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An audit of international student mobility to the UK

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ECONOMIC & SOCIAL RESEARCH COUNCIL

Improving our understanding of the key drivers and implications of population change

ABSTRACT

The number of students from other European Union countries coming to the UK has been in decline over recent years, although this trend has so far been offset by the number of students from some non-European countries, especially China. The largest reductions from the European Union have been from countries such as Germany, Ireland and Greece. In this paper we carry out secondary data analysis of HESA data and draw on primary research previously carried out within our research team to discuss the significance of these trends. We offer potential explanations for region and country-specific trends in student mobility in relation to recent changes to higher education fees and immigration policies. The possible consequences of the 2016 Brexit referendum for international student mobility to the UK is discussed.

KEYWORDS

International student mobility; student migration; immigration policies; tuition fees; Brexit; post-study work visa.

EDITORIAL NOTE

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AN AUDIT OF INTERNATIONAL STUDENT MOBILITY TO THE UK

TABLE OF CONTENTS

1. INTRODUCTION

International student mobility is on the rise globally and the United Kingdom has been one of the foremost destinations for international students (Universities UK 2014a). This paper examines the numbers, profiles and trends of international students to the UK in relation to characteristics such as gender and region of origin. It considers possible factors influencing these trends and the implications for UK higher education. While the effects of the 2016 Brexit vote have yet to manifest themselves on incoming student numbers, we suggest that changes to student visas, tuition fee increases and UK immigration policies have already contributed adversely to the profile of international student mobility to the UK. We anticipate that the migration rhetoric associated with Brexit will have even more profound effects (Stone, 2016; Viña 2016).

International students constitute a valuable contribution to the UK's economy through tuition fees, students' living expenses and other receipts such as from tourist visits by the parents of international students. Tuition fee income from non-EU students alone accounted for £4.2 billion in 2014-15 (HESA, 2016). Estimates of the scale of international student expenditure abound, for example, international students' personal expenditures were reported to benefit the economy of Yorkshire to the order of £136m in 2012/13 (Oxford Economics, 2013) while the equivalent figure in London has been placed at £2.3 billion (London First and PwC, 2015).

Within a growing neoliberal agenda, international student mobility is of value to the higher education because of the economic benefits accruing from the high fees charged to international students (Olssen and Peters 2005). Students have become important drivers for the economy in general and a key source of funding for universities in particular (Brooks and Waters, 2011a). Since international students bring with them a wealth of financial and cultural benefits (Matthews, 2013) through tuition fees, personal expenditures and knowledge sharing, the prospect of stagnating or declining numbers is of major concern (UUK, 2016) to higher education institutions (HEIs). This paper reflects on the reasons for the recent decline in international student numbers from the EU and from some other parts of the world, as well as evaluating the differential vulnerability of certain parts of the UK higher education system (Duffy, 2016) to swings in international student numbers.

The aim of this paper is to explore trends in international student mobility to the UK, specifically within the context of degree-mobility where students are enrolled at an institution abroad for the entirety of a degree (King et al. 2011). As such, it focuses solely on degree-seeking students in the UK and excludes Erasmus and other forms of exchange student engaged in credit mobility. As part of a larger ESRC Centre for Population Change project that seeks to understand how international student migration is produced, this paper provides a summary of our primary research on international students that has been reported elsewhere (Packwood et al., 2015; Tindal et al. 2014; Findlay et al., 2016). More importantly, it provides an evidence base for others to evaluate some of the claims being made in the media about international student mobility in relation to UK immigration policy in general and student immigration in particular.

This paper examines and discusses different geographical groups of international student migrants based on secondary data drawn from the Higher Education Statistical Agency (HESA). For the purpose of this paper, any non-UK student group will be referred to under the umbrella term 'international students'. International students will be further subdivided into two sub-groups identified in the HESA datasets: students from other (non-UK) European Union countries (a.k.a. 'other EU') and students from non-European Union countries (a.k.a. 'non-EU'). The data will also be analysed at three levels: undergraduate degrees (these include first degrees), postgraduate taught courses and postgraduate research – where the focus of study is 'primarily through research' (HESA, 2016).

The body of this paper is organised into five parts. Section 2 will briefly present the demographic context of international students in the UK by region of higher education provider. Section 3 will summarise key aspects of the authors' primary research on international student mobility, arguing that student mobility cannot be understood in isolation from longer-term lifecourse mobility aspirations. Section 4 notes that the authors' primary research on student mobility has been undertaken in the context of a wider environment in which there is a downward trend in international student migration towards the UK from a range of sending countries. Section 5, brings the primary and secondary data from the previous two sections together, asking what the implications of this research are for the UK in the context of recent political events.

2. DEMOGRAPHIC SIGNIFICANCE OF INTERNATIONAL STUDENTS IN THE UK

The most recent annual report of the Higher Education Statistics Agency (HESA) for the UK records 337,000 international students enrolled in the UKs Higher Education Institutions in 2014/15. Some 39% were registered on undergraduate courses, with the remainder split between taught postgraduate and research degrees. The relative importance of these figures increases when they are placed in the context of trends in the overall population of students attending UK universities.

Total student numbers (domestic and international) enrolled in Higher Education Institutions in the UK dropped from 2,497,000 in 2010/11 to 2,266,000 in 2014/15 (HESA, 2016). The 200,000 students reduction over the last four years (https://www.hesa.ac.uk/data-and-analysis/students) can in large part be explained by demographic forces at work in the UK population, making the contribution of international students ever-more important (23.1% of the total in 2014/15) to the higher education sector. The demographic challenge has arisen because of the drop in the cohort sizes of people of university age in the UK's population. During the 1990s fertility rates across the UK were in decline. This fed through by 2007 to a reduction in the number of people in the 17-21 age groups (ONS, 2016). The size of this cohort has continued to fall to the present day. This has over many years pushed the potential number of UK-domiciled people seeking university places in a downwards direction.

This demographic trend has to some extent been offset by UK policy to increase the proportion of young people continuing into higher education. Even if participation rates in higher education institutions remain at current levels, the absolute number of UK-domiciled students enrolled in universities would be expected to continue to decline until 2021/22. This demographic force has added to the financial pressures being placed on universities during an era of austerity, resulting in an ever-greater dependency of universities on international student fees as a vital income stream. To summarise, international students have helped to maintain overall student numbers in

UK universities and have provided a vital source of revenue to Higher Education Institutes (HEIs).

A second dimension of the demographic challenge has been a regional one. Fertility rates have been uneven across the UK with fewer births per thousand people in Scotland than elsewhere. At the same time university tuition fees have not been charged at the same rate in all parts of the UK, leading to a remarkably uneven pattern in international student numbers. The Scottish Government with its desire to provide university education without charging fees to Scottish students, has found itself obliged to welcome EU-domiciled students on the same basis, making Scottish universities financially more attractive to EU students than equivalent HEIs in other parts of the UK where significant tuition fees are levied (Tindal et al. 2014; Whittaker, 2014).

Of the UK's four nations, it is not therefore surprising to find that while England has received the highest absolute number of international students (Figure 1), Scotland has by far the highest proportion of international students (Figure 2) relative to its total student population (21.5%), with this being driven largely by the higher proportion of EU-domiciled students (8.9%). Figure 2 also shows that in all parts of the UK 'non-EU' students outnumbered 'other EU' students.

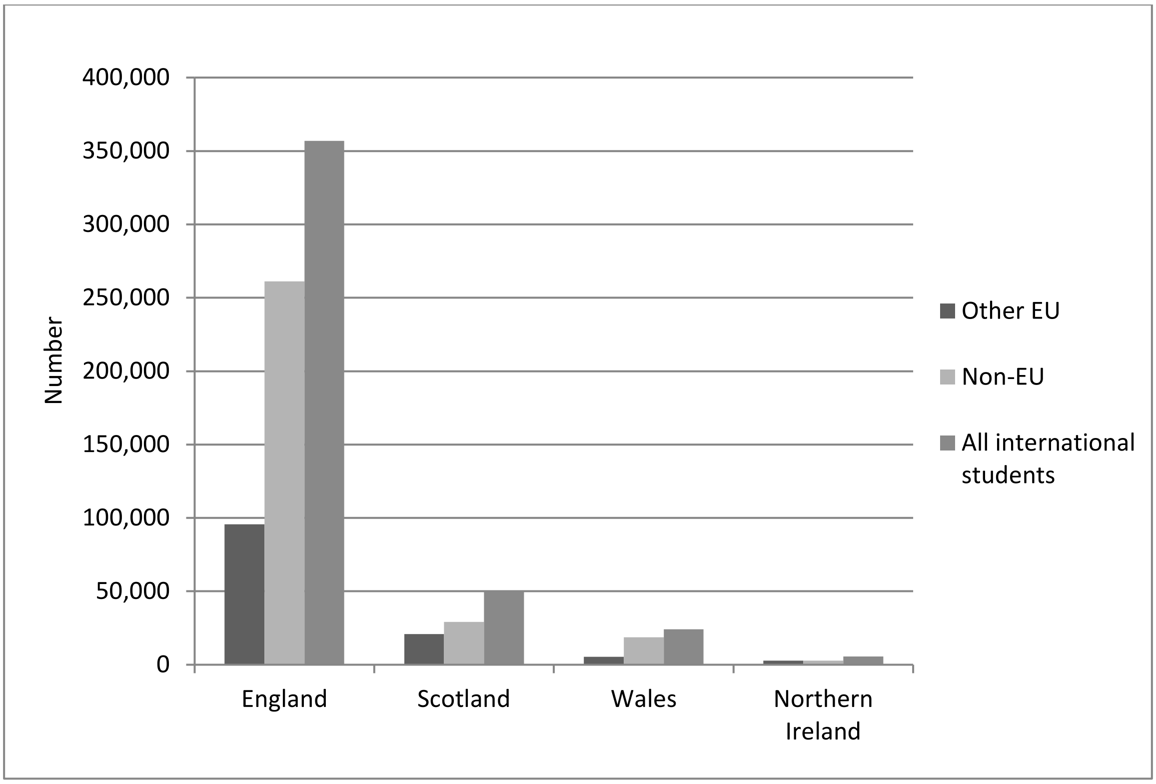

Figure 1: International student numbers in the four nations of the UK (2014/15)

Source: HESA data adapted by author.

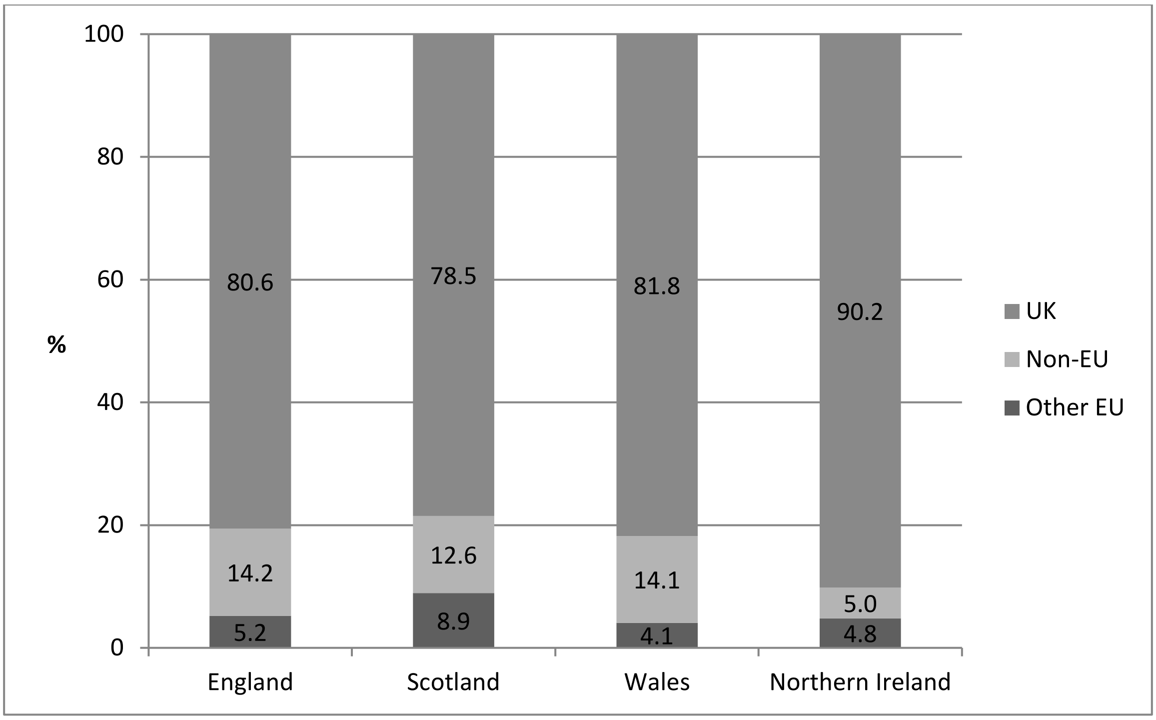

Figure 2: Proportion of students by region of origin and HE provider (2014/15)

Source: HESA data adapted by author.

3. KEY FINDINGS OF PRIMARY RESEARCH ON INTERNATIONAL STUDENT MIGRATION TO THE UK

Over the last two years researchers at the ESRC Centre for Population Change (CPC) have completed a number of research projects to deepen understanding of international student mobility to the UK in comparison with student moves to other destination countries. In what follows we summarise some of the key findings of this research.

The CPC research team undertook a large online survey (over 3300 responses) of international students enrolled at a range of UK universities as well as parallel surveys at universities in Austria and Latvia. In addition in-depth interviews were conducted with international students, and staff from the international offices in these universities, as well as with other key stakeholders involved in student recruitment to the Higher Education sector. In order to participate in the survey, students needed to have moved to the UK in order to study for the duration of their entire degree (i.e. excluding exchange students). Further methodological details are described by Packwood et al (2015) and Findlay et al (2016).

International students enrolled at UK universities declared their decision to select a UK institution had been driven by many factors, the most cited being the desire to enrol at a world class university (82%). The second most mentioned reason was the opportunity to pursue an international career (61% said this was very important). Motivations for undertaking international mobility varied by level of study (undergraduate, postgraduate etc.) as well as individuals long-term mobility plans following graduation (Packwood et al, 2015). Motivations for study in Austria were rather different from those in the UK, with student mobility being more strongly driven by the desire for access to an international career (78% said this was a very important factor).

In their previous research, Findlay et al (2016) investigated the relationship between student mobility and longer-term life mobility plans in more detail. The online survey results for international students in the UK showed some very interesting student expectations about where international study would lead them in five years' time. While

40% expected to return to their country of origin, around 37% had plans for onward migration to other international destinations. This made the third option (staying in the UK) the least likely outcome (Packwood et al, 2015). By way of contrast, the Austrian sample showed a much higher proportion intending to stay on in Austria.

The in-depth interviews with international students in the UK reveal much more information about the relationship between international mobility for study and life mobility planning. Two key points from the research are worth underscoring here. First of all, the widely held expectation that student mobility leads either to return migration to the country of origin or to longer-term integration into the economy of the place study is a false dichotomy (Findlay et al, 2016). Second, geographies of origin are very important in understanding the values driving international student mobility in relation to longer-term mobility plans. For example, student from the EU studying in UK were much more likely to be seeking to ultimately access an international career than students from other countries, with only 24% of them expecting their studies in UK to lead to a return to their country of origin five years after the survey. This research contributes to the wider recognition in the literature (Brooks and Waters, 2011b) that higher education is a globally differentiated product with countries of study offering different opportunities to students depending not only on the quality of individual universities, but on the contribution that international study can make to achieving lifetime mobility aspirations.

The significance of these research findings are of considerable importance to both those responsible for promoting international student migration to the UK and also to migration policy makers. For those engaged in marketing study opportunities in the UK, the research points to the ever-greater significance of going beyond the marketing of degree content to include the potential of an international degree to contribute to longer term mobility prospects. Perhaps it is this that has led so many UK universities to link international study in the UK to the prospect of progressing to achieve ‘global citizenship’. This prospect may compensate for the limited prospects for international students remaining in the UK to work following their studies (Findlay et al, 2017).

4. TRENDS IN INTERNATIONAL STUDENTS FLOWS TO THE UK

In order to put the findings of the CPC questionnaire and interviews into a wider statistical context, we have carried out secondary data analysis using data from the Higher Education Statistics Agency (Annex). Here we summarise the most striking features of that work.

Analysis of the HESA data confirms that income from international student fees is a very important source of funding for UK universities, although the effect is uneven across the sector. During the four years covered by the analysis (2011/12- 2014/15) income from international student fees rose very considerably, due primarily to the rise in the level of tuition fees.

A small number of countries continued to be very important sources of international students coming to the UK, confirming the findings of our primary research where interviews with key stakeholders expressed concern about the narrowness of the recruiting base and the dependence of the UK on good relationships with a few major sending countries, in particular China. By 2014/15 China accounted for 28.7% of all non-EU students enrolled in UK HEIs.

Detailed scrutiny of the HESA dataset reveals that many countries show a consistent pattern of decline in sending students to the UK over the four-year span of the study. Most noticeable are other EU countries, where enrolments in 2014/15 were down sharply relative to levels in 2011/2 (Figure 16A, Annex1). The largest reduction in numbers was among students from Greece, Ireland and Germany. It should be noted that these trends pre-date the effects of anti-immigrant sentiment expressed during the Brexit campaign and clearly exclude any effects that potential student migrants might fear following the 2016 referendum in relation to the loss of post-study work opportunities after graduation.

Outside the EU, there is also evidence of the UK becoming less attractive as a study destination. India, for many years, was a very significant source of students to UK, second only to China amongst non-EU sending countries. As Figure 23A (Annex) shows, this market has collapsed very significantly. Other non-EU sources showing a drop in international student migration to the UK over the last four years include Pakistan and Saudi Arabia (Figure 24A, Annex). In the context of the highly marketized landscape of global higher education (Findlay et al, 2017), it should be of great concern first that the UK has become less attractive in so many key markets, and second that downward trends are well established even before any negative influences of the 2016 Brexit vote take effect.

5. DISCUSSION AND CONCLUSIONS

The demography of international student flows to the UK is changing, and the downward trajectory of certain types of international students should be of real concern. Trends in international student numbers are complicated by recent changes to wider government policies on all aspects of immigration to the UK (Pemberton and Scullion, 2012). As this paper has reported, it is a concern that the number of EU students in the UK has declined over the last five years, a trend that is probably largely due to the UK Government's increase in tuition fees from £3,000 to £9,000 in 2012 for students enrolled in England and Wales. With further increases in tuition fees proposed in the UK 2015 budget due to take effect for Home/EU students from 2017/18 (BBC 2015), further reductions in EU student numbers can be anticipated (Coughlan 2016). Moreover, this anticipated effect does not take account of the wider effects of the 2016 Brexit referendum vote that could lead to EU students being treated in the same way as other international students after the UK leaves the EU. This would imply yet higher fees for students coming from the current EU countries.

The growth in international student fee income has in some quarters been taken as a reason for not being too concerned about the current drop in EU student numbers. The non-EU increase can however be accounted for largely by a single very important and populous source country, China. Relying on one major source country appears a high risk strategy, given the reductions in numbers from some other major sending souces such as India. The numbers of students coming to the UK from India and Pakistan have dropped significantly in the last five years, potentially due to concerns in these countries associated with changes in student visa policies (Universities UK 2012).

With the post-study work visa scrapped by the UK government in 2011, non-EU students have been stripped of an opportunity to find a job in the UK following graduation, this is despite public support (Comres, 2016) not only for a continuation of current levels of international students (75% in favour), but also for students to remain in the UK for a period of post-study work. Our primary research has shown that seeking opportunities to start an international career following study abroad is a major motivation for students (and especially EU students) to select the UK as a place to study. The current government's rejection of post-study work schemes taken along with the prevailing anti-immigration rhetoric of the UK post-Brexit seems likely to affect prospective students' perceptions and consideration of pursuing higher education in the UK (Universities UK, 2014b). Some of these students could have been attracted to the UK as a destination for higher education, with the possibility of securing better employment opportunities upon graduation (Findlay et al., 2016) than in their 'home' country (Bozionelos et al, 2015; Van Bouwel and Veuglers, 2014; Universities 2014b). The UK's existing policies on immigration, as well as their resistance to policies favouring post-study work permits, appear to further dampen prospects of any recovery in international student numbers (BBC 2016a) in the near future.

Following the results of the UK's referendum on membership of the EU on June 23rd 2016, there remains much to be determined in relation to the terms of exit, but what does seem certain is that significant changes in UK immigration policy will ensue. Much of the narratives of the 'leave' campaign in the months leading to Brexit focused on the government's plan to curtail net immigration to the UK. With international students numbers included in the country's overall immigration figures (Universities UK 2014a), achievement of wider overall immigration policy goals seems likely to hit incoming numbers of international students to the UK, both directly in terms of the government cutting back on student visa numbers but also indirectly in terms of the effects of the wider anti-immigration rhetoric shaping perceptions of the UK as a potentially hostile destination for all immigrants including students. This could dissuade a significant number of prospective international students from considering the UK as a destination of study (Stone, 2016; Viña 2016). The effects within EU countries will be strongest, but perhaps more critical to UK universities will be the effect on perceptions of the UK as a study destination for students from China. It would seem that Brexit will inevitably have an adverse impact on UK HEIs (Wade, 2016).

Amber Rudd's speech at the Conservation Party Conference on October 4th 2016 confirmed that policies to control immigration will include international students, with particular targetting of what she referred to as 'lower' quality universites. Rudd stated that the government is considering "*whether our student immigration rules should be tailored to the quality of the course and the quality of the educational institution*". She also criticised the current system for allowing international students the opportunity to gain employment in the UK following graduation: "*I'm proud that we have world-leading centres of academic excellence. (…) But the current system allows all students, irrespective of their talents and the university's quality, favourable employment prospects when they stop studying*" (Spectator 2016; BBC 2016b). Yet, a statistical report on non-EU students indicates a decrease over time in the proportion of student migrants that settled in the UK five years following their entry on a study visa (Home Office 2016). In fact, only 3% of migrants that received a study visa in 2004 obtained settlement in the UK five years later with another 21% with valid leave to remain in the UK. For those issued a study visa in 2009 the numbers are even lower, with only 1% gaining settlement and 15% having a valid leave to stay in the UK.

Too little is known at present of what will become of the status of EU students following Britain's exit from the UK. Yet, before any official decision and outcome is reached on this topic, it already seems very likely that fewer EU students will consider enrolling in higher education in the UK in the immediate future (Stone 2016). As we enter a post-Brexit world, it seems probable that UK immigration policies are at risk of further deterring international students. We call on government, and in particular those with responsibility for immigration, to heed the evidence we have presented in this paper and to recognise the legitimacy of the concerns of MPs from constituencies representing major UK universities (Hansard, 2016) in their call for action to reintroduce policies (such as the post-study work visa) which recognise the very positive contributions of international students to UKHEIs and to the wider economy.

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ANNEX: AN ANALYSIS OF INTERNATIONAL STUDENT MOBILITY TO THE UK BASED ON DATA FROM THE HIGHER EDUCATION STATISTICS AGENCY

PROFILE OF INTERNATIONAL STUDENTS IN THE UK

Figure 1A shows the gender of international students in the UK by region of origin in 2014/15. Women are more likely to engage in international student mobility than men. This is true both for EU countries and non-EU countries.

Figure 2A shows the number of students by gender, level of study and region of origin in the UK. Non-EU students studying for first degrees and postgraduate taught courses are the largest group. Postgraduate taught courses have significantly more non-EU students than other EU students; that is, 81% of all international students in postgraduate taught courses are from non-EU countries. Other EU students studying for postgraduate research degrees are the minority group. With the exception of postgraduate research, women are in higher numbers compared to men for the other two levels of study and regions of origin – particularly among other EU students in undergraduate courses and non-EU students in postgraduate taught courses. In OECD countries, doctoral research was the only level of study in which men outnumbered women (OECD 2016). Men overtake women in sheer numbers within postgraduate research degrees among other EU students and even more so among non-EU students.

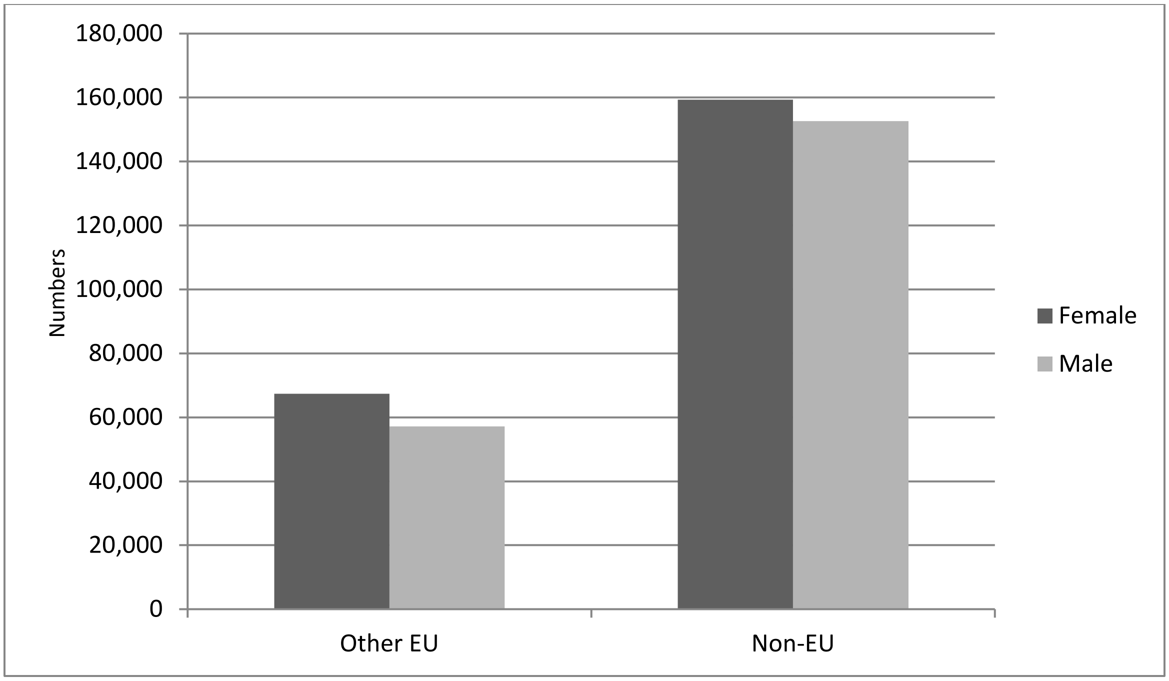

Figure 1A: Gender of international students in the UK by region of origin.

Source: HESA data adapted by author.

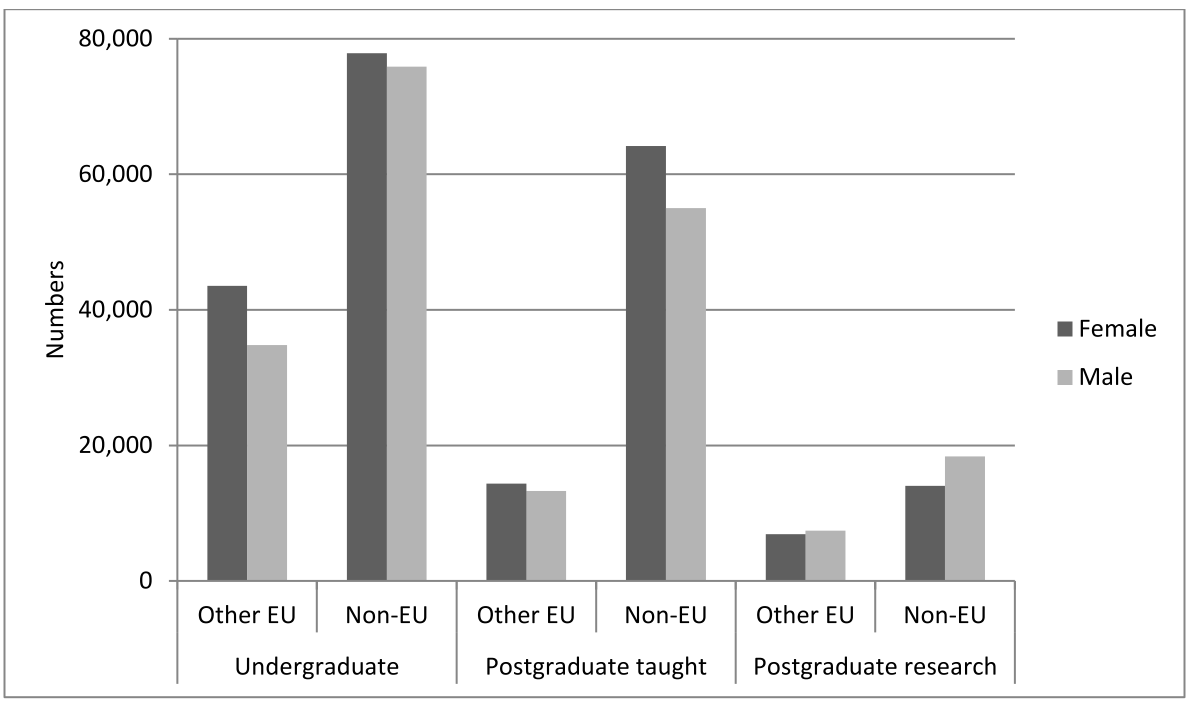

Figure 2A: International students in the UK by gender, level of study and region of origin (2014/15).

Source: HESA data adapted by author.

Figure 3A provides more detail on international students by different regions of origin. The region with by far the largest number of students in the UK is Asia, followed by other EU countries. In a distant third position are students from Africa, followed by the Middle East and North America. Australasia has the smallest number of students in the UK.

Women dominate incoming student numbers from all regions except Africa and the Middle East, the latter sending almost double the number of men than women.. The number of women clearly surpasses those of men from EU countries, Asia and North America, while the gender representation of women is only slightly higher among students from other European countries, Australasia and South America.

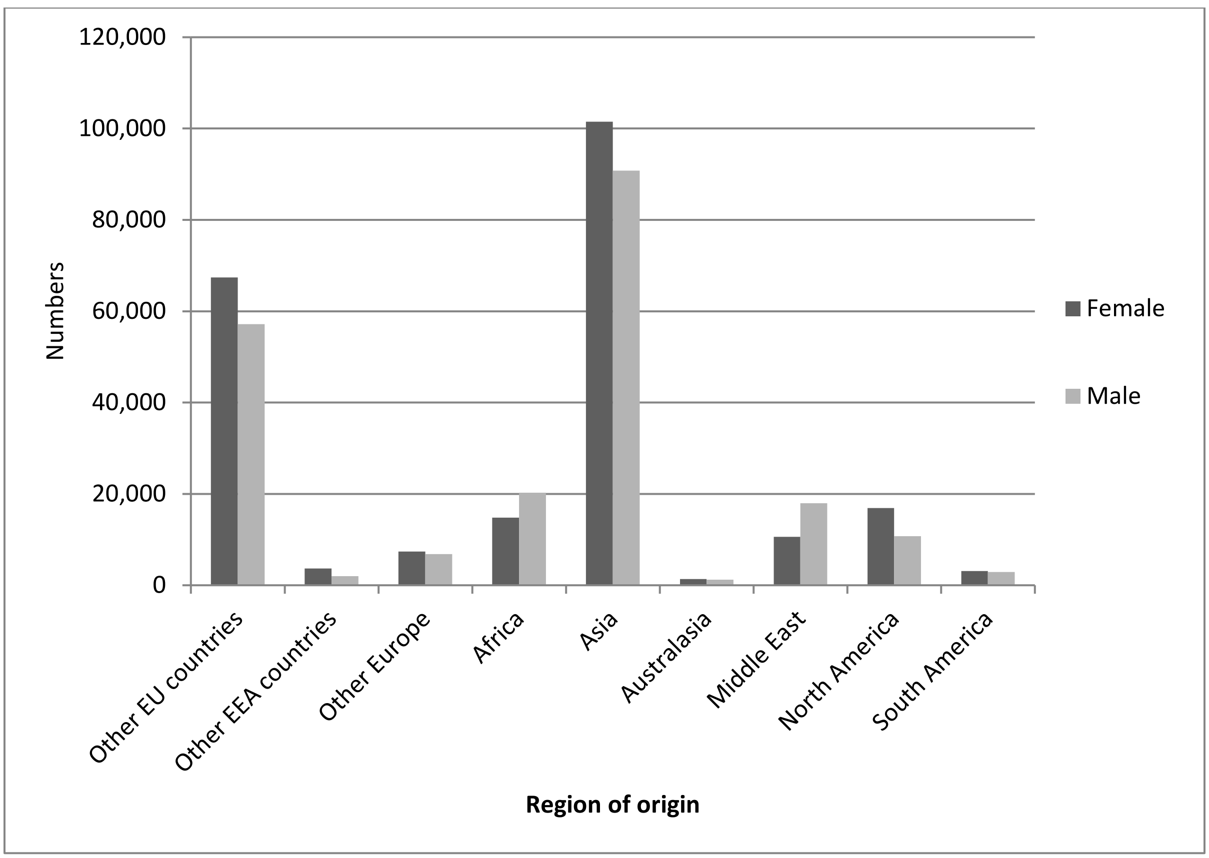

Figure 3A: Gender of international students in the UK by region of origin.

Source: HESA data adapted by author.

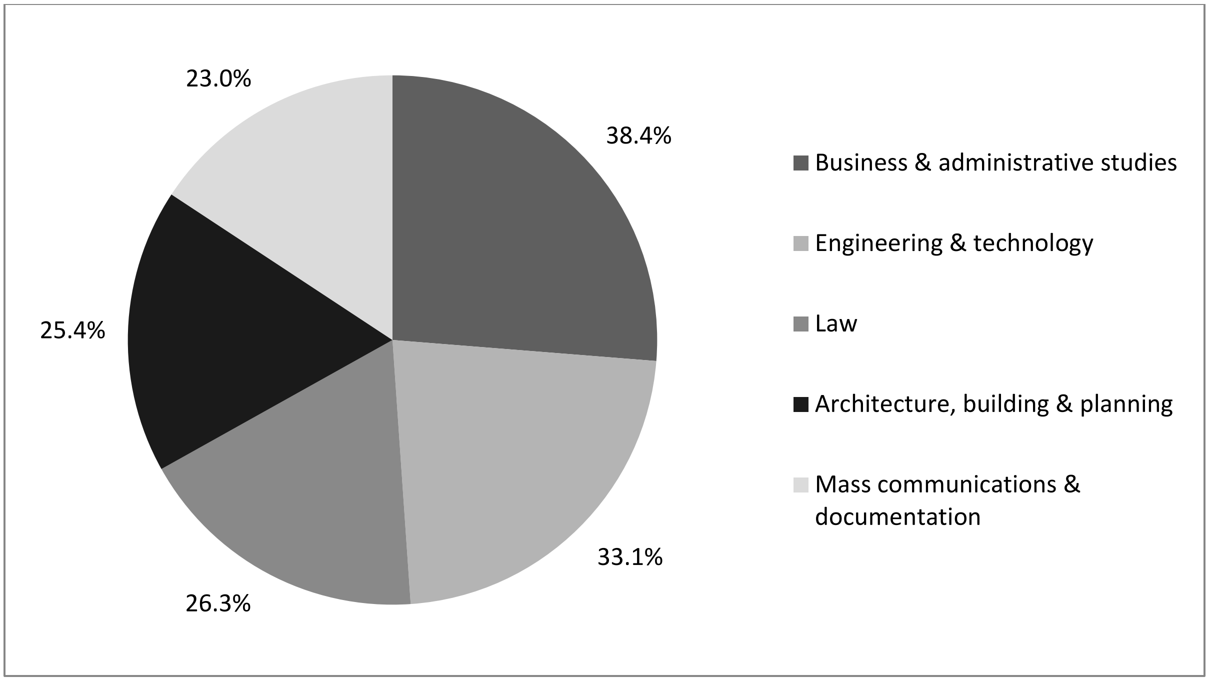

Figure 4A: Proportion of international students within subject areas in the UK (2014/15)

Source: HESA data adapted by author.

Figure 4A illustrates the proportion of all international students in the UK by subject area. International students are well-represented in Business and Administrative studies, followed by Engineering and Technology. High proportions are also found in Law, as well as in Architecture, Building & Planning and Mass Communications & Documentation.

PROFILE OF HEIS BY INTERNATIONAL STUDENT NUMBERS AND COURSE FEE INCOME

Figure 5A shows the income from non-EU students' course fees for higher education institutions by region in the UK and year. In all four nations, the income from course fees of non-EU students grew over time. However, Figure 6A indicates that this growth is more significant for HEIs in Northern Ireland, followed by Scotland and England, while HEIs in Wales had the slowest growth in income from non-EU students between 2011/12 to 2014/15. Not surprisingly, England receives most income from course fees of non-EU students in absolute terms.

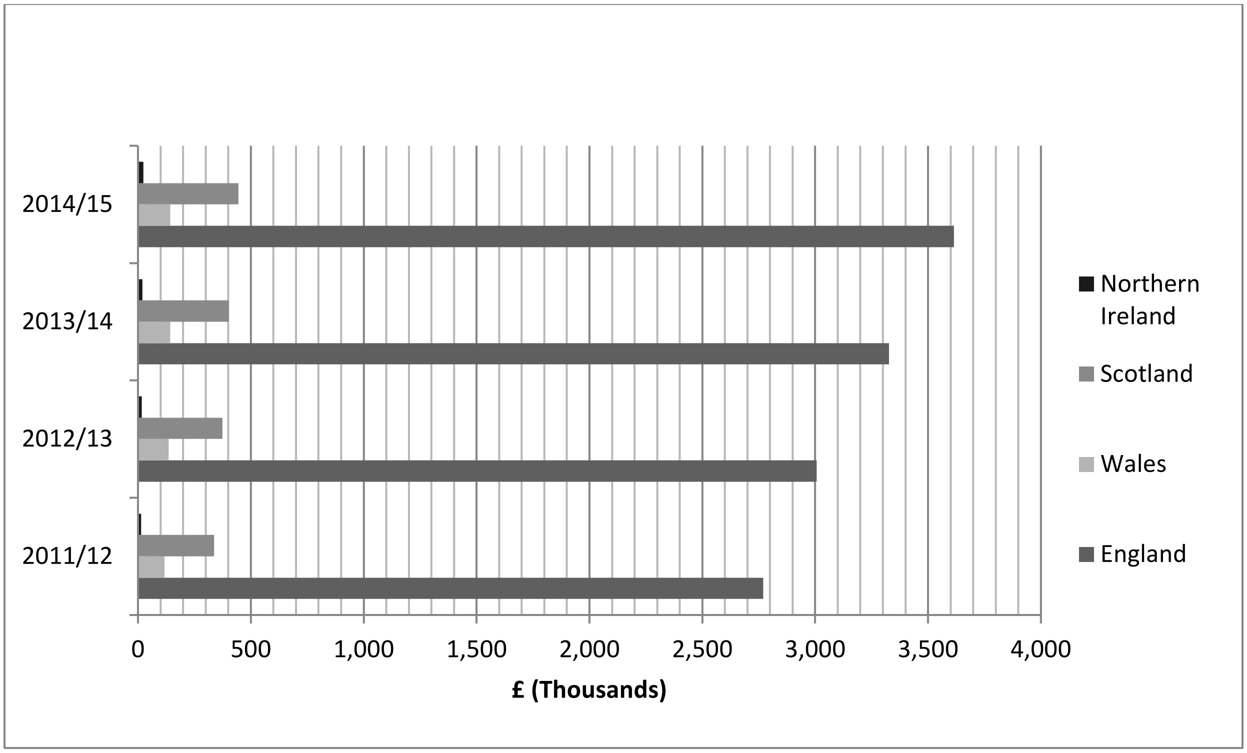

Figure 5A: Income from non-EU students' course fees by location of institution (in £ thousands)

Source: HESA data adapted by author.

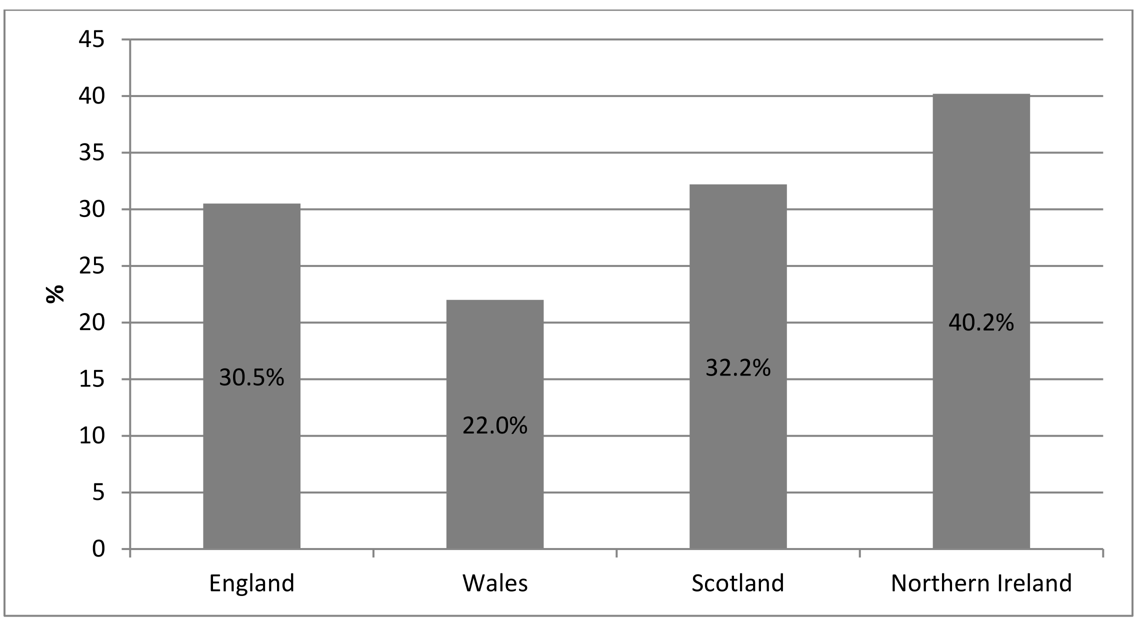

Figure 6A: Percentage change in income from non-EU course fees (2011/12-2014/15)

Source: HESA data adapted by author.

Table 1 shows the proportion of student course fees by region of origin for each of the four UK regions. Notably, more than half of Scotland’s income from student course fees comes from non-EU students (51.6%). Since Scotland does not charge course fees to Scottish and EU students, its higher education providers are largely dependent on the course fees from non-EU students. Scotland’s higher education sector is therefore more vulnerable to changes in the number of incoming non-EU students compared to other regions of the UK. Nevertheless, over a quarter of England’s student course fee income also comes from non-EU students (28.0%), indicating that England’s higher education sector is also susceptible to negative changes in incoming student numbers from outside the EU.

UK regions	Non-EU fees	Home/EU fees
England	28.0%	72.0%
Wales	20.0%	80.0%
Scotland	51.6%	48.4%
Northern Ireland	14.4%	85.6%

Table 1A: Proportion of student course fees by UK region and place of origin (EU/Outside the EU)
Source: HESA data adapted by the authors.

Figure 7A illustrates the number of ‘other EU’ and ‘non-EU’ students in selected higher education institutions in England for 2014/15. HEIs are ranked by total number of international students, with University College London having the most international students – that is, with both ‘other EU’ and ‘non-EU’ students combined. However, since University College London and the Institute of Education merged mid-year in 2014/15, the data for both is counted as one, which could partly explain the dominance of that HEI within the HESA rankings. UCL is followed by the University of Manchester, Coventry University, the University of Sheffield and King’s College London. University College London also has the highest number of other EU students (3,970) but the University of Manchester has the most non-EU students (10,000). King’s College London, while fifth for the total number of international students, has the second highest largest number of other EU students, but significantly fewer non-EU students than most of the HEIs shown in Figure 7A.

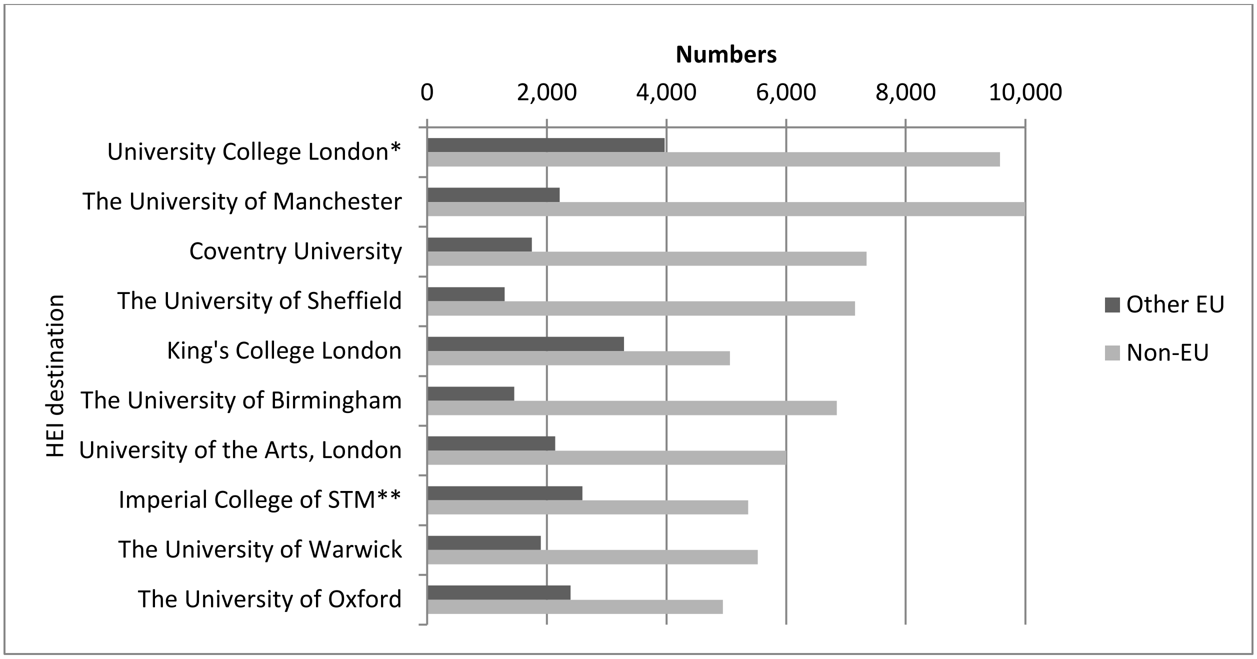

Figure 7A: International students by HE provider in England

Source: HESA data adapted by author.

Notes: * The University College London (UCL) and the Institute of Education merged mid-year in December 2014. As such, HESA merged both returns in its publication numbers.

** Imperial College of Science, Technology and Medicine

Among HEIs in Scotland, the University of Edinburgh leads the pack with a total of 10,080 EU and non-EU students (as shown in Figure 8A). This is followed by the University of Glasgow, the University of St Andrews and the University of Aberdeen. However, the University of Aberdeen has more other EU students than the University of St Andrews, but less non-EU students than the University of Strathclyde and Heriot-Watt University.

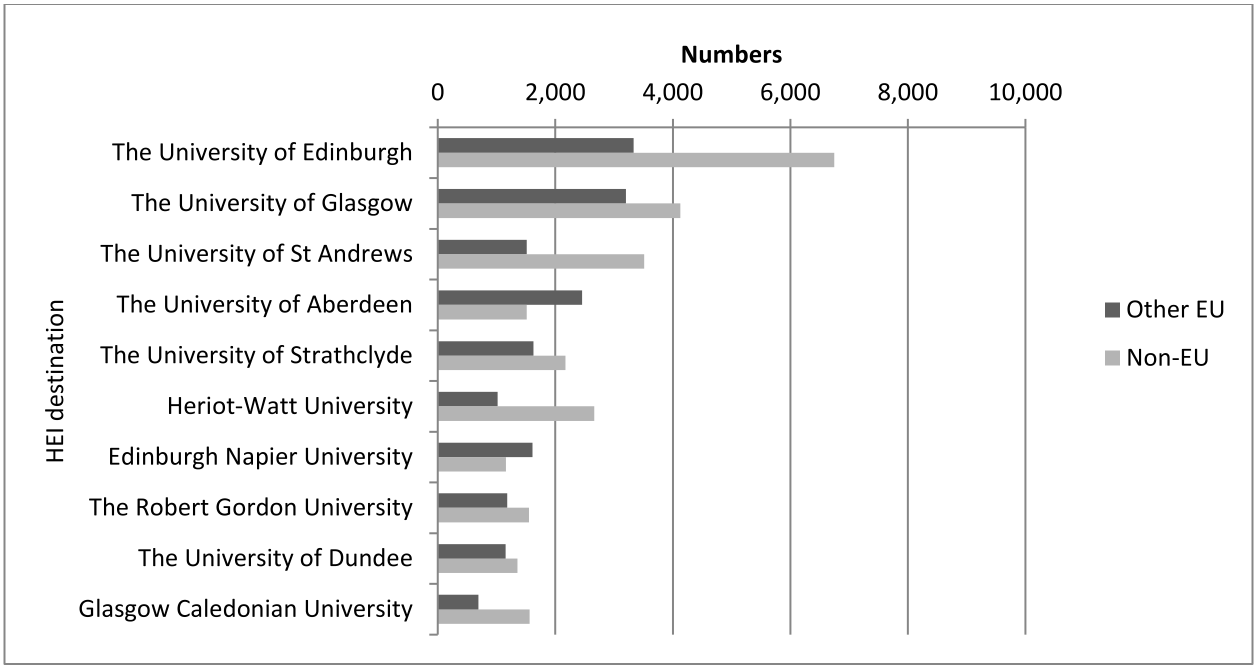

Figure 8A: International students by HE provider in Scotland (2014/15)

Source: HESA data adapted by author.

Much as changes to international student numbers will have an uneven effect on the four regions of the UK, so too these changes have differing impacts on HEIs in these regions. Since 'other EU' students would need to pay international course fees following the UK's exit from the European Union, their numbers are expected to drop even more than they already have since the 2016 referendum (Stone 2016). Within England, University College London along with King's College and Imperial are likely to be hit the hardest in terms of student numbers (Fazackerley 2016), while in Scotland, this impact would be most pronounced at the University of Edinburgh, University of Glasgow and University of Aberdeen. Furthermore, changes to immigration policies seem very likely to also influence the number of non-EU students over time, the University College London, the University of Manchester, Coventry University and the University of Sheffield appear to be most vulnerable to any decline. In Scotland, the highest impact is likely to be on the Universities of Edinburgh, Glasgow and St Andrews.

TRENDS IN INTERNATIONAL STUDENTS NUMBERS

Figure 9A compares undergraduate degree qualifications obtained between 2013/14 and 2014/15 by region of origin. With the exception of non-EU female students, there has been a decline in the number of qualifications obtained in 2014/15 among all other student types. Therefore, even before the anti-immigration rhetoric of much of the Brexit referendum debate, there was already a decline in the number of male international students from outside the EU graduating from UK universities and there was a drop in numbers for both female and male students from EU countries. The decline in qualifications obtained among other EU students may be partly explained by the hike in undergraduate tuition fees introduced by the UK Government in 2012, but undoubtedly other forces were also at work to produce this trend.

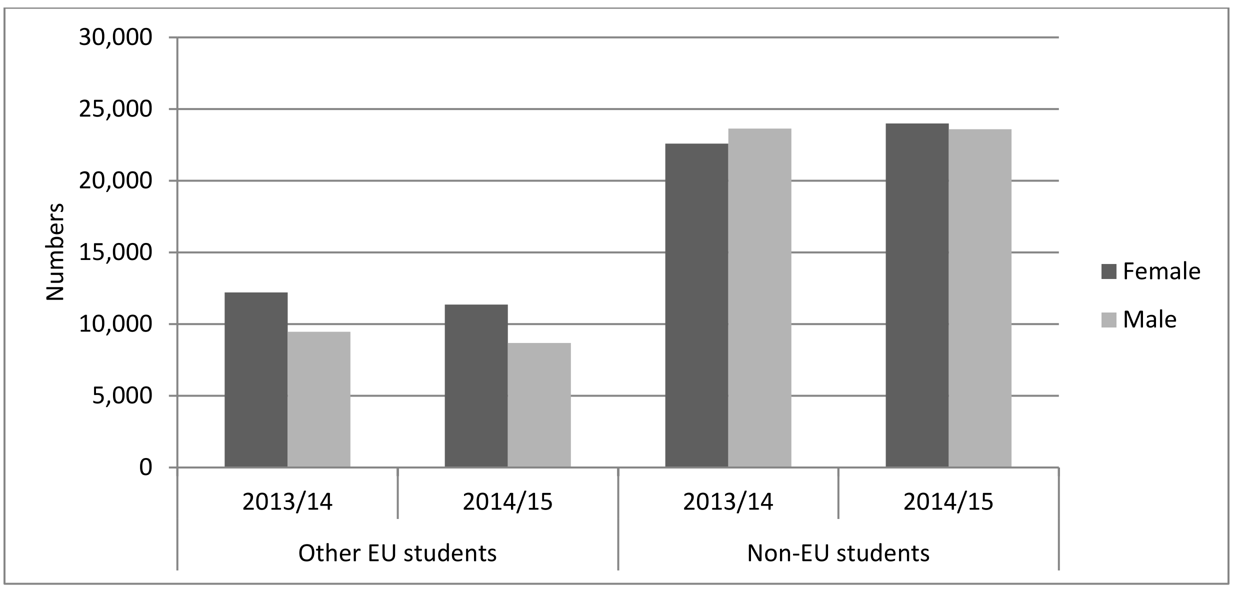

Figure 9A: First degree qualifications obtained by region of origin and academic year

Source: HESA data adapted by author.

Figure 10A shows the number of postgraduate taught qualifications obtained between 2013/14 and 2014/15. There was a slight drop in qualifications obtained by females from other EU countries in 2014/15 and virtually no increase for the other EU males. For both male and female non-EU students there was an increase, but this was more significant among females than for males. Overall, there was little change except for modest increases among non-EU students.

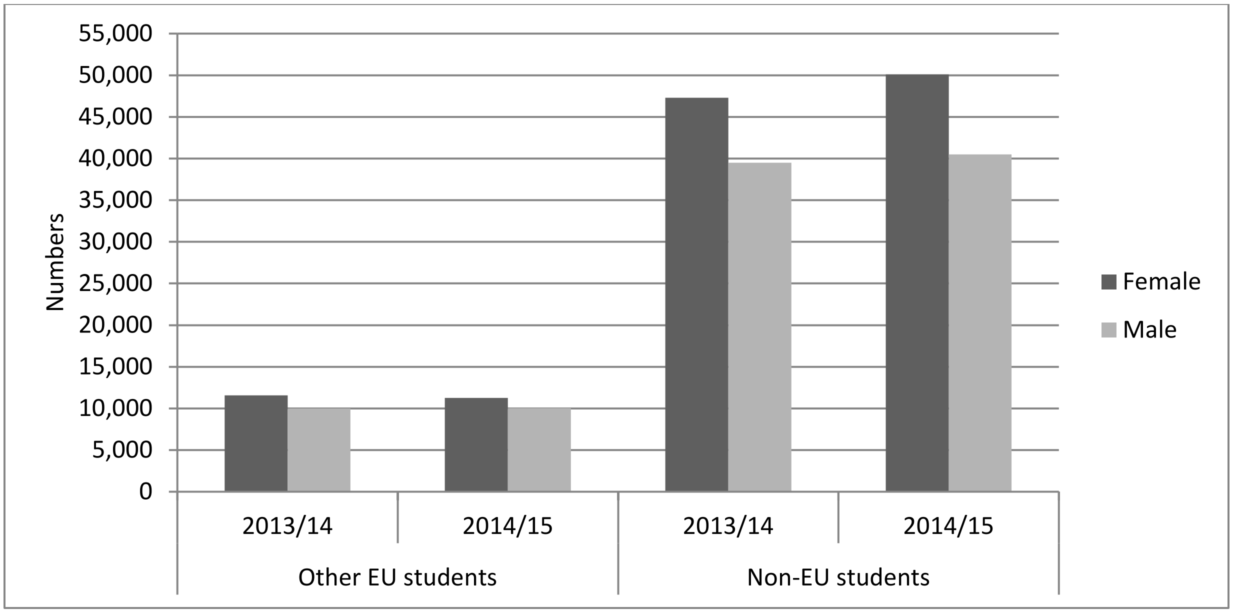

Figure 10A: Postgraduate taught qualifications obtained by region of origin and academic year

Source: HESA data adapted by author.

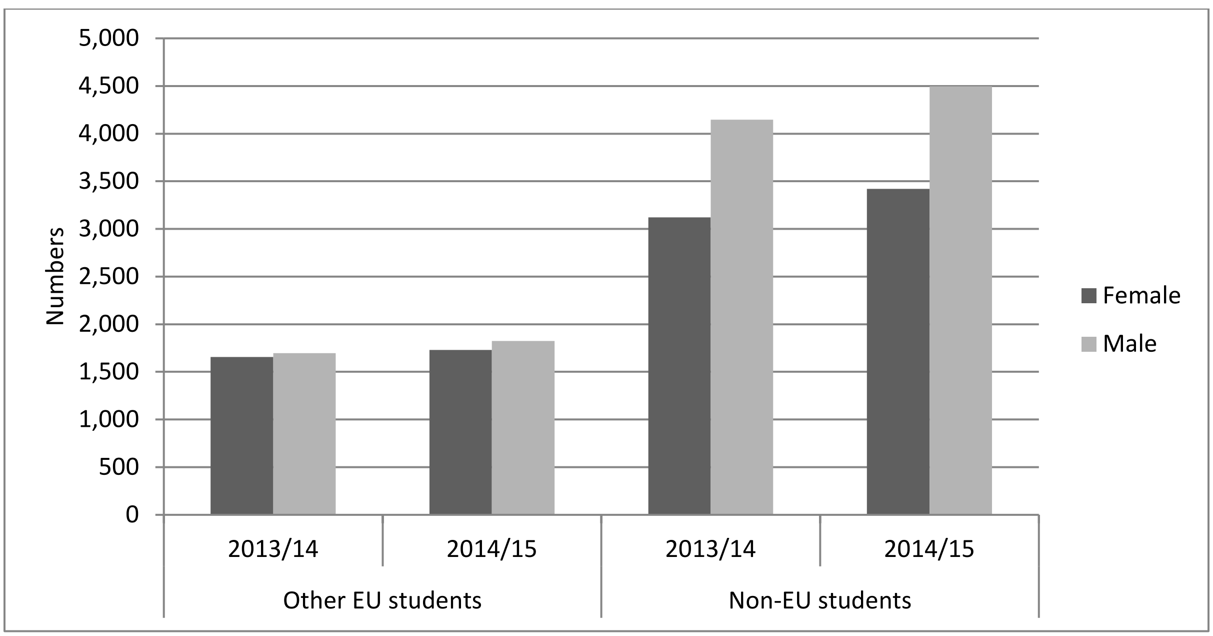

Figure 11A: Postgraduate research qualifications obtained by region of origin and academic year

Source: HESA data adapted by author.

Figure 11A shows a different pattern from the previous two figures. Unlike first degrees and postgraduate taught degrees, there is a marked increase between 2013/14 and 14/15 in every category in the number of postgraduate research qualifications obtained. Interestingly there was a clear male dominance in the graduation of non-EU research students in both 2013/14 and 2014/15.

Figure 12A shows the uneven growth of international student enrolment in the UK between 2010/11 and 2014/15. International student enrolment went from 298,125 in 2010/11 to 312,010 in 2014/15, representing a 10% change between those years. However, a more detailed look at the numbers shows a more uneven picture. There was a temporary increase in 2011/12 followed by a drop in 2012/13. Numbers went back up the following year before stagnating in 2014/15.

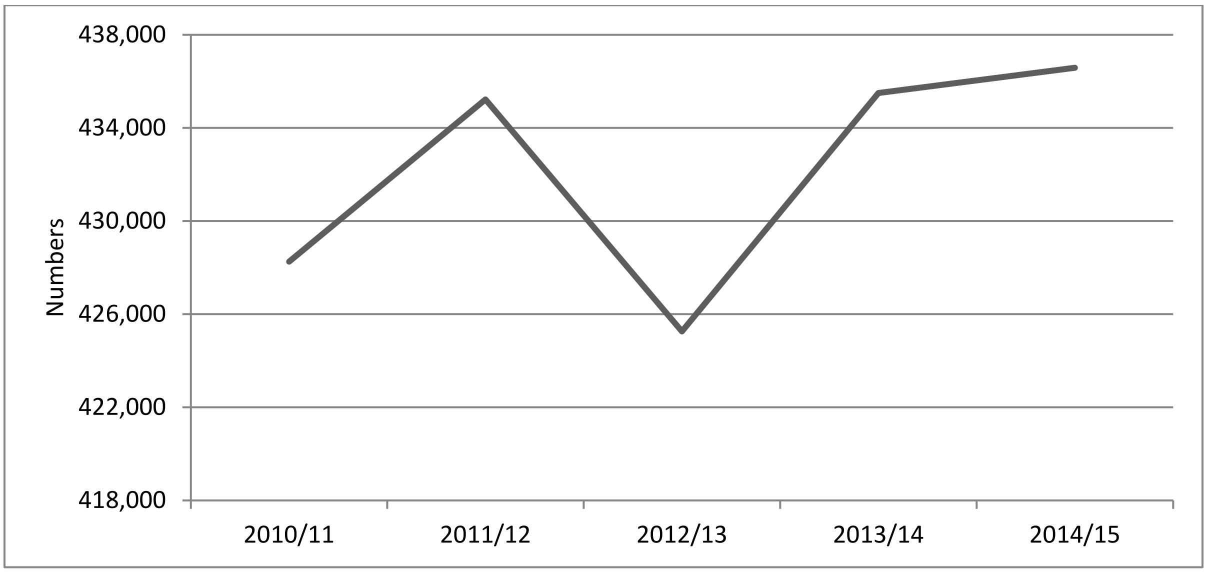

Figure 12A: Change in enrolments of all international students in the UK (2010/11-2014/15)

Source: HESA data adapted by author.

Figure 13A shows a growth in the number of enrolments by non-EU students in the UK, from 298,125 in 2010/11 to 312,010 in 2014/15; that is, an increase of 13,885 student enrolments. There is, however, a dip in enrolments in 2012/13 which coincides with the hike in tuition fees for Home/EU students. Although the increase in home tuition fees did not directly affect the tuition fee rates of non-EU students, it is evident that forces shaping Home/EU student enrolment seem to have also had a wider effect on the UK's Higher Education economy with fewer non-EU students also enrolling in this year. This raises the important observation that changes in one aspect of the UK's international student migration system may well affect (intentionally or unintentionally) other parts of the system, a point that may have wider implications following the 2016 Referendum on the UKs membership of the EU.

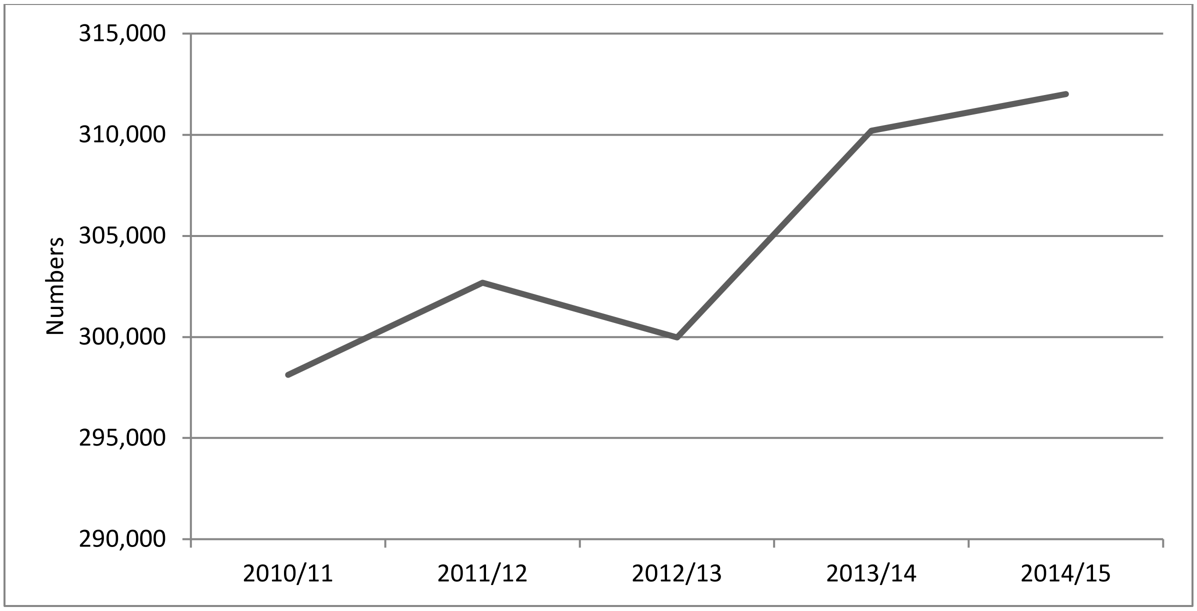

Figure 13A: Change in enrolments by non-EU students in the UK (2010/11-2014/15)

Source: HESA data adapted by author.

Figure14A focuses solely on EU students. It shows the decline that has taken place in the number of enrolments by EU students, dropping from 130,135 in 2010/11 to 124,575 enrolments in 2014/15. There was an increase in 2011/12 followed by a sharp drop in 2012/13 following the tuition fee rise. Stagnation in enrolments between 2012/13 and 2013/14 has been followed by a further slight decline in 2014/15.

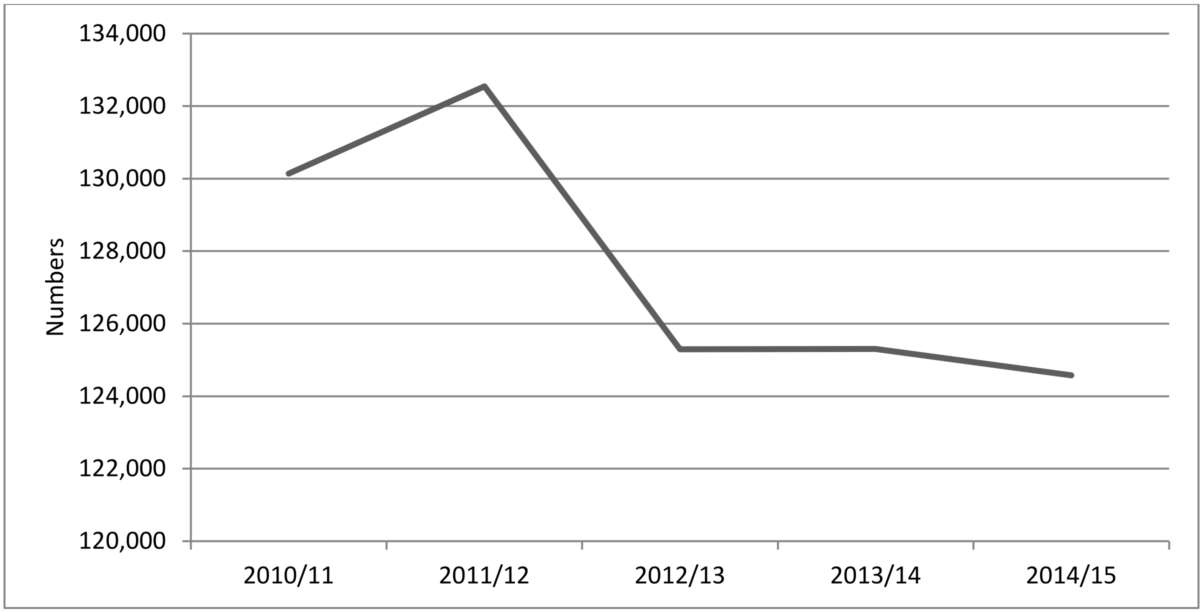

Figure 14A: Change in enrolments by other EU students in the UK (2010/11-2014/15)

Source: HESA data adapted by author.

Figure 15A disaggregates time trends for the main EU source countries. Ireland which was the top country in 2010/11 had dropped significantly by 2014/15. Similarly Germany, the second most important source country in 2010/11 saw a long-term decline. While there seems to be a general downward tendency among the top source countries in 2010/11, there is conversely a general upward movement amongst some countries that were less important at the beginning of the period. Italy in particular saw a significant growth in students selecting to study in the UK. It seems plausible that the difficult socio-economic situations in some southern European economies (particularly youth unemployment) could partly explain why students numbers from these sources continued to rise.

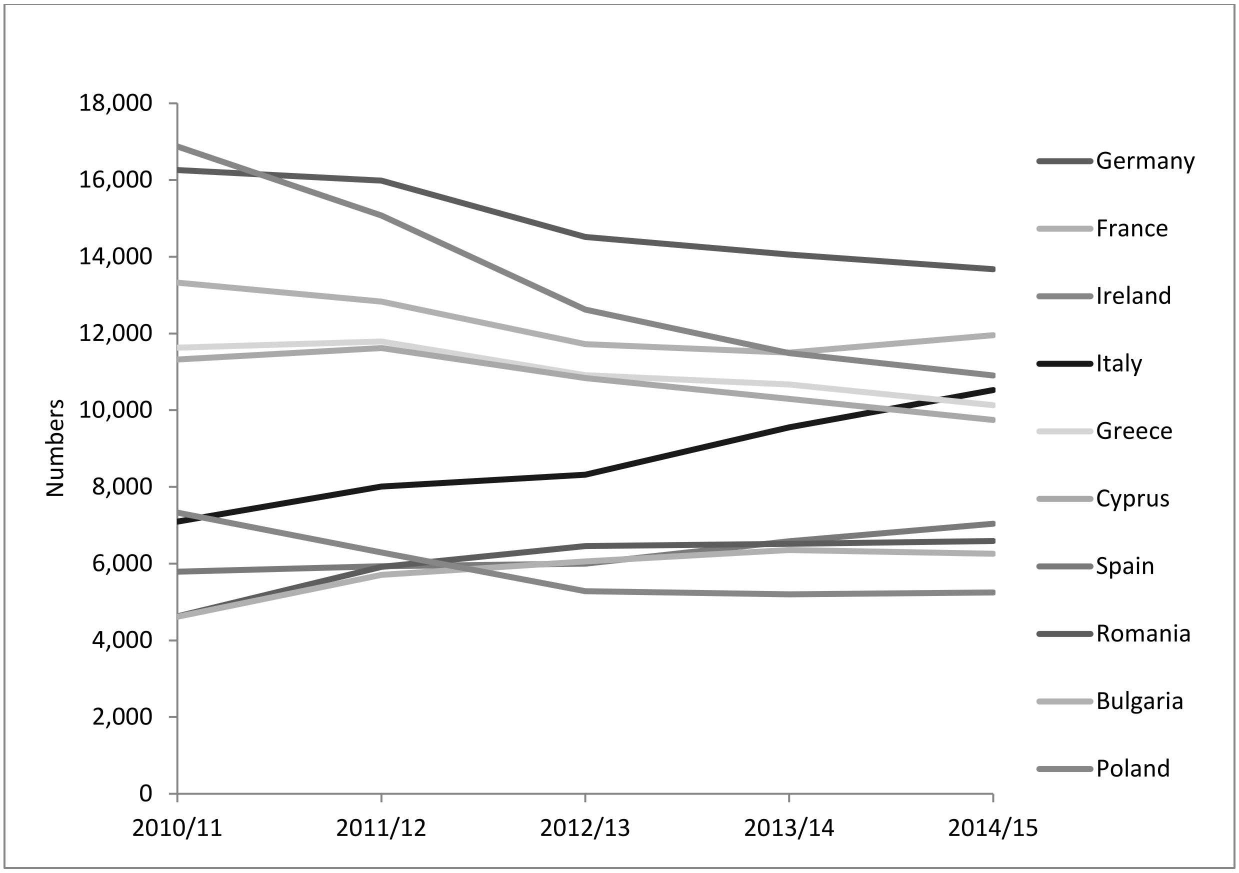

Figure 15A: Top other EU students in the UK (2014/15)

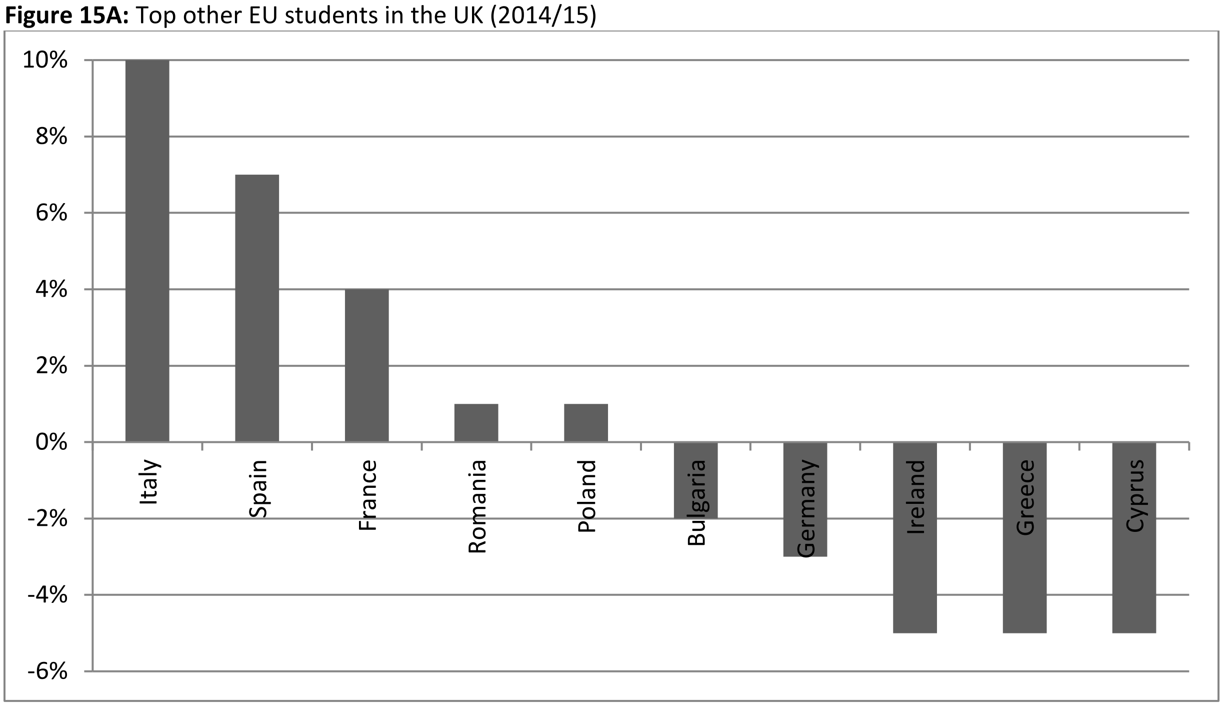

Figure 16A: Percentage change of top other EU students in the UK (2013/14 to 2014/15)

Source: HESA data adapted by author.

Turning to consider international student numbers from outside the EU, the dominant observation is the immense importance of China to UK HEIs. In 2014/15 China had 89,540 students in the UK, compared to only 18,320 from India – the second largest source country. Figure 17A illustrates the significance of students from China as a proportion of all international students. Chinese students represent 20.5% of the total share of international students in the UK; that is, one in every five international student is from China. However, when we focus only on non-EU students (Figure 17A), Chinese students make up 28.7%; that is, approximately one in every four non-EU student is Chinese. This proportion also signifies that 28.7% of non-EU tuition fee income is from Chinese students. Students from China therefore make up a sizeable share of international student fee income and their continued interest and investment in UK higher education is thus critical to the UK's higher education sector.

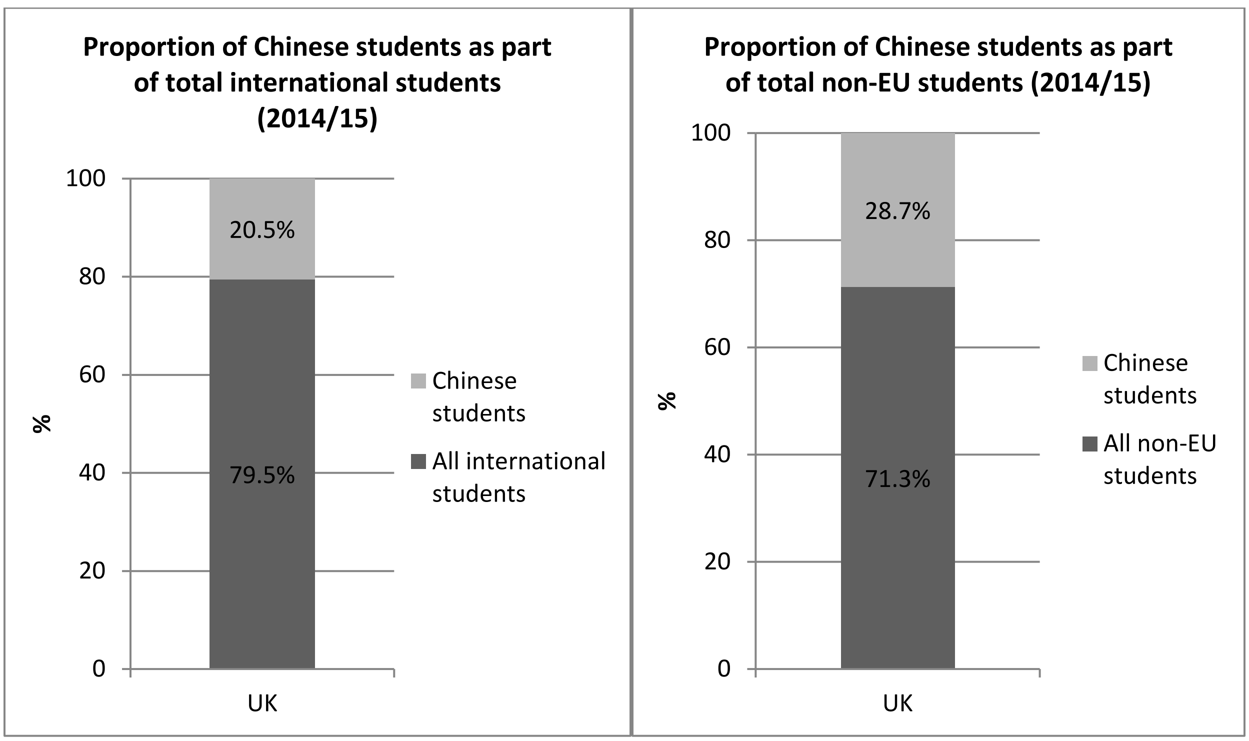

Figure 17A: Proportion of Chinese students as part of total international students and non-EU students (2014/15)

Source: HESA data adapted by author

While the number of students from China has been steadily increasing since 2010/11, Figure 18A shows that this increase tapers off in 2014/15. With the UK higher education sector very dependent on the enrolment of Chinese students, any negative changes in student numbers of the kind that happened recently with Indian student numbers could be immensely damaging.

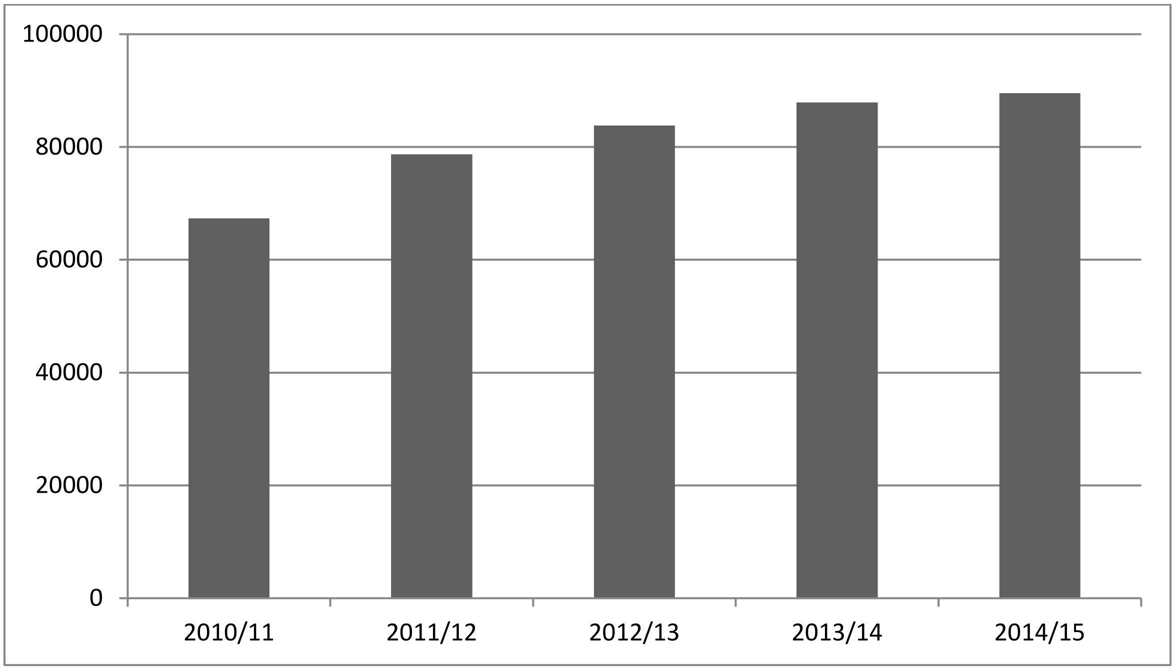

Figure 18A: Change in enrolments of Chinese students in the UK (2010/11-2014/15)

Source: HESA data adapted by author.

Figure 18A shows the top non-EU source countries for international students enrolled in the UK in 2014/15. China has been excluded from the diagram to allow more detailed examination of trends in other countries. Notably, the number of students from India has seen a sharp decline, from 39,090 students in 2010/11 to 18,320 students in 2014/15. This could be partly explained by the fall of the Indian rupee following 2011 (Srinivas 2012) but also the removal of the post-study work visa in the UK (Study International, 2016; Kohli, 2016; Srivastava, 2016). Nigeria, the third largest non-EU country of origin, has seen little change in numbers over the last five years. Malaysia, the United-States, Hong Kong and Singapore have displayed an upward trend, while Saudi Arabia, Thailand and Pakistan have sent fewer students. The implementation of the UK Government's new student visa policies may have contributed to the diminishing numbers of students from some non-EU countries. Faced with the prospect of paying high international course fees and with no possibility of work following graduation, students' that were initially attracted to the UK education system for its post-study employment opportunities may have found there is less appeal and incentive to study in the UK (Elmes, 2016a; Kohli, 2016; Universities UK, 2014b).

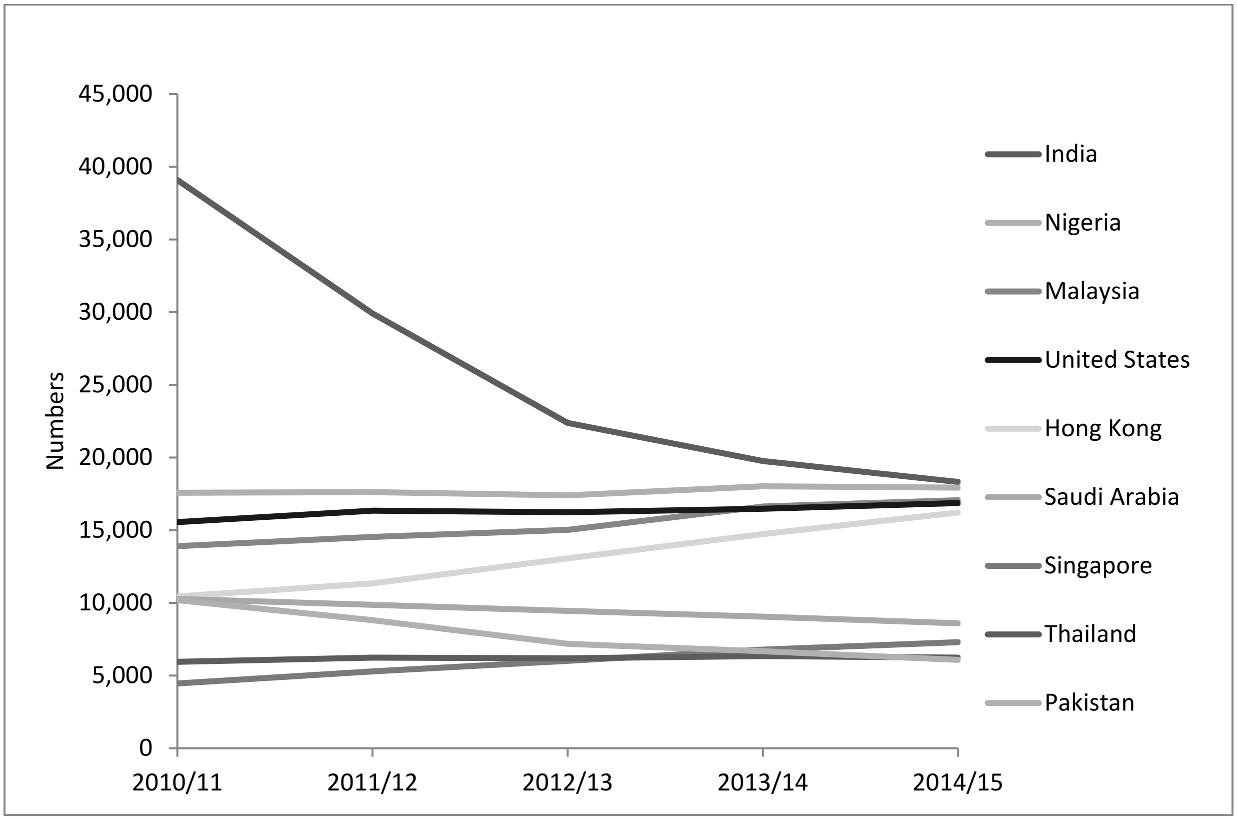

Figure 19A: Top non-EU students in the UK (excluding China) 2014/15

Source: HESA data adapted by author.

Concern about the decline in international student numbers from some origin countries and stagnation in the overall numbers is heightened by the fact that in the same years other countries in the Western world have surged ahead in student recruitment (Universities UK, 2014b). While the number of Indian students has declined in the UK, Indian student numbers are on the rise in the USA and many other international study destinations (IIE, 2016; Srivastava, 2016). In addition, the OECD has reported that while Canada “facilitates permanent residence for international graduates (…) in contrast, countries like the United States and more recently the United Kingdom have made it more difficult for international students to enter” (OECD, 2013, 3). Following the 2016 vote to leave the European Union, the UK Government has adopted an ever more negative discourse on immigration, explicitly including international students in its goal to reduce net migration levels, and this despite public opinion seeming to look favourably on international students, in contrast with public views on labour migration (Comres, 2016). The UK therefore seems increasingly at risk of losing international students to countries whose governments favour more inclusive immigration policies (Elmes, 2016b; Gurney-Read, 2015; Morgan, 2016; Scullion and Pemberton, 2015).

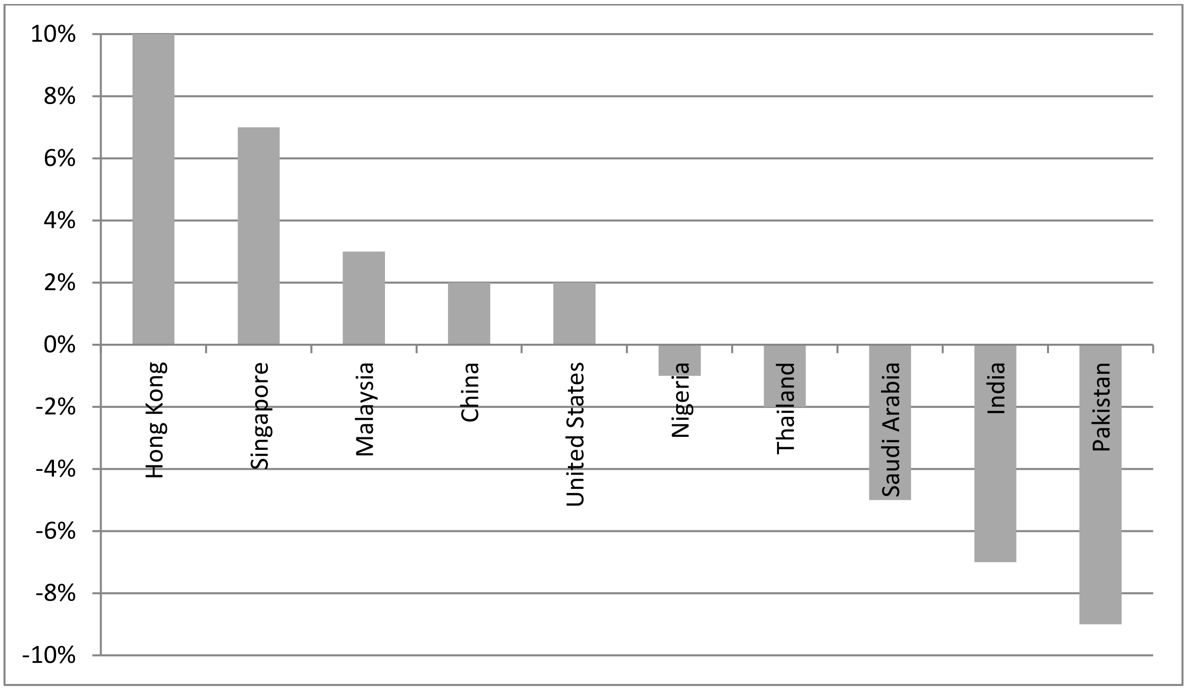

Figure 20A: Percentage change of top non-EU students in the UK (2013/14 to 2014/15)

Source: HESA data adapted by author.

The most recent variations among the top 10 non-EU countries in the UK (Figure 20A) show some countries continue to increase in importance as sender states (Hong Kong, Singapore, Malaysia, China and the United-States being the most important). However other populous states such as Pakistan, India, Thailand and Nigeria have recorded major reductions in the last year, showing that it is not just EU nations that are turning away from the UK as a study destination. It is noticeable that leaders of some of these countries, such as India, have specifically commented on the UK's restrictions on student mobility as a block to other trading opportunities. During a visit in November 2016 by the UKs prime minister to India, India's Prime Minister Narendra Modi stated that student mobility was a necessary precursor to expanding trade links. He stated: "Education is vital for our students and will define our engagement in a shared future. We must therefore encourage greater mobility and participation of young people in education and research opportunities" (BBC, 2016c). The request was denied and this despite a drop in study visas issued to Indian students from over 68000 in 2010 to less than 12000 in 2015 (BBC, 2016c). It seems remarkable that the UK Government's fixation with a net migration cap not only seems to threaten the potential of its universities to recruit internationally, but that it now seems to be becoming a block to the country's wider international trading prospects.

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