



Universities UK
International

NOVEMBER 2018

INTERNATIONAL STUDENT BEHAVIOURS

QUARTERLY DATA RELEASE

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DEAR COLLEAGUES



We're delighted to share this briefing presenting data on potential international student interest and subsequent recruitment to the UK and some of our competitor countries.

This paper uses data from sources including Hotcourses Group, HESA, UCAS and the Home Office, to form a picture of international demand for UK higher education as well as demand for the likes of the US, Australia and Canada.

We offer a comparison with our international competitors in terms of students enrolling with and studying at our universities, and then use the latest data on visa applications, and UCAS data for the EU, to indicate definite interest shown in coming to study in the UK.

The final section focuses on new data from Hotcourses Group's international insights demand tool and offers valuable insights into areas of interest for students across the world when they are researching their study options.

This gives us a fascinating indication of possible future trends in international student recruitment, and enables us to see the real-time effects of global events.

The document focuses on a few key markets including India, China, the Middle East and the EU. We also take a closer look at an interesting competitor destination: New Zealand, which is currently exploring making policy changes to attract more international students.

I'd like to take this opportunity to thank Hotcourses Group for sharing its data and making this report possible.

A handwritten signature in blue ink, appearing to read 'Vivienne Stern'.

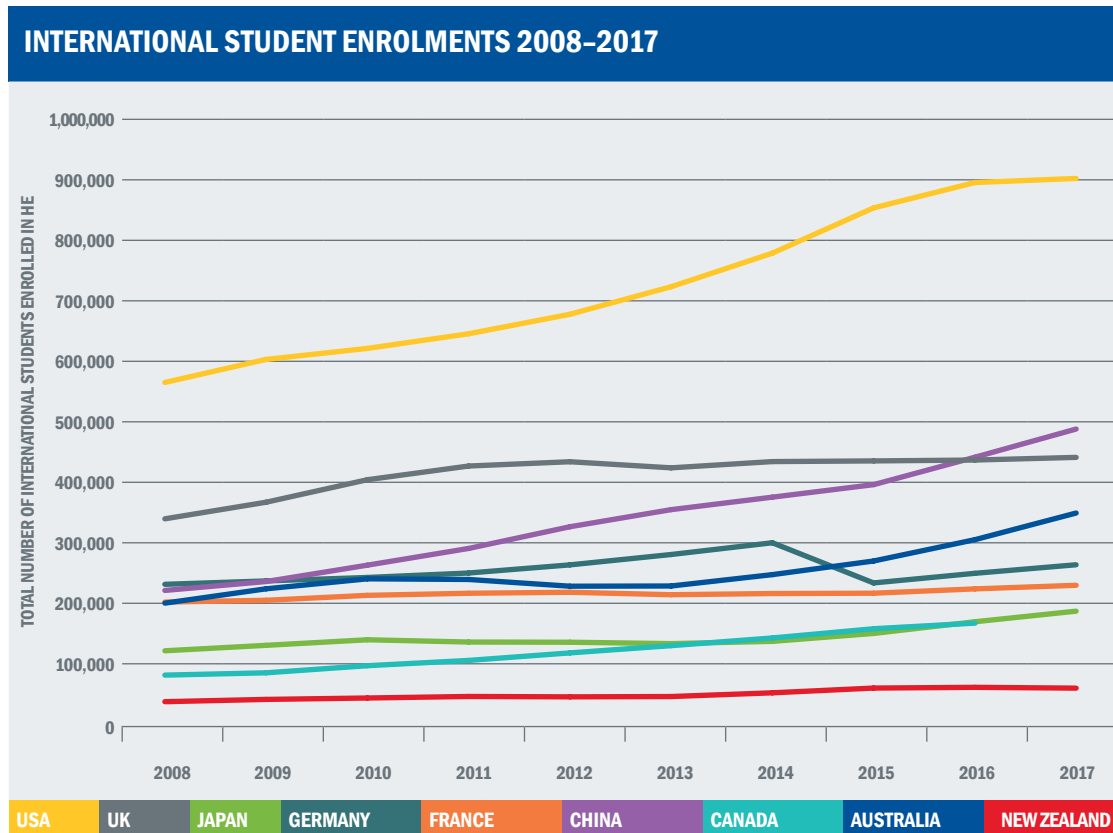
VIVIENNE STERN

Director,
Universities UK International

THE LATEST DATA AN OVERVIEW

In this section we analyse the latest data from HESA and the home office to look at international student demand for key destinations across the world. We use UCAS data to analyse demand for UK courses from the EU. All data sources are listed in full at the end of this document.

INTERNATIONAL STUDENT NUMBERS



The non-European nations have seen much stronger growth in international student numbers than the UK, France and Germany since 2011.

The latest enrolment data suggests that **CHINA** has now overtaken the **UK** as the second largest recipient of enrolled international students, although the Chinese figures include categories of student not counted by other countries.*

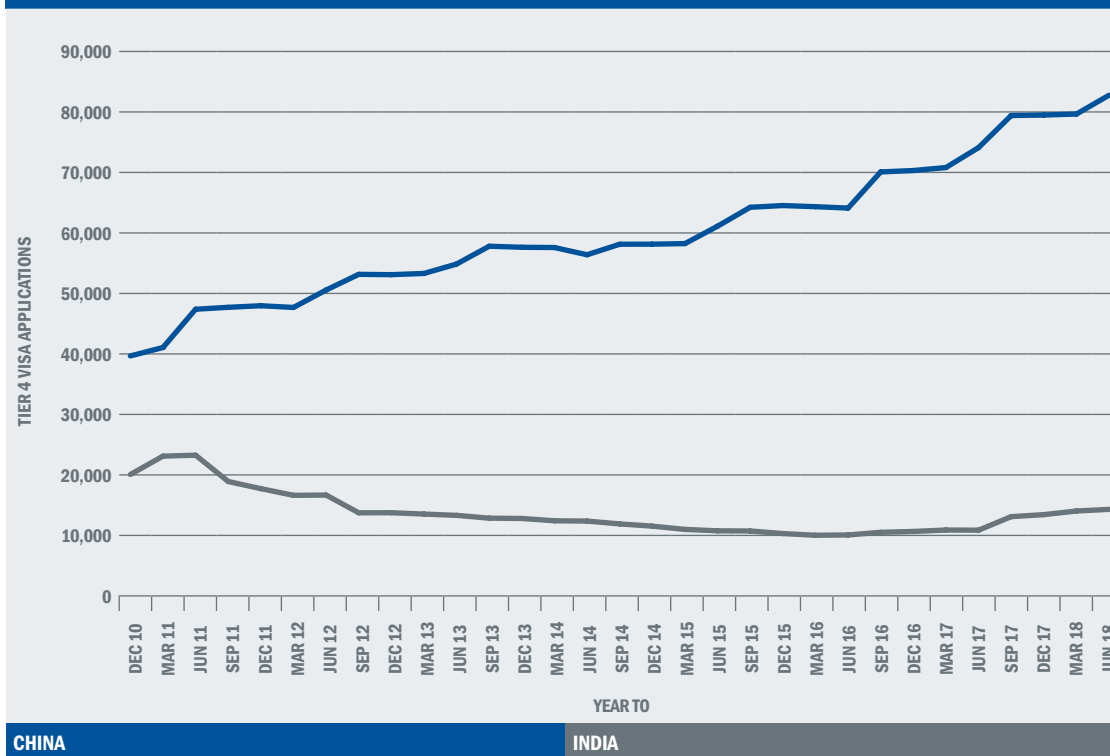
The **USA** has seen strong growth over the decade but is beginning to plateau as the current administration proposes restrictions to the immigration system.

AUSTRALIA has recently experienced strong growth following a disappointing period up to 2011. **CANADA** and **NEW ZEALAND** have seen steady growth from low initial baselines.

*see notes for more information.

TIER 4 VISA APPLICATIONS CHINA AND INDIA

QUARTERLY TIER 4 VISA APPLICATIONS TO STUDY AT UK HIGHER EDUCATION INSTITUTIONS FROM CHINA AND INDIA



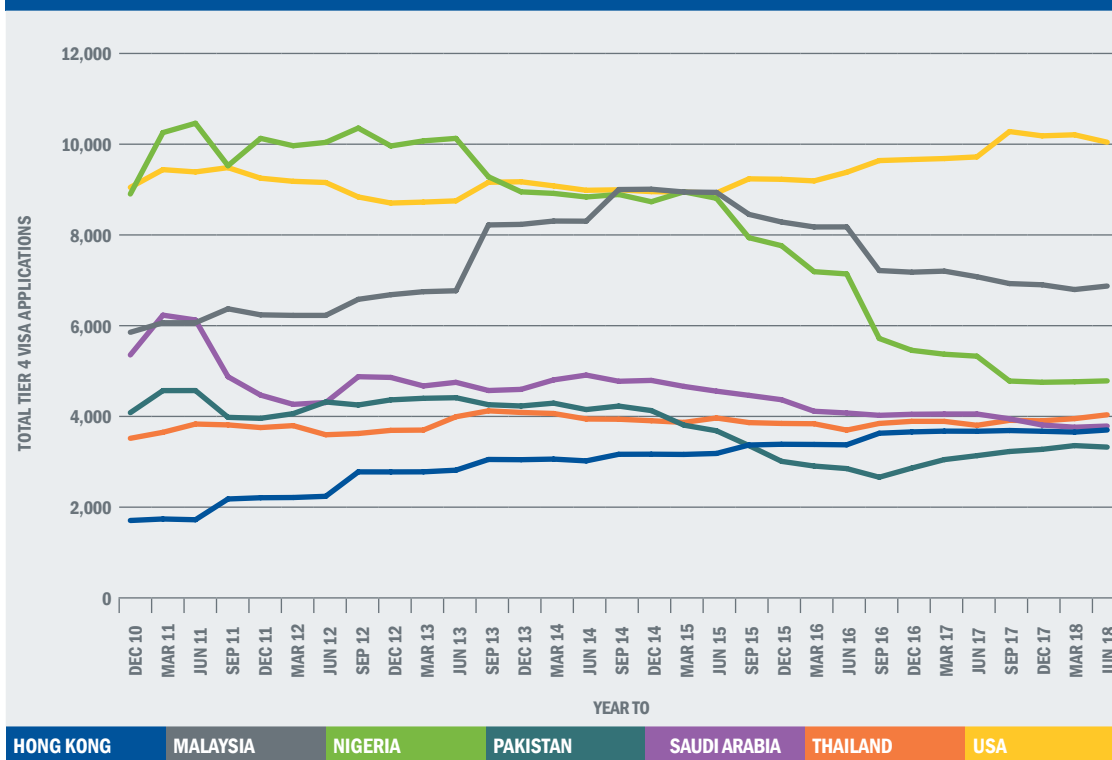
The two biggest contributors of Tier 4 visa applications are shown in this chart.

The increase in applications from **CHINA** has been impressive. There were more than double as many applicants in 2018 as there were in 2011.

Applications from **INDIA** were in slow decline from 2011 until 2016. However, there have since been some encouraging signs of recovery, especially through 2018.

TIER 4 VISA APPLICATIONS BY COUNTRY OF ORIGIN

QUARTERLY TIER 4 VISA APPLICATIONS TO STUDY AT UK HIGHER EDUCATION INSTITUTIONS BY COUNTRY OF ORIGIN



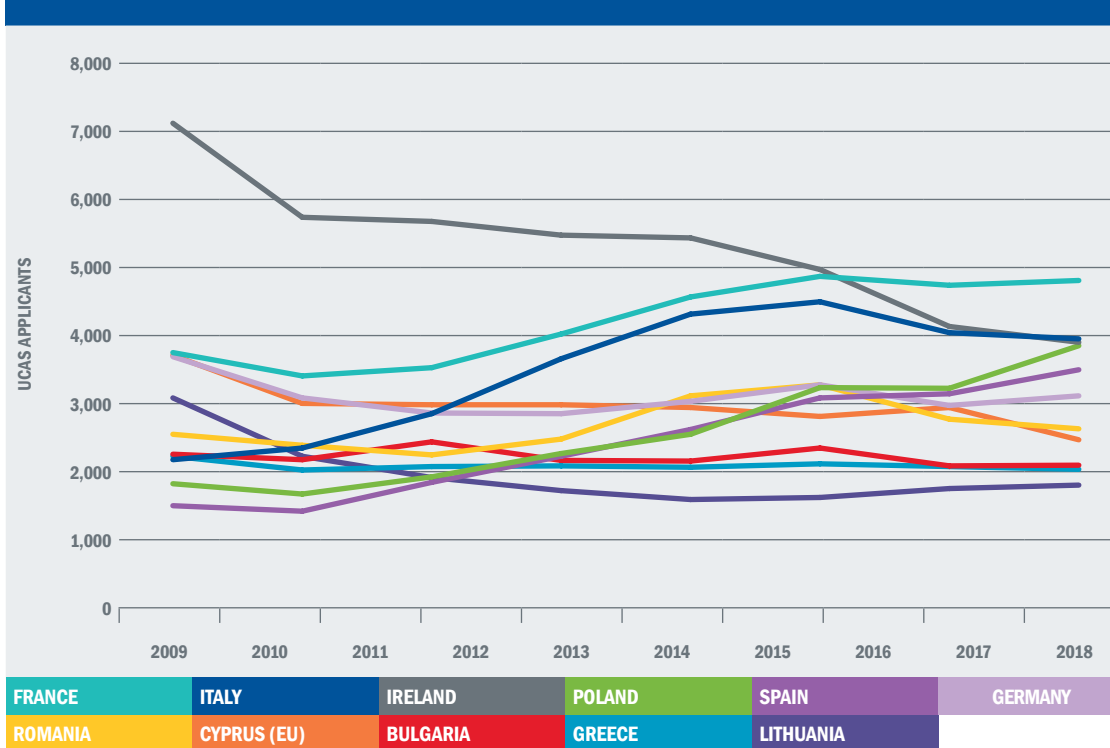
The overall upward trends in the number of Tier 4 visa applicants from the **USA** are the most encouraging, despite a slight slow down in the last year.

A steep downward trend from **NIGERIA** is notable, as is the faltering momentum from **MALAYSIA** caused by demographic forces. Applicants from **SAUDI ARABIA** have been decreasing since a brief upswing in 2014.

A downward trend from **PAKISTAN** was reversed in 2016 with modest increases in the number of applicants since that point.

TOP 10 EU COUNTRIES BY UCAS APPLICANT NUMBERS

TOP 10 EU COUNTRIES BY UCAS APPLICANTS TO UK UNIVERSITIES SINCE 2011



A busy lower half of the chart is overshadowed by the obvious downward trend of applicants from **IRELAND**. From an initial comfortable top position, **IRELAND** is now third behind **FRANCE** and **ITALY**.

FRANCE and **ITALY** lead the way in growth, slowed by a slight stagnation between 2016-18. Other very positive trends come from **POLAND** and **SPAIN**, with a slight uptick from **GERMANY** in the year to 2018 a positive sign.

A lack of certainty surrounding the fee status of EU students from 2019 onwards may lead to decreases across the board.

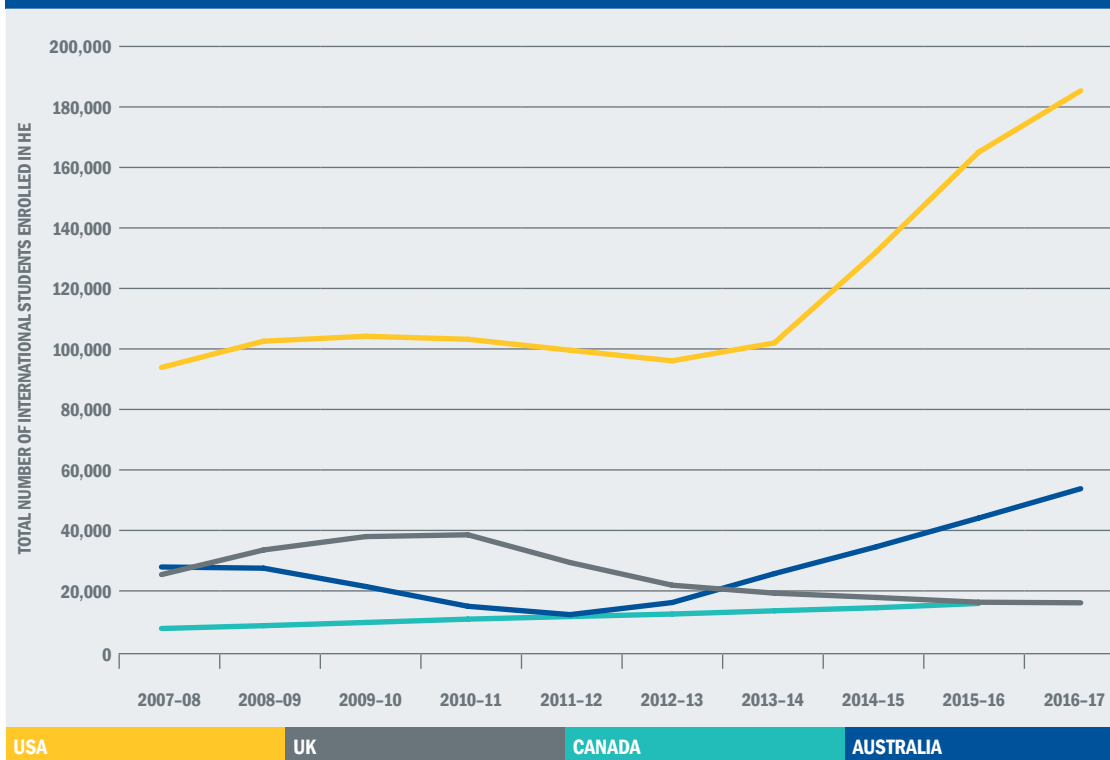
SENDING COUNTRY FOCUS CHINA & INDIA

Chinese and Indian students account for a large proportion of the UK's international students. This section examines how we compare to our competitors when it comes to these two key markets.

SENDING COUNTRIES

INDIA

STUDENTS FROM INDIA ENROLLED IN HIGHER EDUCATION IN THE UK AND COMPETITOR COUNTRIES



The **USA** is racing ahead in the number of Indian students enrolled in higher education, with a rapid increase from 2015.

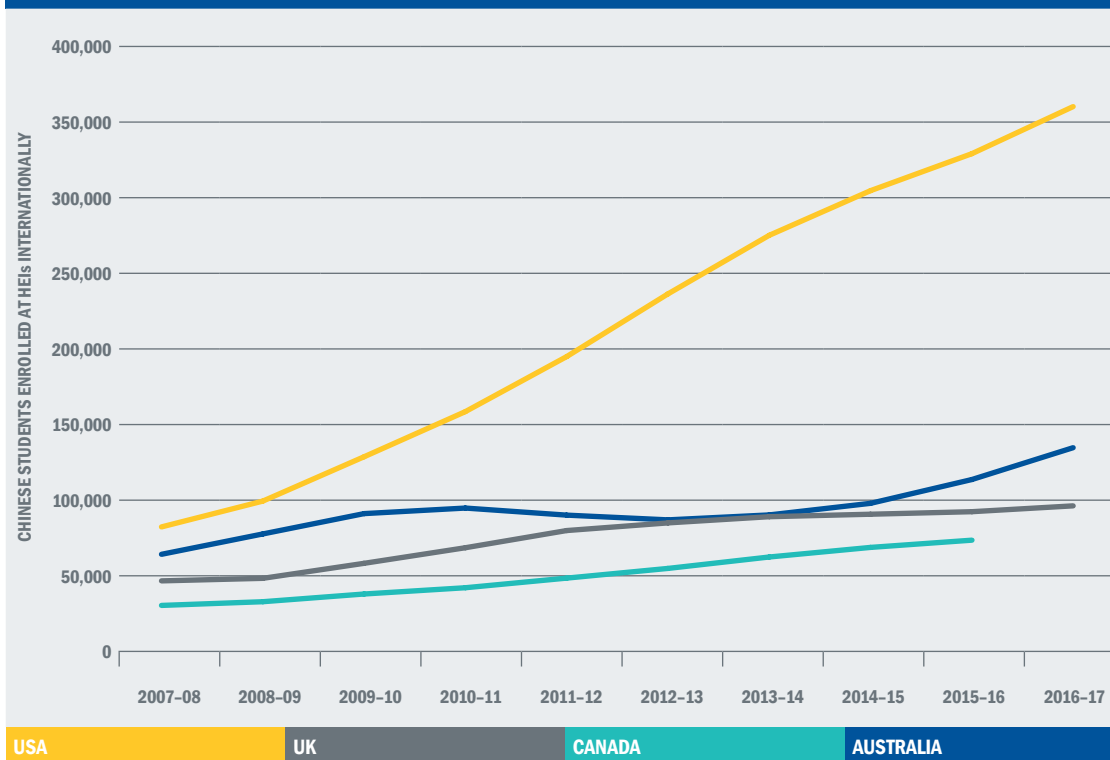
The **UK** looked to be comfortably in second place until 2011-12 when a decline began, likely as a result of post-study work visas for international students being scrapped.

AUSTRALIA'S early dip in numbers and their subsequent rapid increase from 2012 onwards following the introduction of changes to the student immigration regime is the inverse of what has happened in the UK.

CANADA'S slow and steady improvement sees them almost level with the UK by 2016.

SENDING COUNTRIES CHINA

STUDENTS FROM CHINA ENROLLED IN HIGHER EDUCATION IN THE UK AND COMPETITOR COUNTRIES



The dramatic growth in the number of Chinese students enrolled at higher education institutions internationally since 2007-08 is shown in this chart.

The **USA** has seen by the far the largest influx of these new Chinese students, enrolling almost 360,000 by the 2016-17 academic year. This represents a staggering 343% growth since 2007-08.

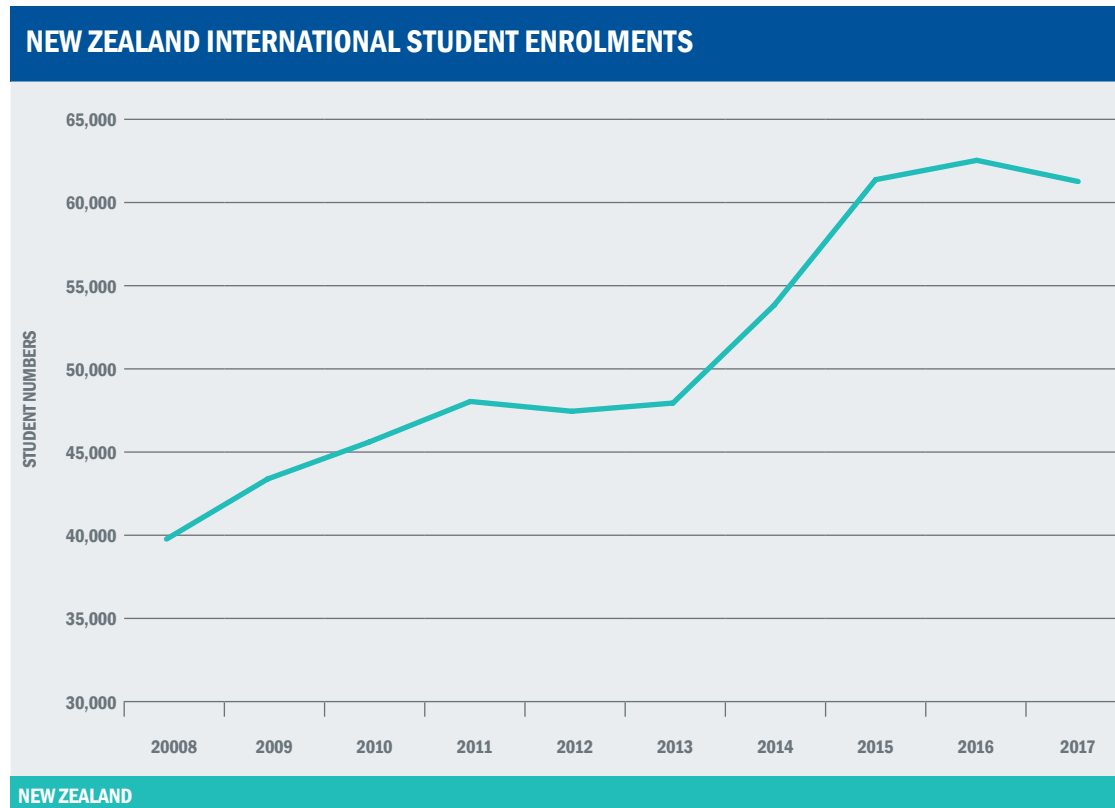
The **UK** experienced strong growth from 2008-09 onwards to draw level with **AUSTRALIA** in 2012-13. Since then however, **AUSTRALIA** has once again pulled comfortably ahead. The **UK** could potentially benefit from increasing diplomatic tensions between **AUSTRALIA** and the **USA** and **CHINA**.

CANADA'S growth has been slow but steady since 2007-08 and it looks set to continue.

COMPETITOR FOCUS NEW ZEALAND

This section focuses on New Zealand as a destination for international students at a potentially pivotal moment for the country's higher education sector while it adjusts to a range of policy changes.

INTERNATIONAL STUDENT NUMBERS IN NEW ZEALAND



The number of international students enrolled at New Zealand Universities has grown by an impressive 54% between 2008 and 2017.

The slowdown in 2016-17 was caused by a tightening of English language requirements and general increased scrutiny of student visa applications by Immigration New Zealand (INZ). Despite the slowdown in numbers, revenue from tuition fees increased due to an increased proportion of postgraduate students.

In order to continue growth in international student enrolments, the New Zealand government is taking action to make their education offer more attractive. From November 2018, international students in New Zealand at degree level will be able to get a three-year post-study work visa, without any employer sponsorship requirement.

SUBJECT BREAKDOWN IN NEW ZEALAND

NUMBER OF INTERNATIONAL STUDENTS IN NEW ZEALAND BY FIELD OF STUDY IN 2017

92,450

SUBJECT ENROLMENTS



SUBJECTS

● Management and Commerce	25,835	27.9%
● Society and Culture	20,180	21.8%
● Information Technology	9,235	9.9%
● Natural and Physical Sciences	8,365	9%
● Engineering and Related Technologies	6,665	7.2%
● Creative Arts	4,950	5.4%
● Food, Hospitality and Personal Services	4,880	5.3%
● Health	4,190	4.5%
● Education	3,150	3.4%
● Agriculture, Environmental and Related Studies	2,075	2.2%
● Architecture and Building	1,625	1.7%
● Mixed Field Programmes	1,300	1.4%

The most popular fields of study for international students in New Zealand are business & management, the humanities, IT, and the sciences. The international student population is 53% male and 47% female.

RECENT DEVELOPMENTS:

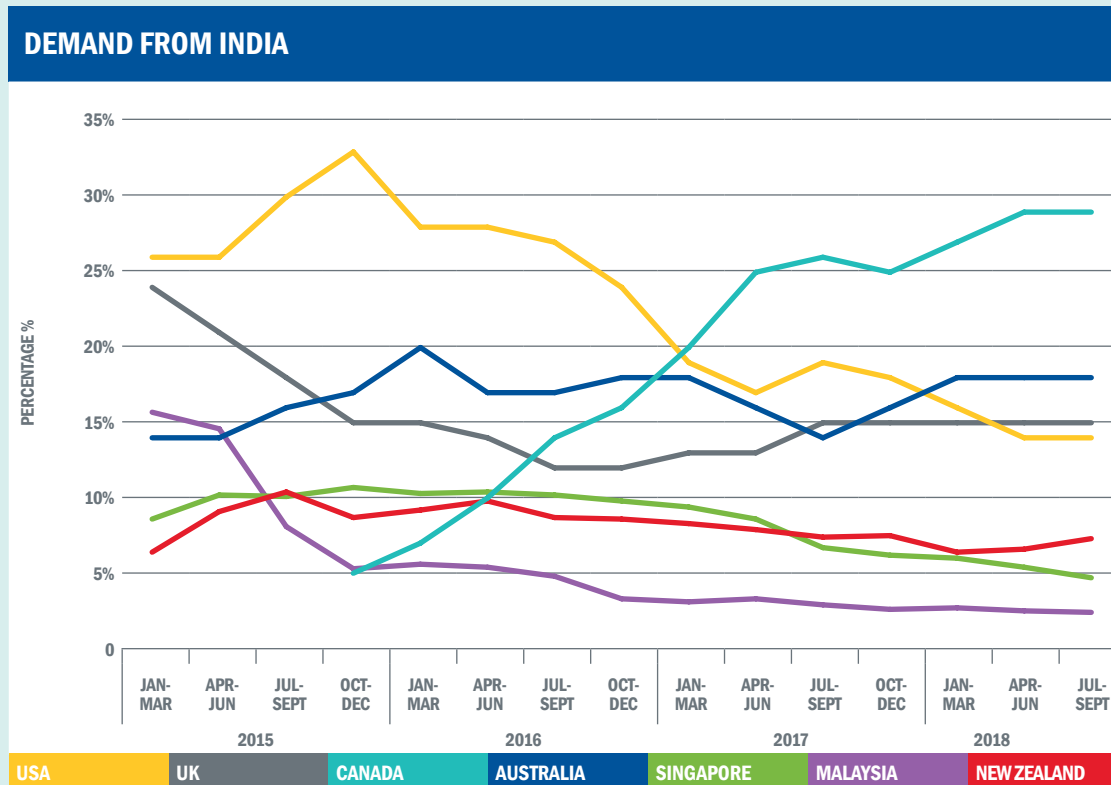
The New Zealand government have released their international education strategy for 2018-2030. The strategy focuses on increasing the quality of education, providing domestic students with international experiences to promote global citizenship, and achieving sustainable growth for the education sector.

The NZ Labour-led government is currently working to phase out tuition fees for domestic students, and so institutions may increasingly look to recruitment of international students to bridge gaps in funding.

SEARCH BEHAVIOUR IN KEY SENDING COUNTRIES

This section uses search behaviour data from Hotcourses Group's course search tools as a window into the first steps on the international student journey, and an early indicator of future trends in international student enrolments in the UK and worldwide.

SEARCH BEHAVIOUR IN INDIA



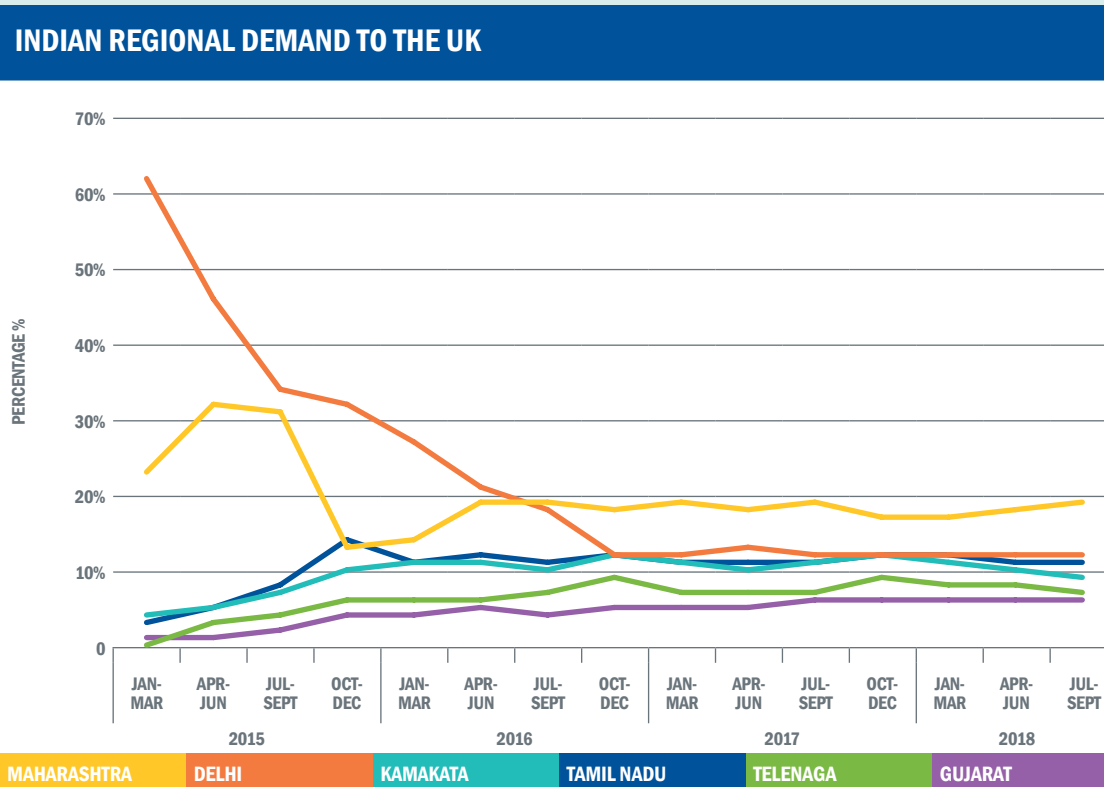
Note the significant decline in the **USA**, which now drops to fourth place in the latest quarter. When compared with the Indian student enrolments graph on page eight, we can see that the drop in prospective student interest is reflected in a slight slow down in growth in Indian student enrolments in recent years. This search data could predict an even more severe slow down in growth for the **USA** over the next few years.

Watch the rise of **CANADA** since mid 2015. Australia has also improved on its position from three years ago, sitting in second place in 2018.

The **UK** steadily declines from 2015 to mid 2016, but looks to have stabilised.

Compare this data to the Indian student enrolments graph on page eight to see these trends play out in enrolment numbers.

WHERE PROSPECTIVE STUDENTS LIVE IN INDIA



This chart shows the regional breakdown of where students researching UK universities from in India are based. In 2015 demand was dominated by **DELHI** and **MAHARASHTRA**, however in recent quarters demand is more equally shared between a number of regions. Over the same period of time, the total number of students searching from India has almost doubled (see next slide).

This would suggest that demand in regions outside of **DELHI** has shot up in the past two years. Now more than ever, universities need to spread their recruitment efforts across the whole country to make the most of these developments.

SUBJECT DEMAND FROM INDIA (FOR ALL COUNTRIES)

2016

80,193

STUDENTS



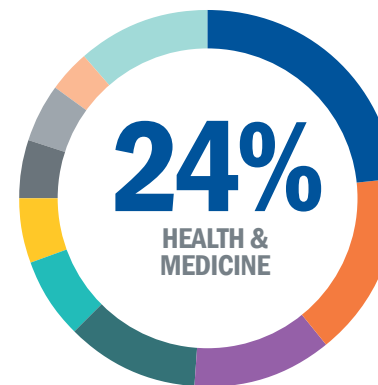
SUBJECTS

● Health & Medicine	20.2%
● Engineering	19.4%
● Business Management	12.7%
● Applied and Pure Sciences	10.1%
● Creative Arts and Design	6.4%
● Social Studies and Media	6.2%
● Travel and Hospitality	5.9%
● Computer Science and IT	4.4%
● Architecture and Construction	3.5%
● Other	11.2%

2017

164,002

STUDENTS



SUBJECTS

● Health & Medicine	23.6%
● Engineering	15.6%
● Business Management	12.0%
● Applied and Pure Sciences	11.3%
● Creative Arts and Design	7.1%
● Social Studies and Media	5.6%
● Computer Science and IT	5.0%
● Travel and Hospitality	4.9%
● Architecture and Construction	3.6%
● Other	11.3%

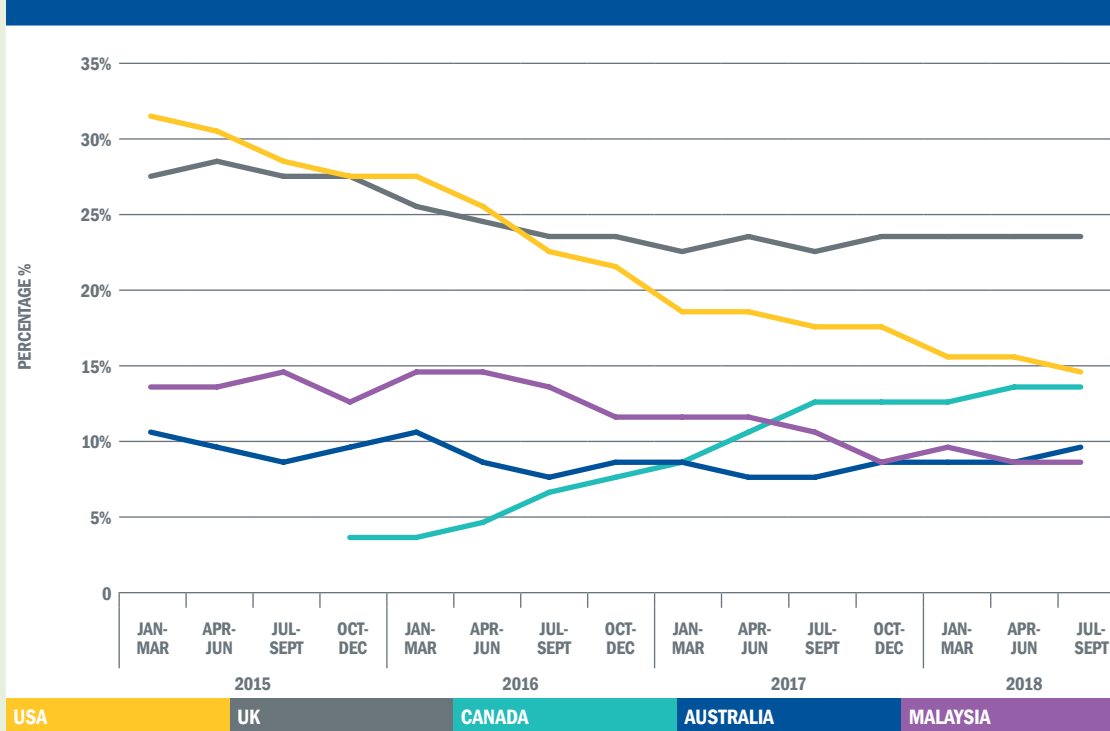
The pie charts show high level subject demand from students researching all countries from India during 2016 and 2017.

Although the number of students searching have almost doubled, the breakdown of interest by subject has remained relatively stable; the rank order for the top six subject areas remains the same.

- **HEALTH AND MEDICINE** has strengthened in first position, growing from 20.2% in 2016 to 23.6% in 2017.
- **ENGINEERING** remains the second most researched subject area, but falls from 19.4% in 2016 to 15.6% in 2017.

SEARCH BEHAVIOUR IN THE MIDDLE EAST

MIDDLE EAST DEMAND TO 5 MAJOR STUDY DESTINATIONS



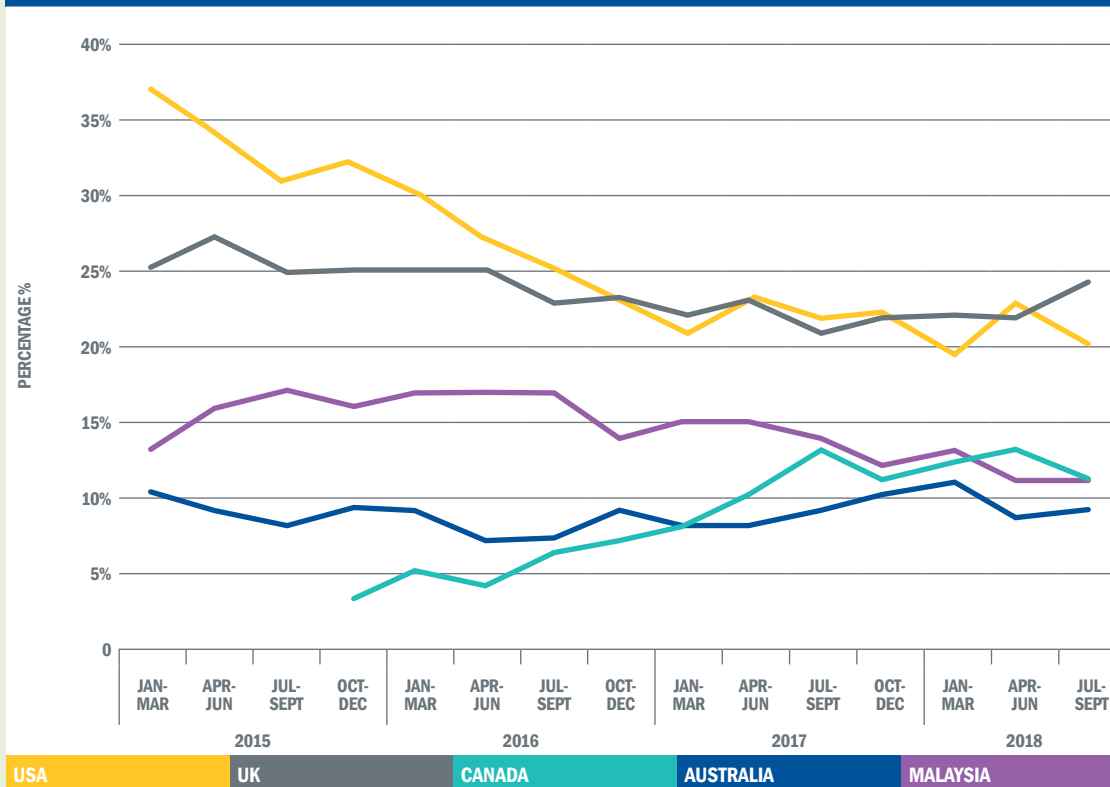
Across the **MIDDLE EAST** as a whole, and **SAUDI ARABIA** (next page) and the **UNITED ARAB EMIRATES** (next page) there has been a significant drop in numbers of students looking at the **USA**. This decline does not show signs of slowing down in the near future without major changes to policy and posture towards the **MIDDLE EAST** from the incumbent US government.

Although the **UK** has lost some market share, it is still performing strongly, together with **CANADA**.

MALAYSIA has seen a modest decline since 2015, while demand for **AUSTRALIA** hasn't changed dramatically.

SEARCH BEHAVIOUR IN SAUDI ARABIA

SAUDI DEMAND TO 5 MAJOR STUDY DESTINATIONS



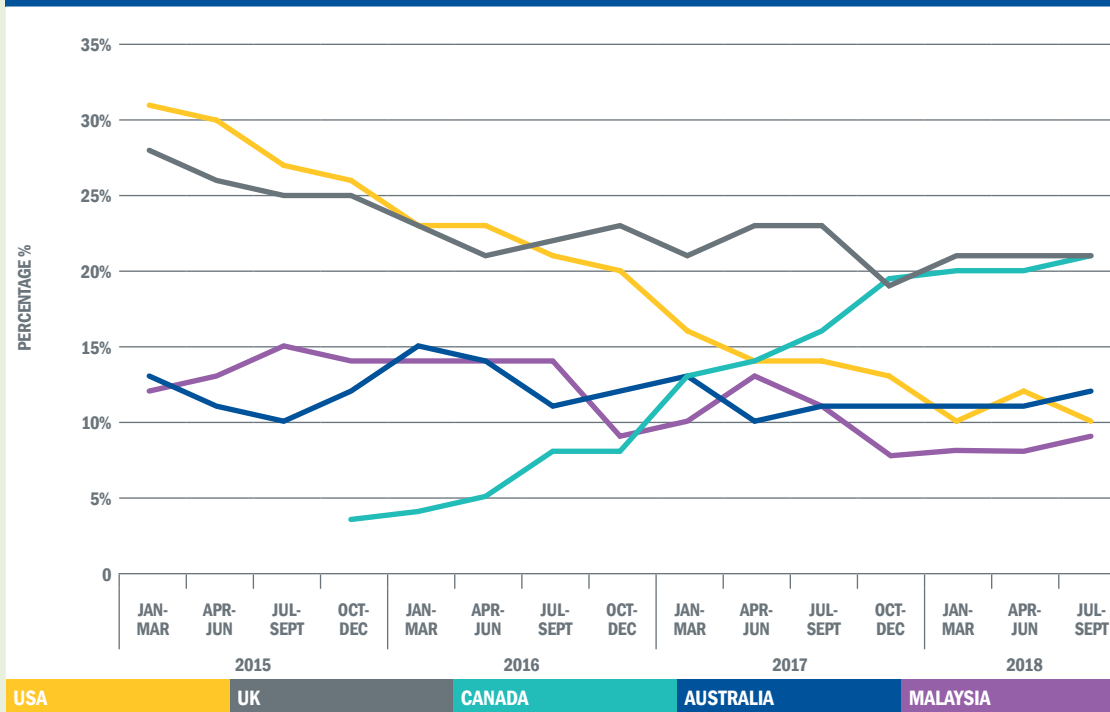
Overall this chart once again demonstrates how demand for the **US** has fallen, although demand in **SAUDI ARABIA** has stabilised to a degree from 2017. Demand for the **UK** has seen only a very modest decline.

The downward trend in Saudi interest in **CANADA** in the last quarter could predict a steeper drop as we begin to see the impact of the Saudi government's decision to remove government-funded Saudi students from **CANADA**.

Trends from the most recent quarter suggest that the **UK** and **AUSTRALIA** are more likely to benefit from a decline in **CANADA** than the **US**.

SEARCH BEHAVIOUR IN THE UAE

UAE DEMAND TO 5 MAJOR DESTINATIONS



For the UAE, the **USA** drops to 4th place in the latest quarter, having been the most popular choice in 2015. In the last quarter its market share was only slightly larger than **MALAYSIA'S**.

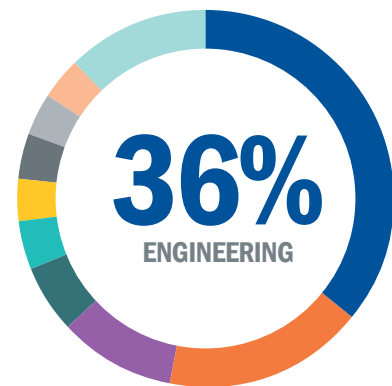
The clear beneficiary of this US decline has been **CANADA**, which has rocketed up from obscurity in 2015 to have the joint largest market share alongside the **UK**. The welcoming message sent out by Canada's universities and government appears to be landing effectively in the UAE.

SUBJECT DEMAND FROM SAUDI ARABIA (GLOBAL)

2016

348,934

STUDENTS



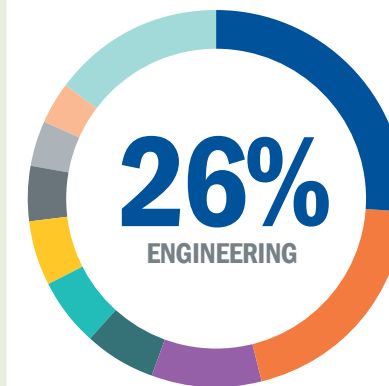
SUBJECTS

● Engineering	35.9%
● Health and Medicine	17.4%
● Business Management	10.0%
● Law	5.8%
● Creative Arts and Design	4.0%
● Computer Science and IT	3.8%
● Applied and Pure Sciences	3.8%
● Humanities	3.7%
● Architecture and Construction	3.6%
● Other	12%

2017

292,268

STUDENTS



SUBJECTS

● Engineering	26.2%
● Health and Medicine	20.0%
● Business Management	9.4%
● Creative Arts and Design	6.2%
● Applied and Pure Sciences	5.8%
● Computer Science and IT	5.6%
● Humanities	4.6%
● Law	3.9%
● Social Studies and Media	3.7%
● Other	14.6%

When exploring internationally, students from Saudi Arabia are most likely to be looking at **ENGINEERING** related subjects, followed by **HEALTH AND MEDICINE** and business management. The change in Saudi leadership, and corresponding shift

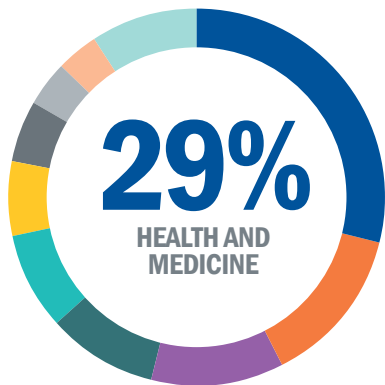
in governmental priorities, may have led to changes in subject areas of interest. There is a notable rise in interest in **HEALTH AND MEDICINE** and **CREATIVE ARTS AND DESIGN**. Interest in **ENGINEERING**, meanwhile, has dropped by almost 10%.

SUBJECT DEMAND FROM SAUDI ARABIA (UK ONLY)

2016

64,111

STUDENTS



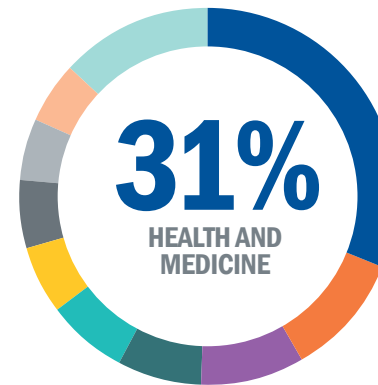
SUBJECTS

● Health and Medicine	29.0%
● Law	13.5%
● Engineering	11.5%
● Architecture and Construction	9.4%
● Business Management	8.4%
● Applied and Pure Sciences	6.4%
● Humanities	5.2%
● Computer Science and IT	4.0%
● Social Studies and Media	3.5%
● Other	9.1%

2017

53,388

STUDENTS



SUBJECTS

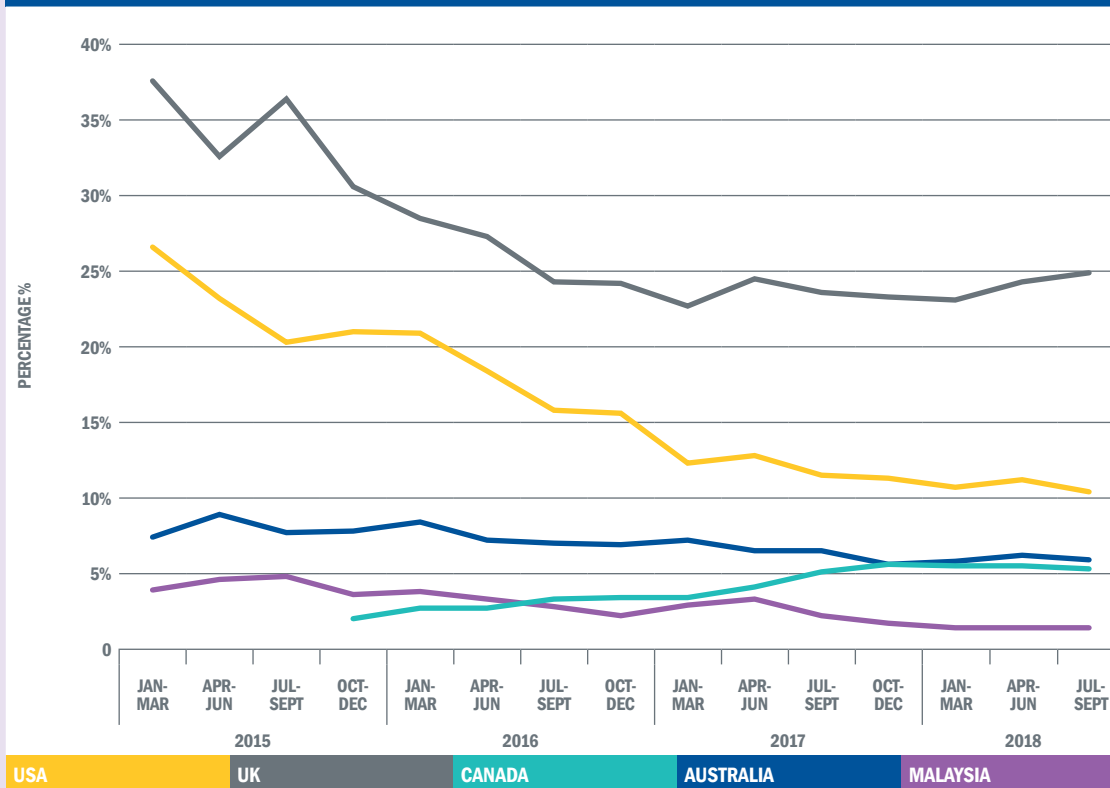
● Health and Medicine	31.3%
● Business Management	10.5%
● Engineering	9.0%
● Architecture and Construction	7.0%
● Applied and Pure Sciences	7.0%
● Law	5.9%
● Humanities	5.8%
● Creative Arts and Design	5.4%
● Social Studies and Media	5.1%
● Other	13.0%

Looking at the **UK**, the picture is quite different. **HEALTH AND MEDICINE** is the most explored subject rather than engineering.

Although total demand to the UK has fallen by over 17% during this period, the UK could stand to benefit from the overall shift in Saudi interest towards **HEALTH AND MEDICINE**.

SUBJECT BEHAVIOUR IN EUROPE

EUROPEAN DEMAND TO 5 MAJOR DESTINATIONS



This chart shows prospective student interest from across Europe in six key destinations: **UK, USA, MALAYSIA, AUSTRALIA & CANADA.**

Search demand from prospective European students has seen significant drops in the market share of the **UK** and the **USA** since 2015.

Despite the Brexit vote, the **UK** maintains its position as the top destination. However, it has fallen from around 35% to 25% of market share, despite a small, steady rise in 2018.

The big takeaway from European search data is that all major destinations are losing market share, as many students look to stay in country or consider other European destinations.

NOTES ON DATA

INTERNATIONAL COMPETITORS

Australia

- Australia data does not include New Zealand students and only includes those on students' visas
- Students studying at two institutions will be counted twice
- Academic year runs January to December

Germany

- Study abroad students included

Japan

- Study abroad students included

USA

- US data excludes students on OPT (post-study work visa system)

China

- Data includes categories of short term students not counted by other countries, including Chinese language learners and secondary education level trainees.

VISA APPLICATIONS

- It's important to note that these are just application numbers. Not all of these visas will be granted, and not all of those whose visas are granted will take up their offers
- However, the total number of visa applicants made up 97% of total new non-EU enrolments for the past three years, so it's increasingly reliable as an indicator of new non-EU student enrolments

UCAS APPLICATIONS

- EU students accepted through UCAS comprise 98% of all new EU student enrolments at UK HEIs. (31,350/31,865 in 2016-17)

SOURCES

INTERNATIONAL COMPETITORS

- **UK:** HESA EU and non-EU enrolments and new enrolments
- **US:** IIE Open Doors data, available from <https://iie.org/Research-and-Publications/Open-Doors/Data>
- **Canada:** CANSIM https://www150.statcan.gc.ca/n1/en/subjects/education_training_and_learning
- **Germany:** The German Academic Exchange Service, DAAD via Destatis, including study abroad <https://www.destatis.de/EN/FactsFigures/SocietyState/EducationResearchCulture>
- **Japan:** Japan Student Services Organization (JASSO) , including study abroad students https://jasso.go.jp/en/about/statistics/intl_student/index.html
- **Australia:** Australian Government Department of Education and Training, international student data <https://internationaleducation.gov.au/research/International-Student-Data>
- **France:** MENESR-DGESIP/DGRI-SIES, MENESR-DEPP, available from <http://publication.enseignementsuprecherche.gouv.FR/>
- **China:** China Scholarships Council via Project Atlas

VISA APPLICATIONS

- **Home Office:** <https://www.gov.uk/government/statistics/immigration-statistics-year-ending-march-2018> UCAS

UCAS EU APPLICANTS DATA

- **UCAS:** <https://ucas.com/corporate/data-and-analysis/ucas-undergraduate-releases/2018-cycle-applicant-figures-march-deadline>
- **Populations:** <http://ec.europa.eu/eurostat/tgm/refreshTableAction.do?tab=table&plugin=1&pcode=tps0001&language=en>

INTERNATIONAL DEMAND

- **Hotcourses Group** an IDP company: <https://www.hotcoursesgroup.com/>