

IS BREXIT TURNING INTERNATIONAL STUDENTS AWAY FROM THE UK?

*The effects of the EU referendum on
the UK's international student market*



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ABOUT THE REPORT

On the 24th of June 2016, contemporary British politics experienced an enormous upheaval as the European Union (EU) referendum results were announced: Britain had chosen to leave the EU. It was a marginal win; the vote to leave was only 4% ahead of the vote to remain. Nonetheless, the people had cast their vote and history was made, catapulting a divided nation into an uncertain future.

One sector which had been particularly pro-EU in the run-up to the referendum was higher education (HE). Universities and academics banded together to campaign for the UK to remain in the Union, appreciating the benefits it offered the sector and fearing the consequences of a 'leave' outcome.

The aim of this report is to understand the effects the referendum has had on prospective international students. Has it made the UK a less attractive study destination?

Based on research collected at the QS World Grad School Tour events across 10 European countries, this report presents a comparative analysis of students' views on the issue. Interviews in each city gathered over 1000 survey responses, the vast majority of which came from students looking to study outside of their

home country. The survey questions were formulated to unpick how students felt Brexit would impact their education and future careers, whether they were still considering studying in the UK and, if indeed, it has altered their choices.

This report captures the views of undergraduate, master's and PhD applicants at events across Europe, adding their voices to the debate and providing insight into the possible outcomes of Brexit. Due to the locations, most of the voices heard are of current EU nationals, but some views from non-EU nationals are also captured. A number of distinctive elements appear to particularly characterise the views of the students: their concern for potential rising fees and reduced diversity in UK institutions; the perception that immigrants are no longer welcome in the country; fear of reduced employment opportunities, particularly in the financial sector. Though not all students felt Brexit was necessarily going to lead to negative outcomes, there was an overwhelming shared feeling of uncertainty for the future. These factors form the basis of our report and will be covered in detail, presenting a range of perspectives, which both diverge and unify in captivating ways - much like the outcome of the EU referendum itself.



10
countries



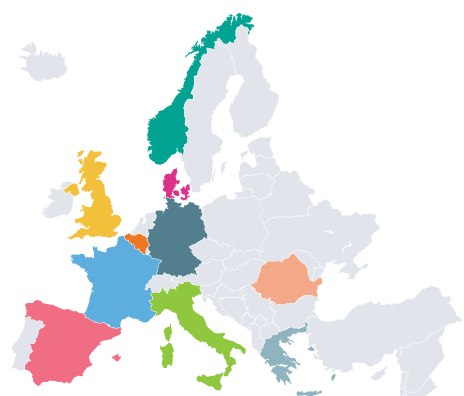
11
cities



100+
interviews



1000+
survey
responses



KEY FINDINGS

- ***Divided opinions***

As British opinion cleaved down the middle, international voices also reacted with a vast range of opinions and emotions that Brexit stirred up. Everywhere we held interviews, we found some who were ardently opposed to the move, some who were entirely apathetic, and even some who thought it was a good decision.

- ***The erasure of EU benefits***

The millennials seem to be particularly aware of the benefits of EU citizenship. Almost all students we spoke to treasure the ability to live, study and work anywhere in the EU, without the hassle of visas, work permits or extortionate international university fees. Our interviews reveal that some students fear that, in respect of the UK, these benefits will be entirely erased by Brexit. Consequently, in the pursuit of their freedoms, many applicants are reconsidering their study destinations.

- ***Opportunism***

Among the sea of opinions was a streak of opportunism. Some students felt the decreasing value of the pound would provide cheaper fees and accordingly were not discouraged from study in the UK. Others saw Brexit as a potential booster to their own economies, if the banks and other financial organisations relocated in their favour. UK students were conflicted, some felt isolated by the decision and worried about their careers, whereas others optimistically hoped there could be less competition in the UK job market.

- ***Unequal consequences***

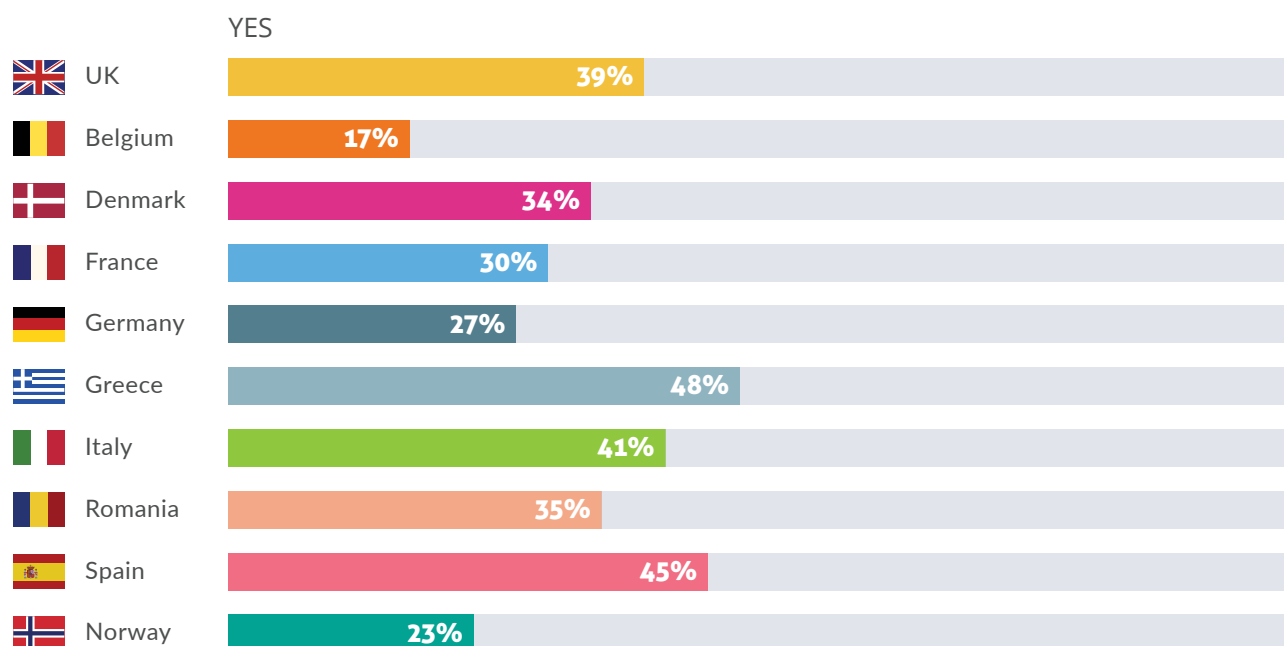
Many applicants were concerned that while Oxford, Cambridge and the other 'elite' UK institutions would be relatively untouched by Brexit, the less renowned universities could be hit much harder. Students felt that if Brexit is to negatively impact on UK universities through reduced diversity and potentially higher fees, questions would be raised about the value of studying in the UK versus studying in other key European destinations, such as France or Germany. It is likely that only the most reputable institutions would be seen as good value for money in this instance.

- ***Doubt***

One of the most striking findings of this study is the feeling of uncertainty shared by students across Europe. A large proportion of applicants felt unsure as to what impact Brexit would have on not just themselves, but the UK's higher education system more broadly. They attributed blame to the UK government, citing a lack of transparency and communication on the matter, which has subsequently left them caught up in a guessing game. As a result, many were dissuaded from studying in the UK, fearing the potential risks associated with Brexit, little confidence in positive outcomes and a lack of reassurance about the status quo and what is to follow.

FEELING UNWELCOME

Has Brexit influenced your decision about where to study?



Rightly or wrongly, Brexit has been widely interpreted as a political event that was largely motivated by the desire to reduce immigration to the UK. This has contributed to the image of the UK as unwelcoming to foreigners. Our interviews reveal this sentiment to be felt palpably across the world, by both EU and non-EU students. Even applicants whose decisions were not influenced by Brexit felt that there was a change in the UK's attitude towards immigrants.

We found a real strength of feeling in Greece, Italy and Spain about the EU referendum result. Norway and Belgium, on the other hand, indicated a relative sense of indifference to the Leave vote, and, German students were more likely to feel unsure about what the result means for them, than to flag up strong opinions either way.

It is important to note that for several applicants Brexit had made no impact, with the UK still intended as their number one destination. A minority of students expressed support for Britain's exit from the EU, although these students still supported the view that Brexit was fuelled by negative attitudes to immigration.

"I don't feel so much welcome like before... Now it's like, oh, they want to be alone, so we're looking somewhere else."

Emma, France

"I was hoping to go [to the UK] to study but I've changed my mind. I don't see the point of going to a country that is sending signals such as these, I won't be welcome there."

Ema, Spain

This mixed reaction paints a picture of uncertainty surrounding the referendum's outcome, but one thing is clear: Britain's image within and beyond Europe has been affected, and it would seem, not for the better.

Hate crimes on the rise

"I was hoping to go there to study but I've changed my mind. I don't see the point of going to a country that is sending signals such as these, I won't be welcome there." said Ema in Spain, a prospective master's student. The immediate aftermath of the EU referendum result saw a record 58% rise in racist incidents in the UK.¹ The following months were burdened by a continued spike in hate crimes (ibid). In 2016, a survey found that a third of international students reported a reduced desire to study in the UK.² Some of them cited rising racist attacks and a perceived unwelcoming environment as a key reason. Whilst most prominent in Italy and Spain, our interviews show the extent to which this view prevails in different contexts.

The international media picked up on the deluge of coverage of xenophobic attacks. Interestingly, in Greece, most students believed that the refugee crisis was the main reason the UK voted to leave the EU, an impression they attributed to their local media. This contrasts with other countries in Europe, in which the students understood the decision to primarily be a

rejection of the EU.

However, the view that Britain is anti-immigrant cropped up in most places, conveyed most ardently by Andrei from Romania, who said he now believed the British were "bigots". Emma in France, in her last year of a master's degree at SKEMA Business School, voiced a similar perspective: *"I don't feel so much welcome like before. I know that before UK and France were very close, with the Eurostar and everything. Now it's like, oh, they want to be alone, so we're looking somewhere else."*

Can anything be done to reassure students?

When asked if there was anything UK institutions could do to change attitudes, many replied they wanted reassurance that they would not be treated differently from home students. This was expressed by Diego in Madrid, a prospective master's student in public policy from the USA, who insisted: *"Someone needs to send a clear message to the EU and the world that the UK is open and will not treat European students any differently."*

"I would feel weird having a lot of immigrants come to my country... I feel like it is a good decision for them. [the UK]"

Anca, Romania

Emma in France said she was reassured by the UK universities on the QS World Grad School Tour in Paris, who created information sheets especially for French students, and suggested that such efforts might alleviate the perception that overseas students are unwelcome. *"It would be great if all the regulations could just stay the same."* she added.

1. <https://www.theguardian.com/society/2016/sep/07/hate-surged-after-eu-referendum-police-figures-show> (Date retrieved: 1/6/2017)

2. <https://www.ft.com/content/c179cb10-53f3-11e6-9664-e0bdc13c3bef> (Date retrieved: 1/6/2017)

Difference in opinion

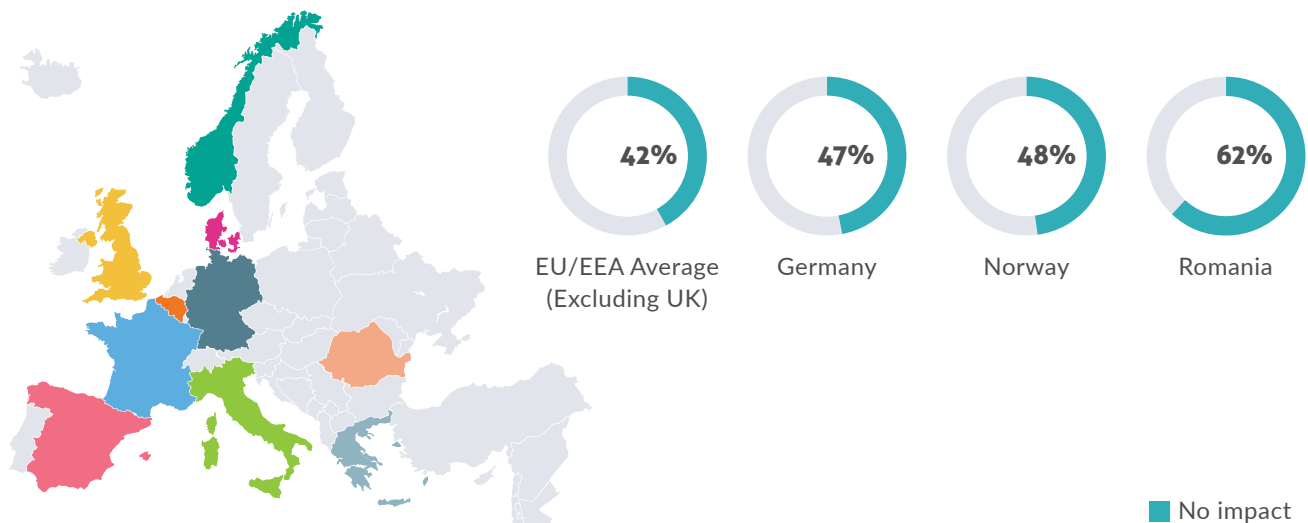
Some perceptions about the UK, however, have not been affected by the referendum result. This was voiced by Emeline in Belgium, who wants to apply for a master's in anthropology in the UK. "I don't feel any less welcome," she said. Elsewhere, not all students felt negatively about Britain's attitudes to immigration either. In Romania, opinion was split. Some empathised with the idea of increased border controls. Anca in Bucharest said: "I would feel weird having a lot of immigrants come to my country... I feel like it is a good decision for the UK."

Survey responses revealed that students in, Germany, Norway and Romania tended to be the least concerned with Brexit's potential consequences for their individual lives and a high percentage of students from these countries felt that the UK leaving the EU was unlikely to have any impact on their education.

"I don't feel any less welcome."

Emeline, Belgium

Do you think Brexit will have an impact on your education?



CHANGED VIEW OF THE UK

Our research shows that, for most, the EU referendum result has cultivated a somewhat altered view of the UK. Many students, including British students, vocalised a view that the UK has gone from appearing like an open, inclusive country, with one of the most culturally diverse capitals in Europe, to one that is less progressive.

The UK has been collaborating with the EU since 1973, producing innovative research, enabling freedom of movement and fostering unity. In general, students felt this relationship, and its benefits, were now in jeopardy as a result of Brexit. Interestingly, students whose study destinations would remain unchanged by Brexit and those who felt generally unaffected by the decision of the British people, still stated that their views of the UK had changed.

"I thought the UK was a more liberal, sensible country... I thought they were more progressive, more towards globalisation. I struggle to put it into words - I had a different opinion of Britain prior to Brexit."

Cédric, Belgium

Britain no longer progressive?

So, one of the key findings was that many students felt Britain is becoming a less liberal nation. This was put succinctly by a prospective master's student in Belgium, Cédric: "I thought the UK was a more liberal, sensible country... I thought they were more progressive, more towards globalisation. I struggle to put it into words - I had a different opinion of Britain prior to Brexit."

The notion that Britain may be taking a step back

politically seemed to have a knock-on effect on students' overall conception of the UK, including the reputation of British universities. Numerous prospective international students saw Britain as a less prestigious and desirable place to study. Moreover, some students like Eliorna in Italy, who had never intended to study in Britain, still communicated this view: "It's a pity. It seems like we are going backwards... It will have big reputational damage to the UK... I don't think it will have any effect [on her future career] because I don't plan to work there. It's expensive, the weather is horrible, the work-life balance is non-existent and they don't like us Europeans."

"It's a pity. It seems like we are going backwards... It will have big reputational damage to the UK..."

Eliorna, Italy

Yasin, a languages undergraduate in the UK, also raised the concern that Britain's reputation had been jeopardised: "It will be damaging in the long run... I think it's alienating for both myself and international students. The decision is quite regressive but I think international students will feel it more." This shows that the concern for Britain's new political direction is not just a preoccupation of international students, but of British ones too.

Is Britain breaking away from Europe?

Many students felt that the UK was no longer united with the EU and the broader Europe. This was considered a threat to the political and economic makeup of the EU as a whole. It was also seen as an indication of Britain

being no longer aligned with Europe's core values. This was expressed by Sophia, a PhD student in Italy: "We built the EU so people can move freely without borders and have a sense of community; now the UK decided to leave it breaks all these basic principles."

This disunity was considered by Jisso, in Belgium, as an inevitable impact: "It's happening not only physically but it happened politically also... I think it might just be natural, not feeling entirely a part of the land mass and the EU - the effect of geopolitics."

"We built the EU so people can move freely without borders and have a sense of community, now the UK decided to leave it breaks all these basic principles."

Sophia, Italy

"I think Brexit is inspiring - the people's voice is heard."

Wei, UK

Unchanged perceptions

Not everyone's view of the UK was negatively impacted by Brexit. Wei from Singapore, currently studying in London, saw it as a triumph of democracy: "I think Brexit is inspiring - the people's voice is heard." Some students raised concerns about the EU as a governing body and sympathised with Britain's desire to become independent: "I can understand why UK people are frustrated by the Brussels' hold on them", said Milienda, a prospective student in Italy. However, despite being understanding, some of these students still felt Brexit was the wrong decision for both the UK and the EU.



Case study

Name: Naomi
Location: Madrid

Seeking a master's in film production outside Spain, Naomi has been having doubts about studying in the UK since the EU referendum result. She worries that the UK will be cut off from EU funding and that this will affect the arts and film industries in particular. She is also concerned that in a post-Brexit environment, British universities will be hit hard, and lose their standing as some of the most innovative and highly regarded institutions globally.

She attributes this downgrading of quality to the erection of borders and loss of free movement: "Free

movement allows me to move to other countries and exchange ideas, wealth, experiences and learn about other cultures including the UK. I think once the UK is out there is less knowledge transfer and that could be reflected in academics. They will be isolated and they could regret it." Naomi believes in a united Europe and cannot understand the motivations behind such a decision. She conveyed a sense of uncertainty about what Brexit means for someone like her, but feels her industry will not go unscathed.

MONEY, MONEY, MONEY

Possibly the most significant Brexit issue we found international students raised, and one which appeared in every nation we visited, was the financial concern. Currently, EU countries offer reciprocal fee agreements to other member states, meaning that EU students are charged the same as domestic students. If no new post-Brexit fee agreement is reached between the UK and the EU, EU students will be charged full 'international' fees, which are much higher. Another potential implication of this change is that EU students will no longer be eligible for domestic loans to fund their tuition. This will remove a major method of degree financing, meaning that students wishing to study in the UK will be reliant on their families, private loans or scholarships. Considering that the UK's domestic fees are already the highest in Europe, the likelihood of EU students wanting to pay rates substantially higher, without the benefit of government loans, is questionable.

Many students we spoke to, who had considered the UK a potential destination, have been put off by the fear of potentially rising fees, although others felt that they could complete their degrees before this happened. Some particularly economically savvy students, however, were planning on using Brexit to their benefit, by taking advantage of the resultant weakened pound to enable them to study in the UK for less than before.

Rising fees

The perception of the UK as being expensive was prominent with students in every country, but those from less wealthy nations were particularly concerned. In Greece, the financial crisis has left students worried about their futures and financing their degrees, with many citing cost as a major factor in their study destination choice. Theodora, a Greek student of English language and literature at the University of Athens, echoed this sentiment: *"With everything that's happening*

with the Greek crisis, it is more difficult for me and my family to decide where I should study because of the tuition. So I'm looking for something that my family can afford."

Gian, in Italy, told us that the only reason he had decided to still come to the UK was because his institution had guaranteed his fees and funding: *"This [Brexit] has no impact on my decision because I have been assured by the university that funding for EU students will continue; this was one of the important factors in my decision."* Funding for EU students is guaranteed to stay the same across the UK for one or two years, while the Brexit process is negotiated, which may limit the immediate decline in international applications. The full implications of Brexit will only become apparent when these guarantees end, and Britain withdraws completely.

"I feel like I can get what I could get in the UK in Denmark. I can get that type of education in Copenhagen."

Eda, Denmark

An interesting trend found in Scandinavia and parts of Western and Northern Europe, was that students felt that while the standard of education in the UK was very good, it wasn't good enough to justify the high fees. Eda, in Denmark, studying jewellery technology and business, stated: *"I feel like I can get what I could get in the UK in Denmark. I can get that type of education in Copenhagen."* The general feeling was that the UK was too close to Scandinavia culturally and pedagogically to provide added study benefit, especially at higher prices.

When asked what universities could do to counter the negative effects of higher fees, many students felt that scholarships and financial aid, along with reassurances about fees from the UK government, would go a long

way towards improving the UK's desirability. Francesco, an MA student in Italy, put it bluntly: "They need to offer more scholarships."

However, even if universities do offer more scholarships, it would be impossible to offer enough to cover everyone. Our research therefore indicates that UK universities should plan for a major drop in applicants from EU students.

Beating the clock

As a result of the threat of an increase in fees, a significant proportion of students seemed to plan to enter UK universities before the country withdraws from the EU. In fact, of those who told us that the UK leaving the EU hadn't dissuaded them from studying there, many were planning on applying in the next one/two years, therefore avoiding the potential future rise in fees. Prospective student Damianos, in Greece, was planning just this: "I've put some thought in it, but I think that the Brexit talk is going to last two years so I think I will be able to finish my master's beforehand."

So, for now, some of the potential future decline in EU student numbers may be curtailed by the fact that Brexit hasn't actually happened yet. It will be interesting to see how this changes once Brexit is fully implemented.

Student responses may then be very different.

Playing the markets

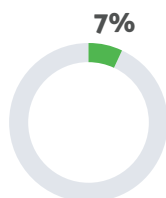
For a number of students, the weakened value of the pound offered a perfect opportunity to access the UK's higher education system for less money in their own currencies. Christine, a management student in Norway, told us that she had now decided to study in the UK for this reason: "The pound is getting cheaper, so tuition is not as much as it would have been a year ago for example." Matvey, a Russian student of business administration in London, told us: "The positive side [of Brexit] is that the currency exchange got cheaper, so when I pay for my tuition fees it's 30% less right now. So instead of paying £10,000, I will pay £7,000."

This is a sentiment which was also found in this year's Hobson's Student Survey, in which 43% of respondents stated that the weakening pound made a UK degree less expensive, actually increasing their likelihood of applying.³

This downturn in the value of the UK currency may be a positive for prospective international students right now, however when, or indeed if, the pound regains its former strength, this will no longer play in UK universities' favour.

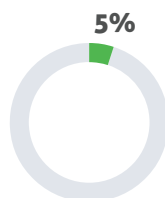
Overall, 7% of all students interviewed said they were more likely to study in the UK as a result of Brexit - a slightly higher percentage to those that viewed Brexit as beneficial to their education and slightly lower to those who thought Brexit might positively impact their career:

As a result of Brexit, are you:



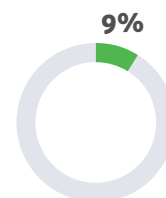
■ More likely to study in the UK

Do you think Brexit will impact your education?



■ Yes, a positive impact

Do you think Brexit will impact your career?

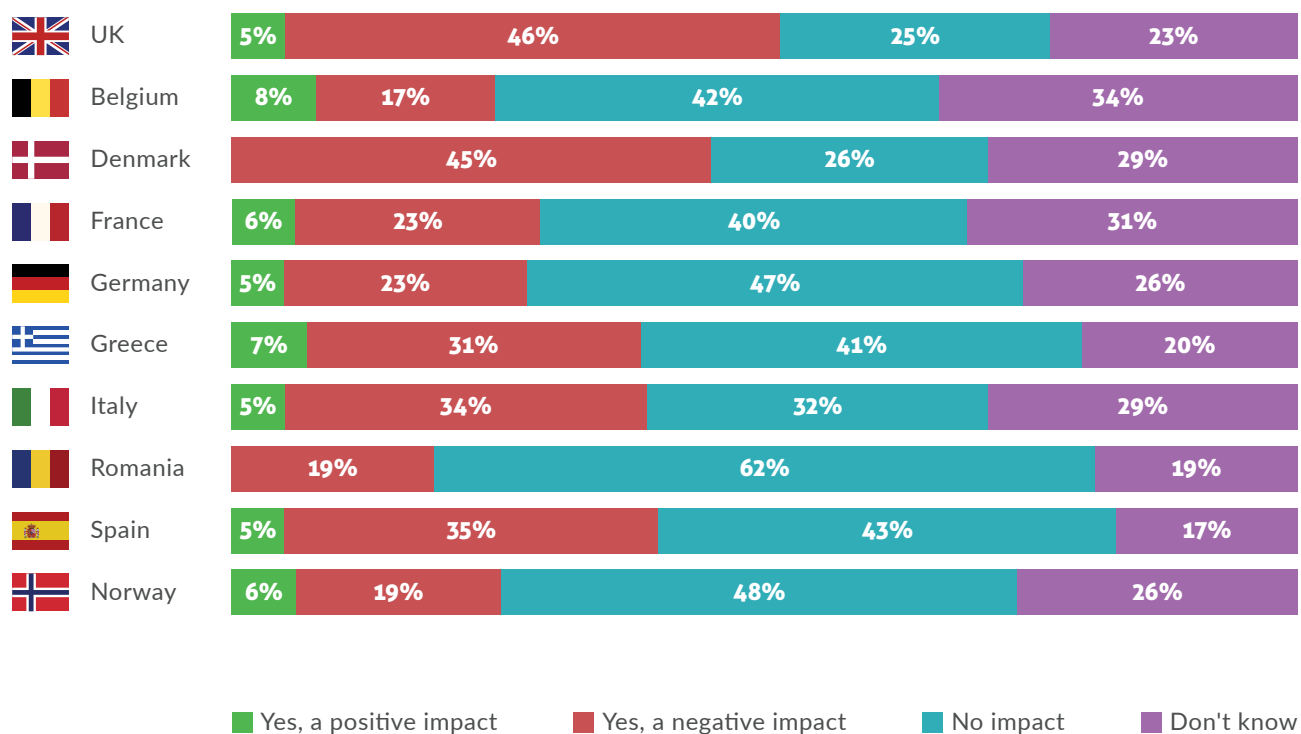


■ Yes, a positive impact

3. <http://www.internationalstudentsurvey.com/about-us> (Date retrieved: 1/6/2017)

EFFECT ON THE UK'S HIGHER EDUCATION SYSTEM

Do you think Brexit will have an impact on your education?



As can be seen from the chart above, a significant proportion of applicants from across Europe, not just the UK, feel Brexit is likely to have a negative impact on their education. Particularly prominent here is Denmark in which this is the view of 45%, closely behind the UK's leading 46%. The UK has one of the world's most respected higher education systems, but the question needs to be asked to what degree internationalisation has contributed to this success. Will Brexit result in reduced international diversity and if so, will the whole higher education sector suffer?

The value of international staff and students to the world's higher education systems cannot be underestimated. They bring with them not only their knowledge but also their cultural backgrounds, enriching the diversity of universities. One of the most essential elements for academic development is innovation, something which is aided by new perspectives, and collaboration which is enriched and catalysed by diverse sources of knowledge. With around 15% of university staff in the UK coming from the EU, and around 125,000 students, a decline in these numbers could cause significant issues for the diversity of the sector.⁴

4. *The Uncertainty of Brexit*, <http://monitor.icef.com/2016/07/the-uncertainty-of-brexit/> (Date retrieved: 1/6/2017)

Will international academics desert the UK?

Fear that international staff may leave the UK, resulting in a damaged higher education system, is a worry we ran into frequently. Many students felt that if a significant proportion of EU academic staff leave, they would also be dissuaded from coming to the UK. Milienda, in Italy, said: *“Many scholars and academics are considering going elsewhere if the academic environment is affected... Although I have UK universities on my list, I am reconsidering my options because I am afraid many scholars will leave the UK.”*

International staff offer more than just their expertise: they offer the ability for institutions to easily foster connections and partnerships with foreign institutions; they provide insight into the culture of international recruitment markets; and they often help create exchange programmes for students. Many international partnerships are formed because of staff links and exchanges, providing opportunities for students to study internationally as part of their degrees. A potential decline in these opportunities was a concern voiced by applicants.

Christelle, a student from Cameroon who has been studying in France, was under the impression that: *“There are some partnerships between universities that are not even existing anymore [sic]. I’m studying at Sciences Po and they had a lot of partnerships for PhDs before, I just checked at the beginning of this [academic] year and they’re not sure if they’re going to keep them.”*

Cross-border programmes

It’s not just the worry of academics leaving the UK that is of concern to students. The EU has a significant number of cross-border programmes of which the UK is a part. Brexit could lead to reduced participation of UK

universities, further damaging the sector. Prospective student Michael, in Germany, considered the UK but changed his mind after Brexit: *“What if I want to do a semester abroad? Will the UK lose some of its European partner universities based on European law? Brexit has a negative influence on my choice.”*

The UK could be forced to leave programmes like Horizon 2020 and Erasmus+, which have had a significant global impact beyond higher education. This in turn could repel students, especially those at postgraduate level who are looking to benefit from, and contribute to, the significant research projects of the EU.

When Switzerland voted to limit freedom of movement in 2014, the EU suspended its access to Erasmus+ and cut off EU funding. This situation could be replicated for the UK.

“What if I want to do a semester abroad? Will the UK lose some of their European partner universities based on European law? Brexit has a negative influence on my choice.”

Michael, Germany

European financial support





The potential loss of EU funding was one of the major reasons the UK’s higher education network lobbied to stay in the union. The EU invests around £700 million into research funding in the UK every year, which is disproportionate to the amount the UK contributes.⁵ Without this money, and with the UK’s poor track record of educational investment (it was highlighted that, out

5. <https://fullfact.org/europe/how-much-money-do-british-universities-get-eu/> (Date retrieved: 1/6/2017)

6. <http://www.universitiesforeurope.com/register/Documents/The-European-Unions-contribution-to-UK-higher-education.pdf> (Date retrieved: 1/6/2017)

Funding from the EU 2007-2013 (€ billion)








The Top Four Countries

	Total	Competitive
 Germany	12.08	7.14
 Poland	9.77	0.44
 Italy	9.66	3.59
 UK	8.85	6.94

Source: <https://royalsociety.org>

G7 Research Expenditure * 2011

% Total Government Spend

	G7 Average	0.69%
 Canada	0.60%	
 France	0.82%	
 Germany	0.89%	
 Italy	0.54%	
 Japan	0.56%	
 UK	0.53%	
 USA	0.86%	

Source: <http://sciencegram.org/>

of any G7 country, the UK already has the lowest per capita spending on research), it is likely that research could suffer, negatively impacting institutions and their ability to attract students.⁶

Naomi in Spain, studying a master's in film production, highlighted the fear of the financial impact: "In my industry, I think there will be an impact as the EU does provide funding across many arts industries and of course much of this goes to the UK. We all know the UK has a famous film industry, and if they lose the funding will this affect people like me?... I think UK universities will lose prestige."

For those studying at PhD or research master's level, the worry about European financial support was, as is to be expected, much higher. In the 2007-2013 period, the UK received €8.8 billion out of a total of €107 billion expenditure on research, development and innovation from the EU (the fourth largest share). For competitive

funding, the UK came second only to Germany, receiving a further €6.9 billion.⁷ Andrea, in Italy, looking for a PhD in computer science agreed, telling us that to reassure her: "The government needs to set up legislation saying academics will not be affected i.e. in research and funding. In the research world, many projects are funded by the EU. If this changes it will be huge; it will affect jobs, economy and research... This decision changes everything and we don't know what will happen."

"The government needs to set up legislation saying academics will not be affected i.e. research and funding..."

Andrea, Italy

7. <https://royalsociety.org/topics-policy/projects/uk-research-and-european-union/role-of-EU-in-funding-UK-research/how-much-funding-does-uk-get-in-comparison-with-other-countries/> (Date retrieved: 1/6/2017)

UNEVEN IMPACT

Although it is broadly evident that Brexit will impact the UK higher education system, there is a view that the impact will be uneven, with middle-tier, non Russell Group, universities being more seriously affected. Some students felt that, given the UK is home to some of the most renowned universities in the world, these elite institutions would be unlikely to suffer fallout from Brexit and would maintain their prestige. Universities such as Oxford, Cambridge, Imperial College and UCL, among the highest ranked universities in the world, were considered to be able to maintain their positions in spite of possible impacts on their funding, international diversity and fees. However, it is clear from the chart below that both types of institutions rely on international students quite heavily.

The elite or nothing

The idea that Brexit will impede the higher education system in the UK has led some students to filter and grade British universities with a harsher, more considered eye than prior to the EU referendum. Some of these students felt the elite institutions were now the only ones worth their attention. They considered top-ranked universities as uniquely capable of withstanding any possible backlash of Brexit. As prospective student Martina, in Italy, told us: *“I don’t agree with it. I am scared it will have a big impact on universities in terms of rankings and prestige. I think many UK universities will get downgraded... I am only really considering the top ranked schools because*

I think they may not be affected as much.” This attitude was predicated on the idea that less reputable universities will lose applicants if fees increase, funding dissolves and diversity decreases. The table below shows the percentage of international students drawn to both elite and middle-tier universities in the UK. As can be seen, these figures are not insignificant, so a drop in EU applicants will significantly affect the composition and, for some, prestige of these institutions.

Alternative views

Some students were still determined to study in the UK, regarding its higher education system highly, regardless of Brexit. As Efrain, in Spain, studying a master’s in political science told us: *“No, this [Brexit] will make not make any difference to me as I am dead set on studying in the UK because the universities I am considering are some of the best in the world.”* This view was prevalent in Spain, where many felt students and academics would still be drawn to the elite institutions. Additionally, students valued the variety and breadth of programmes on offer in the UK, citing this as a key pull factor despite the potentially unpleasant consequences of Brexit. One student mentioned her degree was not offered universally in Europe, so she regarded the UK as a reputable place to study above other countries: *“I would still study in UK because my subject area is so niche and there are not many universities at all which offer research in design,”* said Sophia in Italy.

Top ranked UK universities	Percentage of international students
Cambridge University	35%
Imperial College London	54%
LSE	69%
Oxford University	36%
UCL	43%

Non-Russell Group UK universities	Percentage of international students
City University	50%
Lancaster University	36%
Reading University	30%
Surrey University	39%
Sussex University	36%

Source: QS World University Rankings Statistics

THE RED TAPE

A prominent issue we encountered associated with both the EU and Brexit was added bureaucracy. Interestingly, the issue of “EU red tape” was used as an argument to leave the EU during the referendum, but is now seen to be an unfortunate consequence of Brexit. The cornerstone of the EU is the ability to work and travel to all constituent countries without needing to apply for visas. Within the Schengen zone, even an identity card is not needed to cross borders. This is something that today’s young people, as the most well-travelled demographic in history, are particularly passionate about. Theresa May, the UK’s prime minister, at the time of writing, has set out a vision for Brexit which signals an end to the full freedom of movement. This would mean that, barring a renegotiation or further announcements, EU students may in the future need to apply for visas to study in the UK.

“I considered London because it’s English and it’s in Europe and it was easy as I didn’t need a visa. I was considering the US for example but you need a visa and it’s complex – bureaucracy put me off.”

Zoe, UK

The visa issue

Applying for visas takes time, effort and money. For many students, *‘it’s not worth the hassle’*. Prospective student Zoe, from France, currently studying in the UK, told us that it was the bureaucracy itself that put her off studying in the US: *“I considered London because it’s English and it’s in Europe and it was easy as I didn’t need a visa. I was considering the US for example but you need*

a visa and it’s complex – bureaucracy put me off.” Jan, a business administration student in Germany, shared a similar view: *“I think I would love to go there [the UK], but if they are leaving the EU it is more risky and requires more planning than going to another EU country.”* For some, like Amalia, in Greece, looking at studying a master’s abroad in public health, needing passports and visas would be a major reason not to come to the UK: *“Not if we have to have passports and visas. If the UK stays in Europe we can go just with our IDs.”*

Studying internationally can be a challenging experience, requiring adaptation to a new culture and environment. The added cost and inconvenience of needing to apply for a visa is enough to deter many EU candidates.

Travel broadens horizons

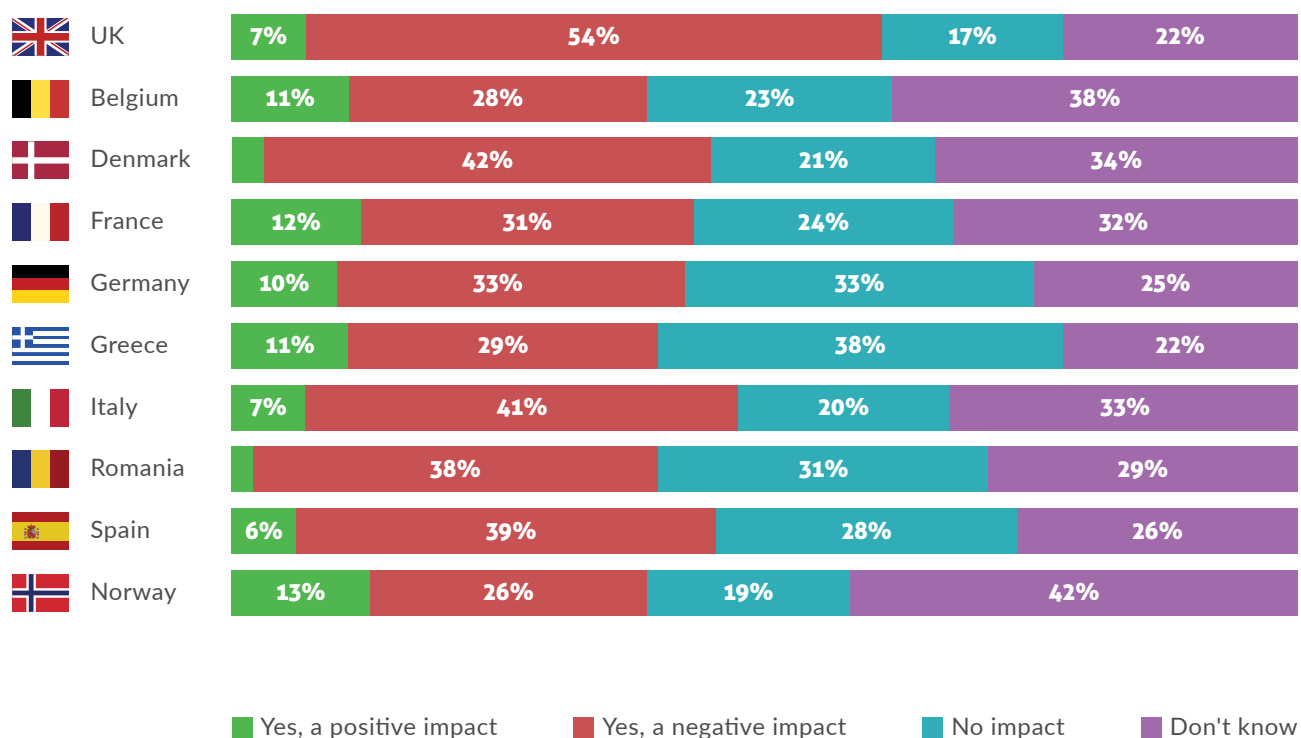
A major aspect of international study is the ability it gives students to travel. In the QS ‘What Matters to International Students’ report series from 2016, it was clear that students from several nations placed significant emphasis on this.⁸ Raturaj from the US, told us he was considering studying in Europe, due to the fact it was easy to travel around and explore nearby countries: *“Of course, studying abroad is one of the coolest experiences, so I would love to live in Europe. Location is also important as I want to be well connected so that I can travel.”* If the idea emerges that it’s difficult to travel while using the UK as a base, students looking to explore their surroundings may begin to look elsewhere.

When we asked students how they felt their countries benefitted from the EU, travel was always named. Andreea, in Romania, thought there were many advantages of being part of the EU, but: *“especially easy way to travel around [sic].”*

8. What Matters to International Students: Focus on US, QS

POST-STUDY EMPLOYMENT

Do you think Brexit will have an impact on your future career?



Employment prospects following study in a post-Brexit Britain were a contentious issue for many students. This was one of the key potential outcomes most likely to deter students from considering the UK as a study destination. Others were uncertain, but fears about obtaining a work permit after graduation were making them reconsider their options. Some students felt a mounting sense of pressure to make a decision in light of this risk and there was a shared feeling that other countries in Europe may offer a far easier work transition.

Many believed that fewer employment opportunities would result from Brexit's detrimental effect on the

UK's economy. The negative impacts of Brexit on employment were most feared in Denmark, Italy, Romania, Spain and of course especially in the UK itself, as can be seen in the chart above. Some believed that Brexit could have a detrimental effect on the UK's economy, leading to fewer jobs and therefore fewer employment opportunities. There were some students who were unfazed by Brexit's potential impact on their careers, but those were students less likely to consider studying in Britain in the first place.

Freedom to work post-graduation

Almost universally, students were concerned about potential visa restrictions post-Brexit. Many thought this would present a particular challenge for employment after graduation, viewing Brexit as a creator of red tape for the UK job market. Some of these students felt their studies would not be affected, but their career would. As Camille, in France, studying business management in London, said: *“For my education, I do not think it is going to change anything, but career-wise there is less chance of me having a job here. Visa-wise, because the barriers are supposed to be back. It just... blocks it... Even though I have a degree in the UK and a life settled, it’s going to impact the chances of me wanting to stay here.”* Like Camille, fear about obtaining a visa had made many students reconsider studying or working in the UK after graduation. The word ‘complicated’ was used repeatedly in our interviews and some thought it would not be worth trying.

“I... recently read that UK companies can only employ a certain number of foreigners, well that’s bad for me because it will limit my chances of working there and just add another complication.”

Ema, Spain

Some students felt that UK companies would be more likely to employ UK applicants, as there would be less administration and fewer costs involved. As expressed by Ema, in Spain: *“I read a story almost every day about what is happening and [have] recently read that UK companies can only employ a certain number of foreigners, well that’s bad for me because it will limit my chances of working there and just add another complication.”* Students from outside of the EU also believed it would be harder

to get a visa and find work as a consequence of Brexit. This was represented by Christelle, from Cameroon, who has been studying in France but is considering the UK for her PhD: *“There are also some issues with the visa, immigration. I’m still interested to study in the UK, because the programmes are still awesome. It’s all about the costs and how difficult it’s going to be to challenge all the obstacles – that were difficult before and are getting more difficult now.”*

“I’d quite like to get into research, so I am worried about how leaving the EU would affect British research. I wanted to stay in Britain to work, so I am worried about how it would affect research funding.”

Alex, UK

British students concerned

It was not just international students considering studying in the UK who raised issues around employment prospects after study post-Brexit. Some students in the UK also had apprehensions. For example, British students who are looking to pursue careers in research, said they were worried that Brexit would result in reduced access to funding, which would have a damaging effect on their ability to conduct research into their chosen fields. As Alex, in the UK, looking to go into earth observation, shared: *“I’d quite like to get into research, so I am worried about how leaving the EU would affect British research. I wanted to stay in Britain to work, so I am worried about how it would affect research funding.”*

A British student, Sanya, who has started her own business, felt Brexit was pushing her to study in Europe with greater urgency. She also shared her perspective as an employer in the UK: *“I think it’s going to be harder for me to retain some employees, and having to get their visas.”*

Fewer career opportunities in post-Brexit Britain?

“One of the reasons I would consider studying there [UK] is because I want to work there later. But if there won’t be so many jobs after...” said prospective master’s student Christine, in Norway. She was planning to study in the UK but the potentially less good prospects of post-Brexit job opportunities were deterring her.

The idea that Brexit will have negative repercussions on the job market in Britain has pushed some students to consider studying elsewhere in Europe. As Bulgarian student Assya, currently studying in the UK, said: *“I decided that after the Brexit, I don’t want to stay in the UK anymore. I would prefer to do my master’s elsewhere in Europe. I was investing a lot, my time and everything, and now suddenly – if I won’t be able to find a good job, it won’t be worth it to do one more year in the UK.”*

“I decided that after the Brexit, I don’t want to stay in the UK anymore... I was investing a lot, my time and everything, and now suddenly – if I won’t be able to find a good job, it won’t be worth it to do one more year in the UK.”

Assya, Bulgaria

It is not just the need to apply for visas that is putting off potential applicants either, for many international students, who do not have access to the UK maintenance loans or grants, the ability to work during their studies is essential. EU students used to be unrestricted in the number of hours they could work, now however, they could be subject to strict restrictions. Such regulations

are likely to not only impact the amount of part-time work they can do during their degree, but also the number of internships they can undertake - impacting their future careers.⁹

In the Hobson’s Student Survey, almost half the respondents said that that the freedom to live and work in a country were key to their decision on which university to attend. This is highlighted by Marcello, a student in Italy: *“I am concerned being an Italian citizen I don’t know if it will be easy for me to study or work in the UK.”*

Unfazed voices

Not everyone felt Brexit would have an impact on their future careers. While some students we spoke to had no intention of studying or working in the UK, others felt there were plenty of other options in Europe and that a potentially ‘closed’ UK would not hold them back.

Some students in Norway felt that, particularly as Norway is not in the EU, Britain’s relationship with their country would remain strong. When Christian, a Norwegian currently studying in the UK, was asked if he thinks it will become more difficult to get a job in the UK, he said: *“I think it won’t, because Norway and the UK have very good trading agreements, and so it shouldn’t be that hard. And because Norway is not even a part of the EU – we have a special agreement, so it should be fine.”*

“...Norway and the UK have very good trading agreements, and so it shouldn’t be that hard. And because Norway is not even a part of the EU – we have a special agreement, so it should be fine.”

Christian, Norway

9. <https://www.ukcisa.org.uk/Information--Advice/Working/Can-you-work#layer-5430> (Date retrieved: 1/6/2017)

WILL LONDON REMAIN A FINANCIAL HUB?

London's financial district is seen to be particularly impacted by Britain's impending exit from the EU. This was of greatest concern to those studying or applying for finance degrees, as many of them saw the financial hub of London as one of the most desirable destinations for their academic and postgraduate careers. Others were indifferent, pledging to go where the financial sector re-established itself.

London has been the financial centre of Europe for some time. However, as a result of Brexit, some banks have already announced plans to migrate staff and operations elsewhere, with Paris, Frankfurt, Dublin and Luxembourg predicted to be alternative destinations. According to our research, should London be replaced as a financial capital of Europe, Britain's higher education system and diverse workforce will see changes – at least, where the financial sector and related degrees are concerned.

"If a lot of companies are leaving, then my interests would leave with those companies."

Anders, Denmark

London's financial district threatened by Brexit?

In Scandinavia, most students who were considering studying in the UK were interested in business and finance degrees. This interest was compromised by their belief that Britain was losing its foothold as one of the global powerhouses of the finance industry. Switzerland was considered a safer destination in this respect. The potential relocation of business was approached tactically by Anders in Denmark, who has a master's in finance and wants to do a second master's in economics:

"If a lot of companies are leaving, then my interests would leave with those companies."

Martina, in Italy, raised the same concern: *"We are already seeing businesses leaving the UK, so I'm scared there won't be any jobs in the UK anymore."* The concern about the economic impact to the UK and London's financial sector was common in Italy. Students were unsure if businesses would be choosing to invest in other countries instead of the UK. These candidates generally fell into two groups: a) completely set on working in London, b) working wherever the financial sector moves.

"We are already seeing businesses leaving the UK, so I'm scared there won't be any jobs in the UK anymore."

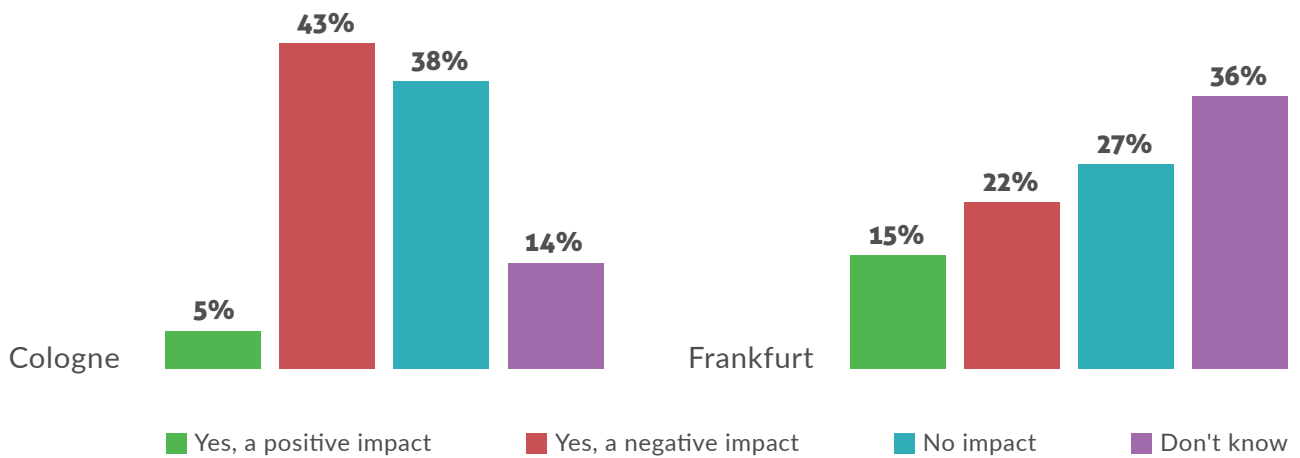
Martina, Italy

Opportunities created elsewhere

Some students regarded the anticipated decline of London as a financial centre as a positive change, creating opportunities elsewhere in Europe. They welcomed the benefits to their own economies, with one student from Luxembourg convinced it was on track to take over from London.

This was also voiced by Jan, a prospective master's in business student in Frankfurt: *"...On the other side, maybe the investment banking and trading will move to Frankfurt and that will offer new jobs for me. On a micro level it might be good, but on a macro level it is definitely bad."* This demonstrates that Brexit is an emotive topic for some students, provoking mixed feelings, which are neither wholly positive nor negative.

Do you think Brexit will have an impact on your future career?



Jan's belief that Frankfurt might benefit economically from Brexit is more broadly reflected in our survey responses. Students in Frankfurt were the biggest believers in the potential positive impact of Brexit on their careers, a statistic which was not as strongly reflected in other German cities.

"...On the other side, maybe the investment banking and trading will move to Frankfurt and that will offer new jobs for me. On a micro level it might be good, but on a macro level it is definitely bad."

Jan, Germany

Impact on competition for work

Not everyone was convinced that London would necessarily lose its standing as a financial capital of Europe as a consequence of Brexit. However, these students were more troubled about how Britain exiting the EU would impact their careers as London becomes less accessible to them personally. This was

demonstrated by Anders in Denmark, who thought it was: *"Very likely [that it will impact his career], because I work in the financial industry and London is the financial hub where everyone would like to get a job eventually. If it becomes more difficult to get work permits... it would definitely be a huge obstacle."*

On the other hand, Courtney from the UK, studying a master's in physics, believed less immigration meant greater opportunities for British workers in the finance sector: *"The financial district in London is still big. I believe that the competition may be lowered, because many people might not be able to work in the UK anymore."* Despite his positive outlook, our survey shows 54% of British students, the highest percentage in Europe, felt Brexit would negatively impact their careers.

"The financial district in London is still big. I believe that the competition may be lowered, because many people might not be able to work in the UK anymore."

Courtney, UK

UNCERTAINTY

The EU referendum divided Britain, but for all voters, even those who voted to leave, the future remains uncertain. Thus, a clear image of an independent UK is hard to imagine, for those both inside and outside of Europe. This is explained by the fact that Brexit negotiations are just beginning, so it is not known exactly how British governmental policy and trade relationships will subsequently develop, or the precise implications for higher education.

One thing is certain: Brexit has drawn an often emotional response from students across the world. We found widespread confusion about what Brexit means for the UK, Europe and students and young professionals personally. The level of this reaction is extremely varied and swings between passion and indifference. However, some students were simply uncertain. Uncertainty in itself seems to have had a detrimental impact on some prospective students' desire to study in Britain.

Into the looking glass

Talks of 'hard' or 'soft' Brexit have left many feeling unsure and fearful about how the future of the UK will look. Moreover, it is impossible to predict the full political, economic and social implications, whichever Brexit route is taken. This is reflected in British student Courtney's words: *"I can't be entirely sure, because no one knows the extent of Brexit on a long-term basis. We know the short term effects: the pound is down, a lot of Europeans living in the UK are worried. I feel it just put a lot of panic into people's eyes."*

An uncertain future hovers on the horizon for some outside the UK too. Several students were unsure what Brexit means for both Europe and their own individual countries. Some of these students discussed confusion about what it means to be part of the union, and exactly what benefits it provides. This was expressed by Daniel,

in Frankfurt, a prospective business master's student: *"I'm not sure what we are actually getting out of it [EU membership], I'm pretty sure we gain something, but I'm not sure what."* Additionally, quite a few students conveyed uncertainty about why Britain voted to leave in the first place.

Some British students had an optimistic outlook regarding Brexit and so, unlike the majority of students interviewed, their uncertainty was tempered with hope. As Yasin said: *"It's hard to tell... But I'm personally hoping that we do have a more positive country afterwards."*

"It will diminish my chances of doing a PhD in the UK because I simply don't know what will happen. Before the vote the UK was first on my list."

Andrea, Italy

The "I" in Brexit

Despite the possibility of a more positive Brexit outcome for the UK, most of our interviewees assumed the impact would be a negative one. As Cédric, a history student in Belgium, said: *"I guess in a way it will definitely affect my future but I can't really tell you why or how... In my mind right now, since they're demonising Brexit, I would say it would be a bad impact."* The lack of certainty regarding the Brexit outcome leads to a general feeling that it will affect individuals' lives.

Numerous applicants told us they were no longer considering studying in the UK primarily due to the uncertainty about life as an immigrant in Britain. Andrea, a prospective PhD applicant in Italy, shared: *"It will diminish my chances of doing a PhD in the UK because I simply don't know what will happen. Before the vote, the UK was first on my list."*

Hard, soft or transparent Brexit?

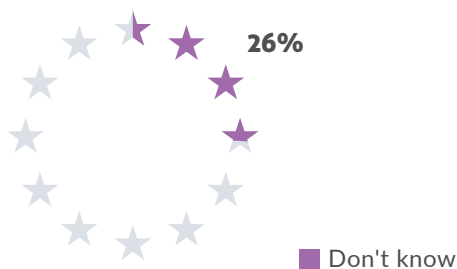
There was a shared feeling that the British government and universities need to be more transparent and to communicate more effectively about what Brexit would entail for international students. They felt uncertain about how policy would change, and how easy it would be to live, work and study in Britain once it leaves the EU. This was voiced by Ana, in Romania: *“UK universities should communicate more with the future students, and also invest more in advertising to explain what will happen in the future. They need to be clear that Brexit will not affect their studies.”* Such a view suggests that students might be more likely to study in the UK if the government makes a clear statement about the terms of Brexit. Until this happens, the number of international student applications may well continue to decline.

“I’ve never dived in to this topic. I’m not aware of the changes and how it might influence my career.”

Danielle, Norway

Some students, particularly those in Greece, were concerned that a British degree would potentially be less valuable in the EU context. This can be seen in an

Do you think Brexit will have an impact on your education?



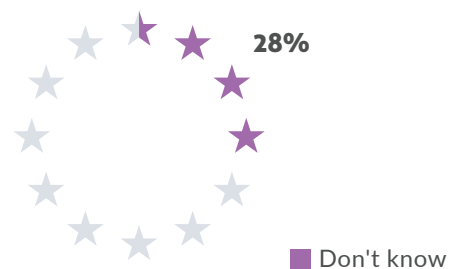
exchange between two prospective master’s students, Michael and Aspasia, in Greece. Michael said: *“I just think that we are not sure about the future, because if you’re going to leave Europe we don’t know about our degrees... what is our country going to say? Okay you have a degree from England but England isn’t in the EU so it’s not a degree.”* To which Aspasia responded: *“They won’t accept the degree.”* Uncertainty, rightly or wrongly, can lead to speculation, which often leads to negative, rather than positive conclusions.

Ignorance is bliss

A significant proportion of students (27%) felt they were simply uninformed about Brexit, and so their uncertainty was attributed to a lack of knowledge on the matter. These students were less likely to think Brexit would negatively influence their careers or studies. As expressed by Danielle, originally from the Netherlands but currently studying in Norway: *“I’ve never dived in to this topic. I’m not aware of the changes and how it might influence my career.”*

Like Danielle, many said they had no opinion on the subject because they hadn’t read up on it. Despite this outlook, some still believed it would impact their careers, they just weren’t sure how: *“I cannot say. I’m not familiar enough with Brexit to say that. My feeling is that it will have an impact but I don’t yet know if that will be negative or positive,”* said Gaspard, in Belgium, who is looking to do a master’s in business management abroad.

Do you think Brexit will have an impact on your future career?



FINAL THOUGHTS

Reassurance is key

- If the UK is to remain a key study destination for international students, there needs to be some reassurance that research funding, university partnerships and the international composition of higher education will stay strong. Simply telling students things will continue as normal is not the solution; students want more concrete promises. A strategy for preserving current partnerships and study abroad programmes, along with student fee guarantees, will go a long way to safeguarding EU student numbers.
- While it might be impossible for institutions to guarantee continued access to EU programmes, they can promise that internationalisation remains a priority, and make efforts to preserve the diversity of the UK's campuses. Dialogues with university recruiters should be used to seek assurances that EU students will still be welcome to apply for positions after graduation from UK universities.

Fees need to be addressed

- Given that UK institutions already have some of the highest tuition fees in the world, many students felt that any increase in fees could act as a major deterrent to them studying in the UK. While the guarantee of domestic fees for the next few years has somewhat helped to reassure current prospective students, universities will need to take preventative action if they want to continue to attract EU students.
- Scholarships and financial aid are two additional options. Another, already being considered by a number of high-profile UK universities, including Oxford and Warwick, is setting up branch-campuses within remaining EU countries.

Marketing could be the only option

- A particularly significant trend we noted is

that students who were considering the 'elite' institutions, such as Imperial College, LSE, Oxbridge and St. Andrews, had not been dissuaded by Brexit. They felt that these institutions could weather the storm because of their global reputation and status. Meanwhile, the non-Russell group universities are more likely to be affected.

- Some students said the reputability of a degree from the University of Cambridge, for example, would be enough to justify increased fees and other difficulties. The same could not be said for less prestigious institutions.
- To tackle this, institutions without a longstanding global reputation may need to rethink their recruitment strategies to continue attracting students from the EU. Rebranding strategies could help curtail some of this negativity.

How welcoming is the UK?

- Naturally, many EU students had an emotional reaction to the Brexit vote. Some viewed it as an attack on the EU citizens living in the UK, and many interviewees said they now felt unwelcome. A few students shared that they had changed their mind about studying in the UK because they saw the referendum result as a vote against freedom of movement. This view was not helped by the spike in hate-crimes following the vote, or the anti-immigration rhetoric used throughout the campaign.
- In order for UK universities to counteract this perception, they need to ensure they are promoting themselves as welcoming and inclusive. It is imperative that they reassure potential students that they will not be ostracised during their studies. Institutions should ensure that their marketing and communication strategies convey the message that despite Brexit, the UK will not become a closed-off nation and that its universities, in particular, will uphold and practise internationally open values.

For more insights into the decision making of prospective international students worldwide, further reports are available to read online at www.iu.qs.com.



If you are interested in first-hand access to insights, want to explore a particular topic or region, or would like to partner with us on future research projects, please do not hesitate to get in touch, on dasha@qs.com. Alternatively, you can find out more on www.iu.qs.com/services/market-insight-service.

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QS Intelligence Unit (QSIU) was formed in 2008 in response to growing public demand for comparative data on universities and other higher education providers, and for institutions to develop deeper insight into their competitive environment. Committed to the key values of rigorous integrity, undeniable value, unique insight and charismatic presentation, QSIU strives to be the most trusted independent source of global intelligence on the higher education sector.

In addition to the research and insights provided by QSIU, QS offers a range of services to help prospective international students find the right institution – and vice versa. This includes a global series of higher education fairs; an annual publication cycle of guides, reports and e-papers; and a dynamic range of online platforms.



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