



Global Student Mobility at a Crossroads: Why Data Matters

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Abstract

The profile of globally mobile students has shifted over the last 20 years, and discourse on international higher education today and in the future must take this into account. This article provides insights into trends of student host destinations, the push and pull factors that drive students to study abroad, and the valuable role of comparable host data to identify patterns over time.

The profile of globally mobile students has shifted over the last 20 years, and discourse on international higher education today and in the future must take this into account. What remains constant is the value of data and global mobility trends over time, helping us study the challenges and opportunities host destinations face. Since 2001, *Project Atlas* has focused on comparable data of top hosts of international students, including the United States, United Kingdom, Canada, and Australia. By analyzing trends in international student mobility, countries' capacities to host students at their colleges and universities, and the effects of external shocks such as the COVID-19 pandemic on international higher education, *Project Atlas* provides the necessary context to compare and contrast mobility flows.

What Is the Destination of Choice?

In 2001, there were 2.1 million globally mobile students, according to the OECD report *Education at a Glance*. The total has expanded to over six million in 20 years, with relatively stalled growth in the last two years due to the COVID-19 pandemic. The effects of the COVID-19 pandemic were uneven and affected some countries, including Australia, New Zealand, and China, more adversely than others. Rebounds of international student numbers in 2022 and 2023, particularly in the United States, United Kingdom, and Canada, as reported in *Project Atlas*, indicate that the global total may again accelerate. However, what remains unseen is whether we will return to a global growth rate of 5 percent per year, as experienced before the COVID-19 pandemic.

The composition of top hosts of international students has shifted as well. The United States and the United Kingdom remain the leading hosts of international students. In 2001, the United States and the United Kingdom made up 28 percent and 11 percent of all globally mobile students, respectively. In 2023, this number decreased to 17 percent for the United States and remained stable at 11 percent for the United Kingdom, according to *Project Atlas*. Competition from other Anglophone hosts has increased, including Canada, which holds 10 percent of the global pie. Add this to the traditional European hosts Germany and France, and the top five hosts make up 50 percent of all globally mobile students.

The capacity to host more international students remains a question for some destinations. In 2015, *Project Atlas* reported that at least five of the top 10 host destinations were countries where international students already made up 10-20 percent of the total college population. As the number of globally mobile students has grown, even more international students have entered these tertiary markets. In 2022, Canada, Australia, and the United Kingdom all had international students make up over 20 percent of their total higher education. The United States is an outlier here, as international students comprise just 6 percent of the country's total college population.

Considerations for Prospective International Students

When prospective students decide where to study, multiple factors drive their decisions. For emerging student markets like Nigeria, Bangladesh, and Pakistan, a primary factor is the booming tertiary-age population and the low capacity of the local university systems to accommodate needs. While these students look beyond their borders, further support is critical to ensure they successfully apply to, pursue, and complete their studies overseas. We have already seen an increase in students from India choosing to study in Canada, the United Kingdom, and the United States. But we have also noted that Indian students are studying predominately for graduate degrees, waiting to study

abroad for a shorter period and only after finishing their undergraduate degree. This is quite different from the significant increases the United States experienced in the last decade with Chinese students, for example, as these students were more likely to pursue undergraduate degrees. Students' choices on when to study and whether to go for a short- or a long-term study affect pipelines for host destinations.

Challenges abound regarding other “push factors,” including the realities of conflicts and geopolitics. One of the fastest-growing mobile populations consists of students from conflict-affected areas like Afghanistan, Ukraine, Russia, and other countries, who are looking to continue their higher education elsewhere. Mental health support for these students is essential, as are options for students to continue studying if they cannot return home. Finally, health and safety continue to play a role, as the ramifications of the COVID-19 pandemic and travel restrictions still impact student mobility in Asia, particularly in China.

For host destinations, “pull factors” have been well studied. The quality of the higher education system seems to drive students to certain countries, predominantly the United States and the United Kingdom. But it is also important to note that the cost of higher education, economic incentives such as international scholarships or fellowships, and opportunities for students to stay beyond their degree have increased in priority. If the marketplace of host destinations is growing, so are the considerations for students, and they go well beyond the degree itself.

Deconstructing Data for Purpose

The work of *Project Atlas* is not finished. In 2001, the commitment of the research initiative was to focus on how data is collected and opportunities for alignment, comparison, and discussion of trends. These principles continue to resonate.

The definition of who counts as an “international student” or a “foreign student” differs significantly across host countries. While some countries include only students on country-issued student visas, others include all foreign-born students, including those with residency. Furthermore, there is also the measure of how a student's global academic journey is counted. While some countries only count students who pursue a full academic degree in their country, others include students who take courses toward a degree, even nondegree pursuits. And, of course, there is the role of global online learning and whether countries are able to capture students studying at their institutions in-person and online. *Project Atlas* analyses give nuance to the comparisons made. Calculations regarding international students and higher education capacity allow for side-by-side comparisons considering local data collection and realities.

Project Atlas partners also take the time to discuss their data and the trends they are seeing, domestically and globally. Since multiple factors influence each year's data, the ability to discuss domestic and international policies, trends in higher education, and other considerations brings more insights to the data. *Project Atlas* partners learn from each other and improve practices regarding data collection. For example, the introduction of online learning has spurred the discussion of how many students are enrolled in online classes. Some partners have collected such data for years, while others lack the means. Through discussions, partners share approaches.

In the past three years, the rapid accessibility of data has also been critical. *Project Atlas* released and presented data during the COVID-19 pandemic before regularly scheduled releases by the OECD and UNESCO. The urgency of sharing international student data periodically and from a trusted source was vital. Knowing that the picture of global student mobility continues to change, it is imperative to continue this focus on data to inform local and international discussions. As we know, looking at data from the past may help us grapple with the future. ▲

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