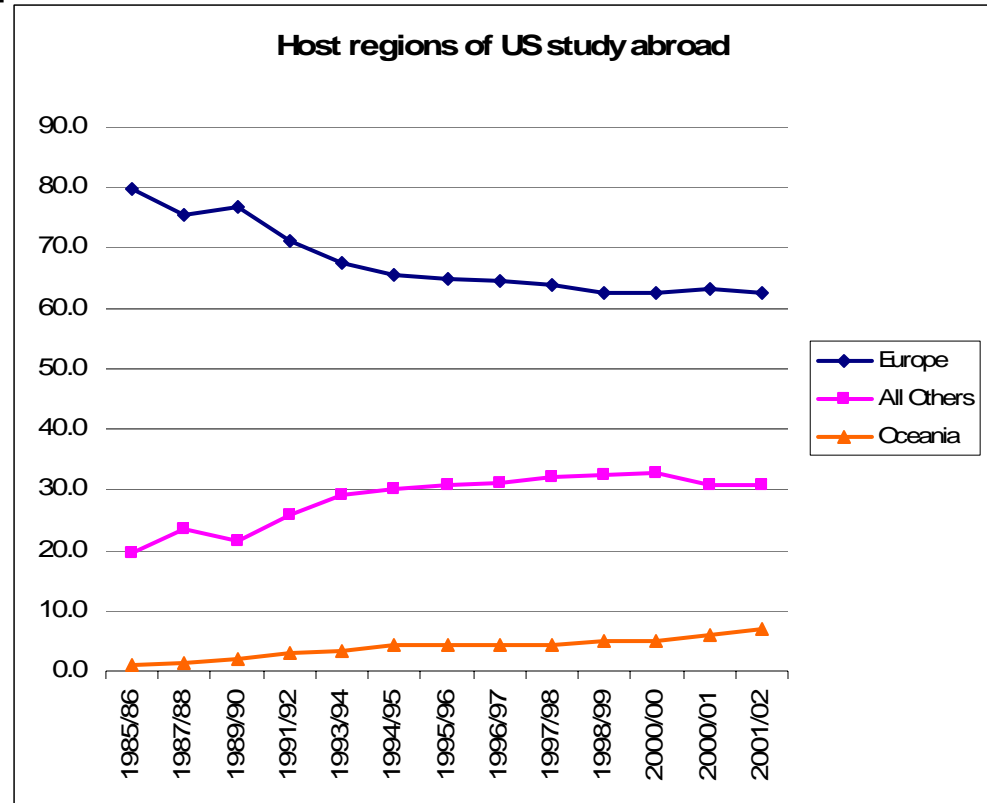
Europe is the leading host region for US study abroad

Locality	2001/02	Percent
United Kingdom	30,143	18.7
Spain	17,176	10.7
Italy	17,169	10.7
France	12,274	7.6
Australia	9,456	5.9
Mexico	8,078	5.0
Germany	4,856	3.0
Ireland	4,375	2.7
China	3,911	2.4
Costa Rica	3,781	2.3
Japan	3,168	2.0
Austria	2,180	1.4
Greece	1,856	1.2
Netherlands	1,676	1.0
Czech Republic	1,659	1.0



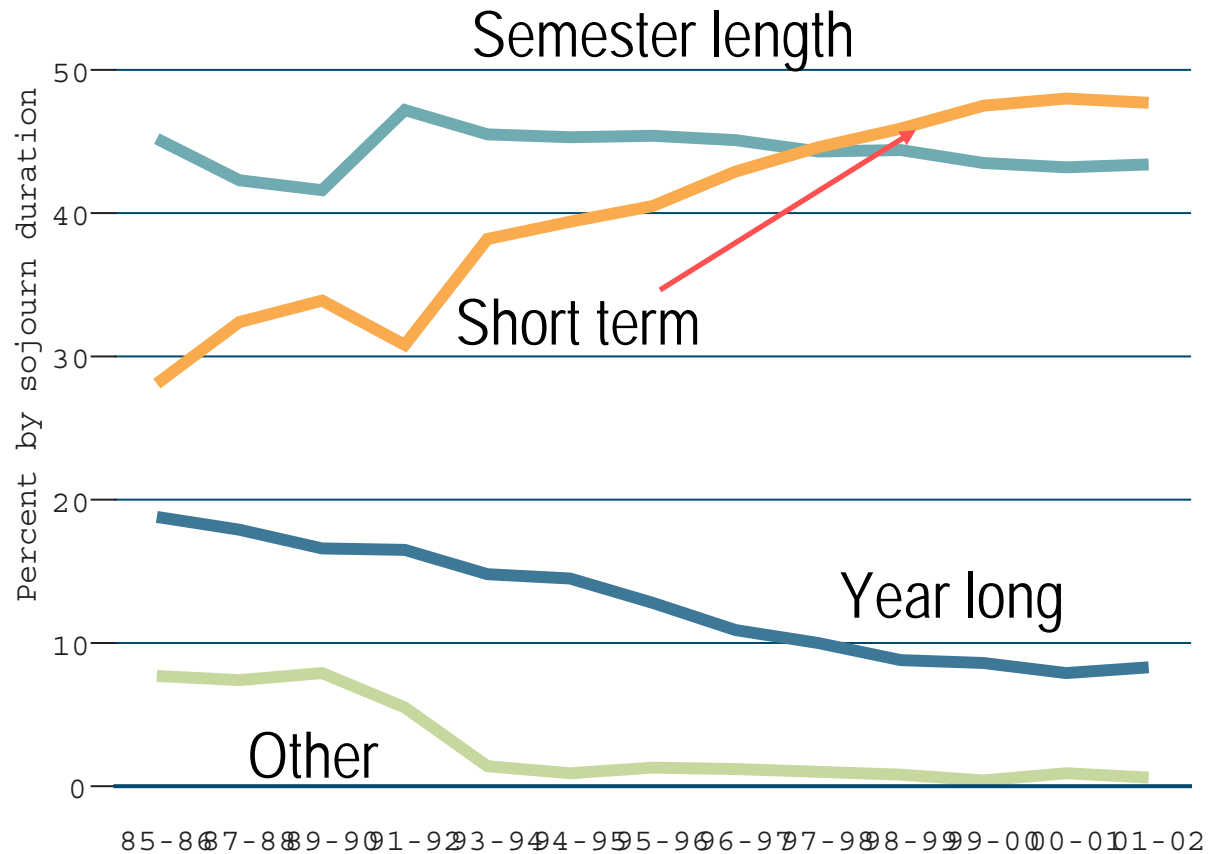
Move to non-European regions stalled... except for Australia

The loss of European sojourns appears to be in Australia's favor...



Host Region	85/86	87/88	89/90	91/92	93/94	94/95	95/96	96/97	97/98	98/99	99/00	00/01	01/02
Europe	79.6	75.4	76.7	71.3	67.4	65.5	64.8	64.5	63.7	62.7	62.4	63.1	62.6
All Others	19.4	23.4	21.4	25.7	29.1	30.1	30.9	31.2	32.0	32.5	32.6	30.8	30.7
Oceania	0.9	1.2	1.9	3.1	3.4	4.3	4.4	4.4	4.4	4.9	5.0	6.0	6.8

The length of study abroad has been getting shorter over the past ten years



- Summer,
- January term,
- Programs of 8 weeks and less...
- are the most frequently selected formats for study abroad

Closing reflections on a difficult year

This year the run up to the start of the 2003 academic year has been marked by strong media interest in the international student story...

Attribution of campuses losses to the difficulties associated with the start up of the SEVIS system in 2003

Denver Post

Foreign students facing scrutiny: Security agency mandates tracking

The latest target in the Department of Homeland Security's widening hunt for potential terrorists: foreign students.

Stories describing the presumptive effects of the war on terrorism on Middle Eastern enrollments

The Observer

Keep your talented: John Sutherland on US paranoia

Campus police are obliged, under the pretext of "homeland security", to liaise with the FBI. So, to their indignation, are college librarians ("What is Ali reading?"). The Immigration and Naturalization Service requires universities to provide confidential information about their Middle Eastern and Muslim students - those from countries suspected of "harboring" al-Qaida ("Who is Ali emailing?").

These stories fit a ready media template:

The closing of the American Open Door

What the media and many observers have missed are the swirling crosscurrents of a Perfect Storm

The elements of the storm:



Dramatic run up of enrollments from India, China and Korea (largely at the graduate level) and its impact on the entire international student mix.



The long term stagnation of enrollments from Europe, especially Western Europe



The long-term effects of competition from the UK and Australia on key US markets in Asia, especially South East Asia and the development of Intra European (EU) mobility.



And yes... the War on Terror... and a post 9/11 background anxiety

The way forward: we are on the right side of history but we must remain confident and steadfast

During the summer of 2000, IIE initiated a futures forecasting activity to identify global developments that would have implications for the future of international education

Respondents noted that:

Global business activity will continue to stimulate the interest of international students in participating in the global economy

As Asian economies grow, these students will continue to acquire further education abroad

Developments in technology are creating a vast pool of individuals who will seek a trans-national education

History is not at an end...

We the inheritors of the Anglo Celtic tradition must keep faith with our core beliefs:

1. In the primacy of liberty,
2. The spread of free markets world wide,
3. The rule of law,
4. The centrality of education as the means by which a civil society is sustained

It is in the universal attainment of these four principles that our work is rooted