INTERNATIONAL STUDENT BEHAVIOURS QUARTERLY DATA RELEASE

CONTACT US
Woburn House
20 Tavistock Square
London, WC1H 9HQ

EMAIL info@universitiesuk.ac.uk
TEL +44 (0)20 7419 4111

IN PARTNERSHIP WITH
hotcourses group
an idp company

@UUKIntl University UK International
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.

VIVIENNE STERN
Director,
Universities UK International
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.
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.
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.
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.
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.
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.
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.
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 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.
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.
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.
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.
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.
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.
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.
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.
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.
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.
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%.
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**.
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
- **Canada**: CANSIM [https://www150.statcan.gc.ca/n1/en/subjects/education_training_and_learning](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](https://www.destatis.de/EN/FactsFigures/SocietyState/EducationResearchCulture)
- **China**: China Scholarships Council via Project Atlas

VISA APPLICATIONS


UCAS EU APPLICANTS DATA


INTERNATIONAL DEMAND

- **Hotcourses Group** an IDP company: [https://www.hotcoursesgroup.com/](https://www.hotcoursesgroup.com/)