The OBSERVATORY
on borderless higher education

The Figures in Light of PMI2

International Student Experience in Higher Education Conference

28 April 2009

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Overview

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- Main Competition: US, Australia, Canada, NZ
  - National Data & Major 'Source' Countries
  - Competition Elsewhere: Europe & Asia
- Target Markets:
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PMI2: Target Countries

As of March 2009, PMI2 priority markets are:

- China (including Hong Kong);
- India;
- Nigeria;
- US;
- Ghana;
- South Korea;
- Pakistan;
- Vietnam; and
- The Gulf (Bahrain, Iraq, Kuwait, Oman, Qatar, Saudi Arabia and the UAE)

PMI2: Results

Country	2004	2005	2006	2007	2008
China	47,740	52,675	50,755	49,595	45,355
Hong Kong	10,575	10,780	9,455	9,640	9,700
India	14,625	16,885	19,205	23,835	25,905
Nigeria	5,940	8,145	9,605	11,135	11,785
US	13,380	14,385	14,755	15,955	13,905
Ghana	2,880	3,035	2,895	2,675	tba
SK	3,480	3,845	4,025	4,310	tba
Pakistan	4,380	6,545	7,940	9,305	9,305
Vietnam	705	1,110	1,450	1,685	tba
Saudi Arabia	2,190	2,440	2,755	3,250	tba

Main Competition:
US, Australia, Canada, New Zealand

The US

Country	2004	2005	2006	2007	2008
Canada	27,017	28,140	28,202	28,280	29,051
China	**61,765**	**62,523**	**62,582**	**67,723**	**81,127**
India	**79,736**	**80,466**	**76,503**	**83,833**	**94,563**
Japan	40,835	42,215	38,712	35,282	33,974
Mexico	13,329	13,063	13,931	13,826	14,837
Saudi Arabia	**3,521**	**3,035**	**3,448**	**7,886**	**9,873**
South Korea	**52,484**	**53,358**	**58,847**	**62,392**	**69,127**
Taiwan	26,178	25,914	27,876	29,094	29,001
Thailand	8,937	8,637	8,765	8,886	9,004
Turkey	11,398	12,474	11,622	11,506	12,030

Australia

Country	2004	2005	2006	2007	2008
China	**41,562**	**55,461**	**63,092**	**70,598**	**82,114**
Hong Kong	**18,175**	**17,317**	**16,450**	**16,085**	**14,951**
India	**19,587**	**26,255**	**35,707**	**54,469**	**80,082**
Indonesia	15,405	13,910	12,980	12,843	13,482
Malaysia	18,819	18,278	18,025	18,754	19,851
Nepal	996	1,201	2,440	8,035	16,151
Singapore	10,368	9,476	8,897	8,573	8,620
South Korea	**9,138**	**10,464**	**12,269**	**14,442**	**16,889**
Thailand	10,289	10,408	10,849	12,136	13,140
US	**12,463**	**12,406**	**11,892**	**11,681**	**11,411**

Canada

Country	2004	2005	2006	2007	2008
China	39,296	39,598	39,845	41,082	NYA
France	6,591	6,737	7,774	8,353	NYA
Hong Kong	5,671	5,172	4,765	4,484	NYA
India	5,761	6,293	6,690	6,937	NYA
Japan	9,447	9,370	8,512	7,793	NYA
Mexico	3,390	3,597	3,789	3,830	NYA
South Korea	26,721	27,254	29,030	30,075	NYA
Taiwan	5,288	4,962	4,907	4,747	NYA
UK	2,392	2,453	2,628	2,765	NYA
US	12,566	12,624	12,266	11,853	NYA

New Zealand

Country	2004	2005	2006	2007	2008
China	29,881	26,543	21,036	NYA	NYA
Germany	934	1,178	1,272	NYA	NYA
India	2,035	2,095	2,143	NYA	NYA
Japan	2,104	2,041	1,978	NYA	NYA
Malaysia	1,258	1,329	1,519	NYA	NYA
South Korea	1,940	1,889	2,137	NYA	NYA
Thailand	688	656	653	NYA	NYA
UK	678	752	697	NYA	NYA
US	2,302	2,480	2,429	NYA	NYA
Vietnam	584	630	670	NYA	NYA

Competition Elsewhere:
Europe & Asia

Europe: Germany & France

- In 2007, Germany & France each welcomed an average of nearly 255,000 foreign students
- Germany's 'source' countries: Bulgaria, Poland, Russia, Ukraine & Austria
- France's 'source' countries: Morocco, Algeria, Tunisia & Senegal
- According to UNESCO, 3 out of every 5 foreign students studying in Europe choose to attend an institution in Germany, France or the UK, highlighting the growing competitiveness of continental Europe

Europe: Germany & France

Country	Number of international students	International students as % of total	Notes
France	263,126	11.5%	Majority from French-speaking countries; China a significant group
Germany	246,360	12.4%	China is single largest group (11% of total)
UK	**351,470** (2006/7)	**15.0%**	**International/EEA = approximately 70/30; China 14% of total**

Source - UK Universities and Europe: Competition and Internationalisation
Published by Universities UK (April 2009), Research Team: The Observatory on Borderless Higher Education and Kingston University

Other Europe:

The Netherlands, Switzerland & Sweden

Country	Number of international students	International students as % of total	Notes
Netherlands	49,750	8.7%	50% are other European
Switzerland	39,500	18.0%	75% from European countries
Sweden	28,000	7.3%	>50% from EU/EEA; 40% are on exchange programmes
UK	**351,470** (2006/7)	**15.0%**	**International/EEA = approximately 70/30; China 14% of total**

Source - UK Universities and Europe: Competition and Internationalisation Published by Universities UK (April 2009), Research Team: The Observatory on Borderless Higher Education and Kingston University

Asia: China, Malaysia, Singapore & South Korea

Country	Number of international students	International students as % of total	Notes
China	223,499	App.1%	Japan, South Korea, US, Indonesia & Vietnam
Malaysia	72,000	8%	Approximately 23% from China & Indonesia; 25% from MENA region
Singapore	86,000	6%	30% from China, growing numbers from India, SK, Vietnam, Indonesia
SK	64,000	2%	90% from Asia; mostly China & Japan

Target Markets:
Significance

UK	US	AUS	CAN	NZ	+ GER	+FRA
China	China	China	China	China	China	China
HK	HK	HK	HK	HK		
India	India	India	India	India	India	India
Nigeria	Nigeria					
US		US	US	US	US	
Ghana						
SK	SK	SK	SK	SK	SK	
Pakistan						Pakistan
Vietnam	Vietnam	Vietnam		Vietnam	Vietnam	Vietnam
The Gulf	The Gulf		The Gulf		The Gulf	The Gulf

Target Markets:
Future Strategy

- Competition 'heating' up: an unprecedented number of study destinations now exist for overseas students
- Many countries targeting the same students (India, Vietnam, the Gulf region)
- Value of international student experience more important than ever

Key Message: Consistency & Precision