



Leading education  
and social research  
Institute of Education  
University of London

# ***Supply and demand for international research students***

***Dr Neil Kemp  
International HE Consultant;  
Visiting Fellow,  
Institute of Education, London***



Leading education  
and social research  
Institute of Education  
University of London

***Presentation based on research for UK HE  
International by the team:***

- Will Archer: International Graduate Insight***
- Colin Gilligan***
- Christine Humfrey***
- Neil Kemp***

***full report available:***

***<http://www.international.ac.uk/resources/>***



Leading education  
and social research  
Institute of Education  
University of London

## ***Focus on:***

- ***UK and research positioning***
- ***funding***
- ***students***

## ***Highlight:***

- ***what goes well***
- ***areas of concern***
- ***strategy options***



## ***A few clear messages -***

- ***UK will continue to need international PGR students:***
  - *particularly STEM*
  - *low UK student demand in key subjects*
  - *major contribution to UK research output*
- ***UK has been very successful over last few years***

### ***BUT***

- ***Current UK recruitment and funding ‘model’ is not sustainable***
- ***Competition growing rapidly – US, across Europe, Australia, others***

## *what might be changing?*

- *more competitors, both countries and institutions – with different approach to funding and student support;*
- *re-invigorated USA with weaker dollar - most dominant global player;*
- *declining numbers from countries from which UK had recruited large numbers – including recently China;*
- *increasingly different (higher) expectations of students;*
- *lower levels of interest by UK domestic students in STEM subject areas*

## ***some numbers .....***

- ***>50,000 international pgr students in UK***
  - ***EU comprises approximately 30% of these***
- ***international comprise 42% of all PGR students***
- ***worth > £600 million pa to UK economy direct –  
much more indirect***

# Total numbers of international PGR students in UK according to lead countries of origin

LONDON

University of London

		Compound annual growth last 4 years (%)
<b>Total</b>	<b>50365</b>	<b>4.6</b>
<b>China</b>	<b>5160</b>	<b>16.5</b>
<b>United States</b>	<b>3475</b>	<b>5.9</b>
<b>Greece</b>	<b>3070</b>	<b>-1.0</b>
<b>Germany</b>	<b>2520</b>	<b>5.6</b>
<b>India</b>	<b>1975</b>	<b>12.7</b>
<b>Malaysia</b>	<b>1875</b>	<b>-2.0</b>
<b>Italy</b>	<b>1845</b>	<b>3.2</b>
<b>France</b>	<b>1340</b>	<b>-0.1</b>
<b>Canada</b>	<b>1300</b>	<b>3.6</b>
<b>Irish Republic</b>	<b>1235</b>	<b>1.3</b>
<b>Taiwan</b>	<b>1265</b>	<b>4.2</b>
<b>Thailand</b>	<b>1155</b>	<b>7.8</b>

***Overall proportion of international PGR students in UK:  
42%***

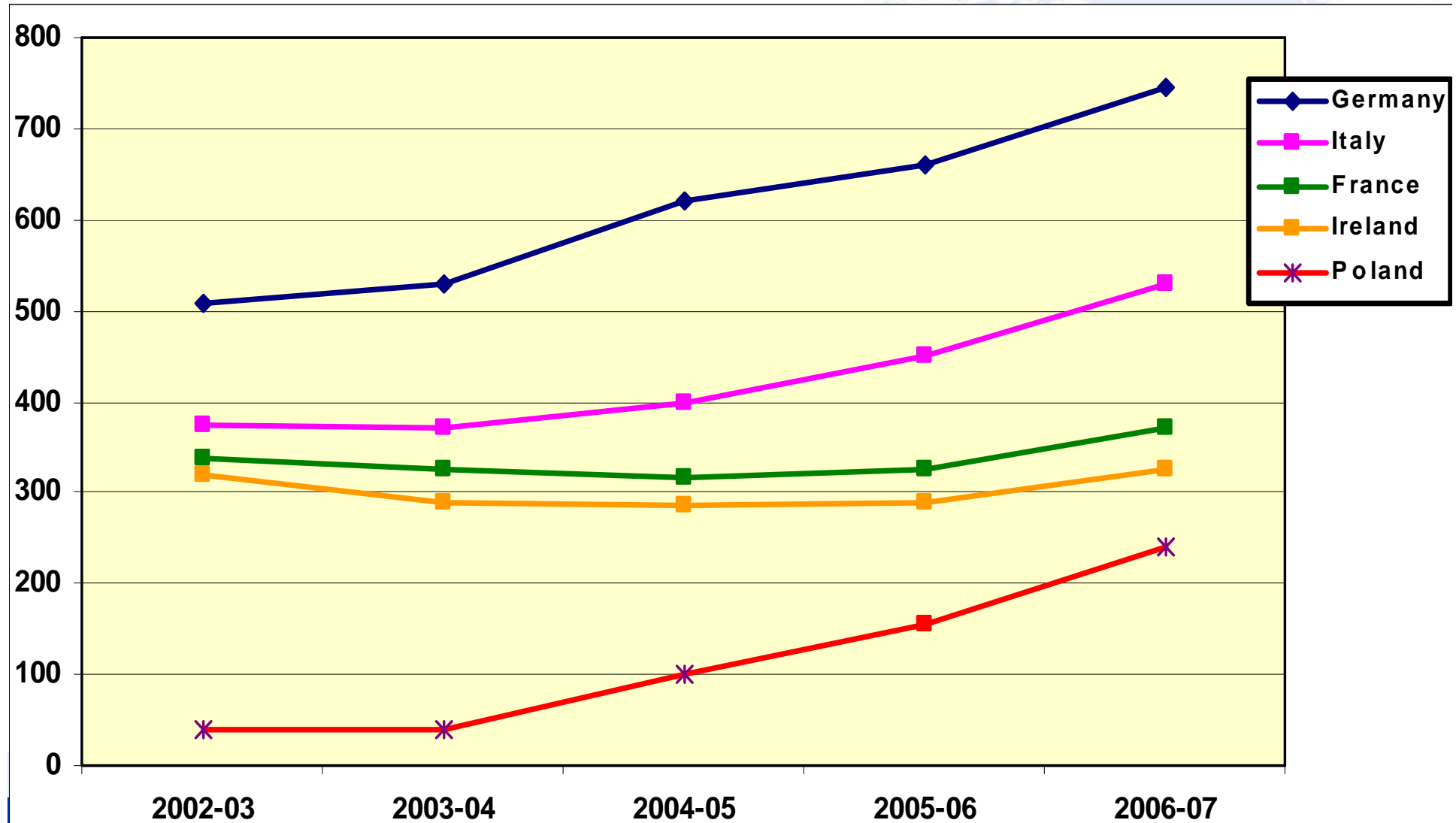
***Disciplines with international students in the majority  
include:***

- ***Engineering and technology (58%);***
- ***Mathematics and computing (53%);***
- ***Architecture and building (58%);***
- ***Social sciences (53%)***
- ***Law (59%);***
- ***Business and management (58%).***

# *New international student enrolments: trends according to EU countries*



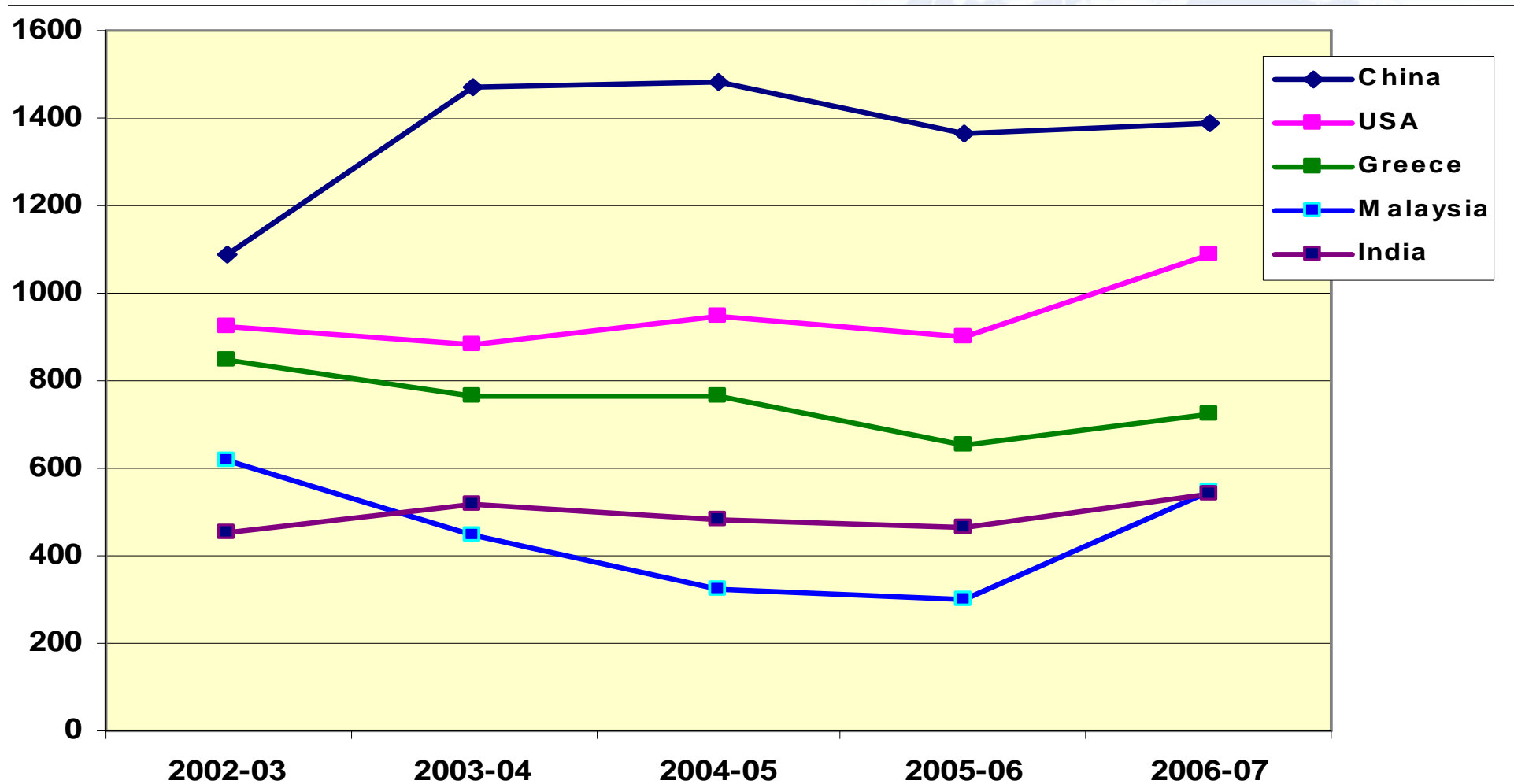
Leading education  
and social research  
Institute of Education  
University of London



# *New international student enrolments: trends according to leading source countries*



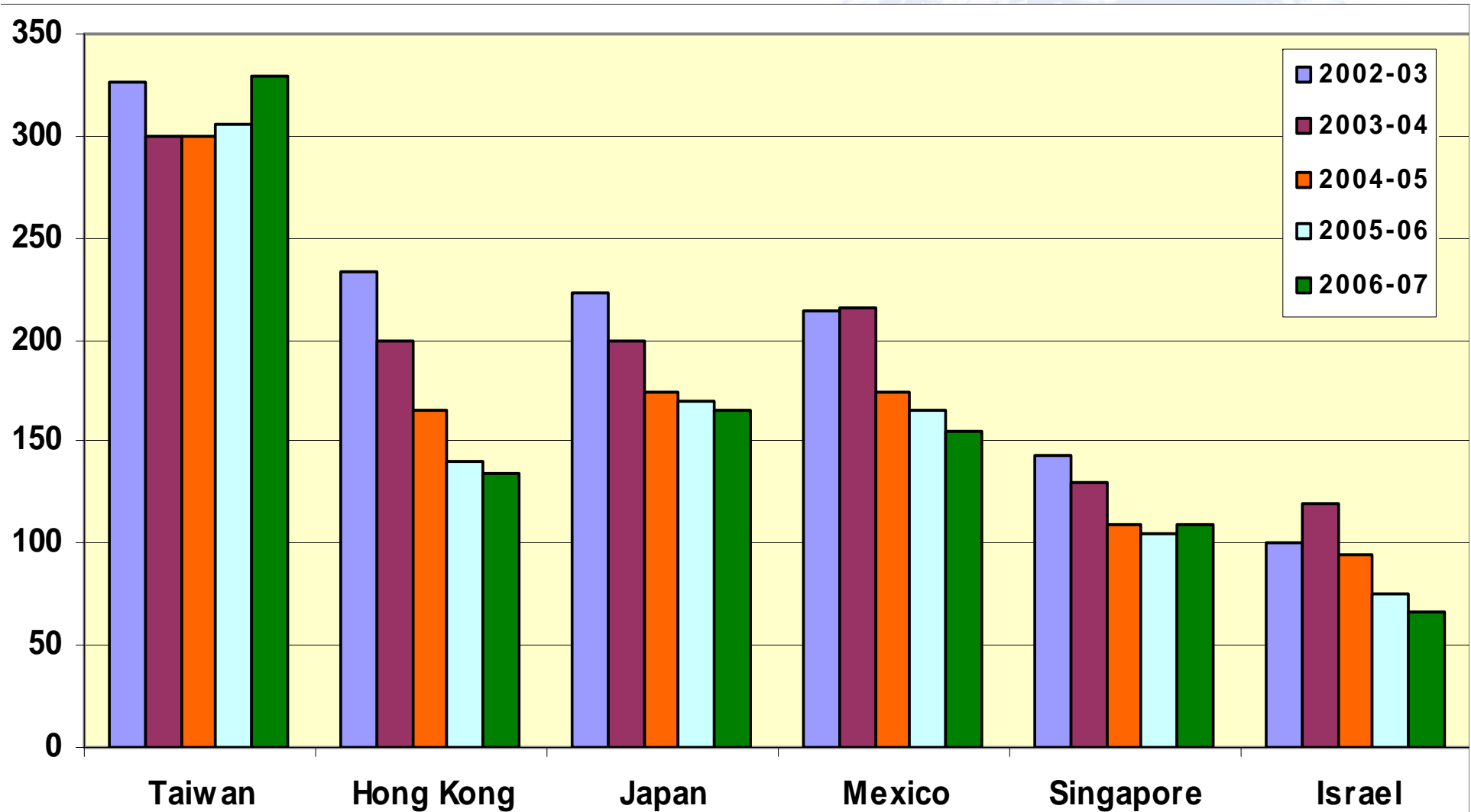
Leading education  
and social research  
Institute of Education  
University of London



# *New international student enrolments: trends from countries with declining numbers*



Leading education  
and social research  
Institute of Education  
University of London



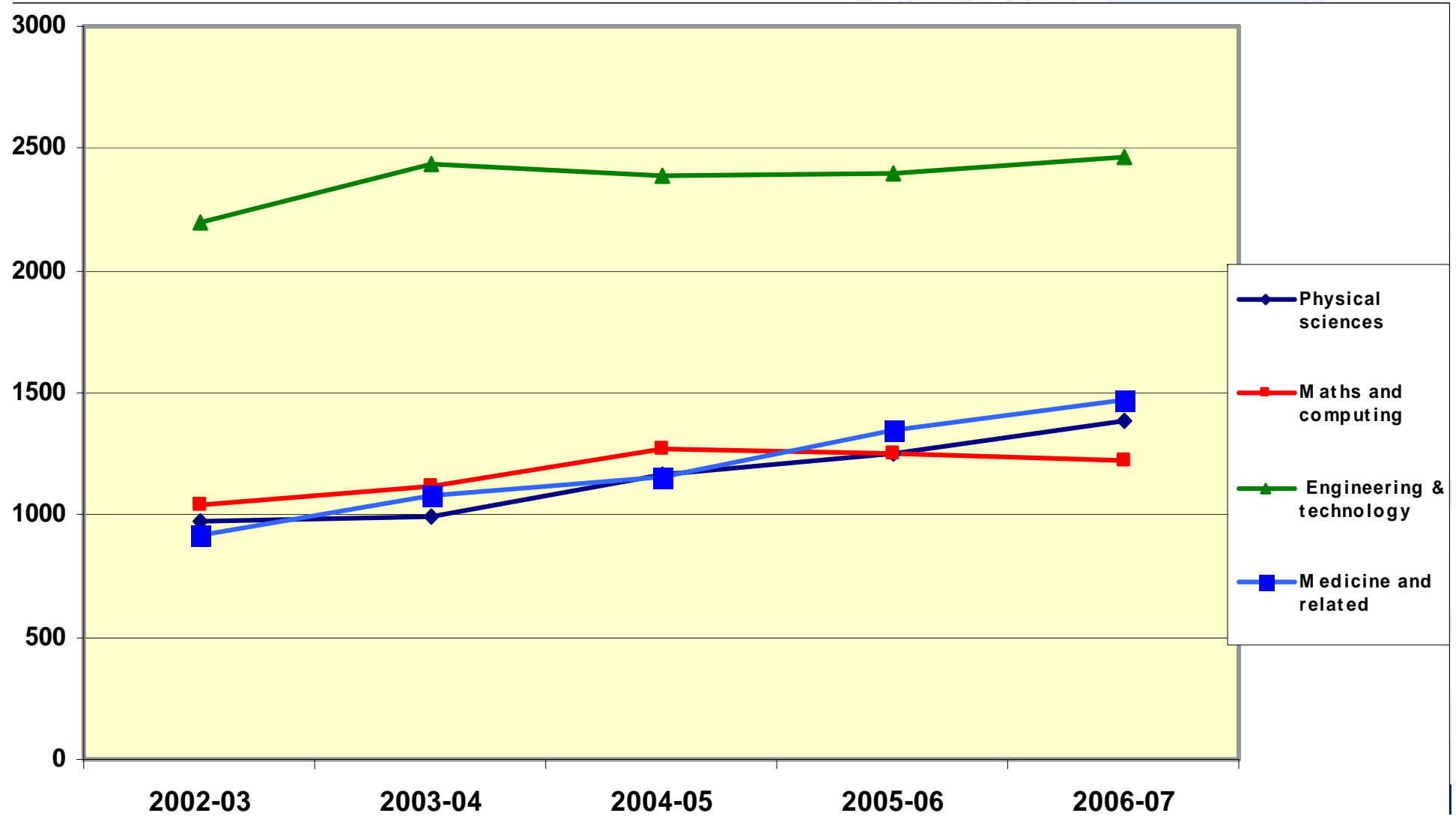
# **Lead countries according to subject area**

- **Engineering and technology:**  
*China, Malaysia, Greece, India, Italy*
- **Physical sciences**  
*China, France, Germany, Italy, Spain*
- **Biosciences:**  
*Greece, China, Germany, India, USA*
- **Social sciences**  
*USA, Germany, China, Italy, Greece*
- **Humanities**  
*USA, Canada, Germany, Greece, Korea*

# Trends in *new enrolments* for international PGR students according to subject area



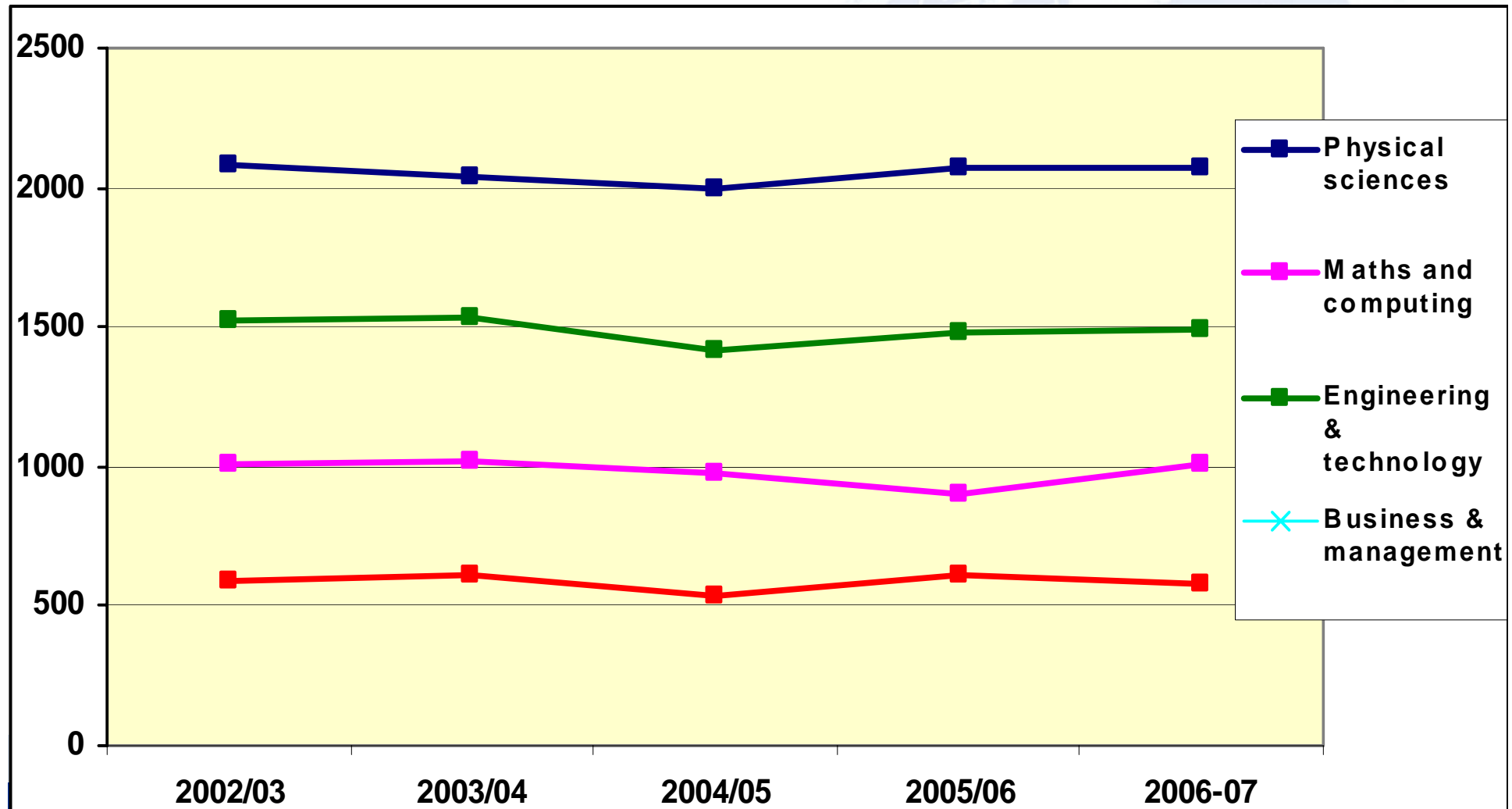
Leading education and social research  
Institute of Education  
University of London



**Trends in *first year UK student enrolments on PGR programmes according to subject areas (2002-03 to 2005-06)***



Leading education  
and social research  
Institute of Education  
University of London

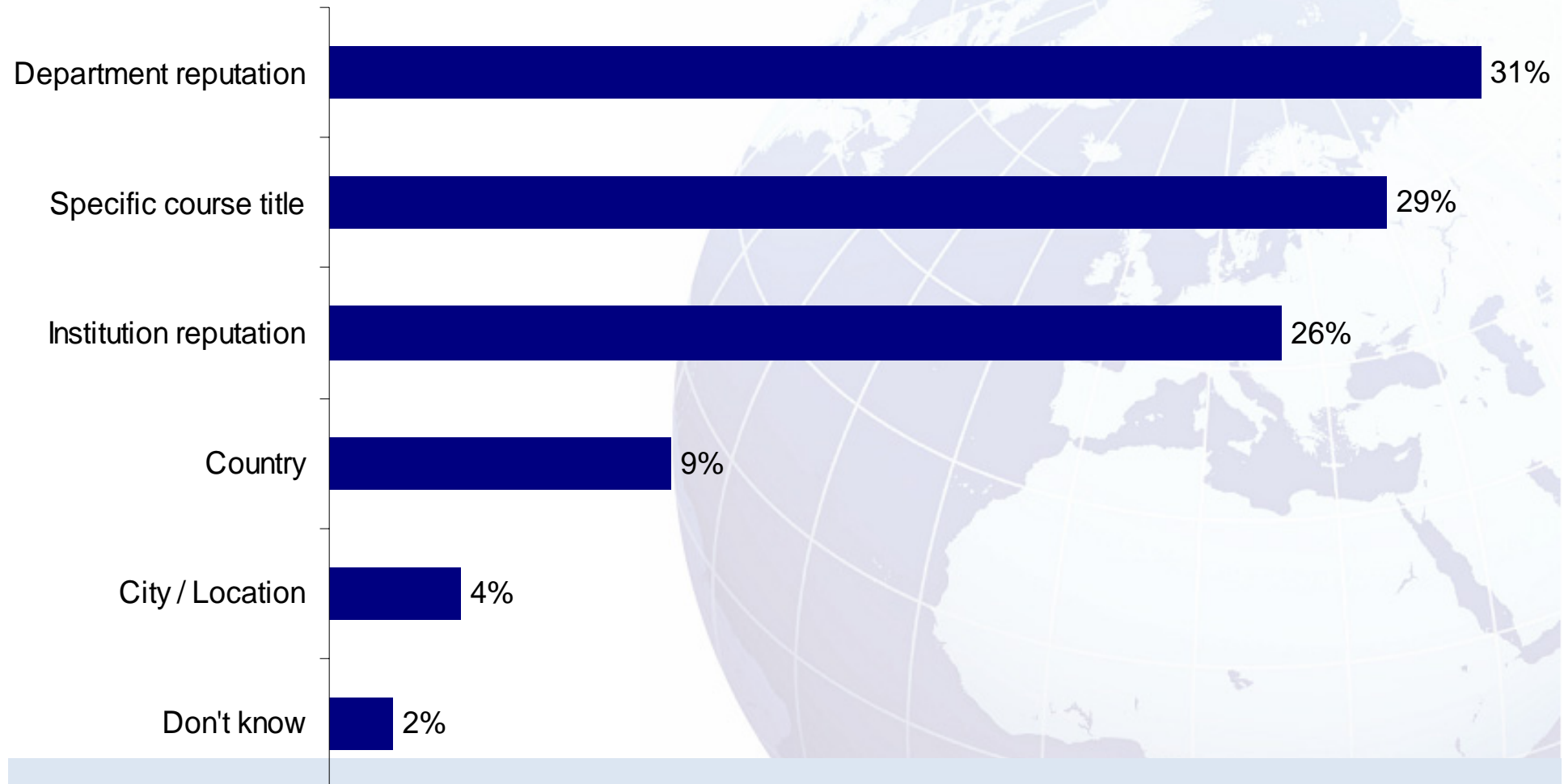


# *turning to the students!*



Leading education  
and social research  
Institute of Education  
University of London

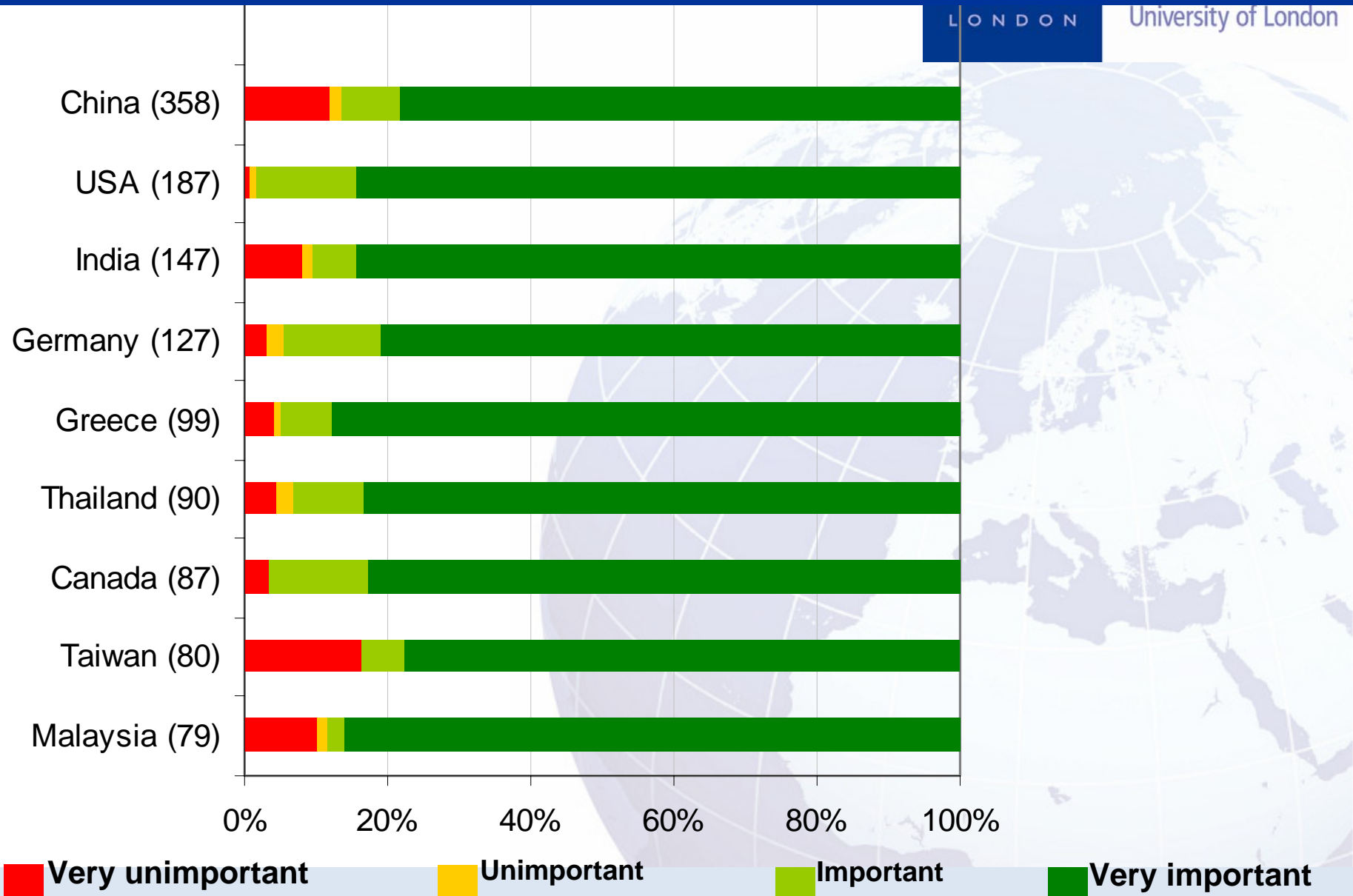
## *Major factors influencing the decision of an international PGR student to study in UK*



# Importance of Research Quality on influencing decision to study in UK according to main source countries

LONDON

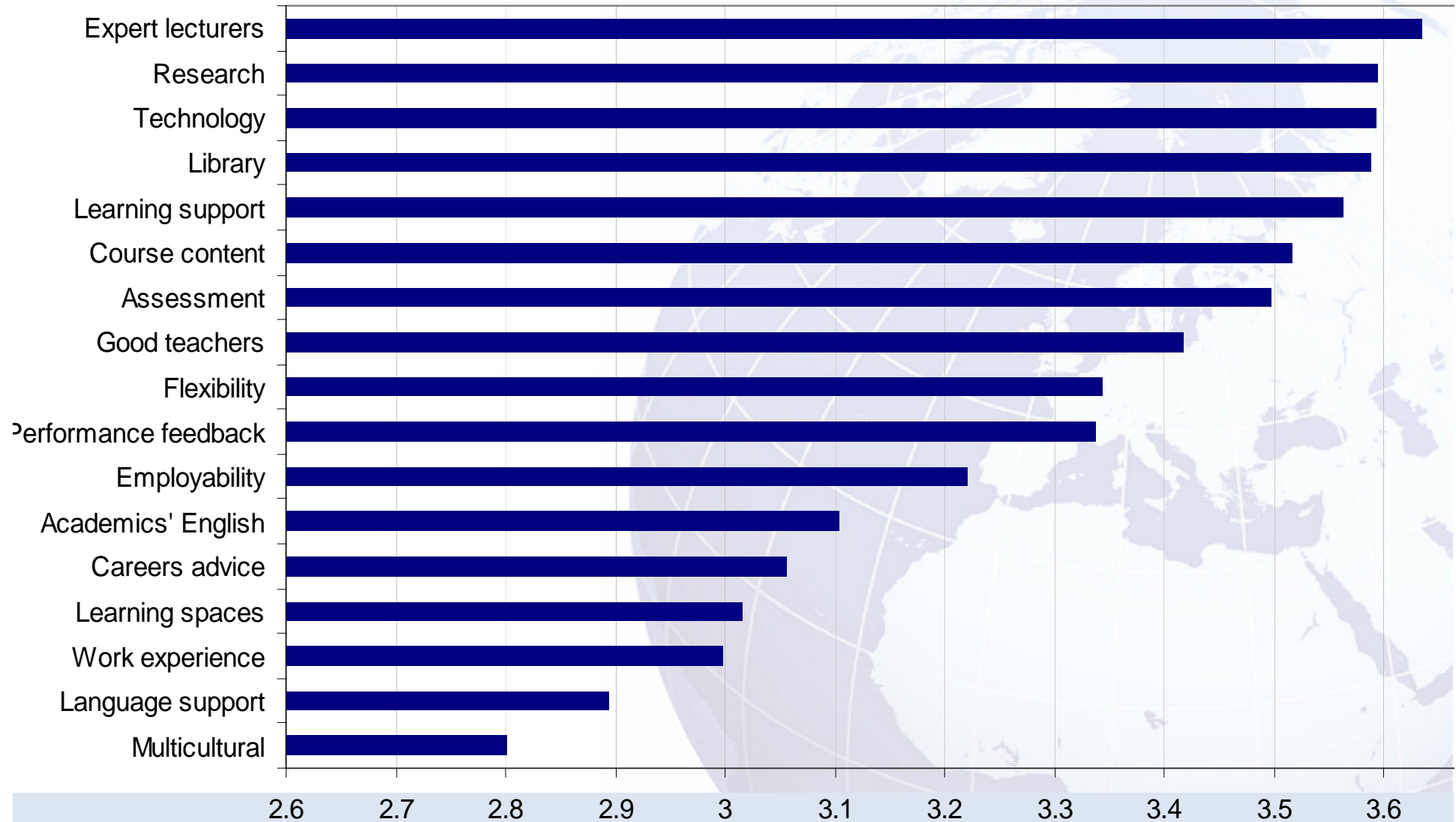
University of London



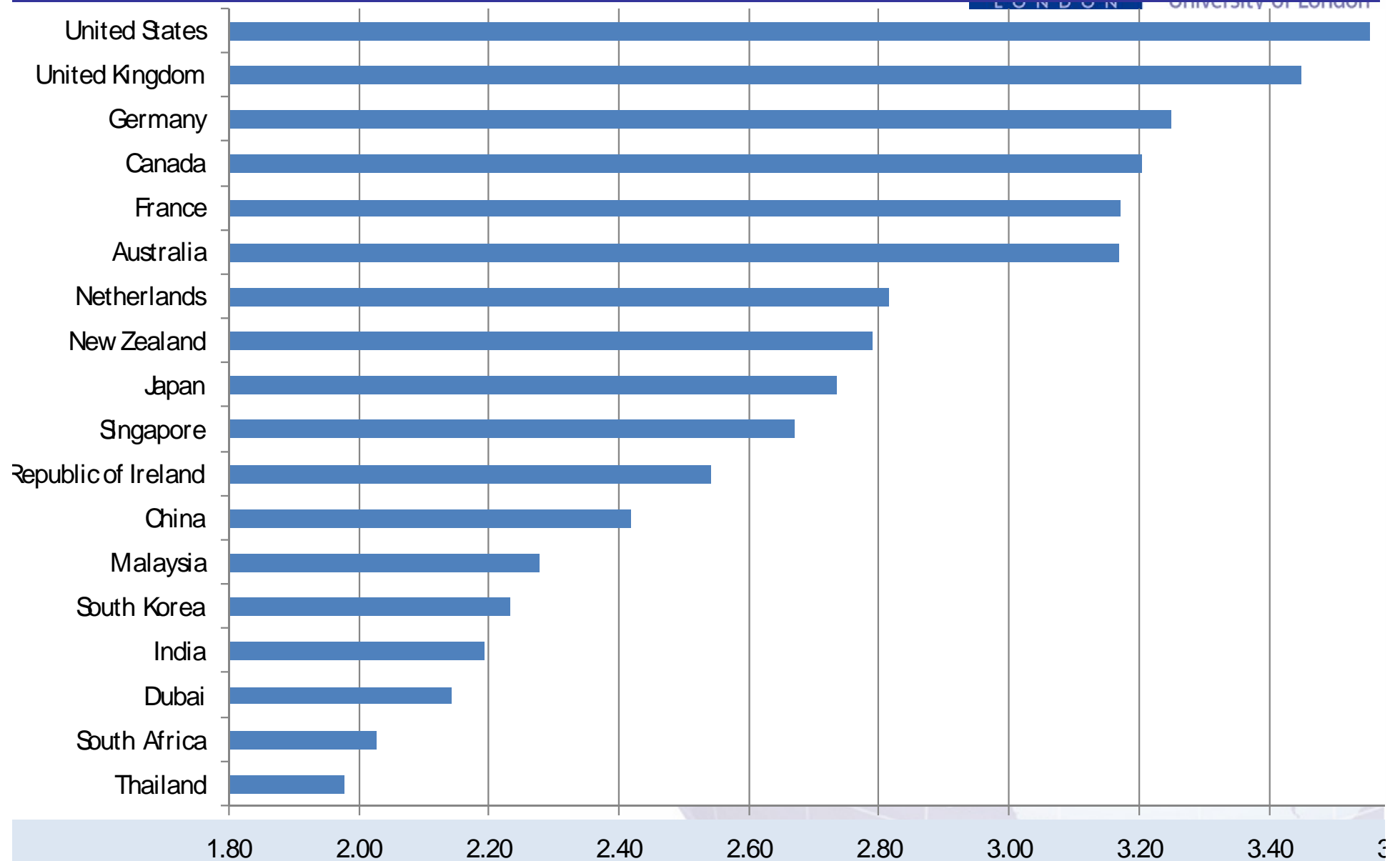
# Relative importance ratings for key factors associated with learning experience.

LONDON

University of London



# Relative attractiveness of country destinations favoured by international PGR students





Leading education  
and social research  
Institute of Education  
University of London

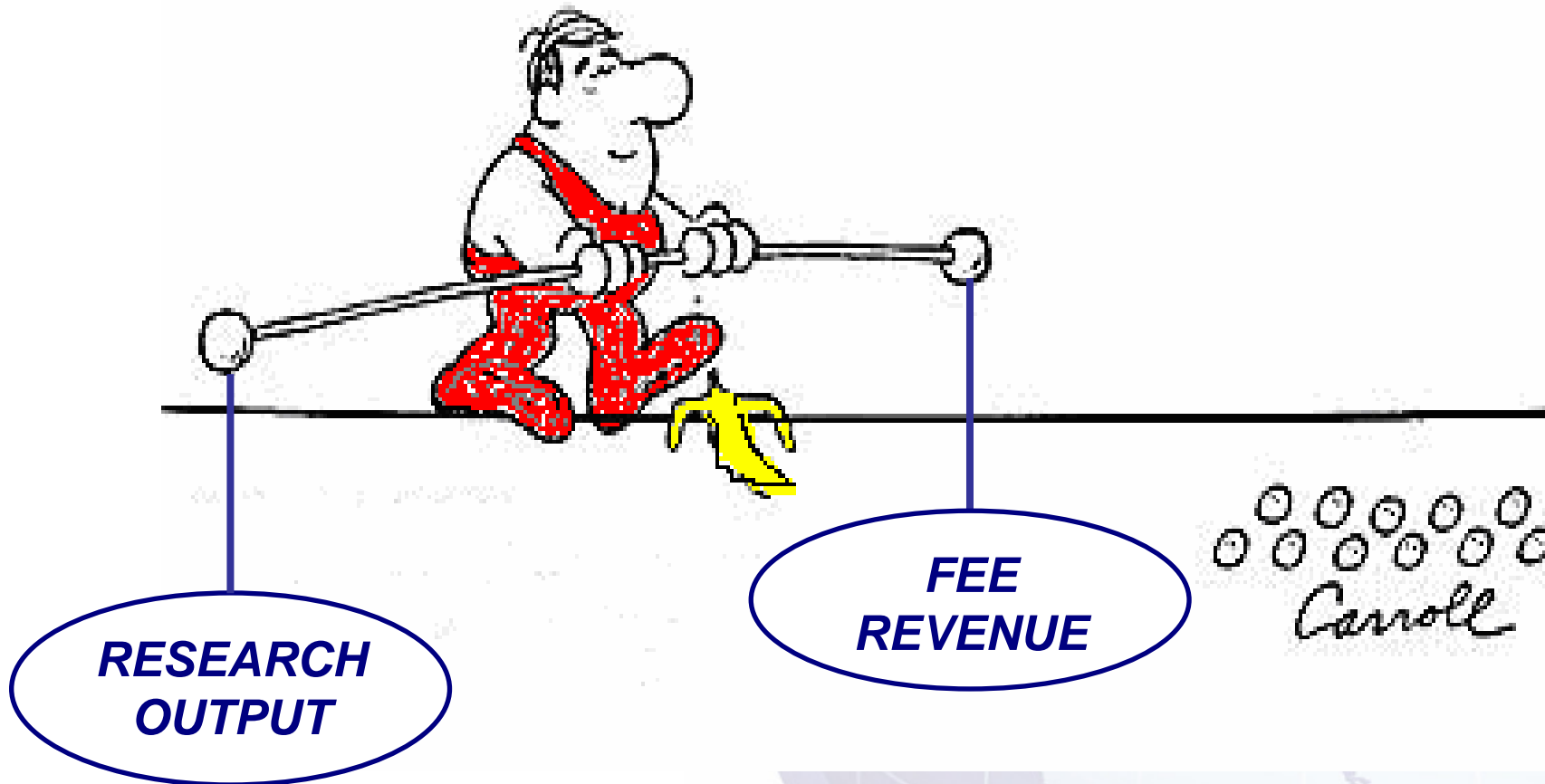
# *Turning to finance .....*



# *The Dean's Dilemma ..... international research students ...*



Leading education  
and social research  
Institute of Education  
University of London



## ***International PGR students in UK - Who pays?***

- ***Students own personal funds:*** 48%
- ***Student scholarship from home:*** 15%
- ***International scholarships*** 0.5%
- ***Fee discounts from UK institutions:*** 23%
- ***UK scholarships (government and institutional)*** 10%
- ***UK foundations*** 3.5%

***Augmented by part time employment***

***Latter is extremely important and its necessity is not  
generally accepted!***

## ***students and their needs***

- ***quality of student experience – particularly as competition grows***
- ***clearer statement of what institution offers***
  - ***supervisory contact***
  - ***training available***
- ***funding support – including access to part time work***
- ***flexible delivery***

# Universities with most international PGR students



Leading education  
and social research  
Institute of Education  
University of London

HE institution		% of total in UK
<i>University of Cambridge</i>	<b>3230</b>	<b>6.9</b>
<i>University of Oxford</i>	<b>2650</b>	<b>5.7</b>
<i>University of Manchester</i>	<b>1880</b>	<b>4.0</b>
<i>University of Nottingham</i>	<b>1665</b>	<b>3.6</b>
<i>University of Birmingham</i>	<b>1360</b>	<b>2.9</b>
<i>University of Edinburgh</i>	<b>1210</b>	<b>2.6</b>
<i>University of Newcastle</i>	<b>1140</b>	<b>2.4</b>
<i>University of Sheffield</i>	<b>1125</b>	<b>2.4</b>
<i>University College London</i>	<b>1040</b>	<b>2.2</b>
<i>Imperial College</i>	<b>1030</b>	<b>2.2</b>
<i>University of Leeds</i>	<b>1025</b>	<b>2.2</b>
<i>University of Bristol</i>	<b>1010</b>	<b>2.2</b>

## ***UK institutional strategies – some comments***



Leading education  
and social research  
Institute of Education  
University of London

- ✓ **Large majority prioritise international research student recruitment**

### **BUT**

- ✓ **Lack specific approach for PGR students – just part of general international recruitment**
- ✓ **Funds not employed strategically - for either country or subject priorities**
- ✓ **Websites not PGR student specific**

## *The Competition*

- ***USA***
  - ***Much of Europe***
  - ***Australia***
  - ***Others – China, Singapore etc***
- 
- A large, semi-transparent globe with a grid of latitude and longitude lines is positioned in the background, centered behind the list of countries.

## *Some opportunities .....*



Leading education  
and social research  
Institute of Education  
University of London

- *Build on high quality reputation of UK*
- *Continuing strong demand for medicine and biosciences*
- *Global growth HE requires more trained academic staff*
- *Growth particularly from Middle East, Pakistan also  
Thailand and Malaysia*
- *European students*
- *Continuing interest from USA*
- *Global delivery – split, distance, professional doctorates*

## ***Possible strategies .....***

- ***New approaches to marketing – both UK and institutional***
- ***What is doctorate and what is its ‘offer’***
- ***Improve student experience – what do you ‘promise’***
- ***Central investment necessary - not a perfect market***
- ***Learn from UKIERI, BRIDGE etc successes***
- ***Significantly improve websites – institutional and national***
- ***Have a strategy - linking national and institutional priorities***
- ***Increase numbers of HE institutions involved in UK***
- ***More flexible approaches to delivery: in-country/split etc***



Leading education  
and social research  
Institute of Education  
University of London

***Thanks!***

***Neil Kemp***

***neil.kemp@nkeducation.com***

