

New research from IDP which sets the standard in forecasting international student numbers

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**Global Student Mobility:
An Australian Perspective
Five Years On**

Melissa Banks, Alan Olsen, David Pearce

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This new report from IDP Education's research group

- Forecasts international student numbers in Australia's higher education sector through to 2025
- Builds on IDP's landmark 2002 report *Global Student Mobility 2025* and sets a new benchmark for forecasting international student numbers
- Represents an indispensable research tool for educational institutions and professionals who work in international education
- Features a *What If?* Calculator for users to explore the results which follow from using different assumptions in the forecasting model.

Look into the future

The international education industry is Australia's fourth largest export industry contributing \$11.3 billion to the Australian economy in 2006/07. More than 380,000 students studied in Australia on student visas in 2006 across all education sectors ranging from schools and English language to vocational training and higher education. 45% of international students on a student visa onshore in Australia in 2006 were in higher education.

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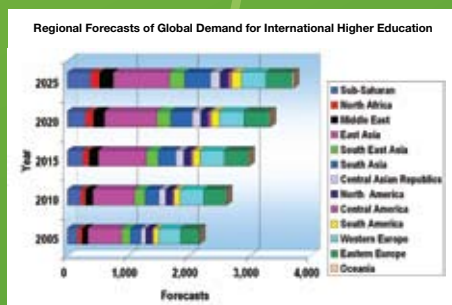
projects the current position of the international education industry forward to 2025. It builds on two previous landmark research reports by IDP, the 1995 study *International Education: Australia's Potential Demand and Supply* and the 2002 study *Global Student Mobility 2025*.

Global Student Mobility 2025 forecast in 2002 that demand for international higher education places in Australia would grow at 8.8% per year. Data from Australian Education International shows that international enrolments in Australia's universities, on campus in Australia, grew a compound 8.5% per year from 2002 to July 2007.

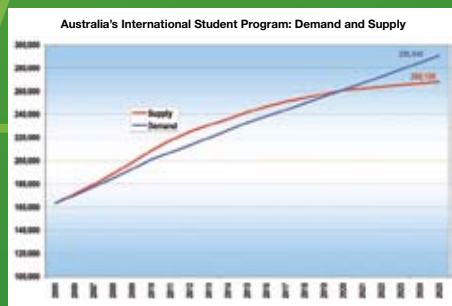
Five years later we have the benefit of access to a broader data set which encompasses time series data from 1999 to 2005 and well as covering around 180 countries. While the broad framework is the same as that used in **Global Student Mobility 2025**, there are some important differences that have had a significant effect on these forecasts.

Key findings

- Global demand for international higher education will grow from 2.173 million in 2005 to 3.720 million in 2025. This is growth of 71% over 20 years, or compound growth of 2.7% per year.



- Demand for Australian international higher education will grow from 163,345 in 2005 to 290,848 in 2025. Demand for international higher education places in Australia will grow 4.25% per year to 2010, then slow to 3% per year to 2015, then slow further
- The Australian university system has the appetite and capacity to provide 268,156 international student places, on campus in Australia, by 2025. Demand will exceed supply in 2020, and by 2025 there will be a shortfall of 22,692 international places on projected demand of 290,848



- Australia's international student program in higher education will continue to be dominated by a small number of markets. Four markets will represent 61% of all international student enrolments in Australian higher education by 2025

Key features

- Global forecasts of demand to 2025 for international students studying in higher education by region and source country
- Demand and supply forecasts to 2025 for international students studying in higher education in Australia by region and source country
- Detailed analysis of demand growth to 2025 in the four largest international markets for Australian higher education – China, India, Malaysia and Indonesia
- A *What If?* Calculator which allows users to vary input assumptions in the forecasting model

Build your own forecasts

Global Student Mobility: An Australian Perspective Five Years On is a flexible forecasting tool. You can use the *What If?* Calculator, supplied with the report, to vary two key assumptions – personal income growth and Australian market share – in the top 45 source countries which supply 97% of international students in higher education in Australia.

This feature means this research report is far more than a set of static forecasts. It allows you to build your own forecasts and undertake risk analysis for the key markets which are of interest to your institution. It also gives you the ability to update the forecasts should unexpected changes occur in particular markets.

“The number of international students seeking Australian university education will almost double in the next two decades, challenging universities’ ability to deal with demand”

(Anthony Pollock, Chief Executive
IDP Education Pty Ltd)

“If nothing else changes, in terms of domestic demographics and domestic demand, the international student program may be the only component of the Australian university student population that grows, out to 2025. Universities may face choices about whether they downsize or whether they grow their international student programs.”

(Banks, Olsen and Pearce Global Student Mobility: An Australian Perspective Five Years On, 2007)

About the authors

Melissa Banks, Head of Research Services at IDP Education Pty Ltd, is responsible for IDP's corporate and industry research. Melissa is an experienced and skilled practitioner with multiple years experience and knowledge working in international education.

Alan Olsen is a consultant in international education, based in Hong Kong. Alan was involved in the original forecasting study in 1995 and brings the benefits associated with extensive research and publishing experience with 26 items on Australian Education International's Database of Research on International Education.

David Pearce is a director of The Centre for International Economics (The CIE) in Canberra. David has over 20 years experience in a variety of fields of applied economic analysis including the environment, R&D evaluation, trade, water and greenhouse. David in 2002 was part of the research team for the study **Global Student Mobility 2025**.

About IDP Education

Since it was established in 1969 IDP Education has been a leading participant in Australian international education. IDP is recognised for its expertise in research providing quality, practitioner oriented research that builds and invests in the knowledge base and advancement of international education.

With a network of over 75 student service centres in 29 countries IDP places more international students in Australian educational institutions than any other organisation. Through its majority-owned subsidiary IELTS Australia, IDP Education is a major shareholder in the IELTS English language proficiency test and conducts IELTS tests in 36 countries.

Ordering information

Order your copy of **Global Student Mobility: An Australian Perspective Five Years On** online at www.idp.com/research. The report is provided on a USB memory stick for easy portability.

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