



IIE Center for Academic Mobility
Research and Impact

A World on the Move

Trends in Global Student Mobility

October 2017

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Project Atlas® is a collaborative global research initiative that focuses on maximizing the understanding, measurement, and use of international student mobility data. This unique and growing network of leading academic mobility research and government entities worldwide aims to disseminate annual standardized and comparable global academic mobility data, collaborate on research, and conduct assessments and workshops worldwide to accommodate the needs of countries seeking to strengthen their data collection systems. Project Atlas® is supported by the Bureau of Educational and Cultural Affairs (ECA) of the U.S. Department of State, IIE, and country partners

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Introduction

This report highlights key developments currently influencing student mobility in higher education in the United States and globally. Drawing upon Open Doors, Project Atlas and other sources of global data, the analysis points to a continuing demand for an international higher education in many parts of the world. Against the backdrop of recent trends, this report provides insight into the context of international student mobility. Countries with social and demographic factors that might inhibit mobility in higher education, such as Korea where the declining birthrate and economic imperatives limit outbound student flows, have implemented initiatives to attract and bolster the enrollment of international students. Attention is also given to the critical issue of academic displacement. Refugees affected by prolonged displacement are seeking higher education opportunities in growing numbers, demonstrating the need for clear pathways and access to professional development opportunities.

It should be noted, however, that this analysis does not reflect the impact—positive or negative—of recent political developments as those have yet to surface. One of the most significant developments over the past two years has been the rise of nationalism around the world, and what is perceived as a turning inward of many traditional host destinations that have typically attracted large numbers of students and scholars from

around the world. The first such development was “Brexit” in the United Kingdom in 2016, which will likely have far-reaching consequences on student mobility into and out of the United Kingdom, and also on mobility between the United Kingdom and continental Europe.

Similarly, political shifts in the United States and two travel bans against individuals from seven countries in January and March 2017 have raised many questions about what effect these developments will have on international student mobility from affected countries and elsewhere. While there is much speculation about this issue, two snapshot surveys conducted in March and May 2017 by six major higher education associations and organizations in the U.S. have pointed to an uncertain picture of the impact on international applications and admissions. At the time of this writing, a third snapshot survey is being conducted that will reveal more definitively the status of current international student flows to the U.S. Nonetheless, what is evident is that the international education community in the U.S. has come together to develop joint strategies and outreach to underscore the value of international education even further. U.S. institutions, in particular, have launched coordinated efforts to emphasize to international students that they are still welcome through the #YouAreWelcomeHere campaign and other similar initiatives.

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Global Student Mobility

Protracted academic displacement warrants a strong international higher education response.

Many factors driving academic mobility have persisted for decades. Limited home country higher education capacity, access and equity, personal and professional goals, and human capital needs play a critical part in whether students pursue education abroad. Today, the scale of structured national scholarships and academic displacement also significantly impact the landscape of student mobility.

In 2013, there were an estimated 4.1 million globally mobile higher education students (UNESCO, 2016b). The United States, United Kingdom, China, France, and Australia rank as top host destinations of international students worldwide and collectively host an estimated two-thirds of all international students (Fig. 14) (Project

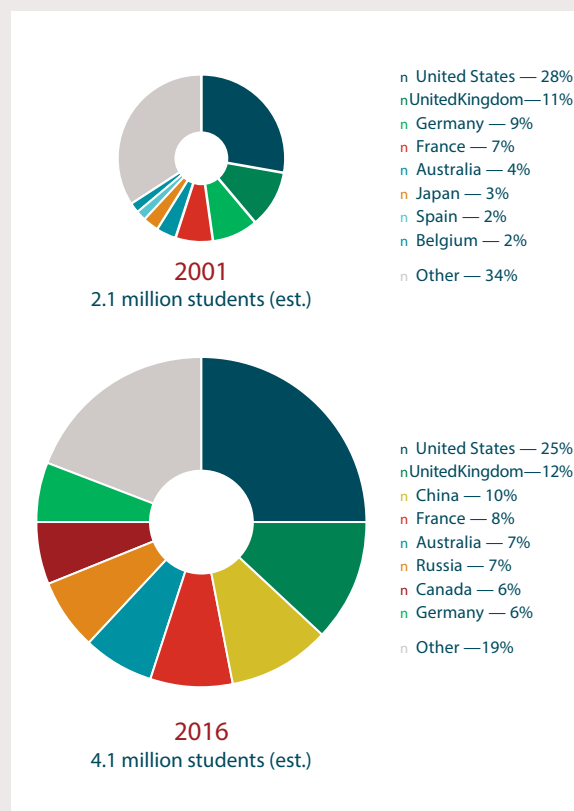


FIGURE 14 Top destinations of globally mobile students, 2001 & 2016 (year of data release) SOURCE: PROJECT ATLAS, 2016; UNESCO, 2016

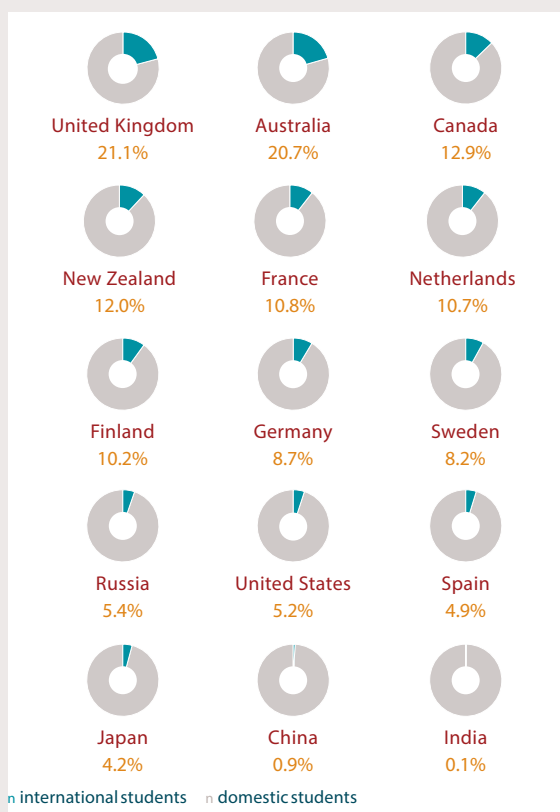


FIGURE 15 International students as percentage of total higher education in select host countries, 2016 (year of data release) SOURCE: PROJECT ATLAS, 2016

Atlas, 2016). In the United Kingdom and Australia, international students comprise over 20 percent of their total higher education populations, while in the United States they comprise just over 5 percent (Fig. 15) (Project Atlas, 2016).

The academic levels and degree types pursued by international students vary by destination. Degree-seeking undergraduates form the majority of international students in New Zealand (75 percent), Russia (54 percent), and Australia (50 percent), while Germany attracts more graduate full-degree students (53 percent). In the United States and the United Kingdom,

degree-seeking international students' academic levels are evenly divided. Driven by the desire to acquire advanced knowledge and specialized skills, a large proportion of students in these key destinations pursue STEM fields, including 50 percent of all international students in Germany and 46 percent in the United States.

SPOTLIGHT: ACADEMIC DISPLACEMENT

Not all higher education students willingly choose to pursue education outside of their home countries; some are forced to do so in order to continue their studies (United Nations, 2016b). In 2015, 21.3 million refugees were registered with the United Nations, with over half under the age of 18 who most likely have yet to enter tertiary education or have experienced a disruption of their higher education studies (UNHCR, 2016a). The 1948 Universal Declaration of Human Rights states that everyone has a right to access higher education (United Nations, 2016). Yet, only 1 percent of all college-age refugees are enrolled in higher education in comparison with 34 percent of tertiary-level age youth worldwide (Fig. 16) (UNHCR, 2016b). Syria is the largest source country of refugees worldwide due to continued conflict (nearly 5 million), but there are also millions of other displaced refugees worldwide, with the majority coming from Afghanistan, Somalia, and South Sudan in 2015 (UNHCR, 2016c).

Concerns over the access of displaced students and scholars to higher education and an understanding of the implications of an uneducated generation is only now becoming a concern for global higher education and the humanitarian community (De Wit & Altbach, 2016). Attention to this unprecedented crisis in tertiary education has been triggered by the prolonged displacement of the largely educated middle-class populations from countries such as Syria, Iraq, and Yemen, all of which had well-established tertiary systems and ambitious national higher education reforms in pre-conflict years (Barakat & Milton, 2015). Refugees from these countries are actively seeking higher education oppor-

tunities on a scale not seen in previous generations of refugee populations (Pacheco & Johnson, 2014; Watenpaugh, Fricke & King, 2014).

With displacement projected to be protracted for refugees, there is a clear need for a stronger international response to integrate them into existing higher education systems worldwide. An estimated 45 percent of refugees worldwide have been displaced for at least five years, with an average period of displacement of 20 years (Ergyork, 2015). Higher education access for refugees is essential for integration into host societies and to redress personal and social disadvantages. Education provides access to professional development that in turn reduces dependence on international aid, protects from crime and conflict, and drives positive change and reconstruction upon repatriation (Barakat & Milton, 2015; Elmes, 2016; Ergyork, 2015; Magaziner, 2015; Pacheco & Johnson, 2014; Watenpaugh, Fricke & King, 2014). Supporting displaced students' participation in higher education is an opportunity for host communities to internationalize their campuses and integrate talented and motivated youth into the national economy.

However, displaced individuals face many roadblocks in accessing higher education. Cost of tuition and travel, unavailability of identification and academic documents, lack of recognition of prior studies, language barriers, pressure to assume work or family responsibilities, host community discrimination, and difficulty obtaining information all restrict access to education (Elmes, 2016; Ergyork, 2015; IIE PEER, 2016; Magaziner, 2015; Watenpaugh, Fricke & King, 2014).

Entities worldwide are leveraging resources to provide displaced students easier access to higher education. Utilizing technology and innovative ideas, universities and NGOs are using Massive Open Online Courses (MOOCs) to provide refugee youth high quality higher education courses online in their host countries and international organizations are partnering with universities to fund scholarships and sponsor refugee students (Africa News, 2016; Redden, 2015; Stampfl, 2015).

Much more still needs to be done to address the scale of growing academic displacement and to provide access to higher education for those affected. With 86 percent of refugees hosted in developing countries, dialogue, sponsoring education and travel costs, and strategic partnerships between refugee and displaced persons' host countries and universities worldwide are of critical importance.

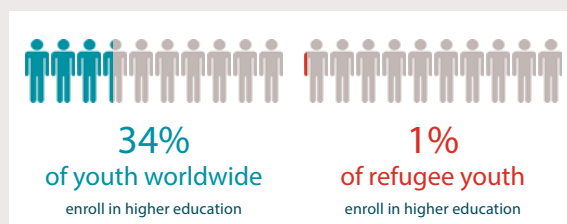


FIGURE 16 Percent of refugee youth in higher education in comparison with youth worldwide SOURCES: UNESCO, 2014; UNHCR, 2015

WORLD REGION TRENDS

Asia



In 2015/16, students from across Asia accounted for 66 percent of all international students in the United States (Fig. 17). Since 2001/02, students from China and India have consistently accounted for the largest international student populations in the United States. In 2015/16, Chinese students reached a high of 328,547 students, comprising 32 percent of all international students in the United States and far exceeding those from any other country for the seventh consecutive year. Indian students in the United States totaled 165,918, growing by 25 percent in 2015/16, marking a second year of high growth.

While the number of South Korean students dropped, enrollments from Japan and Taiwan remained level in 2015/16. As some Asian student populations remain stable or decline, others have soared. Students from Nepal increased by 18 percent to 9,662 and Vietnam increased 14 percent to 21,403 students, making Vietnam the sixth leading source of international students in the United States.

Eleven percent of U.S. study abroad took place in Asia, a slight 2 percent decline from 2013/14. For the third year in a row, U.S. study in China declined, falling 7 percent to 12,790 students. Nevertheless, China remains the only non-European country among the top five U.S. study destinations, with 4 percent of all U.S. study abroad students in China. With over 30 countries in Asia, American students are increasing diversifying their study destinations in the region. In 2014/15, Cambodia, South Korea, Taiwan, and Thailand all hosted growing numbers of U.S. students (Table 2.7).

GLOBAL SPOTLIGHT: A SHIFTING LANDSCAPE OF SOUTH KOREA MOBILITY

For the first time in more than a decade, South Korea fell to the fourth place of origin of international students in the United States. Comprising 6 percent of the U.S. international student population in 2015/16, enroll-

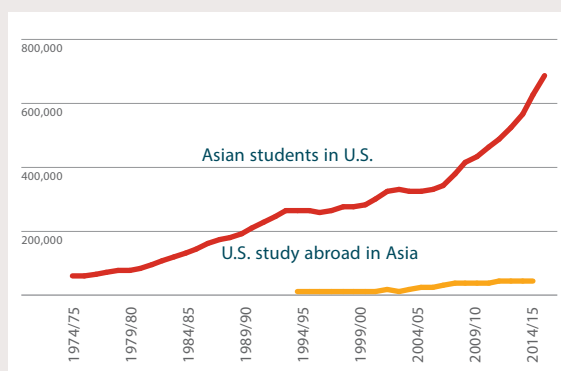


FIGURE 17 Student mobility between the United States and Asia, 1973/74–2015/16

ments dipped by 4 percent marking the fifth consecutive year of declines. Decreases in South Korean students are not unique to the United States. From 2011 to 2015, the number of South Korean students pursuing higher education abroad fell each year resulting in an 18 percent drop in overseas enrollments since their peak outbound mobility in 2011 (Fig. 18) (Ministry of Education Republic of Korea, 2015).

Between 2011 and 2015, other top destinations among South Korean students also saw enrollment shifts (Project Atlas, 2016). South Korean mobility to Canada fell by 58 percent, to Australia by 33 percent, and to Japan by 24 percent. On the other hand, after five years of flat enrollments, South Korea students in China increased 6 percent to 66,672 in 2014/15, surpassing the United States as the top destination for South Korean students. Intra-regional mobility schemes designed to advance economic growth within East Asia, such as those by the Asia Pacific Economic Cooperation (APEC), may contribute to increasing numbers of South Korean students pursuing education in China.

Shifts in South Korean student mobility partially reflect changing local attitudes towards the return on investment of study abroad. Studying abroad is no

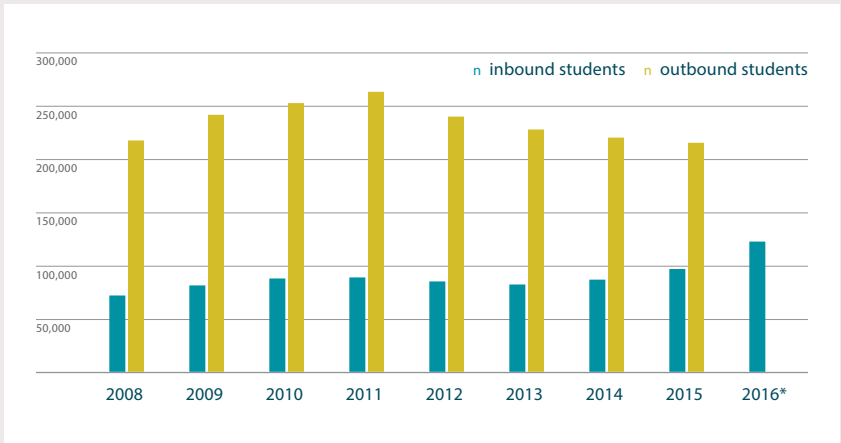


FIGURE 18 Inbound and outbound student mobility in South Korea, 2008–2016

SOURCES: MINISTRY OF JUSTICE REPUBLIC OF KOREA, 2016; MINISTRY OF EDUCATION REPUBLIC OF KOREA, 2015

* As of September 2016

longer necessarily perceived by Korean students and employers as providing a competitive edge in the domestic job market (Gibson, 2015; Kahng, 2015; Rubin, 2014; Yeo, 2015). National companies now often prefer domestically educated employees because of the belief that they will easily adjust to a collectivistic work culture and bring local connections cultivated throughout their university tenure.

Expensive foreign degrees are also becoming hard to justify with increasingly high domestic unemployment rates (Trading Economics, 2016). Not including other living costs, U.S. out-of-state annual tuition at a public institution averages \$23,893, in comparison with \$5,812 for South Korean universities (Kahng, 2015). International education hubs in the country also provide an alternative to overseas study by hosting international branch campuses that offer competitive tuition and international-style education close to home (Incheon Global Campus, 2016).

Demographic trends—particularly declining birth rates—have impacted both the number of South Korean students in domestic higher education, as well as those going overseas. Since 2012, the number of tertiary age students has decreased, prompting the government to close or merge institutions in anticipation of a surplus of unfilled higher education seats (ICEF, 2015a).

Partially in response to declines in domestic students, South Korea has made efforts to increase its international students. In 2015, the government set a goal of 200,000 international students by 2023, to make up 5 percent of all higher education. Initiatives to support this goal include: scholarships; regulations allowing universities to open international departments or programs; expansion of English instruction; and increased

post-graduation employment opportunities for international students in Korea (Custer, 2015; ICEF, 2015c).

Early indications suggest that these efforts are paying off. In September 2016, foreign students in South Korea reached a record high of 122,082, a 20 percent increase from September 2015 (Ministry of Justice Republic of Korea, 2016). Most students are from China and comprise 58 percent of Korea’s international students (Fig. 19) (Ministry of Justice Republic of Korea, 2016). Despite its early successes, this initiative has its critics. Opponents express concern that institutions may accept international students without fully assessing whether they meet academic requirements (Bothwell, 2015; Choi, 2016; Yonhap News Agency, 2016). Another concern is that specialized programs for international students may not support an inclusive global campus environment (Bothwell, 2015; Choi, 2016; Shin & Moon, 2016).

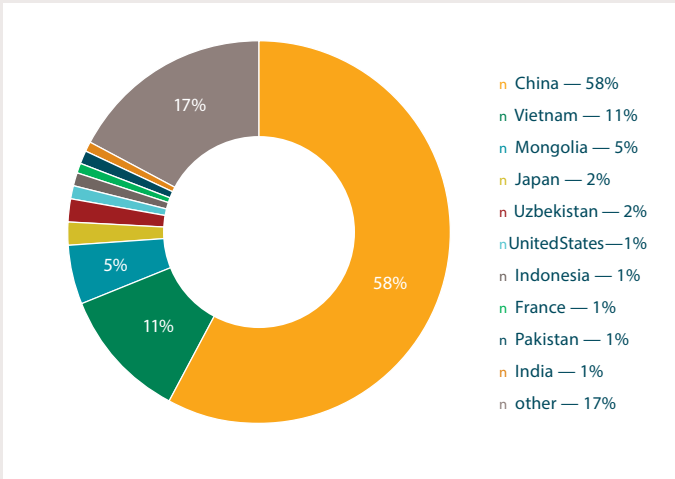


FIGURE 19 Places of origin of international students in South Korea, 2016
SOURCE: MINISTRY OF JUSTICE REPUBLIC OF KOREA, 2016

WORLD REGION TRENDS

Europe



European students comprised 9 percent of international students in the United States during the 2015/16 academic year, reaching almost 92,000 students and inching towards the 2001/02 peak of over 95,000 students from Europe (Fig. 20). Five countries—the United Kingdom, Turkey, Germany, France and Spain—accounted for more than half of all European students in the United States (52 percent). Among the top European places of origin, students from Spain and the United Kingdom increased at the highest rates (8 percent each) while German, Turkish, and French student populations remained stable.

Europe continues to attract the majority of U.S. students who go abroad for non-degree study. In 2014/15, 170,879 U.S. students studied in Europe for credit back at their home campuses, accounting for 54 percent of all U.S. study abroad and reflecting a 5 percent increase from 2013/14. The United Kingdom remains the leading destination for both American study abroad students and U.S. students seeking full degrees abroad. Over 38,000 American students chose the United Kingdom as their study abroad destination, in addition to 18,050 enrolled in full degree programs at U.K. universities.

Growth in U.S. study abroad to Europe is driven by a wide range of host countries. Italy, Spain, and France remain among top destinations for American students and high growth was seen to Greece, Austria, Ireland, Czech Republic, and Denmark in 2014/15 (Table 2.7). Over the last five years, Denmark and Ireland have seen large consistent growth (81 and 52 percent respectively). In 2009/10, 6,798 American students participated in study abroad to Ireland and in 2014/15, 10,230. In 2009/10, 2,228 students chose to study in Denmark and in 2014/15, 4,034, moving it from the 24th most popular destination for study abroad to 15th in just five years.

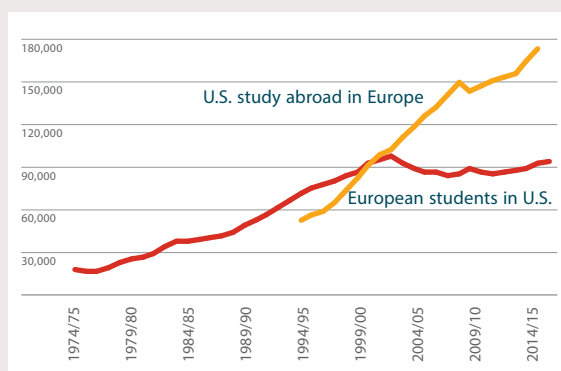


FIGURE 20 Student mobility between the United States and Europe 1973/74–2015/16

SPOTLIGHT: LOCALIZED MOBILITY IN THE POST-SOVIET STATES

The current landscape of academic mobility in the 15 post-Soviet countries is a result of their shared history throughout the twentieth century when these states constituted the Union of Soviet Socialist Republics (USSR) and experienced the impacts of the Cold War. The dissolution of the USSR in 1991 gave way to more international education opportunities after a period of low migration and isolation from global economies. However, remnants of former Russification policies such as imposing Russian as the common language, as well as various economic, social, and political links among these countries continue to position Russia as a natural destination for students from the region (Chankseliani, 2015). In addition to historical and diaspora linkages, Russia's appeal as a higher education destination for students from post-Soviet states lies in the sheer size of its higher education sector, bilateral academic mobility agreements with former Soviet states, and its affordability as a study abroad destination (Minsky, 2015; Study in Russia, 2016).

To date, 11 post-Soviet states have joined the European Higher Education Area (EHEA) and participate in the Bologna Process. To various degrees, these coun-

tries have aimed to align their higher education systems with Western European structures to increase the mobility of their students and the transferability of their degrees. Yet, despite national efforts to align post-Soviet systems with Bologna norms, many globally mobile students from these countries continue to study in other post-Soviet states, including those within and outside the EHEA (Heyneman & Skinner, 2014). This trend is juxtaposed against academic mobility patterns among other EHEA members, which collectively send only a small proportion of their students to post-Soviet countries.

In 2013, the 352,644 students from former Soviet states comprised approximately 9 percent of worldwide student mobility, with an estimated 63 percent of their outbound students choosing to study in another former Soviet state in 2014 (Center for Sociological Research, Ministry of Education & Science, 2016; UNESCO, 2016c & 2016d). Russia ranks among the top five destinations for all students from former Soviet states and is the number one destination for students from nine countries. Countries sending the highest proportion of their international students to Russia include Kazakhstan, Tajikistan, Belarus, and Uzbekistan. Together, students from these four countries

account for 44 percent of international students in Russia (Project Atlas, 2016).

Outside of post-Soviet countries, Europe—particularly Germany, the United Kingdom, Denmark, and the Netherlands—as well as the United States are popular destinations for those post-Soviet students pursuing education abroad (UNESCO, 2016d). In 2015/16, 12,862 students from these countries studied in the United States with the majority coming from Russia (42 percent), Kazakhstan (15 percent), and Ukraine (13 percent). Student mobility from post-Soviet countries to the United States reflects a 12 percent increase from 2005/06 to 2015/16.

Across all post-Soviet countries, greater proportions of domestic students study abroad than do international students who are hosted by post-Soviet countries. Moldova (14 percent), Azerbaijan (9 percent), Georgia (9 percent), and Latvia (7 percent) have the highest ratio of higher education students pursuing education abroad relative to their domestic higher education enrollments. Between 2003 and 2013, Belarus quadrupled and Tajikistan, Georgia, and Latvia more than doubled their outbound mobility ratios (UNESCO, 2016a), indicating growing student interest and opportunity to study abroad.



FIGURE 21 Inbound and outbound student mobility in post-Soviet countries, 2014 SOURCES: PROJECT ATLAS, 2016; UNESCO, 2016

Latin America & the Caribbean



International student mobility from Latin America and the Caribbean to the United States declined by 2 percent to 84,908 students in 2015/16. This small decline was primarily due to an 18 percent decrease in Brazilian students following the freeze of Brazil's Scientific Mobility Program. However, when Brazil is removed from the equation, mobility to the United States from Latin America and the Caribbean increased by 5 percent, driven by strong growth from Colombia, Peru, and Venezuela (Table 1.14).

U.S. study abroad to Latin American and the Caribbean grew 2 percent in 2014/15, with 50,298 American students receiving academic credit for study abroad in the region, second only to Europe. Costa Rica and Mexico are the top destinations in the region for U.S. students and both saw increases in study abroad participation (9 percent and 6 percent, respectively). The eight countries that make up Mexico and Central America hosted more students than Sub-Saharan Africa and the Middle East and North Africa combined (Table 2.6). Latin American and the Caribbean is also the leading destination for U.S. students seeking a non-credit learning activity abroad. Of the 22,000 students choosing to participate in international work, internships and volunteering, 37 percent selected Latin America, most notably Mexico, Nicaragua, and the Dominican Republic (Table 2.14).

U.S.-MEXICO ACADEMIC MOBILITY*

Since 2011, the United States and Mexican governments have focused on promoting greater academic exchange between the two countries. On the U.S. side, President Obama launched 100,000 Strong in the Americas in 2011, with the goal of sending 100,000 students in each direction between the United States and Latin America, including Mexico. The Mexican government also established its own mobility initiative—Proyecto 100,000—with the goal of sending 100,000 Mexican students

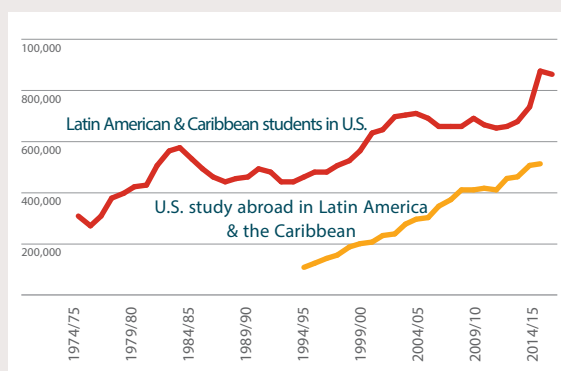


FIGURE 22 Student mobility between Latin America & Caribbean and the United States, 1973/74–2015/16

to study in the United States and bringing 50,000 U.S. students to Mexico.

Although robust data exists on the academic mobility of students and scholars between the United States and Mexico, many of the new mobility initiatives encompass educational activities that are outside the scope of current data collection projects, namely Open Doors and Mexico's Patlani project. These other forms of mobility that are growing in popularity include internships, student research placements, summer study, non-credit language courses, and other forms of non-credit education abroad.

To address the gaps between what is currently measured and these new forms of academic mobility, the IIE Center for Academic Mobility Research and Impact was commissioned by the United States Embassy in Mexico City to analyze the full scope of academic mobility between the United States and Mexico in the 2014/15 academic year. This section describes the key findings of that study, encompassing mobility flows in both directions and across a broad range of mobility types, including higher education, secondary students, vocational/technical, language training, scholars, and other exchange visitors.

*This section is adapted from Farrugia, C. (2016). *Beyond Borders: Measuring Academic Mobility between the United States and Mexico*. New York: Institute of International Education, prepared with the support of the U.S. Department of State.

MEXICAN STUDENTS, SCHOLARS, AND OTHER EXCHANGE VISITORS IN THE UNITED STATES

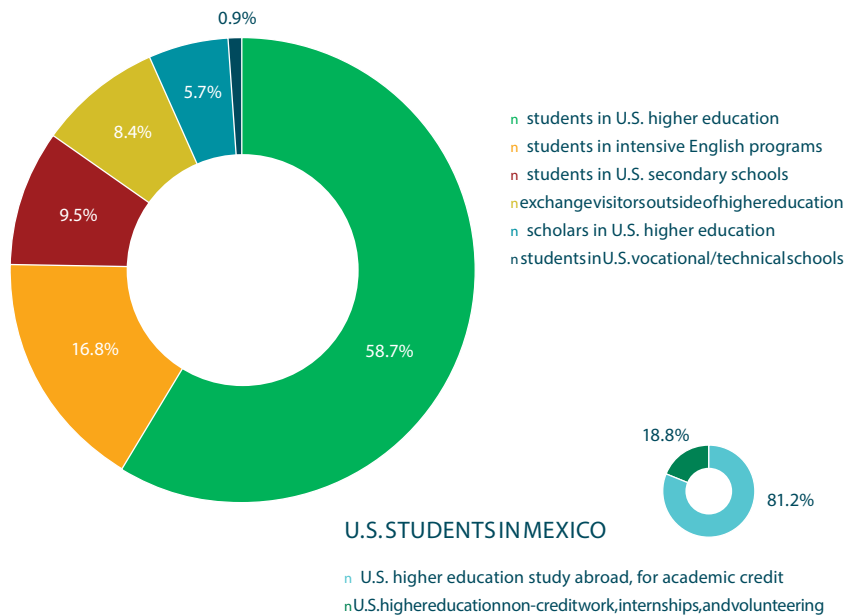


FIGURE 23 Inbound and outbound mobility between the United States and Mexico, all education levels, 2014/15
 SOURCE: FARRUGIA, 2016

Mexico to the United States Mexican students, scholars, and other educational exchange visitors engage in a wide array of activities in the United States. For Mexican students, higher education is the most attractive sector of U.S. education, accounting for more than half of all the academic mobility from Mexico to the United States. In 2014/15, there were an estimated 23,646 students and scholars from Mexico studying, teaching, or conducting research in U.S. higher education institutions. An additional 5,466 Mexican nationals travelled to the United States in fall 2014 to study in U.S. high schools, vocational schools, or to engage in exchange visitor activities outside of higher education. This brings the total number of Mexicans engaging in academic activities in the United States to 29,112 in 2014/15. The number of Mexican students and scholars in U.S. higher education experienced growth of 30 percent from 2013/14 to 2014/15. The highest rate of growth occurred among intensive English students, whose numbers increased by 2.5 times, growing from 1,945 in 2013 to 4,900 in 2014. However, this high rate of growth captured in this study was not sustained in the following year; as reported in this year’s Open Doors statistics, the number of Mexican students

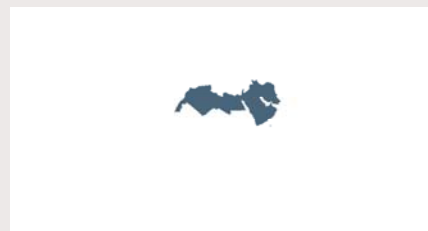
enrolled in intensive English programs fell to 3,384 in 2015. While this is a drop from the previous year, the number of Mexican students in intensive English still remained higher in 2015 than it was in 2013.

United States to Mexico Most U.S. students who study in Mexico do so through study abroad programs for which they receive academic credit back on their home campuses. After several years of declines in U.S. students in Mexico, the number of U.S. higher education students receiving academic credit for study abroad in Mexico increased 19 percent from 2012/13 to 2013/14, and increased another 6 percent in 2014/15 to reach 4,712 students.

In addition to this traditional form of study abroad, a large number of U.S. students in Mexico engage in non-credit work, internships, and volunteering abroad (WIVA), making Mexico the leading destination among all U.S. students engaged in non-credit WIVA around the world (Table 2.14). This component of U.S.–Mexico exchange is likely to continue attracting U.S. students. Expansion of these non-credit educational opportunities offers the potential for significantly increasing U.S. study in Mexico.

WORLD REGION TRENDS

Middle East & North Africa



The Middle East and North Africa (MENA) is the second largest home region of international students to the United States after Asia. Students from MENA increased 5 percent in 2015/16 to reach 108,227. Saudi Arabia, Iran, and Kuwait account for most students from the region and together make up 8 percent of all international students in the United States.

While most MENA students enroll in undergraduate or graduate degree programs (50 percent and 30 percent, respectively) (Table 1.15), many students also enroll in intensive English programs (IEPs), which provide a pathway to degree programs once students improve their English skills. After several years of growing IEP enrollment from MENA, in 2015 there was a 1 percent decline in IEP students at higher education institutions and independent providers (Table 3.5). This drop may portend future declines or slowing growth among students in degree programs, as fewer MENA students enter the IEP pipeline to further study in the United States. U.S. students in MENA grew by 8 percent to 6,844 students, with Israel as the most popular destination, attracting nearly two thirds of U.S. students in the region (Table 2.7).

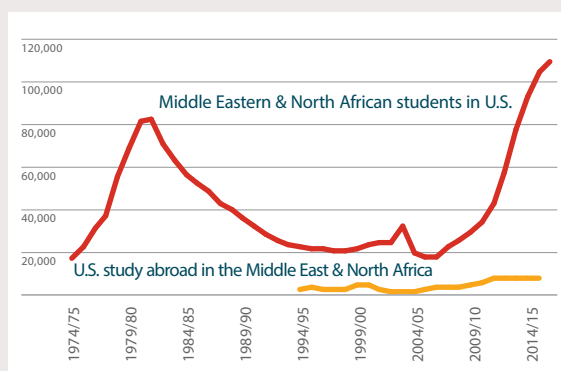


FIGURE 24 Student mobility between the United States and the Middle East & North Africa, 1973/74–2015/16

GLOBAL SPOTLIGHT: SAUDI STUDENTS

AROUND THE WORLD

According to the Saudi Ministry of Education (2016), in 2014/15, 202,803 Saudi students pursued education around the world, with the majority (87 percent) fully-funded by the King Abdullah Scholarship Program (KASP). Hosting 60 percent of all mobile Saudi students in 2014/15, the United States is the top destination for both KASP and privately-funded students (Ministry of Education, 2016). Other Anglophone countries were also top destinations, including the United Kingdom (10 percent), Canada (8 percent), and Australia (6 percent) (Fig. 25).

Due to declining oil prices, reports in 2016 indicated budget cut-backs and changes to the KASP scholarship program in the coming year, even though the program would run as planned until at least 2020 (Gray, 2016; ICEF, 2016a; Kottasova, 2016; Redden, 2016as). Many press reports and U.S. universities have noted that restrictions on students' academic eligibility, permissible fields of study, and the pool of U.S. institutions able to host Saudi scholarship students are beginning to impact applications and enrollments at certain institutions (ICEF, 2016b; Redden, 2016b; Walcutt, 2016).

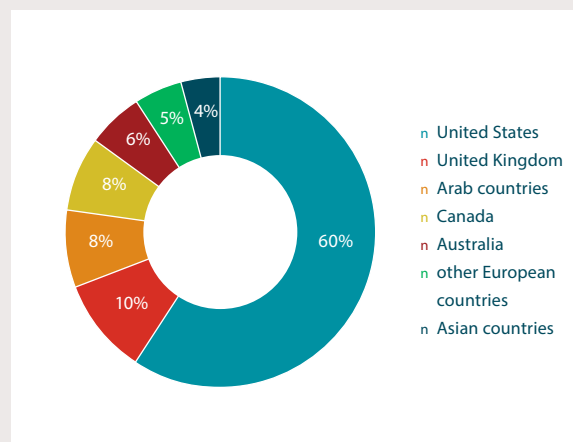


FIGURE 25 Destinations of Saudi students, 2014/15
SOURCE: MINISTRY OF EDUCATION, KINGDOM OF SAUDI ARABIA, 2016

WORLD REGION TRENDS

Sub-Saharan Africa



Over 35,000 students from Sub-Saharan Africa studied in the United States in 2015/16, increasing 5 percent from 2014/15 (Fig. 26). With 10,674 students on U.S. campuses, Nigeria is the only Sub-Saharan African country among the top 25 places of origin. Ghana and Kenya are also large senders from the region with more than 3,000 students each. Over the past 10 years, students from Angola and Ivory Coast have grown, more than doubling from 2005/06 to 2015/16, each sending over 1,200 students to the United States in 2015/16.

U.S. students in Sub-Saharan Africa fell sharply by 20 percent to 10,647 in 2014/15, due to the Ebola outbreak in the fall of 2014 that caused a 68 percent decrease in U.S. study in West Africa. Despite the drop to West Africa, U.S. students in South Africa, the leading destination on the continent, grew 6 percent to over 5,200 students.

SPOTLIGHT: REGIONALIZATION AND HIGHER EDUCATION MOBILITY

After Central Asia, students from Sub-Saharan Africa are the second most mobile students in the world with 264,774 students pursuing education outside their home counties in 2013 (UNESCO, 2016d). Top senders in 2015 include Nigeria, Cameroon, and Zimbabwe, representing three of four African sub-regions (Fig. 27).

Intra-African academic mobility has been identified by the African Union as key to achieving an integrated and prosperous Africa (Woldetensae, 2013). In 2014, over 60,000 Sub-Saharan African students pursued education intra-regionally (UNESCO, 2016d). To facilitate student flows, several African countries, including Rwanda, Ghana, and Benin, have abolished entry visas for fellow African nationals. Recent introduction of the African Union passport, expected to be fully implemented by 2018, should also lead to increased academic mobility (Study International, 2016).

While there have been efforts to promote intra-

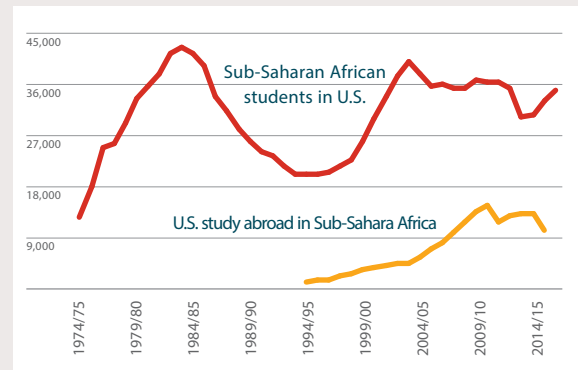


FIGURE 26 Student mobility between the United States and Sub-Saharan Africa, 1973/74–2015/16

regional mobility, there are still challenges in meeting academic mobility demands. Overall higher education enrollment in Africa has grown from 2 million students in 1999 to more than 6 million students in 2012, straining higher education capacity (ICEF, 2015b). This increase in students coincides with surging population growth and expansion of secondary systems across the continent (ICEF, 2014; UNESCO, 2010). Low funding for graduate programs, poor resources, brain drain of academics, and education costs still present obstacles for Sub-Saharan African students wishing to study within the region (Friesenhahn, 2014; Makoni, 2016).

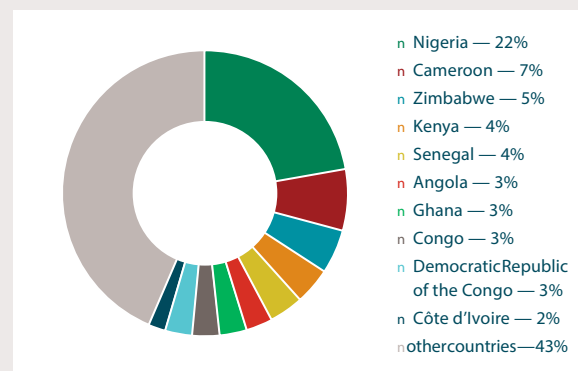
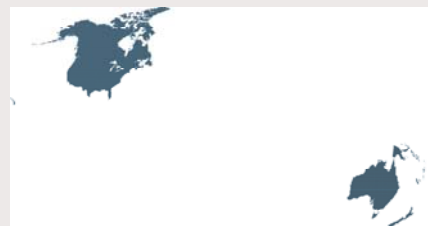


FIGURE 27 Leading sending countries of outbound Sub-Saharan African students, 2015 SOURCE: UNESCO, 2016

WORLD REGION TRENDS

North America and Oceania



Anglophone countries in North America and Oceania are among the top host destinations for international students worldwide and together host approximately 40 percent of all globally mobile students. While the United States hosts the largest number of international students worldwide, the sheer size of its higher education population makes foreign students account for only 5 percent of all U.S. higher education enrollments. In comparison, the proportion of international students in higher education in Australia (21 percent), Canada (13 percent), and New Zealand (12 percent) are among the largest in the world (Project Atlas, 2016).

The number of Canadian students in the United States fell for the second year in 2015/16, dropping 1 percent from the prior year to 26,973 students (Fig. 28). Despite recent declines, Canada remains the fifth leading sender of international students to the United States. Canada is also a popular destination for U.S. students, with over 8,000 enrolled in full-degree programs in Canada and 1,500 engaged in non-degree study in 2014/15.

In 2014/15, both Australia and New Zealand experienced a rise in U.S. students who received academic credit back home and together hosted 12,135 such students (Fig. 29). Additionally, in 2015 the two countries hosted more than 4,500 U.S. students in full-degree programs. The scale of mobility in the reverse direction is much smaller, with just 4,752 Australian and 1,608 New Zealand students pursuing higher education in the United States in 2015/16, most at the undergraduate level (Table 1.15).

CANADA'S SLOWING GROWTH

Between 2010 and 2015, international students in Canadian higher education institutions increased 51 percent (Project Atlas, 2016). While international students in Canada are at an all-time high, there is a slowing of international student enrollment from top sending

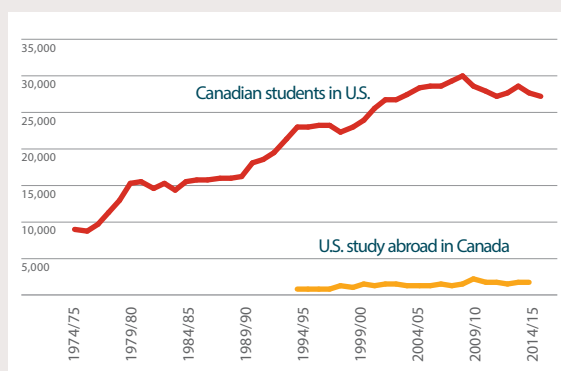


FIGURE 28 Student mobility between the United States and Canada, 1973/74–2015/16

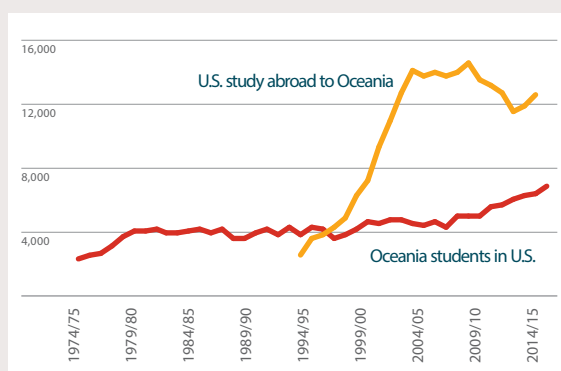


FIGURE 29 Student mobility between the United States and Oceania, 1973/74–2015/16

countries. Consistent with trends seen in the United States, Canada saw the numbers of international students from Brazil decline by 22 percent and Saudi Arabia students declined by 32 percent due to recent cutbacks in both these home government scholarship programs (CBIE, 2016).

The province of Quebec is host to a sizeable number of all students from France (18,525 students), who make up the third largest group of international students in Canada overall and make up 7 percent of the country's international students (Fig. 30). A shared language, as well as provincial tuition policies allowing students

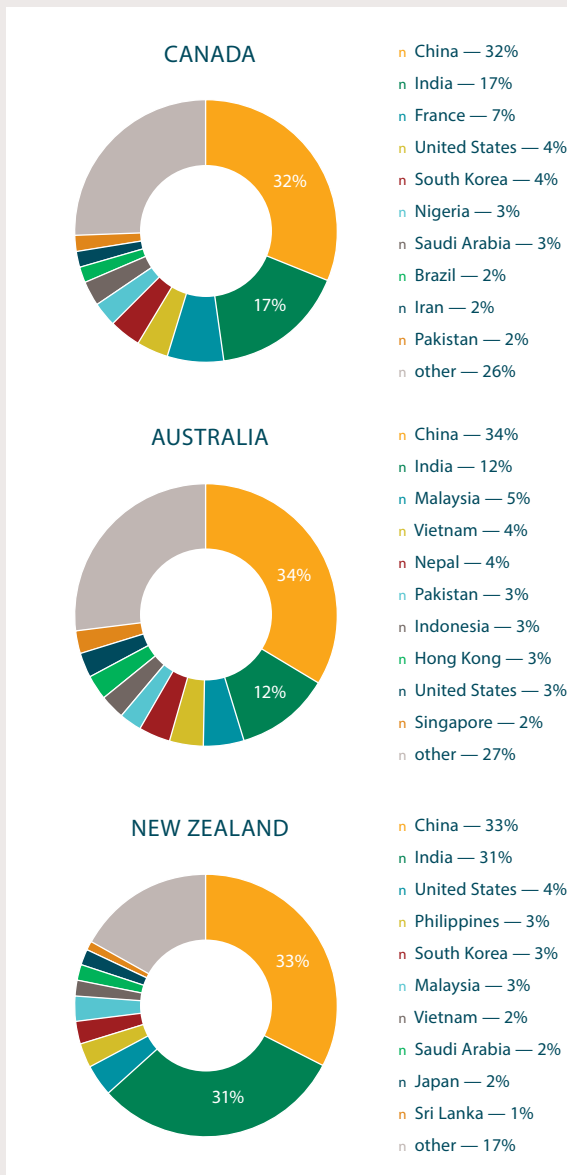


FIGURE 30 Places of origin of international students in Canada, Australia, and New Zealand, 2015 SOURCE: PROJECT ATLAS, 2016

from France to pay the same tuition rates as domestic Quebec students historically enticed many French students to study in Canada. However, new requirements enacted in 2015 have increased the tuition rates for students from France. They now must pay the same tuition fees as Canadians from outside Quebec, which may be contributing to slower growth among French students in Canada (Smith, 2016).

AUSTRALIA AND NEW ZEALAND: INTERNATIONAL EDUCATION LANDSCAPE

In 2015, international student enrollments in Australia (292,352) and New Zealand (50,525) increased 8 percent

each, with most international students coming from the Asia-Pacific region (Fig. 30).

China and India are the two leading places of origin in both Australia and New Zealand, with Chinese students comprising more than a third of all enrollments. Mirroring trends seen in the United States and Canada, Indian students had the steepest growth from the prior year, rising 44 percent in New Zealand and 34 percent in Australia. Undergraduates pursuing full-degrees comprise the vast majority of enrollments in New Zealand (75 percent) and Australia (50 percent).

Owing to the wide range of programs, experiential learning opportunities, and post-graduation employment and migration schemes, business and management studies and STEM fields are the most popular among international students in both countries (Fig. 31).

Among STEM fields, engineering was the most popular in Australia (31 percent) and mathematics and computer science in New Zealand (33 percent).

Capitalizing on its multicultural education environment, Australia promotes the global character of its business education, merging Eastern and Western perspectives, with courses that are recognized and accredited internationally (Studies in Australia, 2014). In addition to student work-study programs offered at institutions, Australia and New Zealand are strengthening their domestic skilled workforce by providing post-study, skilled graduate, and a variety of schematic work opportunities for international students (ICEF Monitor 2012; Joyce & Woodhouse, 2013; Studies in Australia, 2014). For example, international graduates of business and management, computer science, and engineering can apply for work experience through Australia's Professional Work Program, which not only provides students with professional training, but also increases their opportunities to qualify for permanent residence.

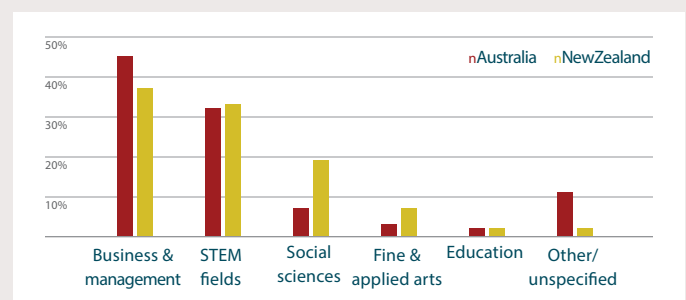
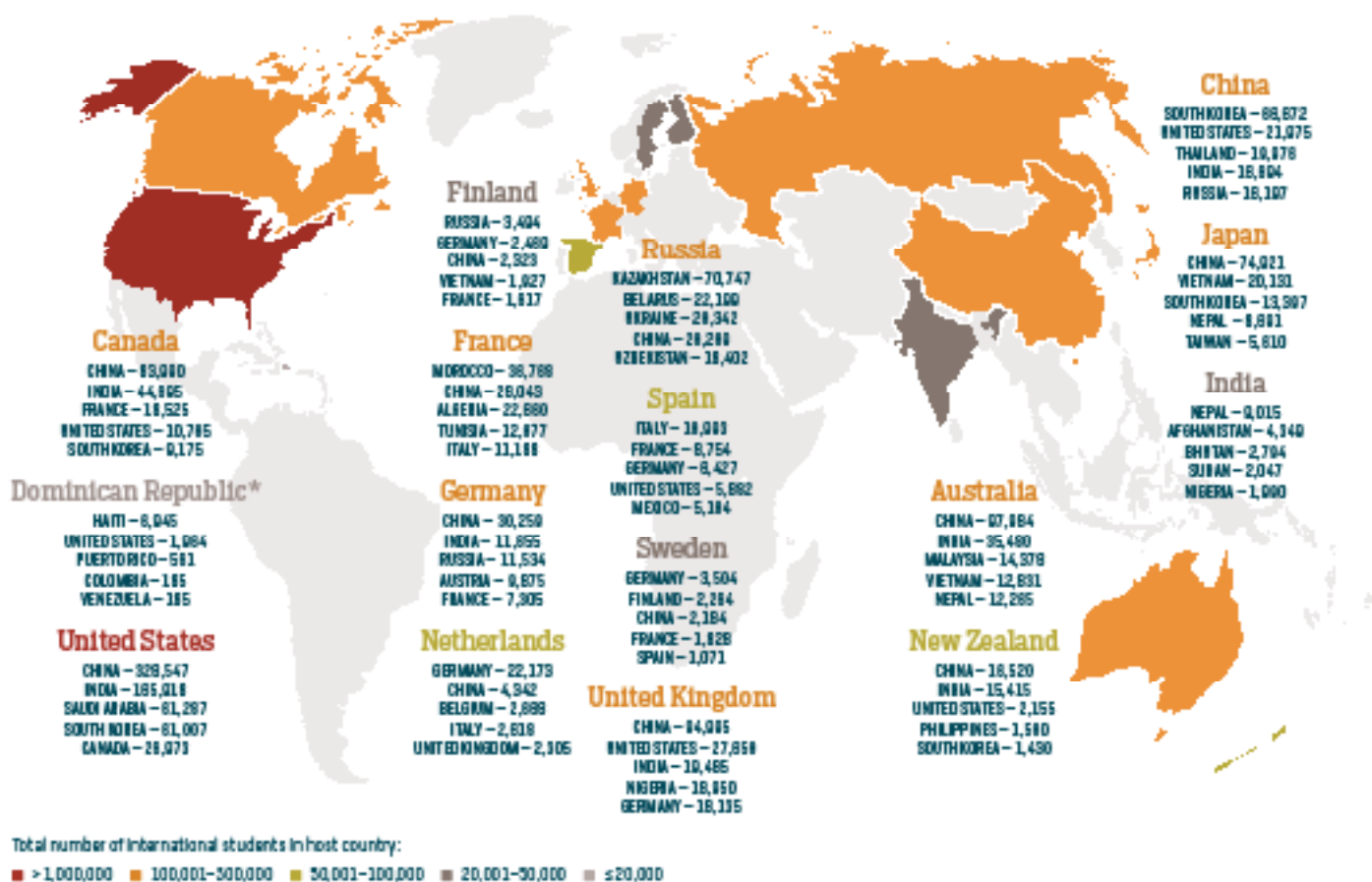


FIGURE 31 Fields of study of international students in Australia and New Zealand, 2015 SOURCE: PROJECT ATLAS, 2016

LEADING PLACES OF ORIGIN OF INTERNATIONAL STUDENTS BY HOST COUNTRY



*Dominican Republic data reflects full-degree MSc/PhD scholars only.

Source: Project Atlas, 2016

PROJECT ATLAS DATA PARTNERS

Australia Australian Government Department of Education and Training

Canada Canadian Bureau for International Education (CBIE)

Chile Ministry of Education, Higher Education Division

China China Scholarship Council

Denmark Danish Agency for Higher Education

Dominican Republic ConnectDR

Finland Centre for International Mobility (CIMO)

France CampusFrance

Germany The German Academic Exchange Service (DAAD)

India Association of Indian Universities (AIU)

Ireland Education in Ireland

Japan Japan Student Services Organization (JASSO)

Malaysia Ministry of Higher Education Malaysia

Mexico National Association of Universities and Higher Education Institutions (ANUIES)

Netherlands Netherlands Organization for International Cooperation in Higher Education (Nuffic)

Norway Norwegian Centre for International Cooperation in Education (SIU)

New Zealand New Zealand Ministry of Education

Republic of the Philippines Commission on Higher Education (CHED)

Russian Federation Center for Sociological Research, Ministry of Education and Science

South Africa International Education Association of South Africa (IEASA)

Spain Spanish Service for the Internationalization of Education (SEPIE)

Sweden Swedish Institute

United Arab Emirates Center for Higher Education Data and Statistics, Ministry of Higher Education and Scientific Research (MOHESR)

United Kingdom British Council

United States Institute of International Education (IIE)

PROJECT ATLAS RESEARCH AFFILIATES

ANE African Network for Internationalization of Education

CIME Center for International Higher Education, Boston College

IAU International Association of Universities

OECD Organisation for Economic Co-operation and Development

TECO-NY Taipei Economic and Cultural Office in New York

UIS UNESCO Institute for Statistics

PROJECT ATLAS® was launched in 2001 by the INSTITUTE OF INTERNATIONAL EDUCATION with support from the Ford Foundation and is now supported by the Bureau of Educational and Cultural Affairs (ECA) of the U.S. Department of State and the participating organizations in each country. The goal of this collaborative global project is to share accurate and timely data on student mobility at the higher education level, addressing the need for improved research comparability of academic mobility data. Project Atlas also helps strengthen data collection capacities worldwide through customized workshops and academic mobility assessment projects. For more on global student mobility data and associated research, please visit the Project Atlas website at www.iie.org/atlas.

Project Atlas

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