Analysis of international student enrolments in January 2024

February 2024
INTRODUCTION

This report presents the results of a survey of Chartered ABS members on the recruitment of international students for programmes starting in January 2024. The purpose of the survey was to examine how recent government policy announcements, such as the ban on visas for dependents of students, has affected enrolments at Chartered ABS members. A total of 50 schools responded to the survey.

The survey reveals that international student recruitment in UK business schools is moving in a concerning direction. For non-EU international students, enrolments for the January 2024 in-take were lower for 76% of the responding schools compared to 12 months ago. The outlook for recruitment from the EU is less worrying, with 59% of schools seeing unchanged enrolments compared to January 2023, but even for this domicile many schools struggled with 41% reporting lower enrolments. Across both domiciles none of the schools participating in the survey reported significantly higher enrolments than in January 2023, with the postgraduate market being especially impacted by the downturn. These results add to the troubling signs already uncovered in the 2023 edition of our Annual Membership Survey. This found that nearly one-third of the responding schools saw a fall in postgraduate enrolments for non-EU international students for courses starting in the autumn of 2023, up from 26% in the 2022 survey.

These findings are arguably unsurprising given government policy announcements over the last year, most notably the ban on visas for the dependents of students. Many of the survey responses voiced concern about the perception that the UK is a hostile environment for international students. Nine out of ten of the respondents agreed that recent government policy announcements were having an adverse impact on their school’s ability to recruit international students. Adverse impacts already noted at some members include delays in issuing student visas, declines in enrolments for MBA programmes, and even course cancellations. Several respondents said that the worst impacts may be yet to come, raising concerns about enrolments for the next academic year.

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• January in-take programmes were reported to be offered by 80% of responding business schools, showing flexibility in enrolment options, whilst 20% of respondents indicated that they do not offer January in-take programmes.

• There were several comments that their institution offers multiple in-take points throughout the year for postgraduate courses; for example, one school has six in-take periods annually for postgraduate courses. Some schools only offer January in-take programmes for specific programmes such as their MBA. There were some comments noting that they offer specific start times beyond January, including February, April, and June, catering to the need for flexibility.
Level of study for January in-take programmes

- A significant two-thirds (67%) of responding business schools offer January in-takes exclusively for postgraduate programmes. A third (33%) of responding schools reported that they offer both undergraduate and postgraduate courses available for a January in-take.
A notable majority of schools (78%) did not introduce a new programme for a January start. However, 22% of schools are offering new January in-take programmes, which may suggest an expansion in their offerings. One respondent commented that their institution is now offering postgraduate courses in International Tourism, Digital Marketing, and Marketing Research and Analytics, which could be to cater to specific market demands or emerging trends in business education.

Figure 3: Proportion of business schools offering new January in-take programmes in 2023/24
Level of study for the new January in-take programmes

Figure 4: Level of study for new January in-take programmes offered by business schools

- The vast majority (78%) of new programmes available for enrolment this January are at postgraduate level.
Is this the first time your school has offered January in-takes?

Figure 5: Proportion of business schools reporting they offered January in-takes for the first time in 2023/24

- Almost all the responding business schools (97%) indicated that they had offered January in-takes prior to 2023/24. This demonstrates that January starts are a long-standing feature of the academic calendar for most UK business schools. In the field for additional responses, one respondent commented that their school introduced January in-takes during Covid in 2021 as a temporary measure and have continued to offer it until now.
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Change in enrolments of international students for the January in-take in 2023/24 compared to 2022/23

Figure 6: Year-on-year change in enrolments of new students for January in-take (2023/24 compared to 2022/23)

- For non-EU international students overall, three-quarters of the responding schools reported that enrolments for the January 2024 in-take were either significantly or slightly lower than for January 2023. An additional 15% reported enrolments were approximately the same and 9% reported higher enrolments but none to a significant extent.

- For non-EU international undergraduate enrolments, 42% reported lower enrolments in January 2024 compared to January 2023, of which 18% saw significantly lower enrolments.

- For non-EU international postgraduate enrolments, 77% of the schools reported lower enrolments for January 2024 and of these 60% reported they were significantly lower.

- As with the results for non-EU international students, for those from the EU we again see that enrolments have been more resilient at undergraduate than postgraduate level albeit none of the responding schools reported an increase.

- For students from the EU overall, none of the schools stated that enrolments for EU students were higher for the January 2024 in-take. 59% of the responding schools said that enrolments for the January 2024 in-take were about the same as 12 months prior, and 41% reported lower enrolments of which 25% saw a significant fall.

- For postgraduate EU enrolments, 45% reported a decline relative to the January 2023 in-take and for 24% of the schools the decline was significant. At undergraduate level 18% of the schools reported a fall in enrolments for students from the EU in January 2024 with the remaining 82% saying that enrolments were approximately unchanged from 12 months ago.
Performance against recruitment targets for international students for the January 2023/24 in-take

Figure 7: For international students, what was your school’s performance against recruitment targets for courses starting in January 2024?

- The recruitment for non-EU postgraduates proved to be the most challenging, with 78% of schools reporting to be below target, of which 61% were significantly below target and 17% were moderately below target. Just under one-quarter met or exceeded their recruitment targets.

- 45% of business schools were below target in their recruitment of non-EU international undergraduate students and 28% were significantly below. An additional 28% of business schools met their targets and the same proportion moderately exceeded them.

- There appears to be challenges in EU postgraduate recruitment, with 71% of institutions reporting that they were below target, with 53% moderately below target and 18% significantly below target.

- EU undergraduates were the student cohort for which performance against recruitment targets was most successful with two-thirds (67%) of schools reporting to have met their recruitment targets, and a small percentage exceeding them.

- There were no schools reporting that they significantly exceeded targets for any category of student in their recruitment for the January 2024 in-take.
To what extent do you agree with the following statement: “recent government policy announcements, including the ban on visas for student dependents, are having a negative impact on my business school’s ability to recruit international students”

Figure 8: Extent of business schools’ agreement that recent government policy announcements, including the ban on visas for student dependents, is negatively impacting their business school’s ability to recruit international students

- Nine out of ten of the business schools who responded to our survey either agreed or strongly agreed with the statement that ‘recent government policy announcements, including the ban on visas for student dependents, are having a negative impact on my business school’s ability to recruit international students’. In the additional comments given to this question, the responding Deans expressed their concerns that other countries offering higher education to international students will be perceived as much more positive and welcoming than the UK. Some schools have already seen adverse effects from the government’s decision to ban visas for dependents of students, whereas others had not yet experienced any impact but believed it was too early to judge.

- The impact reported to date varies by type of programme and particular cohorts of students. One school reported a significant decline in recruitment from Africa and a moderate decline from the Indian sub-continent. The possibility of a significant decline from India was noted as a concern as this has been a market that has helped offset the over-reliance on recruitment from China.

- Another school noted a decline in enrolments for its full-time MBA programme and another remarked that the ban on visas for dependents has been disproportionately detrimental to female applicants and has altered the gender balance of applicants which will impact the gender balance of eventual enrolments.

- There were several comments related to visa application difficulties for international students, including delays in issuing visas and an increase in the number of applicants who had raised concerns about the visa process.

- Some respondents remarked that it was difficult to assess the likely impact of recent government policy on international students which was making it difficult to budget and plan resources for the new academic year in September 2024.
Recruitment challenges and policy volatility: UK business schools face uncertainty in international student recruitment

Respondents were asked to detail any observable effects on programme enrolments and student demographics, categorised by country or region, which may have arisen following recent changes in government policy.

Impact on types of programmes

- The responses to this question indicated that institutions are facing a multifaceted set of challenges in recruiting international students, influenced by government policy changes, visa processing delays and broader economic factors. The feedback suggests a pronounced adverse impact on postgraduate programme enrolments, with Deans highlighting particular challenges in attracting candidates for these courses—especially MBAs—owing to the new visa restrictions for dependents.

- There is a consistent theme of waning interest and applications for MBAs and associated management Master’s programmes. There were several comments raising concerns about the ramifications for future recruitment, including for 2024/25, which may potentially extend to undergraduate programmes. Additionally, the responding Deans articulated concerns regarding the operational and financial repercussions associated with these recruitment struggles, exacerbated by recent government policy changes. Concerns were raised that some programmes might become financially unviable if the current trend persists.

Impact on recruitment from specific countries

- India and Nigeria have been consistently cited for notable decreases in student recruitment. However, this trend extends beyond these nations, with enrolments from regions including Europe, South Asia, and Latin America also experiencing declines, pointing to recruitment challenges across many markets. It was predicted that declines in applications and the conversion rate of applications to enrolments may intensify, particularly from the aforementioned regions, potentially exacerbated by the government’s new policy prohibiting dependent visas for families of international students.
Other impacts business schools have observed

- There were many reports of delays in processing and issuing student visas resulting in an increase in no-shows despite deposits having been paid. One institution cited having no enrolments for their in-person MBA. There was also mention of students’ concerns over the ability to live and work in the UK after graduation due to the impending government review of the Graduate Route.

- Concerns over the cost of living were mentioned, which could make students reconsider their study destination, and potentially pick options closer to their home nation.

- Although some specific examples of impacts due to government policy were noted, some Deans mentioned that it is too soon to tell the effect of these policy changes. However, initial comments indicate that they expect continued difficulty in the recruitment of international students going forward. This sentiment echoes broader concerns within the academic community about the impact on the UK’s competitive stance in the global education market.