

# Global demand for English higher education

## An analysis of international student entry to English higher education courses

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This report examines shifts in enrolments of international students in higher education in England, and explores what might have caused them. It focuses on the entrant student population, which indicates the latest developments in student enrolments. It is one of a series of analyses by HEFCE of current data and future trends in higher education.

## Introduction

1. International students make a significant academic and cultural contribution to the activities of universities and higher education colleges in England, and to our wider society. It is estimated that the overall value of UK higher education exports to the economy in 2011-12 was around £10 billion<sup>1</sup>.

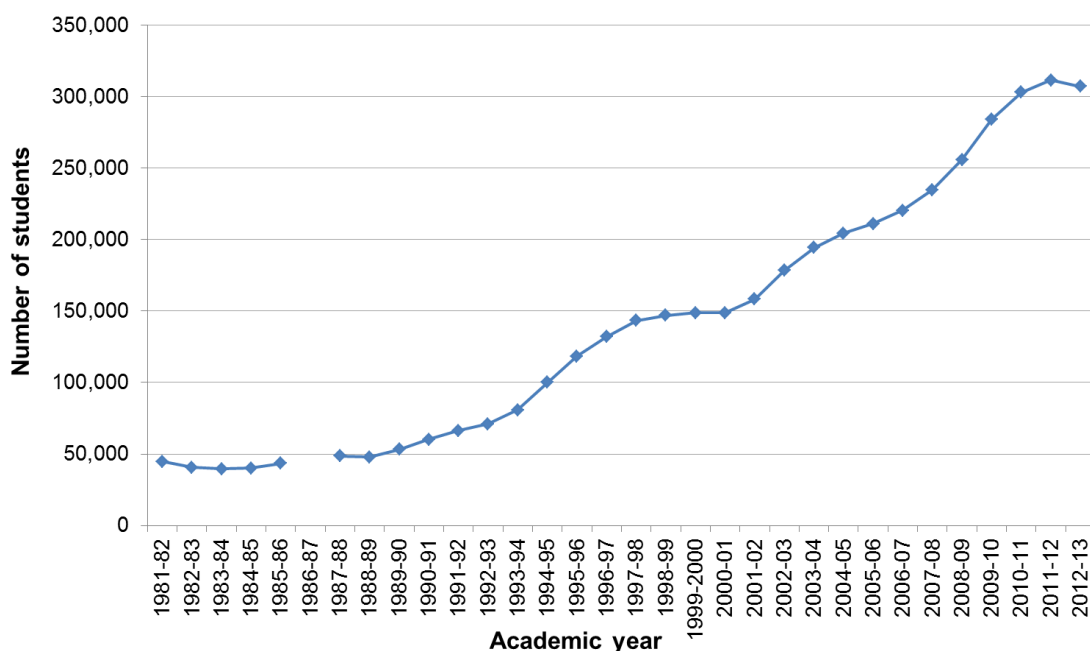
2. As Figure 1 shows, there has been strong growth in international enrolments over the past three decades. The first decline was noted in the early 1980s following an introduction of tuition fees for international students, which was most pronounced in international enrolments reported by polytechnics and further education colleges. Decelerated growth in student enrolments was experienced in the period 1999-2001. The Asian financial crisis which started in 1997 significantly reduced the affordability of studying abroad and reduced student demand from Malaysia and Singapore, which were among the largest countries of origin for international students in England at that time. The period of strong growth which followed was partly as a result of a rise in student demand from China and India. In addition, a decline in international students in the US following tighter immigration policy introduced after the events of 11 September 2001 might have aided the strong growth in England. Figure 1 also shows that the downturn in student enrolments in 2012-13 is the first drop in 29 years.

### Note on data

The analysis within this report draws on data from Higher Education Students Early Statistics Survey (HESES) and Higher Education in Further Education: Students Survey (HEIFES) returns. These indicate the numbers of international student enrolments to higher education institutions (HEIs) and further education colleges (FECs) in England in the current academic year 2013-14.

Historical time series are based on detailed data from the Higher Education Statistics Agency. The latest year for which data are available is 2012-13.

**Figure 1: International and EU students registered on full-time programmes at English HEIs 1981-82 – 2012-13<sup>2</sup>**



Source: 1981-82 to 1993-94 figures sourced from 'University statistics (Universities' Statistical Record)' published by the former Universities Funding Council (previously the University Grants Committee); and from 'Statistics of education students in further and higher education' published by the former Department for Education (previously the Department for Education and Science). There is a gap in our data in 1987-88. Figures for 1994-95 to 2012-13 are sourced from 'Students in HE institutions' published by the Higher Education Statistics Agency. While efforts have been made to provide consistency of coverage and populations, there were a number of known changes in definition and remit that affect the time series but for which we are unable to make any adjustment. The chart shows students in all years of study.

3. Quality of education is the most influential factor in the decision making of prospective international students when they consider different countries as potential study destinations (British Council, 2013<sup>3</sup>; International Graduate Insight Group 2013<sup>4</sup>). English higher education also has the benefit of a long tradition and the provision of courses in a global language.

4. An additional attraction of higher education in England is the relatively shorter courses compared with other countries (Cemml and Bekhradnia, 2008)<sup>5</sup>. For higher education providers, shorter courses also mean much greater recruitment effort in order to maintain the student flows. New entrants into English higher education institutions in 2012-13 represented 53 per cent of the total international and EU enrolment, which means that providers overall need to recruit more than half of the student body every year to replenish numbers. The proportion is highest in postgraduate programmes where new entrants are 65 per cent of the total international and EU enrolments. International comparisons show that these proportions are high, with new entrants to higher education

in Australia estimated at 38 per cent in 2012-13, 31 per cent in the US and 33 per cent in Germany. If the market was to expand, even greater numbers of students would need to be recruited annually. This highlights the importance of a streamlined and efficient student visa process.

5. This report examines shifts in international student enrolments and explores what may have caused them. It focuses on the entrant student population, which indicates the latest developments in student enrolment.

6. Student retention and higher education outcomes for international students will be a focus of further analysis by HEFCE and will complement this study in due course.

## Key facts

Numbers of overseas entrants to higher education in England have **declined in 2012-13 – the first fall in numbers in 29 years.**

**EU full-time undergraduate entrants fell by almost a quarter in 2012-13** – probably due to the increased tuition fees.

Shorter courses in England compared with other countries mean 53 per cent of all international enrolments are new entrants - **English higher education institutions have to work harder to replenish overseas student numbers each year.**

Full-time postgraduate masters courses are increasingly reliant on international entrants – **74 per cent of entrants in 2012-13 were from outside the UK.**

There are **declining numbers of entrants from South Asia** – particularly India and Pakistan – at undergraduate and postgraduate levels.

There is **more English higher education delivered overseas than in England** – through transnational education.

A large proportion of international taught masters entrants studying full-time come from **China – 23 per cent of entrants in 2012-13, compared with 26 per cent from the UK.**

## Overseas entry to undergraduate education

### How many undergraduate entrants come from overseas?

7. The overall decline experienced in 2012-13 was mainly concentrated in postgraduate taught courses, whereas entrants to undergraduate education were less affected. Full-time international entry to undergraduate courses at English HEIs saw strong growth of at least 10 per cent per year between 2007-08 and 2010-11 – but thereafter, growth fell to around 2 per cent a year (Figure 2). In the current academic year, 2013-14, numbers of international entrants increased by 3 per cent (1,000 students) compared with the previous year. Overall, there were 51,000 full-time undergraduate international entrants<sup>6</sup>.

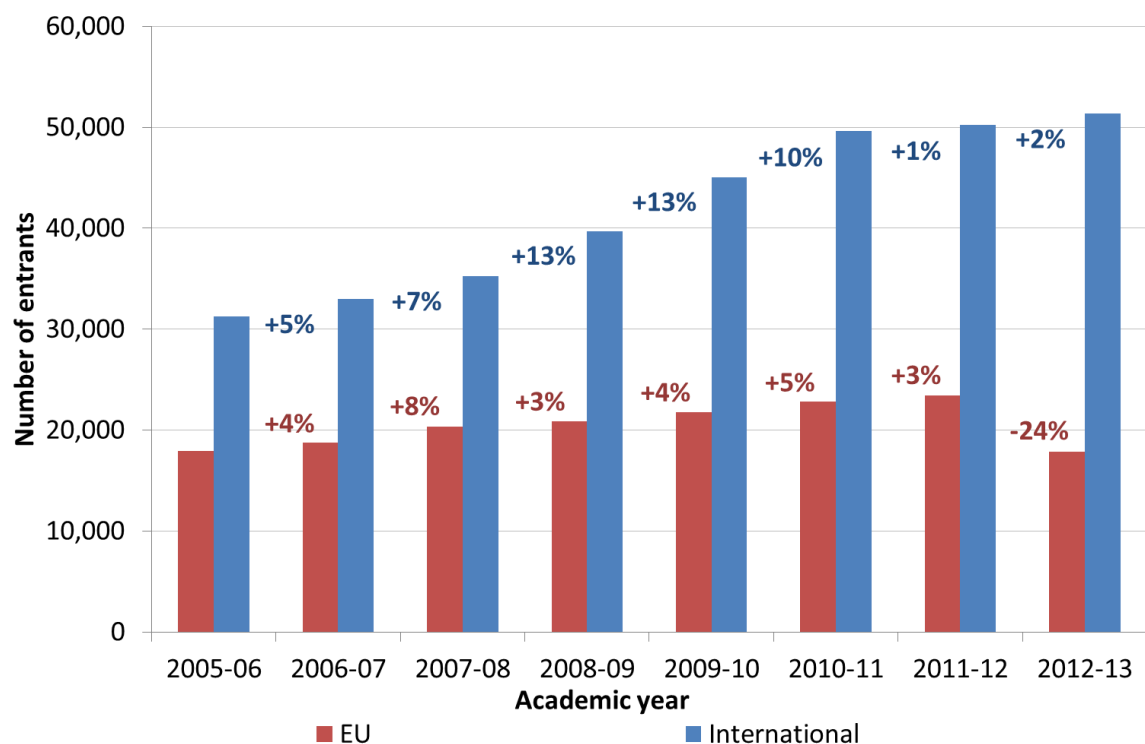
8. There was a steady growth in entrants from the rest of the EU up until 2011-12, averaging around 4 per cent per year between 2007-08 and 2011-12. However, in 2012-13 numbers of EU entrants to full-time undergraduate courses at English HEIs fell by almost a quarter. This is likely to be related to the increase in the maximum level of tuition fees in that year from £3,465 to £9,000. With much lower fee levels for undergraduate education in the rest of the EU<sup>7</sup>, this is likely to have acted as a financial disincentive to study in England.

#### Note on definitions

This report looks at overseas entry to higher education in England. It splits this into:

- Entry from European Union countries outside the UK. Students from these countries are entitled to some of the same support from Government as students from the UK, and pay the same fee levels as students from England. For brevity, we refer to these students as EU entrants.
- International entry – defined as entry from the rest of the world outside of the European Union. These students are not entitled to government student support, and so have to finance all of their own fee and living costs.

**Figure 2: EU and International undergraduate entrants (full-time mode of study)**



Source: Analysis of the HESA standard registration population at English HEIs 2005-06 to 2012-13.

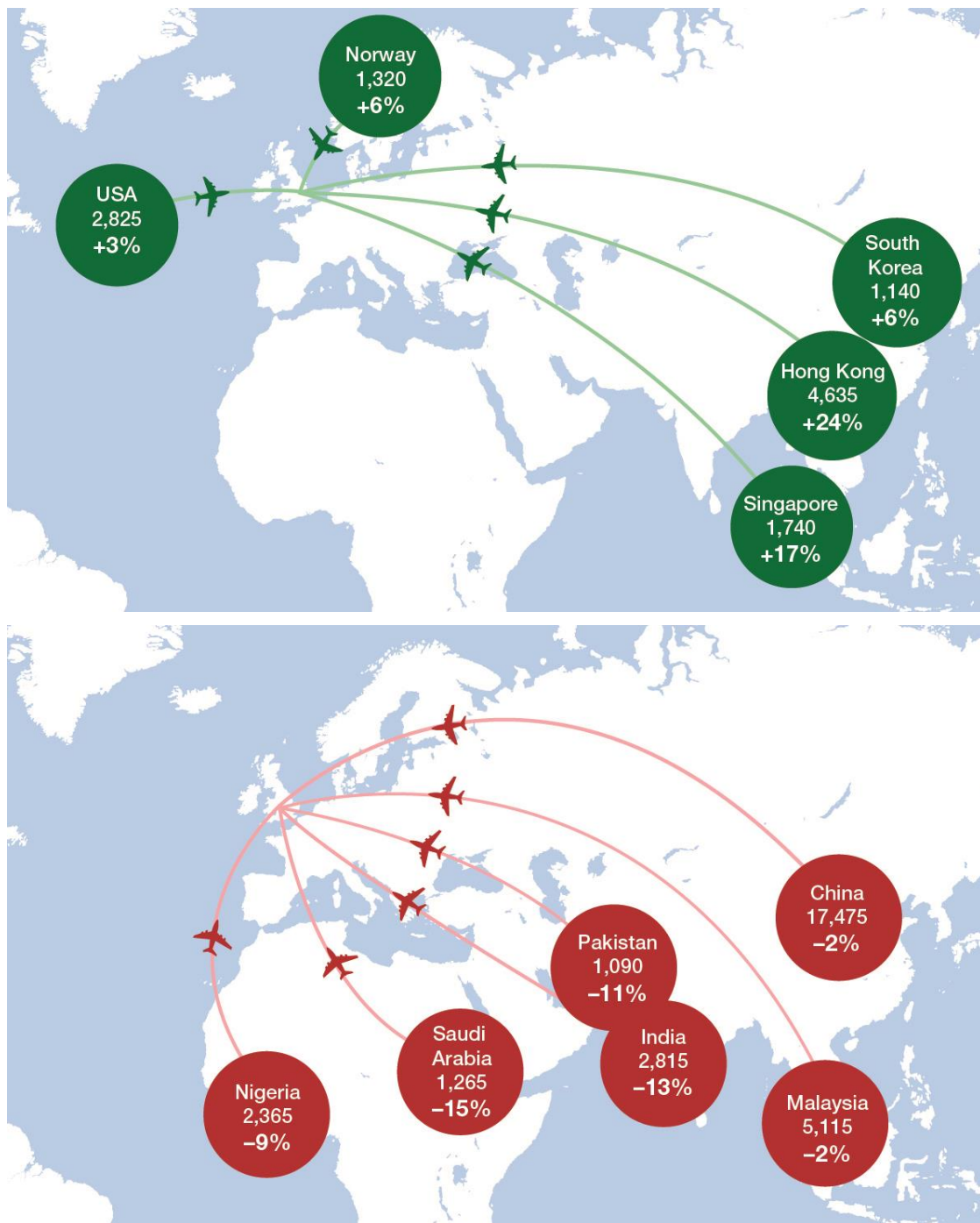
### Where do undergraduate entrants from outside the EU come from?

9. Figure 3 shows changes in international entry to full-time undergraduate education. It gives the overall number of entrants from countries with the largest numbers entering higher education in England, and the percentage change since 2011.

10. Full-time undergraduate entrants grew by 3 per cent (1,700) between 2010-11 and 2012-13. Students from Hong Kong made up a large proportion of this growth. This is likely to be due to changes in the education system in Hong Kong and the graduation of a double cohort, resulting in an excess supply of some 10,000 students who could not be accommodated in the local higher education system<sup>8</sup>.

11. Brazil is another country with strong growth with undergraduate entrants more than doubled to reach 500. However, the growth is from a low base and does not feature in the chart above.

**Figure 3: Changes in flows of undergraduate students from outside the EU in 2012-13**



Source: Analysis of the HESA standard registration population at English HEIs, 2011-12 to 2012-13. Percentages are the change in the number of undergraduate international entrants at English HEIs by their reported country of domicile. Figures are the total number of undergraduate entrants in 2012-13. This only includes countries with largest numbers of students entering undergraduate higher education in England in 2011-12.



## **How do overseas students enter undergraduate course in England?**

12. A high proportion of international entrants commencing undergraduate studies in England do so part-way through a course – that is, starting in the second or third year of a programme of study, rather than the first. About a quarter of full-time international undergraduate entrants in 2012-13 (13,900 students) began undergraduate study in year two or three. This could be due to progression into English higher education from transnational education programmes delivered overseas, or through articulation arrangements with overseas institutions. Some progression also happens within the UK when students study ‘year zero’ with another education provider and then progress into year one or two with an HEI. It is difficult to identify the scale of this progression through the current data collection. Around 60 per cent of international entrants to year two and year three are from China, Malaysia and Bangladesh; these students represent 45 per cent of all Chinese, 41 per cent of all Malaysian, and 50 per cent of all Bangladeshi undergraduate entrants.

## **Are there any specific features of overseas entrants to undergraduate courses?**

### **Age**

13. At the full-time first degree level, mature international entrants fell by 5 per cent (1,000, to around 17,000) between 2010-11 and 2012-13, while young international entrants increased by 16 per cent (4,000, to 29,000). The increase is likely to be due to increasing numbers of entrants from Hong Kong.

14. For undergraduate courses other than first degrees, mature international entrants fell by a third (1,200 students, to around 2,500) between 2010-11 and 2012-13. Their young counterparts are small in number and saw only marginal change.

15. Undergraduate courses other than first degrees are credit bearing courses such as foundation degrees, diplomas and certificates of higher education, Higher National Diplomas (HND) and Higher National Certificate (HNC), and undergraduate PGCE.

### **Subjects**

16. International entrants to full-time undergraduate science, technology, engineering and mathematics (STEM) courses fell by 8 per cent (1,100) between 2010-11 and 2012-13. This decline is almost entirely explained by falls in entrants to full-time first degree courses in computer sciences (down by 900, or 35 per cent) and engineering and technology (down 300, 5 per cent). There is some offsetting of these reductions by an increase of 200 (up 18 per cent) in entrants to full-time mathematical sciences courses.

## **Intentions towards further study**

17. HEFCE’s first Intentions After Graduation Survey revealed that undergraduate international students had a much higher propensity to want to continue their education at postgraduate level, with 69 per cent stating they were certain or likely to enter postgraduate study compared with 41 per cent of UK students and 66 per cent of EU students.

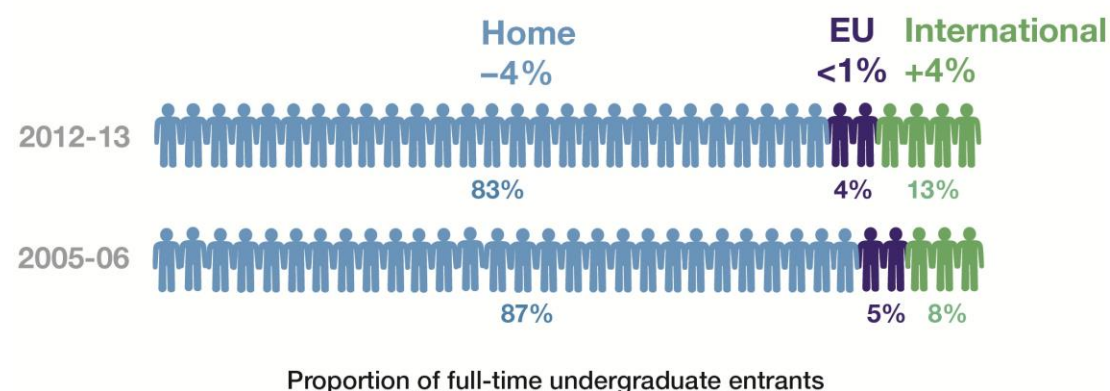
## How international is the overall undergraduate student body?

18. Figure 4 shows that the numbers of full-time entrants to undergraduate courses from EU countries did not change much between 2005-06 and 2012-13. They made up 4 per cent of the full-time undergraduate entrant population in 2012-13.

19. In contrast, the share of international entrants grew within the same period from 8 per cent of the full-time undergraduate entrant population in 2005-06 to 13 per cent in 2012-13.

20. Nonetheless, the large majority of entrants to undergraduate courses are from within the UK.

**Figure 4: Full-time undergraduate entrants by student domicile, 2005-06 and 2012-13**



Source: Analysis of the HESA standard registration population at English HEIs, and the equivalent population at English further education colleges, 2005-06 to 2012-13. Numbers of other EU full-time undergraduate entrants were 0.3 per cent (100 students) lower in 2012-13 than in 2005-06.

## Further indications of shifts in overseas recruitment in 2013

19. Immigration data for July to December 2013<sup>9</sup>, which capture most of the higher education intake in 2013-14, provide detailed figures for visas issued to prospective students to enable them to study in the UK. The data cover all levels of study, and it is not possible to separate visas specifically issued for higher education. The data suggest, however, that East Asia is continuing to lead the growth in student numbers in 2013-14: the most significant increases are from China, Hong Kong (Special Administrative Region of China) and Malaysia. The increase in student numbers from Malaysia, following previous declines, among other factors appears to follow the introduction of a simplified student visa application process for students seeking study at universities with 'highly trusted sponsor' status in 2012<sup>10</sup>.

20. Significant growth was recorded in student visas for Brazilian students. Many of these are likely to be associated with the Science without Borders programme, under which 10,000 Brazilian students over four years are expected to benefit from studies in the UK at undergraduate and postgraduate level<sup>11</sup>.

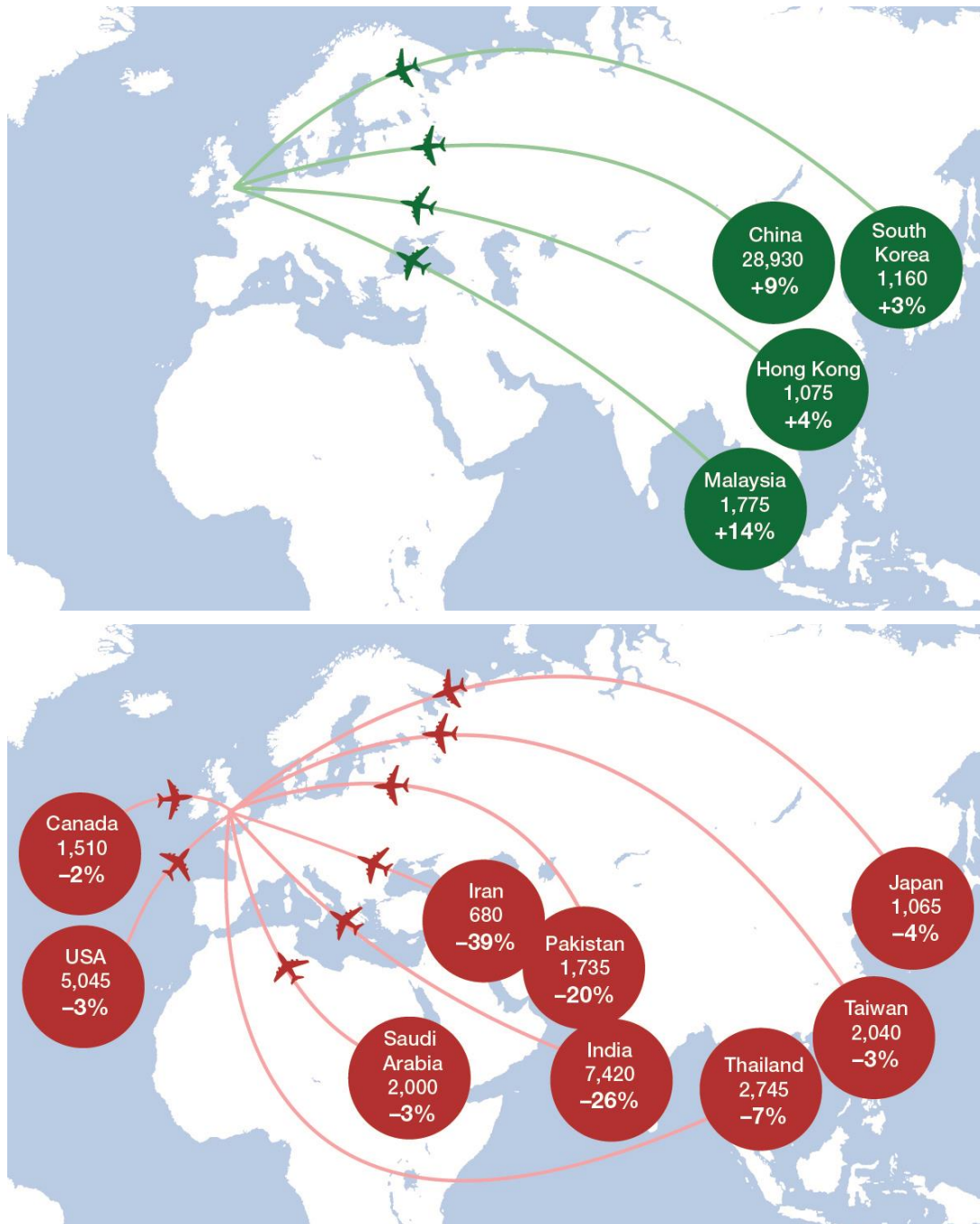
21. The data also suggest a continued decline in student visas issued to applicants from countries mainly in South Asia – specifically Pakistan, India, Sri Lanka and Iran.

### Overseas entry to postgraduate education

#### Where do postgraduate entrants from outside the EU come from?

22. Figure 5 changes in international entry to postgraduate education. It gives the overall number of entrants from countries with the largest numbers entering higher education in England, and the percentage change since 2011.

**Figure 5: Changes in flows of postgraduate students from outside the EU in 2012-13**



Source: Analysis of the HESA standard registration population at English HEIs, 2011-12 to 2012-13. Percentages are the change in the number of full-time postgraduate international entrants at English

HEIs by their reported country of domicile. Figures are the total number of postgraduate entrants in 2012-13. This only includes countries with largest number of students entering postgraduate higher education in England in 2011-12

23. There were reductions in entrants since 2010-11 from India (51 per cent, 7,000 students) and Pakistan (49 per cent, 1,400 students), partly offset by growth in demand from China (44 per cent, 8,300 students).

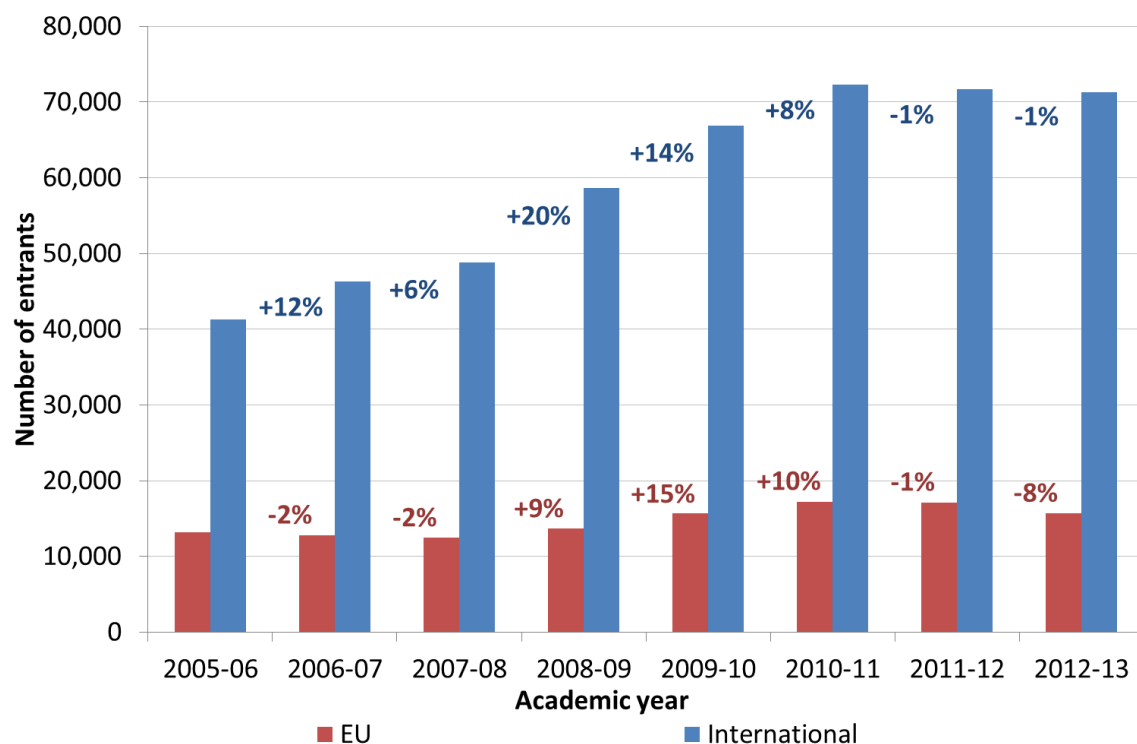
24. There is good growth in student visas issued to Indonesian students in the period July to December 2013, though it is from a low base. This growth is expected to be related to the Indonesia–UK DIKTI scholarship programme for postgraduate students, mainly at doctoral level. About 750 scholars are expected to be trained in the UK over a period of five years<sup>12</sup>.

25. Parallel to the declines in entrants from India and Pakistan in England, the Council for Graduate Schools (2013) in the US reported a 10 per cent increase in international students entering postgraduate study in the US, with growth mainly driven by an increase of 40 per cent in students from India<sup>13</sup>. Another country, which had significant increases in enrolments in 2013-14 from India and Pakistan (across all levels of study) is Australia, where higher education commencements from these two countries showed increases of 66 per cent (3,353 students) and 46 per cent (846 students) respectively<sup>14</sup>. In March 2012 Australia introduced a streamlined visa processing service which means that university applications are considered as ‘low risk’ irrespective of students’ countries of origin. Along with other factors, this is believed to have positively affected demand for higher education in 2013. From March 2014, this arrangement has been extended to cover visa applicants to some non-university higher education providers<sup>15</sup>.

26. The number of entrants from the EU has fluctuated more since 2005-06, but has also seen decline since 2011-12.

27. International entry to postgraduate taught programmes enjoyed high year-on-year growth in the six-year period to 2010-11. The following year marked a stark change in this trend (Figure 6): the numbers of entrants to full-time postgraduate taught programmes decreased by 1 per cent (1,000 students) between 2010-11 and 2012-13. HESES data for 2013-14 suggest a modest recovery of 400 entrants.

**Figure 5: Changes in flows of postgraduate students from outside the EU in 2012-13**



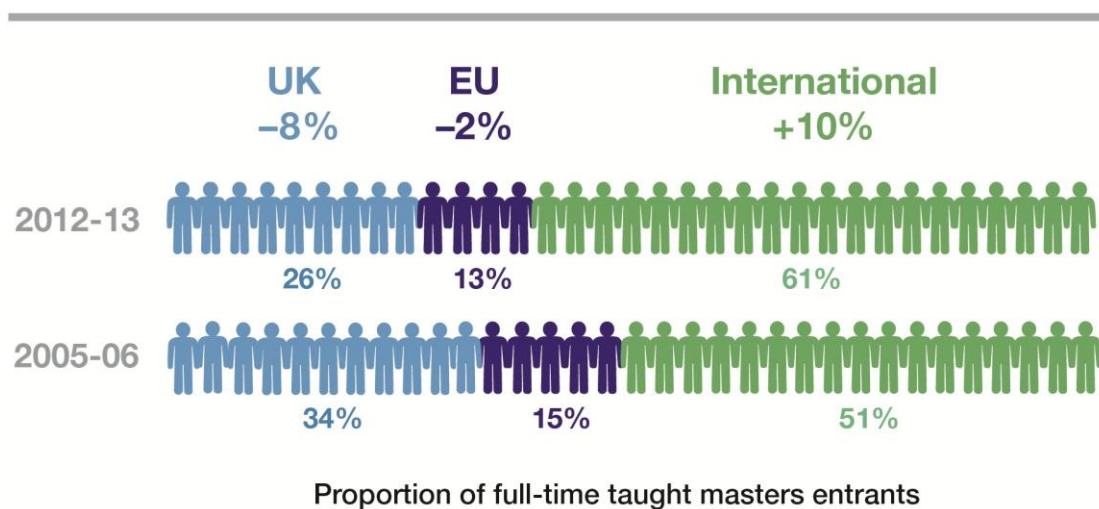
Source: Analysis of the HESA standard registration population at English HEIs, and the equivalent population at English FECs, 2005-06 to 2012-13.

### **What is the most popular type of postgraduate study for international entrants?**

28. International students make up over a quarter of all postgraduate numbers, but in certain subject areas they constitute more than half of the cohort, which makes parts of the sector vulnerable to volatility in this market.

29. The area of postgraduate study most sought after by international students is taught masters courses, where numbers of international entrants are higher than those of home students. The majority of UK students (52 per cent) commencing taught masters programmes studied part-time. Figure 7 shows that between 2005-06 and 2012-13 the proportions of international entrants to full-time taught masters courses grew from 51 per cent to 61 per cent. By comparison, the proportion of EU students dropped from 15 per cent to 13 per cent and UK students fell from 34 per cent to 26 per cent. Overall, the proportion of non-UK students on full-time masters courses in 2012-13 was 74 per cent.

**Figure 7: Full-time taught masters entrants by student domicile, 2005-06 and 2012-13**



Source: Analysis of the HESA standard registration population at English HEIs, 2005-06 to 2012-13

30. Given recent declines in key postgraduate markets including India, Pakistan and Iran, the share of the full-time taught masters students from China, which maintained its growth rate, reached 39 per cent of the non-EU taught masters entrant population in 2012-13. As a share of the overall full-time taught masters population, students from China now form 23 per cent of entrants, which is close to the UK proportion of 26 per cent. More than half (52 per cent) of the entrants from China are on management and business studies courses.

31. The degree of reliance on students from China at full-time masters level varies across the subject group. It is highest in maths, where Chinese students represent 58 per cent of all international full-time entrants, followed by media studies (56 per cent), business and management studies (47 per cent), engineering (39 per cent), architecture and chemistry (37 per cent each) and creative arts (35 per cent).

32. This situation is not unusual globally. Students from China dominate international student recruitment in the major English speaking study destinations (US, New Zealand, Australia and Canada). For example, in Australia in 2012-13, 42 per cent of all entrants at undergraduate and postgraduate level were Chinese, compared with 32 per cent in England and 29 per cent in the US. Data released earlier this year on international enrolments in Australia in 2013-14 show this proportion has dropped to 39 per cent.

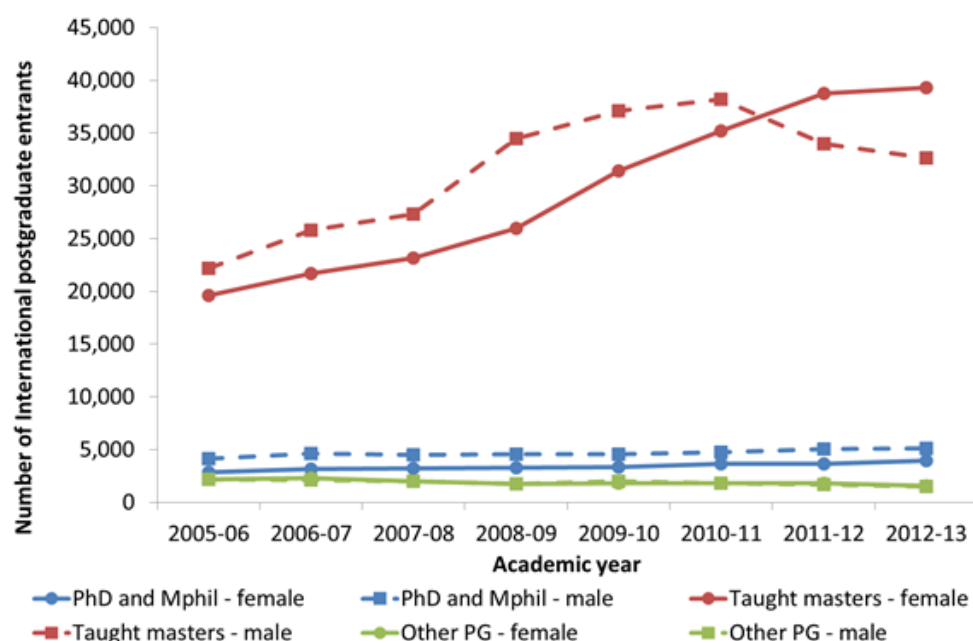
### **Are there any specific features of overseas entrants to postgraduate courses?**

#### **Gender**

33. These shifts in student numbers from some major sending countries have affected the gender balance in student numbers at postgraduate level, as shown in Figure 8. Numbers of male entrants to taught masters programmes started to decline in 2010-11. Declines in entrants from India and Pakistan had a major impact on this, with numbers of male entrants from these two countries dropping by more than half (54 per

cent) in the period 2010-11 to 2012-13. This equates to 5,400 fewer male entrants from India and 1,300 fewer from Pakistan.

**Figure 8: International entrants to postgraduate courses registered at HEIs in England by sex and level of study, 2005-06 to 2012-13**



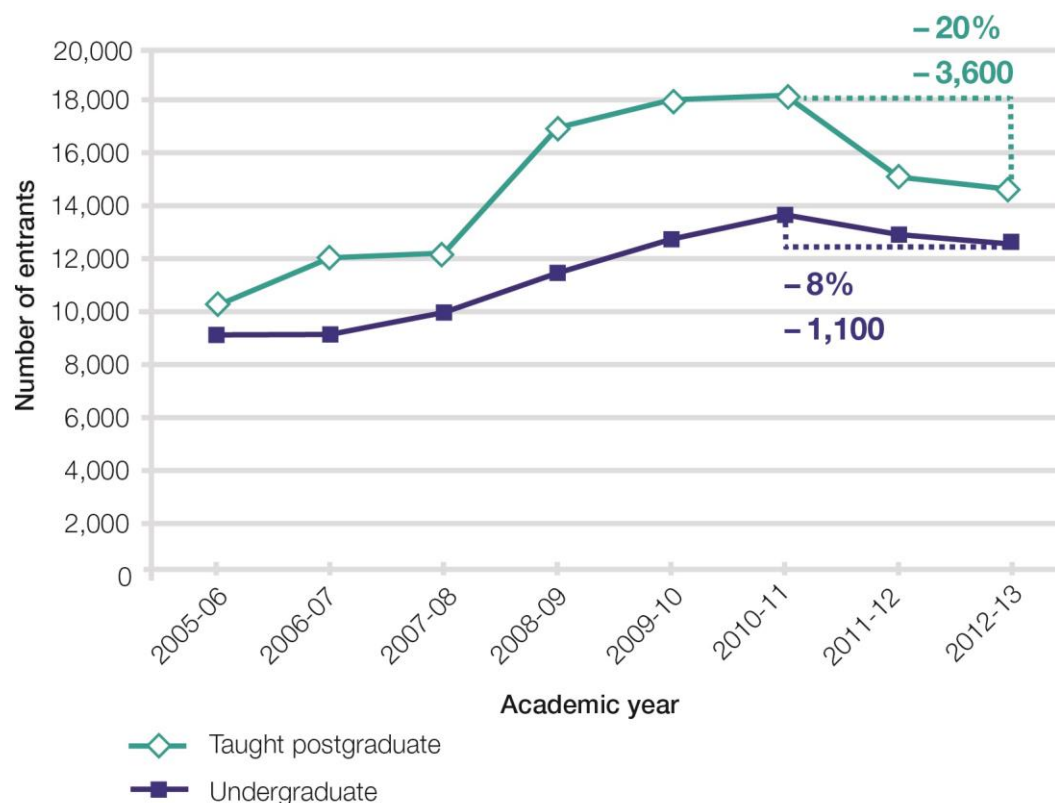
Source: Analysis of the HESA standard registration population at English HEIs, 2005-06 to 2012-13

## Subjects

34. The declines in student numbers from these two countries mainly affected STEM courses – entrants from India were down 64 per cent, and from Pakistan, 65 per cent. Figure 9 shows that total numbers of international entrants to full-time postgraduate taught STEM courses dropped by around 3,600 (20 per cent) between 2010-11 and 2012-13. Falls were concentrated in the subject areas of computer sciences (down 2,000, 37 per cent) and engineering and technology (down 1,000, 2 per cent).



**Figure 9: Full-time international entrants to STEM subject areas registered at English HEIs by level of study, 2005-06 to 2012-13**



Source: Analysis of the HESA standard registration population at English HEIs, 2005-06 to 2012-13

### Postgraduate research courses

35. International entrants to postgraduate research study (almost uniformly studying full-time) increased by 700 (8 per cent) to 9,000 students between 2010-11 and 2012-13. This was the driver for overall growth in full-time postgraduate research entrants (UK, other EU and international) of around 700 (3 per cent). There has been a further 5 per cent increase (400 students) in international entrants to postgraduate research programmes in the current academic year 2013-14 (HESES and HEIFES data).

36. Among full-time students in postgraduate research programmes, the UK has almost equal proportions of students from the UK (51 per cent) and from other EU and international countries (49 per cent). Internationally, most of the Organisation for Economic Co-operation and Development (OECD) countries have larger proportions of international students enrolled on their advanced research programmes than at other levels of study. This reflects the attractiveness of research in these countries, and equally, a tendency among universities to recruit internationally because of the contribution such students can make to research and development<sup>16</sup>. Comparative OECD data for 2011 indicate that the highest proportions of international students in advanced research programmes were in Switzerland (where, like England, about half of the students are international), with proportions of 40 per cent or above in France, the Netherlands and New Zealand.



## Transnational education

37. Transnational education (TNE) is the provision of education to a student based in a different country from the one of the awarding institution<sup>17</sup>. Over recent years TNE provided by English HEIs has seen significant growth and increasing diversity in the modes of delivery.

### How much transnational education is there?

38. There are more international students doing degrees with English higher education institutions outside England than in England. There were 545,000 students registered on TNE courses in 2012-13, most of them based in Asia. One institution accounts for 48 per cent of these students.

39. There was growth of 5 per cent (24,500) in the number of students on TNE programmes in 2012-13 compared with the previous year.

40. A decline of 4 per cent (about 2,000 students) was observed in Singapore, the second biggest TNE market for England (second to Malaysia). All declines in Singaporean activity were concentrated in undergraduate education provision registered at overseas partner institutions, where a fall of 14 per cent (or 4,000 students) was observed and partly offset by increases in other TNE activity registered at English institutions. A possible explanation is an increase in the number of overseas institutions which, acquiring degree-awarding powers in their own country, pull away from existing TNE arrangements or progress into a new type of TNE activity which the current data collections are unable to identify.

### Where does transnational education take place?

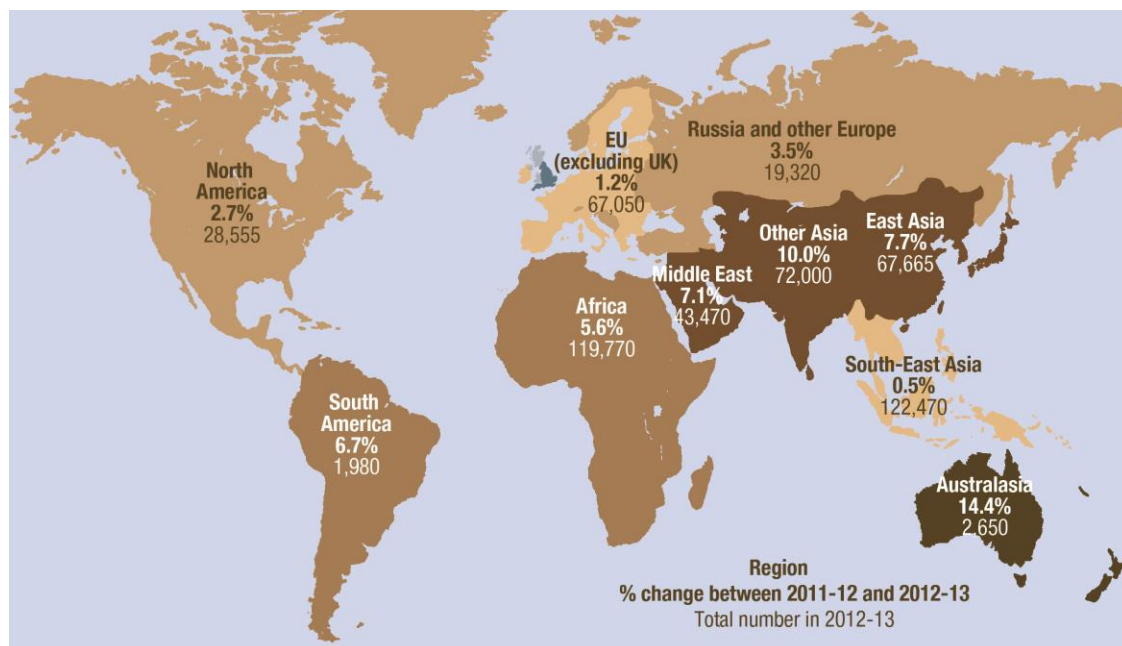
41. Figure 10 shows changes in transnational education students between 2011 -12 and 2012-13, giving the percentage change and the overall number of students from each region.

#### Note on transnational education data

The TNE data have limitations – for example, the existing definitions and data collections do not allow for the full and comparable identification of the offshore activities of English HEIs. These are additionally complicated by the changing nature of their engagement with students and partner institutions overseas. Anecdotal evidence also suggests that TNE is increasingly being used for activities and engagement with overseas institutions linked to research, but at present it is impossible to estimate the scale of these activities.

However, the available data do present a useful broad picture of a wide range of activity.

**Figure 10: Growth in transnational education 2011-12 and 2012-13 (total student population)**



Note: Countries shaded the darkest brown saw the biggest growth in this period; countries shaded the lightest brown saw the smallest growth.

### **What type of higher education does TNE tend to be?**

42. About 85 per cent of TNE is at undergraduate level, and most of it is delivered through partner institutions based overseas. If the students of a single very large TNE institution are excluded from the analysis, the proportion of undergraduate students drops to 71 per cent (with postgraduate taught students accounting for 27 per cent and research students for 1 per cent).

43. This study discussed earlier that international entrants to undergraduate study commence their studies part-way through a course in their second or third year. Except for Bangladesh (which ranks as the 12th largest country for TNE students), these progressions tend to happen from countries with large number of students enrolled on transnational education programmes like Malaysia, China, Nigeria and Hong Kong. Except Nigeria, these are also countries that have enjoyed good growth in student enrolments. In addition to TNE, part-way progressions also take place through articulation arrangements with overseas partners and also in the UK through private education providers.

## Conclusion

44. While English higher education remains popular worldwide, there has been a decline in the growth of international recruitment since 2010. This is the first significant slowdown in the past 29 years. Data show that while entrants from India and Pakistan have halved in England since 2010, their numbers are growing elsewhere.

45. EU full-time undergraduate entrants fell by almost a quarter in 2012-13 – probably due to the increased tuition fees.

46. Given the generally shorter courses in England, international and EU entrants represent over half (53 per cent) of overall non-UK enrolments. The proportion is highest in postgraduate programmes where new entrants are 65 per cent of the total international and EU enrolments. In comparison, the proportions are 38 per cent in Australia, 33 per cent in Germany and 31 per cent in the US. English higher education institutions have to work hard to maintain international student numbers.

47. About a quarter of all full-time undergraduate international entrants in 2012-13 were students who joined courses after the usual first year start point. This is likely to be largely due to students moving into studies in England from programmes delivered overseas by English higher education institutions, or through articulation arrangements with overseas institutions. Some progression also happens within the UK when students study initially with another education provider and then progress into courses delivered by HEIs.

48. The proportion of full-time taught masters entrants from outside the UK (including other EU countries and international) increased from 66 per cent in 2005-06 to 74 per cent in 2012-13. There is therefore increased exposure of this aspect of postgraduate provision to changes in international demand.

49. Demand for transnational education continues to grow, and showed 5 per cent growth (24,500 students) in 2012-13 compared with the previous year. The highest concentration of TNE students is in South-East Asia, which alone accounts for 23 per cent of the total TNE student population.

50. Further research is required to establish the extent to which the downturn in international students is affecting institutions delivering higher education in England. While the data show that different institutional groups are affected differently, this very much depends on the subject mix they offer, which differs between institutions, particularly at postgraduate level. Given the high exposure at postgraduate masters level to non-UK demand, any fluctuations could have an impact on the viability of some subjects at certain English HEIs.

51. In addition, income from international (non-EU) students generated through their tuition fees in 2012-13 came to £3 billion, which represented around 30 per cent of all tuition fee and education contract income reported by English institutions in 2012-13. This growth is expected to remain strong, but there is a risk that future growth will not materialise at the level forecast, and any reduction could have a major impact on institutions' financial positions.

52. International student enrolments so far have dominated the on-going debate in international higher education and the existing international data collections. Student retention and higher education outcomes for international students will be a focus of further analysis by HEFCE and will complement this study in due course.

53. Overall, English higher education remains popular and attractive worldwide. But the recent slowdown points to increasing challenges in recruitment following a long period of growth. With education continuing to become more globalised, competition from a wider range of countries is only likely to increase. Higher education institutions, sector bodies (including HEFCE) and Government need to continue to nurture and support England's international engagement in education. The creation of an enabling environment for collaboration with a wider range of countries in research, teaching and knowledge exchange is emerging as a key determinant of whether higher education in England continues to be a key global player.

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## Notes

<sup>1</sup> BIS (2013) 'International Education: Global Growth and Prosperity', [www.gov.uk/government/publications/international-education-strategy-global-growth-and-prosperity](http://www.gov.uk/government/publications/international-education-strategy-global-growth-and-prosperity)

<sup>2</sup> We are only able to source broadly comparable data for England from 1981. Data collection methodology fluctuated throughout the period and comparisons need to be treated with caution. However, the figures provide a broad picture of growth.

<sup>3</sup> British Council (2013) 'Student Insight', <http://ihe.britishcouncil.org/category/catalog/student-insight>

<sup>4</sup> International Graduate Insight Group (2013) 'International Student Barometer, Autumn'.

<sup>5</sup> Cemmell, J. and B. Bekhradnia (2008) 'The Bologna process and the UK's international student market', HEPI report: [www.hepi.ac.uk/466-1338/The-Bologna-process-and-the-UKs-international-student-market.html](http://www.hepi.ac.uk/466-1338/The-Bologna-process-and-the-UKs-international-student-market.html)

<sup>6</sup> Source: HESES/HEIFES.

<sup>7</sup> European Commission (Eurydice – Facts and Figures) (2013) 'National Student Fee and Support Systems 2013/14', [http://eacea.ec.europa.eu/education/eurydice/facts\\_and\\_figures\\_en.php#fees](http://eacea.ec.europa.eu/education/eurydice/facts_and_figures_en.php#fees)

<sup>8</sup> University World News (2012) 'Students "flee" to change four-year degrees', 23 February, Issue No.210, [www.universityworldnews.com/article.php?story=20120223072121502](http://www.universityworldnews.com/article.php?story=20120223072121502)

<sup>9</sup> Home Office (2013) 'Immigration Statistics, October to December 2013', [/www.gov.uk/government/publications/immigration-statistics-october-to-december-2013/immigration-statistics-october-to-december-2013#study-1](http://www.gov.uk/government/publications/immigration-statistics-october-to-december-2013/immigration-statistics-october-to-december-2013#study-1)

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