

International students: Current Trends

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A case for international students

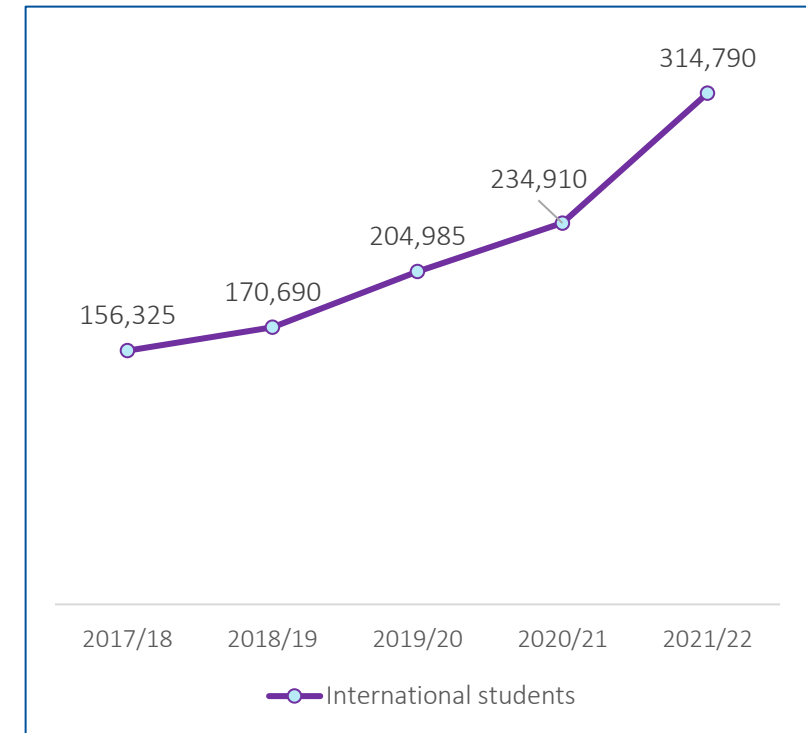
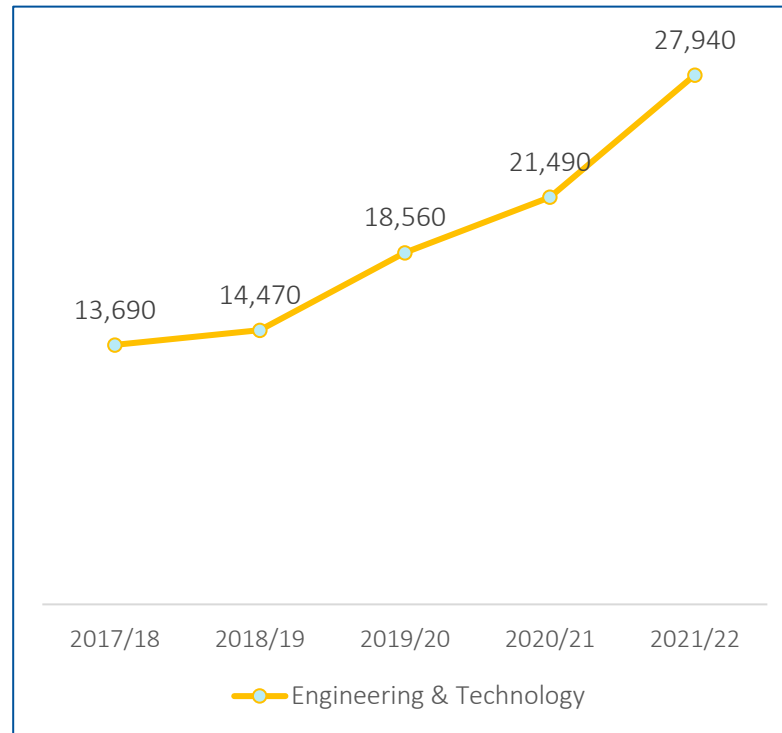
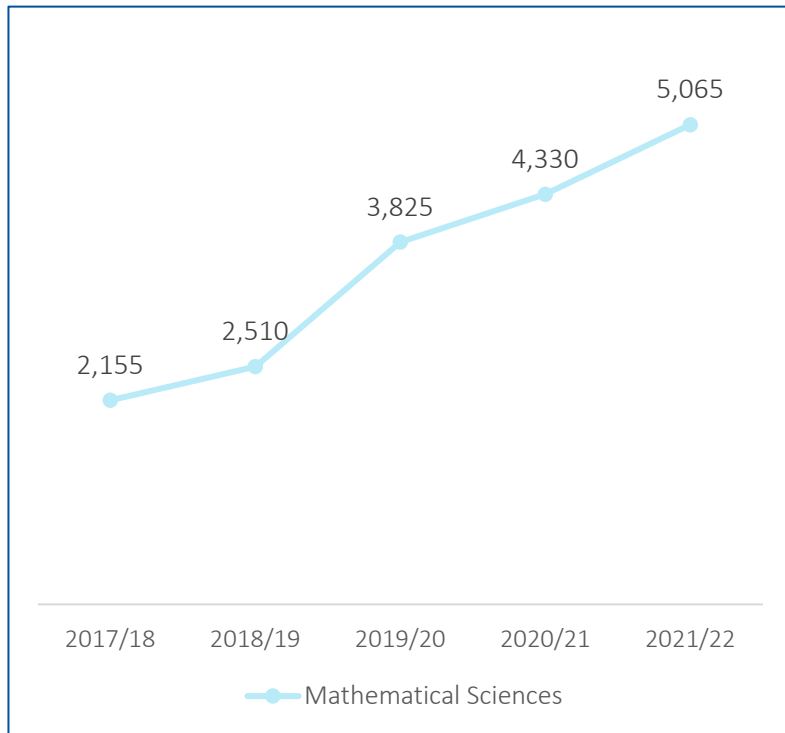
- International student cohort that enrolled in 2021/22 will generate **£42b** for the UK economy.
- Over the course of their studies, every **11** non-EU students generates around **£1m** worth of **net economic benefit** for the UK economy.



- English universities lost an average of **£2,500** per undergraduate, domestic student in 2022/23.
 - STEM: **£14,000** (£3,500 more than classroom-based subjects).
- Between **51% and 80%** of UK universities could fall into deficit if international enrolments decline from 2024/25 onwards.

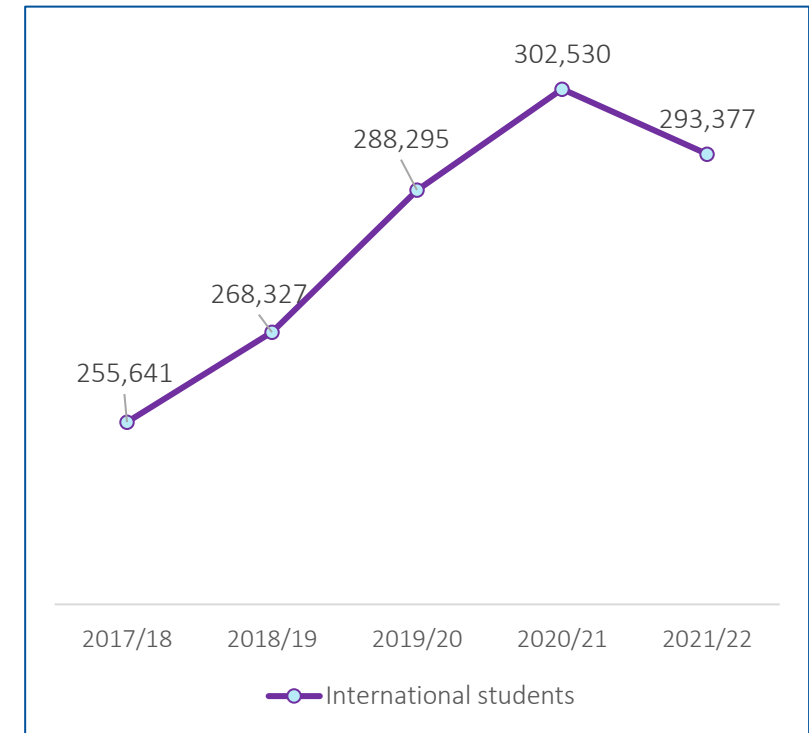
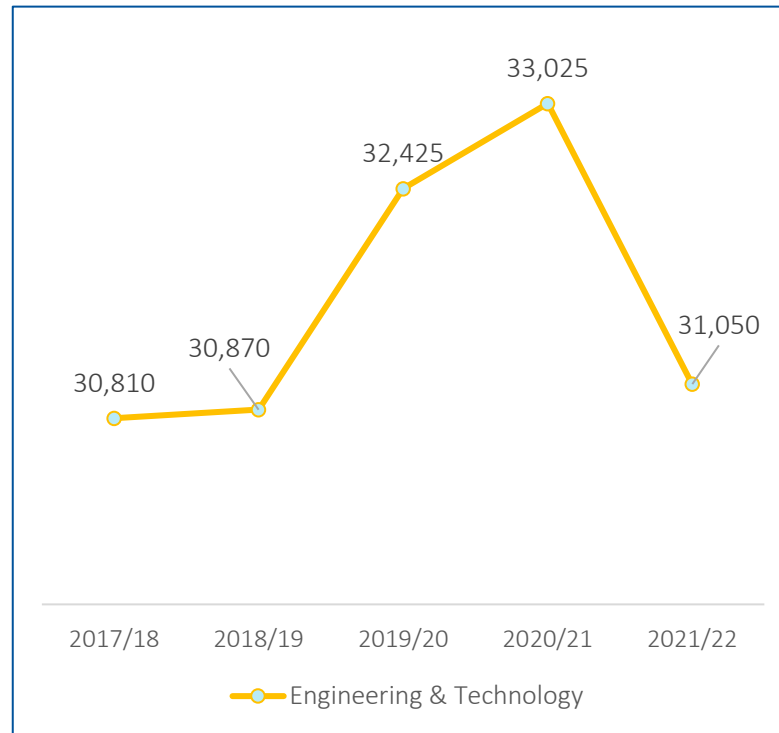
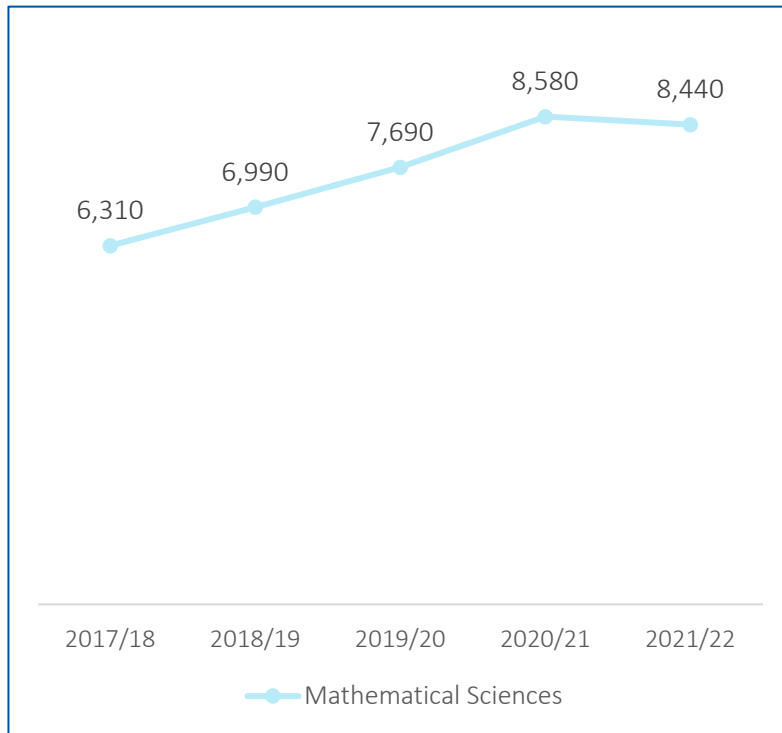
Trends: 2017/18 – 2021/22

PGT international recruitment



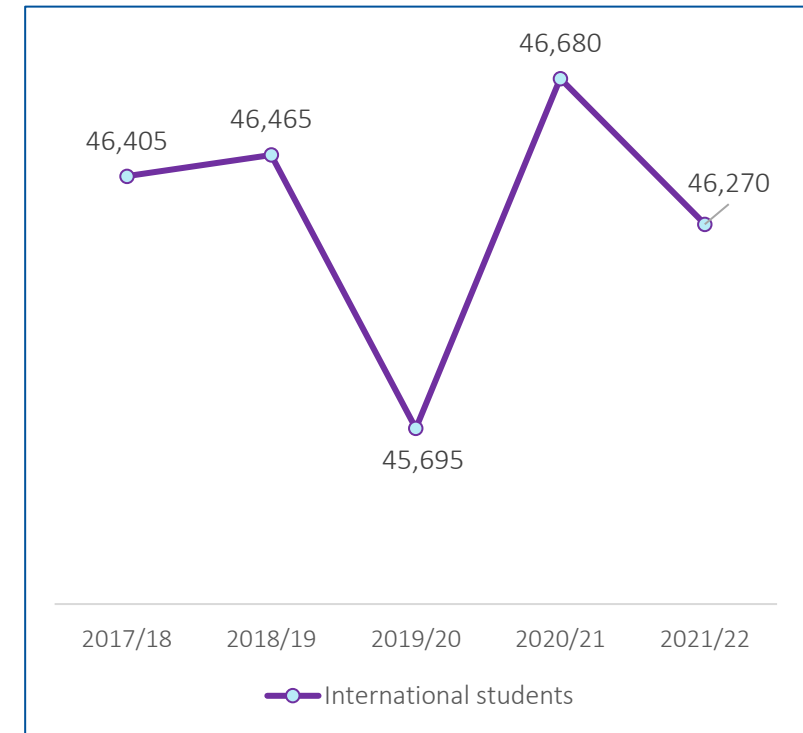
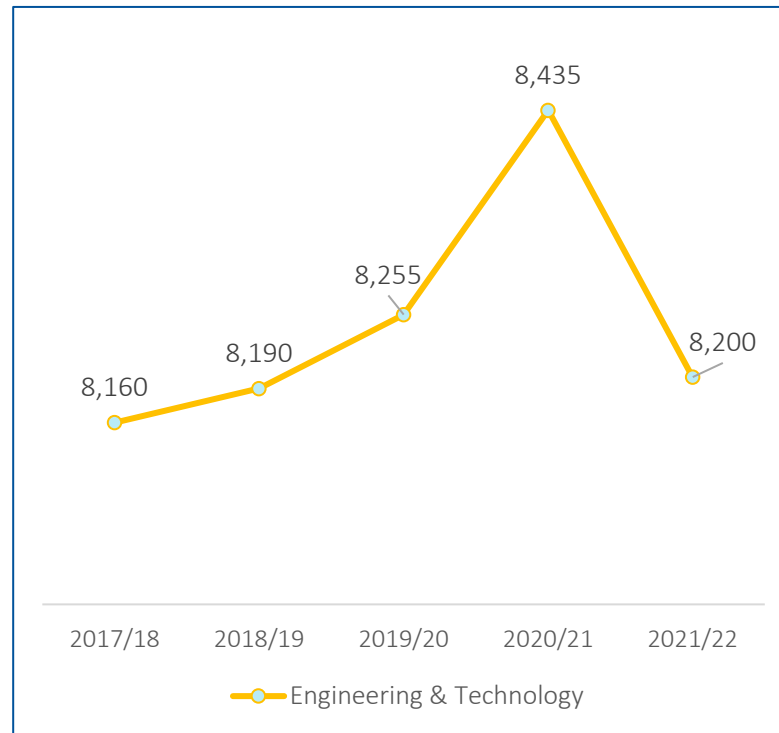
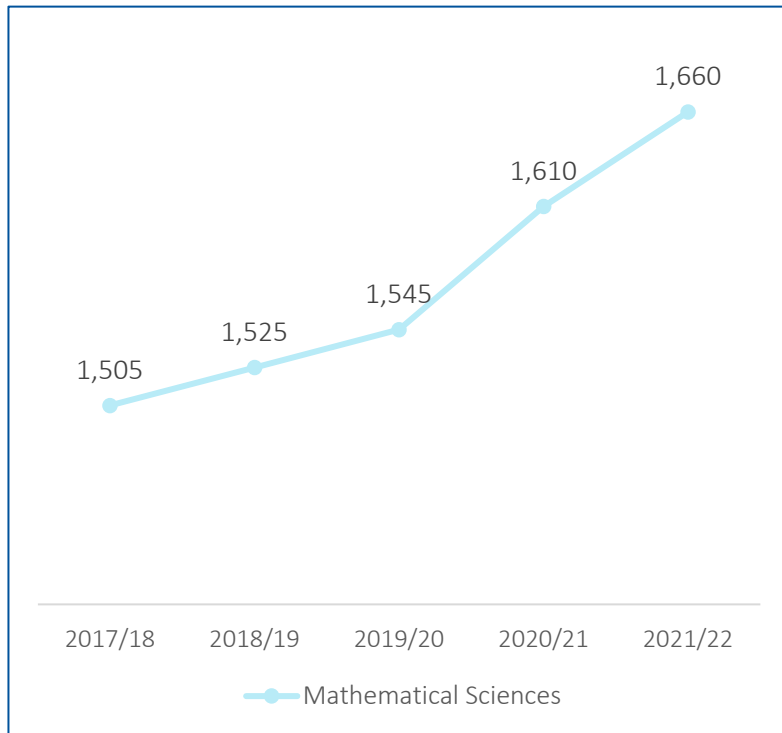
Trends: 2017/18 – 2021/22

UG international recruitment



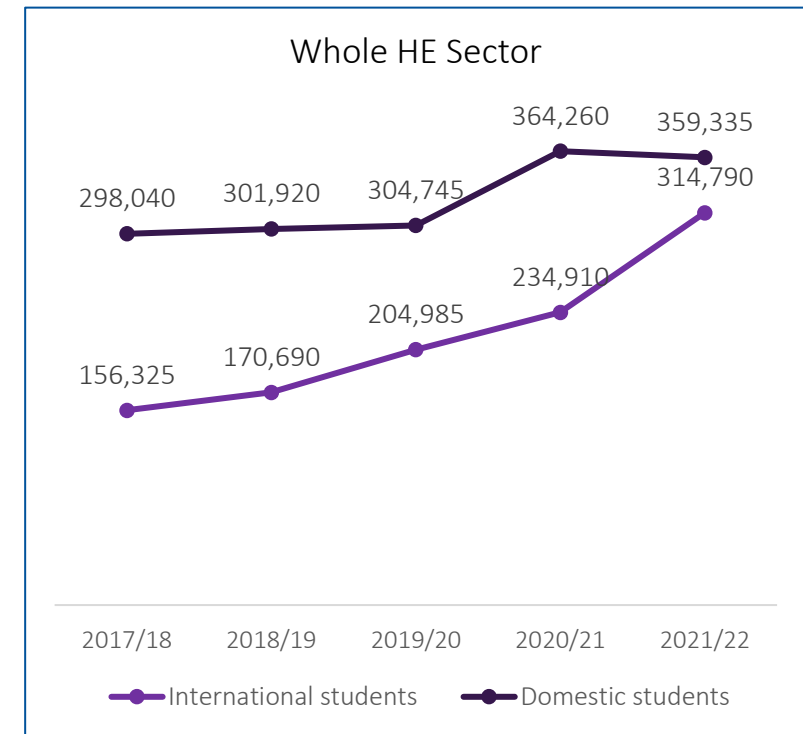
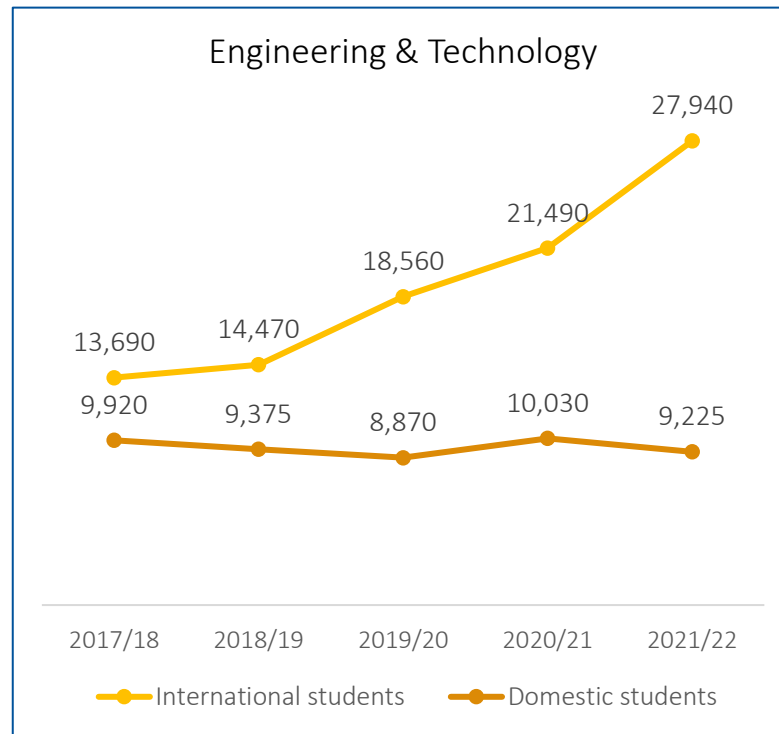
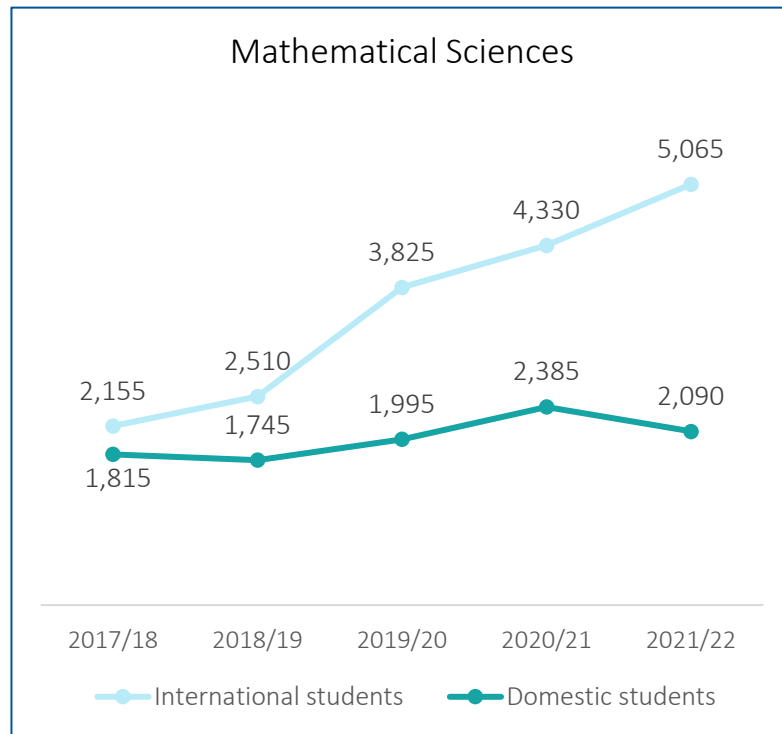
Trends: 2017/18 – 2021/22

PGR international recruitment



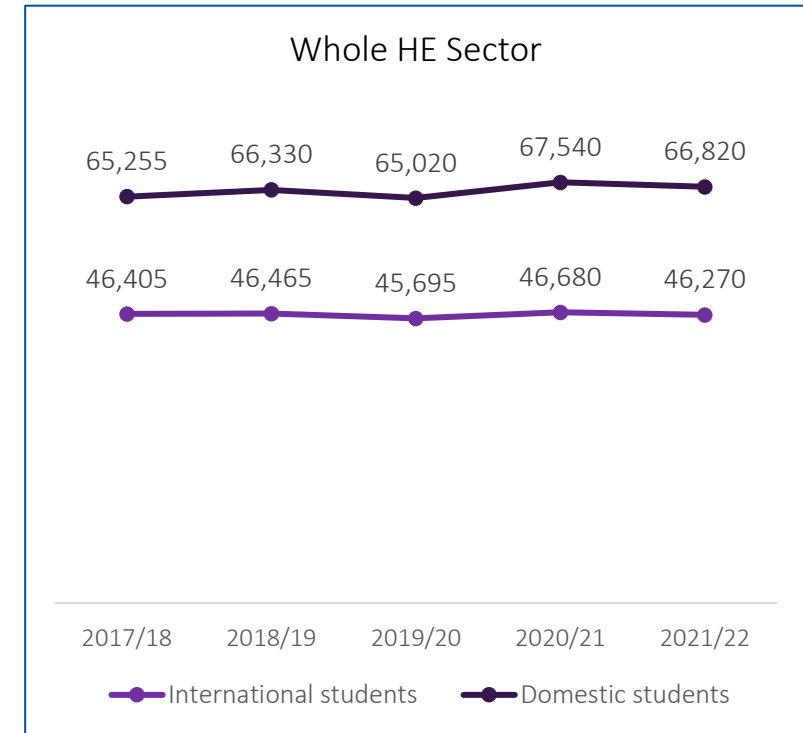
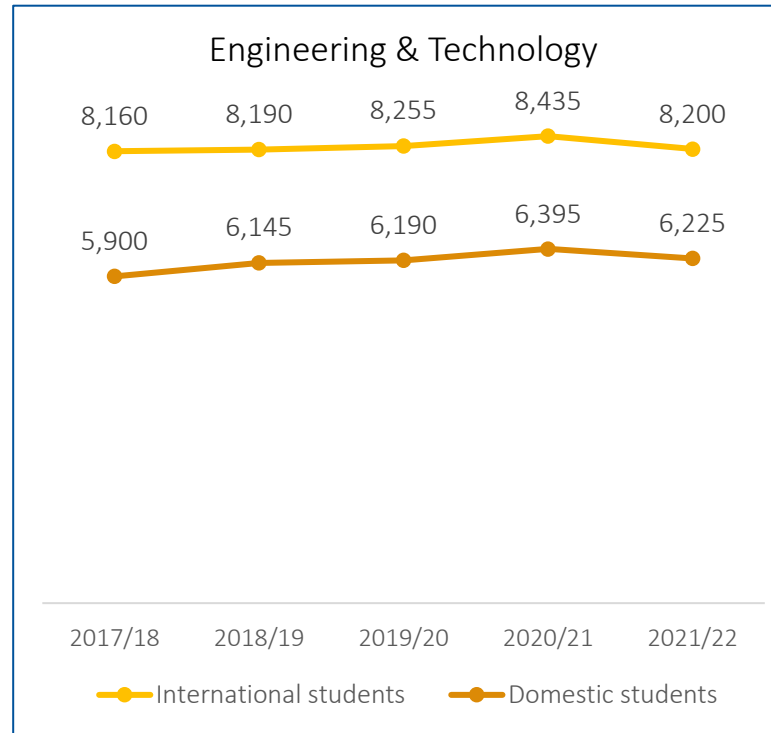
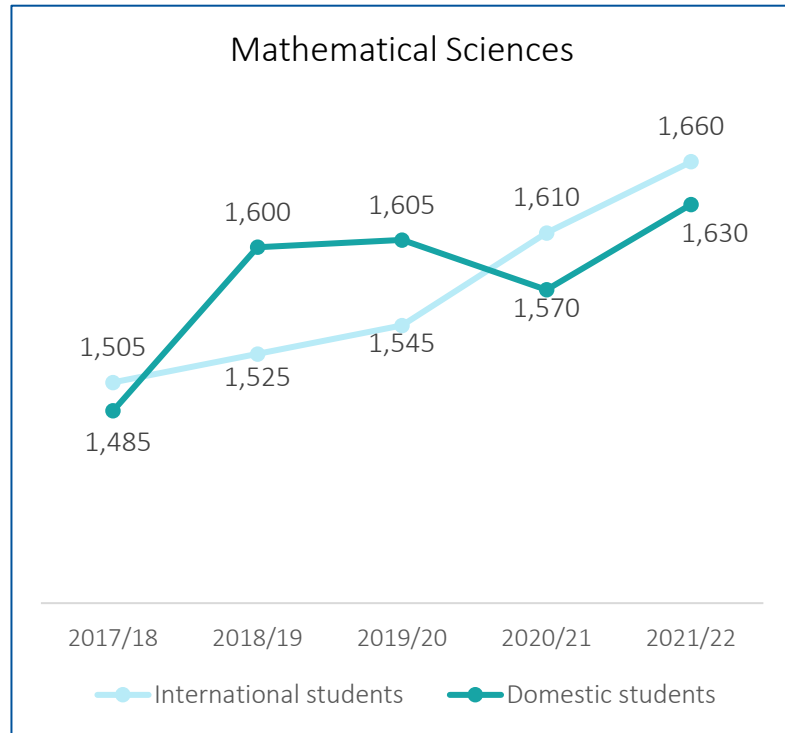
Trends: 2017/18 – 2021/22

PGT international vs domestic students



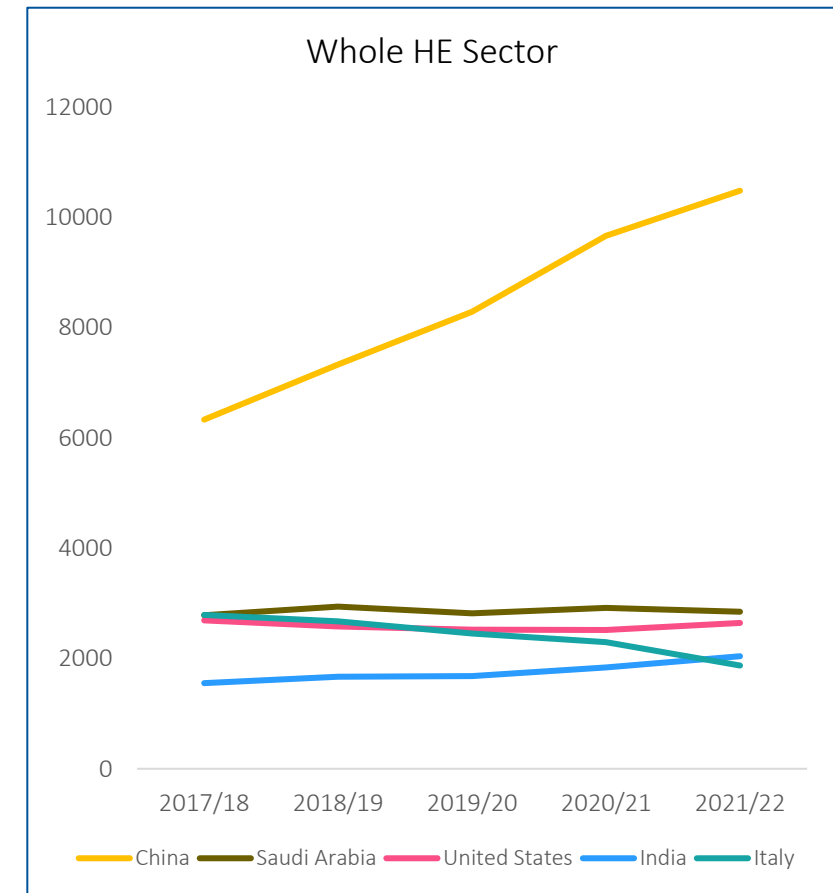
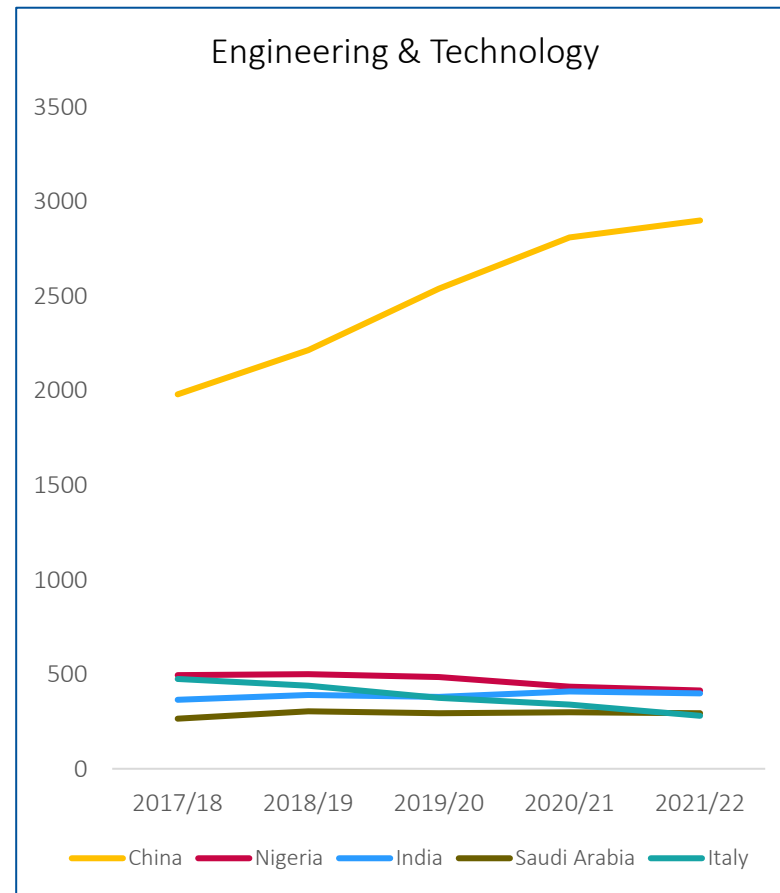
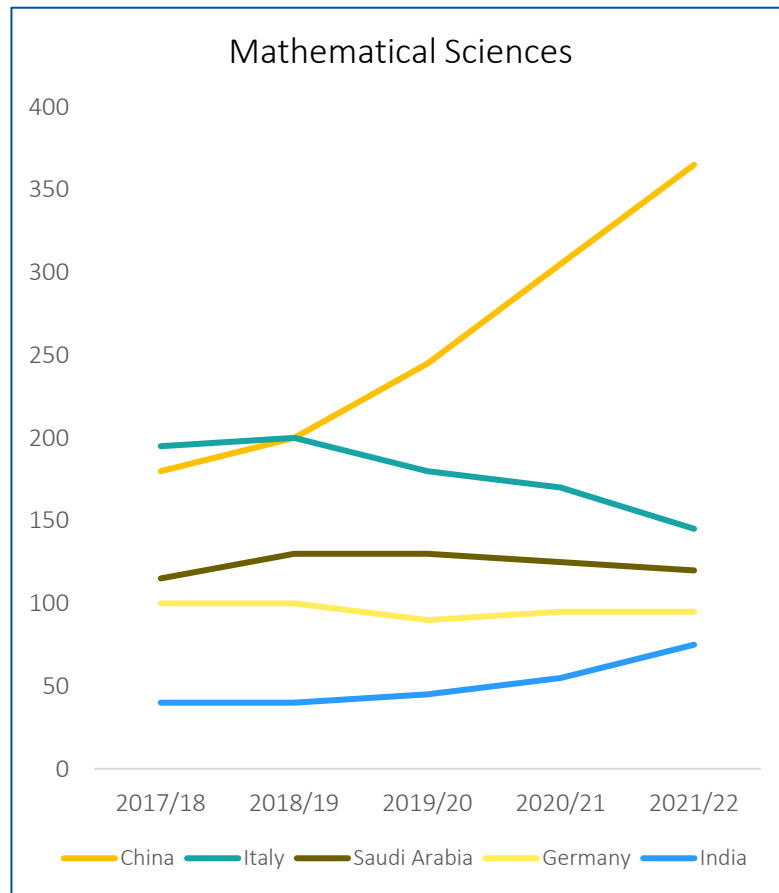
Trends: 2017/18 – 2021/22

PGR international vs domestic students



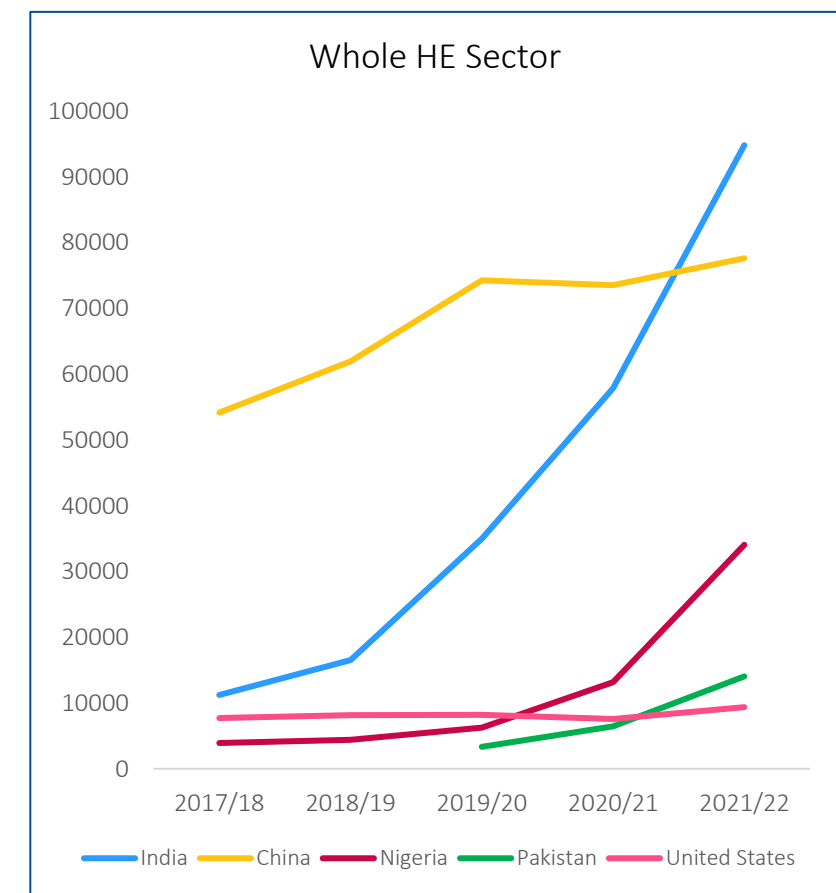
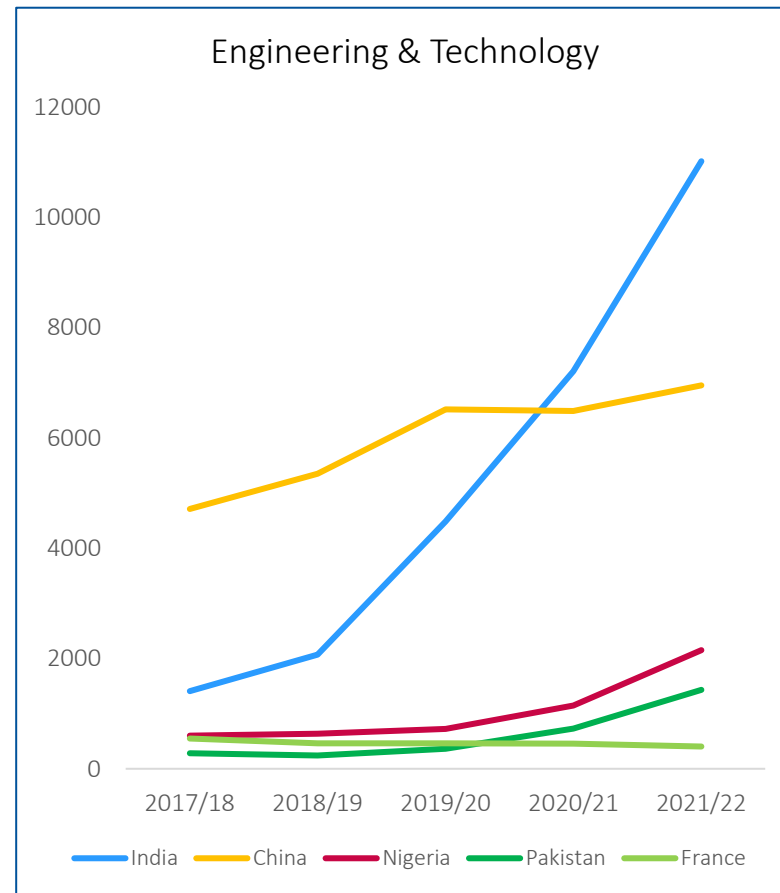
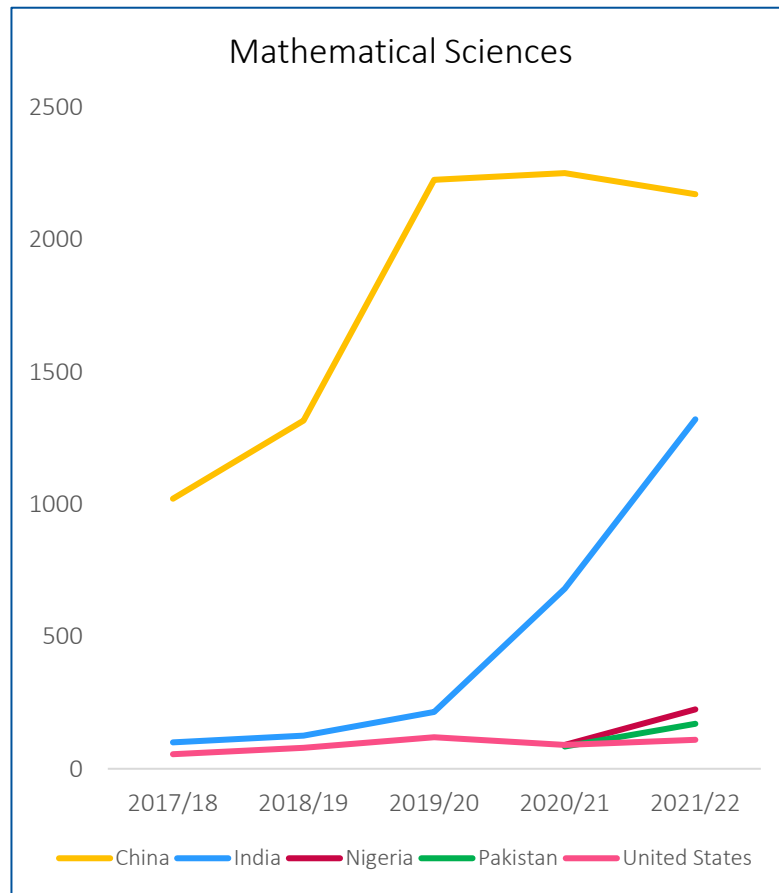
Trends: 2017/18 – 2021/22

PGR top sending countries



Trends: 2017/18 – 2021/22

PGT top sending countries





Spanner(s) in the works

May 2023

Dependants ban (PGT impacted)

Restrictions on visa switching

December 2023

Graduate Route visa review announced

48% increase to earning threshold

February 2024

Immigration Health Surcharge increases by 66%

October 2023

Visa fees increase by 35%

Immigration Health Surcharge increase announced

January 2024

Dependants' policy enforced

International Student Recruitment Survey

- Gathered information on forecasts and actual enrolments for:
 - September 2023
 - January 2024
- 73 responses
- Good spread of regions and types of institution
- Declines at both entry points, particularly at PGT level
- Actual enrolments fell far below forecasts, even in January when the sector was already bracing for a drop in numbers

Summary of main findings

September 2023 enrolments

Overall	
Forecast growth	Actual growth
+10.4% ↑	-0.4% ↓
UG	
Forecast growth	Actual growth
+8.1% ↑	+1.5% ↑
PGT	
Forecast growth	Actual growth
+10.2% ↑	-2.2% ↓

January 2024 enrolments

Overall	
Forecast growth	Actual growth
-9.0% ↓	-44.0% ↓
UG	
Forecast growth	Actual growth
+7.2% ↑	+4.4% ↑
PGT	
Forecast growth	Actual growth
-7.1% ↓	-45.5% ↓

Thank you

Please do get in touch if you'd like to discuss any further or have any questions:

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