

TRENDS IN INTERNATIONAL HIGHER EDUCATION

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2007**

EXECUTIVE SUMMARY

- International higher education is a big business – a \$300 billion “industry.” In Europe, since the late 1990s, the higher education market has been growing at 7% a year.
- Technology capabilities will continue to encourage the rise of global universities. Global partnerships, rather than free-standing institutions, will become the norm.
- There will be an increase in alternative delivery systems, including the creation of foreign campuses and partnerships with international universities for joint degree programs.
- International colleges and universities will continue to collaborate regionally, nationally and internationally.

EXECUTIVE SUMMARY

- Study abroad programs will increase in the future. The students of today and tomorrow are both mobile and global in pursuing their educational objectives.
- No one country will dominate the international student market. Students will migrate to new international destinations based on a variety of factors including price and visa eligibility.
- The EU has moved to the standardization of degrees. ERASMUS MUNDUS will expand the EU network past Europe to a global scale.
- Chinese and Indian student enrollments will increase and will dominate international student enrollments.

This Session Will Cover:

- 1) Trends in U.S. International Higher Education Since 9/11
- 2) Trends in Chinese International Higher Education Programs
- 3) Trends in Australian and New Zealand International Higher Education Programs
- 4) Trends in Middle East Higher Education Programs
- 5) Trends in Higher Education Programs in the United Kingdom
- 6) Future International Student Destinations
Canada and Malaysia
- 7) Conclusion

TRENDS IN U.S. INTERNATIONAL HIGHER EDUCATION SINCE 9/11

UNITED STATES AND INTERNATIONAL ENROLLMENTS – POST 9/11

- The United States is attracting a declining share of foreign students. In 1970, the United States had a market share of 36.7% of international students studying outside their home countries. By 1995, that statistic was 30% and in 2004 it was 25%. Currently it is 22%.
- 2003 – Foreign enrollments in U.S. schools declined for the first time since 1971. Japan, China and India represented the biggest declines.
- Although the decline in international student enrollment in the United States was exacerbated by the events of September 11, 2001, the decline began before then.

UNITED STATES AND INTERNATIONAL ENROLLMENTS – POST 9/11

- The United States Department of State issued 27% fewer F-1 visas in 2003 than it did before the terrorist attacks on September 11, 2001.
- U.S. student visa applications have increased 40% in China over the past year according to the “*Shanghai Daily*”.
- According to Margaret Spellings, the U.S. secretary of education, the number of visas issued to foreign students and scholars over all reached an all-time high of nearly 600,000 last year, up 15% from the previous year.

UNITED STATES AND INTERNATIONAL ENROLLMENTS – POST 9/11

- In 2004, there were 40% fewer international students studying in English language programs than prior to 9/11.
- International applications for graduate programs have decreased by 20% to 30% at most universities for Fall 2004. The greatest declines came from China, India, and Japan.

UNITED STATES AND INTERNATIONAL ENROLLMENTS – POST 9/11

- Declining numbers of foreign students took the Graduate Record Examination. In 2003 – 2004, the percentages of decrease were:
 - China -50%
 - Taiwan -43%
 - India -37%
 - South Korea -15%
 - Japan -10%

U.S. POST 9/11 WORLD

- In 2005, applications to U.S. graduate schools increased by 11% after a two year decline of 32%. Applications from India increased 23% and from China 21%.
- There is a group in the U.S. who believe the government should make it easier for international students to stay in the U.S., especially if the students are graduates of science and engineering programs.
- Currently Arabic is the fastest growing language of study on U.S. campuses.

U.S. POST 9/11 WORLD

Percentage Change in International Graduate Applications From Previous Year

	<u>2003-4</u>	<u>2004-5</u>	<u>2005-6</u>
Total	-28%	-5%	+11%
By Country/Region			
China	-45%	-15%	+21%
India	-28%	-5%	+23%
Korea	-14%	+1%	+3%
Middle East	+4%	+7%	+4%

U.S. POST 9/11 WORLD

Percentage Change in International Graduate Applications From Previous Year

By Field of Study

	<u>2003-4</u>	<u>2004-5</u>	<u>2005-6</u>
Business	-24%	0%	+7%
Education	-21%	-3%	+3%
Engineering	-36%	-7%	+17%
Humanities & Arts	-17%	0%	+4%
Life Sciences	-24%	-2%	+16%
Physical Sciences	-22%	-2%	+10%
Social Sciences	-20%	-2%	+10%

U.S. POST 9/11 WORLD

- Enrollment of international graduate students grew by 1% in 2006, a change from the 3% decline in the prior year.
- Almost ½ of the foreign graduates come from China, India, and South Korea.
- First-time enrollments from India increased 32%.
- First-time enrollments from China increased 20%.

EDUCATION AS AN EXPORT

- The net contribution to the U.S. economy by foreign students and their families for 2005-06 is almost 13.5 billion dollars.
- Education is the fourth largest source of net exports in the U.S. behind:
 1. Royalties & license fees
 2. Business, professional, and technical services
 3. Financial services

Source: PowerPoint Presentation "Understanding the Value of Education: The Economics of College Tuition"
By Anthony Davis, PhD
www.mercatus.org/pdf/materials/581.pdf

STUDY ABROAD

- In 2003, 2%, or 2 million European university students studied outside their home country.
- Over 112,000 students from all over the European Union studied in the U.K.
- Only 1% of Canadian students go abroad to study.
- 600,000 international students study in the U.S. – a \$13 billion a year enterprise.

STUDY ABROAD

- Since 1991-92, the number of U.S. students receiving credit for study abroad increased by 145%.
- In 2004-2005 205,983 American college students studied abroad, a 7.7% increase over the previous year.
- There were small decreases in the number of U.S. students going to English-speaking nations. Australia had a 5% decrease, Ireland a 2% decrease and the United Kingdom a 0.5% decrease.

STUDY ABROAD

- Western Europe attracted 45% of American students studying abroad.
- There was a 35% increase in Americans studying in China, now the 8th leading host destination for American students.
- 2004-05 saw large increases in Americans studying in Argentina (53%), Brazil (28%) and India (53%). Each made the list of top 20 destinations for the first time.

STUDY ABROAD

- The number of American students studying abroad will continue to increase, but the length of stay will be shorter than the “Junior Year Abroad” model. Twenty years ago, 18% of U.S. study abroad students spent an entire year abroad. For the 2004-2005 academic year that number was 6%. 38% went for a semester and 56% for less than a semester.
- Goucher College is one of the first schools in the U.S. to require a study abroad experience to graduate. Starting in Fall 2006 entering students will be required to complete a minimum 3 week study abroad experience prior to graduation.

STUDY ABROAD

- Community colleges are making study abroad accessible to all students and are challenging the stereotype that study abroad is only for elite students.
- 73% of community college students who study abroad do so on short-term programs.
- Barriers to community college study abroad are:
 - Shortage of program offerings
 - Lack of awareness of existing programs
 - Absence of long-term planning

STUDY ABROAD

Top Destinations for Americans Studying Abroad, 2004-05

<u>Rank</u>	<u>Country</u>	<u>Enrollment</u>	<u>1-Year % Change</u>
1	U.K.	32,071	-0.5%
2	Italy	24,858	+13.4%
3	Spain	20,806	+3.6%
4	France	15,374	+12.1%
5	Australia	10,813	-5.3%

STUDY ABROAD

Top Destinations for Americans Studying Abroad, 2004-05

<u>Rank</u>	<u>Country</u>	<u>Enrollment</u>	<u>1-Year % Change</u>
6	Mexico	9,244	-0.5%
7	Germany	6,557	+9.6%
8	China	6,389	+34.9%
9	Ireland	5,083	-2.2%
10	Costa Rica	4,887	+8.4%

The Most Affordable Colleges in the World

Data compiled by the Education Policy Institute in Stanford, Virginia and published in "The Chronicle of Higher Education", April 19, 2005.

1. Sweden
2. Finland
3. The Netherlands
4. Belgium (Flemish speakers)
5. Ireland
6. Belgium (French speakers)
7. Austria
8. Germany
9. France
10. Italy
11. Canada
12. Australia
13. United States
14. Britain
15. New Zealand
16. Japan

CHINA

- China has increased the proportion of its college-age population in higher education to approximately 20%. In 1987 that figure was 1.4%
- According to the Ministry of Education, China will have 124 million potential college students by 2008. The country would have to establish at least 800 new schools to meet the projected demand.

CHINA

- Universities in China issue about 160,000 advanced degrees every year, about four times as many as in the United States
- In engineering alone, China is graduating 442,000 new undergraduates annually, 48,000 graduate students and 8,000 doctoral students.

CHINA

- There are 200 million children in China studying English. There are 24,000 children in the USA studying Chinese.
- The number of students in 2 and 4 year colleges in the United States studying Chinese rose by 20% between 1998 and 2002 to slightly more than 33,000.
- In 2005, the College Board offered for the first time an Advanced Placement test in Chinese. 2,400 U.S. high schools teach AP Chinese.

CHINA

- The Zimbabwe government requires all seven of its public universities to offer Chinese language and history as part of President Robert Mugabe's "Look East" policy.
- Many students in China are choosing to stay home. The Ministry of Education reports that 330,000 Chinese students intend to enroll in graduate programs in China in 2004, up 20 percent from last year.
- In 2005 China sent about 62,580 students to the United States, a slight (0.1%) increase from the previous year.

CHINA

- Beijing government's policy of encouraging students to remain at home for their studies includes:
 - Tax breaks
 - Creating new campuses
 - Encouraging the growth of private universities
- Media reports have also shown that Chinese people returning home with graduate degrees are finding that their foreign credentials are no longer as valuable on the Chinese job market as they used to be.

CHINA

- 86,000 foreigners enrolled in Chinese universities in 2004. This represented an 11% increase from the previous year. The majority of students were from:
 - South Korea (41%)
 - Japan (19%)
 - United States (8%)
- The Chinese Ministry of Education hopes to attract 120,000 foreign students to China by 2007.

CHINA

- China has become the fastest-growing destination for American foreign exchange students, with a 35% increase this past year. This follows a 90% increase the previous year.
- China now ranks 8th as a host destination for American students, up from the 9th spot last year and the 12th spot two years ago.

AUSTRALIA and NEW ZEALAND

- In the 1990s the number of international students tripled in Australia and New Zealand. Twenty percent of students in Australia are full-paying foreign nationals. International higher education activity has overtaken transportation to become the country's 3rd largest money maker.
- However, in 2005, the number of new foreign students who enrolled at Australian universities increased only 0.8%. The figures represent a sharp falloff from the typical growth of previous years when the rate of increase was about 10 times higher.

AUSTRALIA and NEW ZEALAND

- The new enrollment figures relate only to the 140,000 foreign nationals physically studying in Australia, but not the 60,000 international students enrolled at one of the country's 1,500 offshore arrangements, mostly in Southeast Asia and, increasingly, the Middle East.
- According to M.P. Jenny Macklin, Australia's 39 universities now rely on international students to provide more than 20 percent of their income.

AUSTRALIA and NEW ZEALAND

- International higher education enrollment is a \$7.5 billion dollar industry for Australia and a \$2 billion dollar industry for New Zealand. (2004 statistic)
- Among the places of origin showing the largest declines in sending international students to Australia were Hong Kong, Malaysia, and Singapore.
- The majority of students come from China, India, and South Korea.

AUSTRALIA and NEW ZEALAND

- In 2004 Australia eclipsed the United States and Britain as the destination of choice among fee-paying foreign students according to a study conducted by JWT Education for the British Council.
- 81% of foreign students studying in Australia reported that Australia was their first choice over Britain or the United States.
- In 2000, fewer than ½ of the international students in Australia regarded the country as a destination preferred over Britain or the United States.

MIDDLE EAST

- Enrollment in the U.S. from Middleeastern students decreased 10% in 2003 and another 9% in 2004. Between 2001 and 2004, the U.S. lost 5,271 students from the Middle East.
- According to a press release from the U.S. Embassy in Saudi Arabia, the embassy as of December 1, 2005 had processed nearly 7,000 student visas for study in the United States. Over the next four years as many as 20,000 Saudi students are expected to come to the U.S.

MIDDLE EAST

- Saudi Arabia announced it will send more students to Asian countries such as China, India, Malaysia, Singapore, and South Korea for higher studies in medicine, general science, and engineering.
- Students from Muslim countries, especially those in the Middle East are choosing to study in Europe, the Middle East, or Asia rather than in the United States.
- Between 2003-04 and 2004-05 enrollment in American institutions of students from Indonesia, Oman, Pakistan, and Saudi Arabia declined by 12% or more.

MIDDLE EAST

- Saudi Arabia's decision to send larger numbers of students to Asian countries follows King Abdullah's visits to China, India, Malaysia, and Pakistan where he explored the prospects of increasing cooperation in vital sectors including education.
- Nearly 250,000 prospective students and professionals visited AMIDEAST's Education USA advising centers in 2005, a 13% increase in visits over the previous year.
- Centers for education have been established and are flourishing in Qatar and Dubai.

UNITED KINGDOM

- China is the leading sending country to the United Kingdom with 52,675 students. China is followed by India (16,685), United States (14,385), Malaysia (11,475), and Hong Kong (10,780).
- American students outnumbered English students at the London School of Economics last year.
- In 2005, John Hood, vice-chancellor of Oxford, announced that there would be a cutback in the number of spaces available in order to allow more international students to enroll.

UNITED KINGDOM

- In 2005 applications from international students outside the EU decreased by 5.3%. Chinese applications decreased by 25.8%. However, applications from Nigeria increased by 76.5% and China still has more students in the U.K. (+40,000), than any other country.
- The numbers from Hong Kong, as well as from Malaysia and Singapore also decreased.
- The statistics are of concern to British universities because international students are an important source of income, contributing as much as \$17 billion to the national economy.

UNITED KINGDOM

- It is more expensive to get a degree in the UK than in the US, according to an international study of the cost of higher education. Only New Zealand and Japan are more expensive study abroad sites.
- But the UK is one of the best in terms of recruiting students from all socio-economic backgrounds, says the Global Higher Education Report 2005 for the Washington and Toronto-based Education Policy Institute (EPI).

FUTURE INTERNATIONAL STUDENT DESTINATIONS

CANADA

- 50,000 international students made up 7% of the Canadian university population in 2003-04. This is nearly double the proportion of a decade earlier.
- The Canadian government will spend \$8 million to promote study in Canada.
- Like the U.K., Canada will allow international students to work off-campus in Canada for two years after graduation provided they do not take a job in Toronto, Montreal, or Vancouver.

FUTURE INTERNATIONAL STUDENT DESTINATIONS

CANADA

- As a place to study, Canada recently dropped from being in the top 5 preferred countries to 9th place. Its main competition comes from Australia, Britain, and the United States.
- Enrollment at Canadian universities surpassed the one-million mark for the first time during the 2004-05 academic year, Part of the increase was due to the rising number of foreign pupils.

FUTURE INTERNATIONAL STUDENT DESTINATIONS

MALAYSIA

- There are currently 40,000 international students studying in Malaysia.
- The government hopes to enroll 100,000 international students by 2010.

OVERSEAS CAMPUSES

- There are nearly 400 American-accredited institutions or programs operating overseas.
- American institutions have been slow to operate overseas because there is no national strategy around international higher education.
- Institutions need to be socially sensitive when operating in a foreign country.

SAMPLES OF OVERSEAS CAMPUSES

Australia

Carnegie Mellon University

Hong Kong

Kaplan

Qatar

Carnegie Mellon University

Weill Cornell Medical College

Texas A & M

Virginia Commonwealth

Georgetown School of Foreign Service

SAMPLES OF OVERSEAS CAMPUSES

Russia

Bard College

Singapore

Kaplan

State University of New York at Buffalo

The Georgia Institute of Technology

South Korea

Carnegie Mellon University

SAMPLES OF OVERSEAS CAMPUSES

UAE

Knowledge Village

George Mason University

State University of New York at Buffalo

United Kingdom

University of Chicago

SAMPLES OF OVERSEAS CAMPUSES

China*

University of Phoenix

University of Montana

Nottingham University (UK)

Essex University (UK)

- * Since 1995, China has received more than 700 international programs from colleges and universities all over the world, including the U.S., Britain, Canada, Singapore and Japan.

SAMPLES OF OVERSEAS CAMPUSES

Sylvan Learning Systems

Chile

Panama

Mexico

Costa Rica

Spain

Switzerland

France

University of Phoenix

China

Netherlands

Puerto Rico

Canada

Mexico

ISSUES CONFRONTING HIGHER EDUCATION

- The Fulbright New Century Scholars are examining access and equity in higher education around the world.
- Some of the issues they are investigating are:
 - Academic quality
 - Physical infrastructure of the university
 - Curricula development that reflects social problems
 - Setting clear standards for faculty and student conduct
 - Access for low-income students
 - Defining reasonable conditions for foreign students to secure visas and study permits

ISSUES CONFRONTING HIGHER EDUCATION

- International schools abroad are changing.
- Thailand relaxed restrictions in the early 1990's allowing international schools to recruit as much as 50% of their enrollment from local populations.

CONCLUSIONS

- International student enrollment is a big business. The World Bank calculated that global spending on higher education is about \$300 billion a year, or 1% of the global economic output.
- There are more than 80 million students worldwide and 3.5 million people are employed in higher education.

CONCLUSIONS

- In 2003, international students provided a great amount of income for the following countries:
 - 9.3 billion euros for the United States
 - 5.7 billion euros for the United Kingdom
 - 1.5 billion euros for Australia

CONCLUSIONS

- There are 2 million students selecting to study outside their home country and colleges and universities compete with each other for a share of the \$300 billion a year market.
- Technology and today's global students will determine educational delivery methods in the future.

CONCLUSIONS

- No one country will dominate the international student market. Students will migrate to new international destinations based on a variety of factors, including price and visa eligibility.
- Global partnerships will be the norm, rather than free-standing institutions. One example is Cornell's joint project with Stanford University to study life sciences in a research center on the Israeli-Jordanian border.

**CHANGE WILL BE OUR CONSTANT
COMPANION**

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