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Adapting to change in the higher education system: international student mobility as a migration industry

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ABSTRACT
Of late there has been considerable interest in understanding international student mobility, and this has tended to focus on the perspective of the students who take part in this mobility. However, international students are part of a considerable migration industry comprised of international student recruitment teams, international education agents and other institutions selling an education overseas (such as the British Council in a UK context) and as yet there is little research which analyses these relationships. This paper investigates a series of interviews with international office staff to examine the methods they use to recruit international students, and in particular the relationship that they have with international education agents who work with them on a commission basis. It focuses on recent changes to the UK visa system which have led to a decline in the numbers of Indian students choosing to study towards a UK higher education. However, it also reveals that some universities have managed to avoid this trend. This paper investigates why this is the case, demonstrating that there is a need to think about the intersections between migration industries, visa regulations and international student mobility.

KEYWORDS
International student mobility; international education agents; student recruitment; migration reform

Introduction

Over the last 15 years, there has been a profound shift in our understanding of how and why international students choose to study overseas. This research has tended to focus on the perspectives of the students themselves and the structural factors that lead to the pursuit of an overseas education with issues of demand outstripping supply often cited as one of the key influences for higher education mobility (Gribble 2008; Simpson, Sturges, and Weight 2010). Such work has also been attuned to other social, cultural and economic factors which may encourage a student to study abroad. The work of Brooks and Waters (2011), in particular, has identified how mobility often relates to a desire for greater social and cultural capital, which students believe will be almost immediately transferable to economic capital when they enter into the global job market. This has been reinforced by evidence that even when the higher education infrastructure improves in sending countries (such as those in South-East Asia), the desire to study overseas is maintained as an overseas qualification becomes a way of differentiating oneself from

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the local graduate market (Waters 2009; Findlay et al. 2012). There are other possible reasons for this as well, work by Collins (2008) and Beech (2015) discusses how students are influenced by their social networks in the decision to study overseas. These networks then normalise the process of choosing an international education, so that study abroad becomes an accepted stage in the life course.

Consequently, there is a steady stream of prospective international students who are eager to study abroad as a result of these structural and socio-economic factors. However, the work of those who recruit international students is a subject of very little systematic study, and yet it is these individuals who are ultimately responsible for creating and distributing information about their universities to prospective students. This information is critical because higher education is now a key export industry for many industrialised countries, in particular for the UK, USA, Canada, Australia and New Zealand (Pandit 2009; Brown, Edwards, and Hartwell 2010; Naidoo 2010; Zheng 2014) and has been since the neoliberalisation of their tertiary education systems in the 1980s and 1990s. It is therefore crucial that these dynamics are given far greater attention, as this neoliberalisation has enabled universities to actively seek out new sources of funding, including focusing on the recruitment of 'high value', full-fee paying students.

It is their high value of these students that has led to the development of a global migration industry in higher education has become established. This could be defined as the actors, entrepreneurs or systems of governance involved in facilitating student mobility and migration (Betts 2013; Hernández-León 2013; Cranston, Schapendonk, and Spaan 2017). Within a higher education context, these 'industries' operate in two ways. First, many UK higher education institutions (HEIs) can, in themselves, be considered migration entrepreneurs, they provide opportunities for mobility and often invest considerable financial capital in outreach activities to access these students. Second, as demand for overseas education has risen (both from the students seeking opportunities for study and the universities wishing to recruit these students), a network of international education agents has also become established. These agents are employed by private companies which have links and contacts at universities worldwide, and are paid a commission by the universities for every student recruited successfully to one of their programmes. It is important to note that agents will not necessarily have either studied abroad themselves, or even visited all, if any, of their university partners, nonetheless they can be useful and valuable middleman in international student recruitment as they have the same cultural and local understandings as the students. This can make it easier for them to gain the students' trust, benefitting the university. Furthermore, as higher education is also subject to governance and policy systems which provide or limit opportunities for international study, agents can also help students to negotiate these hurdles, or even encourage them to seek out alternative overseas education destinations. Over time and as a result of the benefits that they can bring, agents have become integral to international student recruitment, with both universities and students viewing agents as gatekeepers to international students and higher education opportunities, respectively. Thus, similar to the calculative practices discussed by Cranston (2017), this relationship does more than describe the economy, but also produces it.

With this in mind, this paper considers how the end of the UK Post-Study Work Visa in 2012 (which allowed international students to remain for two years on completion of their studies) has affected international student recruitment. This paper will analyse a series of

interviews conducted with higher education recruitment officers working at a range of UK universities. It investigates the methods used by universities to recruit students and the measures taken to ensure that they remain competitive in a saturated market. This also details their response to these changing visa policies which have impacted upon the UK's 'desirability' as a destination for overseas study. In so doing it shows not only how government policy leads to the establishment of different migration industries (in particular the agent/university relationship), but also how policy reform affects the success of these industries and an analysis of the university response to maintain competitiveness despite these changes.

Higher education and the 'migration industry'

Higher education in a UK context has expanded rapidly since the 1960s with student numbers quadrupling between then and the beginning of the twenty-first century (Blanden and Machin 2004). In particular, focus has often been upon the Further and Higher Education Act of 1992 which fundamentally changed the UK higher education system by removing the binary divide between universities and polytechnics (Mayhew, Deer, and Dua 2004). This was significant as institutions, which in the past had focused on vocational training, were now able to apply for university status and were often appealing to students because of their long-standing reputations and the applied nature of the degrees that they offered (HEFCE 2004). Consequently, by 2011, there were 140 university and university colleges in the UK (a rise from 33 universities in 1960) with a 42% participation rate in higher education at an undergraduate level for the relevant age cohort (Foskett 2011). The result of this is a 'highly differentiated HE [system]' (Tindal et al. 2015, 94), comprised of HEIs which have a variety of different histories and sociocultural understandings of what the universities can offer in terms of their research and education, and therefore also in terms of their reputations.

The neoliberal reforms which facilitated these changes also enabled universities to adopt free-market principles and generate some of their own funding with the aim of increasing efficiency through competition and streamlining (Deem 2001; Harvey 2005; Olssen and Peters 2005). As a result of this, alongside developments in internationalisation and globalisation which facilitate international travel, communication and relationships, universities now operate on a global scale and aim to exploit international opportunities for funding and growth. The investment into international student recruitment and the development of an international student migration industry within the UK is testament to this, as are the range of different strategies which universities use to exploit these alternative markets; such as distance learning, transnational higher education opportunities, collaboration with overseas partners (in both research and teaching), branch campuses overseas, and opportunities for student and staff mobility (Leung and Waters 2013; Gopinath 2015).

There are short-term financial benefits to these various strategies – universities are able to reach prospective students in new markets and recruit high value, internationally mobile students which may help to maintain healthy finances and support research and development (Zheng 2014). Lange (2013) noted that in the UK students from non-EU countries (who pay higher fees than both their domestic and EU counterparts[1]) contributed some £2.5 billion to higher education funding. Thus, in the short-term, it makes sense

to put considerable effort into recruiting these 'international' students. Furthermore, the influence of social networks on student mobility could lead to opportunities for greater student recruitment in the future, as links between the sending and receiving countries, or even links to particular universities, become more established (Beech 2015).

With so much at stake, competition for these students is fierce, and in recent years (and partly as a response to this competition), we have witnessed increased use of third parties and international education agents to grow student enrolment numbers. Pioneered in Australia (Choudaha and Chang 2012), the agent model of recruitment is now widespread. They inform students on their higher education options, and may also offer a wide range of services including help with visas and travel, English language testing, accommodation and counselling (Collins 2012). This has led to the development of what is effectively a Global Mobility Industry facilitating the movement of these highly skilled migrants (Cranston 2016; 2017). Agents themselves are free to prospective students and are paid on a commission basis by the universities which they recruit to. For universities they therefore offer a 'one stop shop' for student recruitment in exchange for a fee, and this can often reap considerable reward as agents also tend to understand better the specific cultural context of where the international students are coming from – something which is often not the case for university recruitment officers.

In addition to this, international students can also reap longer term recruitment rewards should they choose to remain on graduation, with evidence suggesting that even on a temporary basis this can have advantages for sectors of the economy which rely on a university-educated workforce (Adnett 2010). Thus, immigration policies are often designed to encourage students to stay and fill particular skills shortages, such as those in the science and engineering sector, which may be less popular with home graduates (Gribble 2008; Madge, Raghuram, and Noxolo 2009; Lange 2013; Tang et al. 2014). It was with these aims that the Post-Study Work Visa was established in the UK, granting leave for international graduates to remain for two years without the need to establish a sponsor beforehand. However, swelling anti-immigration sentiment and fears over the abuse of the system led to changes to UK immigration policy and the Post-Study Work Visa ended in April 2012. Now, should international students wish to remain in the UK, they have to either qualify for a Tier 2 visa which requires a sponsor in advance and that the applicant is in receipt of an offer of employment with a salary of £20,800 or more, or a Tier 1 visa for aspiring entrepreneurs. Neither of these options were (or indeed are) as appealing as the Post-Study Work Visa. At the time Mavroudi and Warren (2013) suggested that these changes were likely to act as a deterrent for potential international students and impact upon their recruitment, at least on a temporary basis until the workings of the replacement visa system became clearer. This hypothesis seems to have been confirmed in a recent report by Universities UK (2014) which showed a marked decline in the numbers of international students from outside of the EU to the UK between 2010–2011 and 2012–2013 (the numbers of Indian student enrolments had almost halved in this time period). This was particularly notable when compared with the levels of growth experienced before 2010.

However, the report also drew attention to the fact that there are now a number of different options available to international students, reflecting on evidence that the top five study destinations had all experienced some decline in international student numbers since 2000 due to growing opportunities in destinations such as China, Malaysia,

Egypt, Saudi Arabia and the United Arab Emirates for both local and international students (Collins and Ho 2014; Ma 2014; Universities UK 2014). Thus, while reforms have occurred, the shape of the international student market is very different and established markets, like the UK, need to work harder to maintain their market position (Universities UK 2014). This makes policy and recruitment spaces (and practices) crucial to the future of the international student body on campus. Despite this, whilst we have a well-rounded understanding of what attracts them to study overseas, our knowledge and understanding of the geographies of this recruitment process are limited. We understand why universities want to recruit these students, and what enables them to do so, but we do not yet understand the processes that they employ and why, or how they have responded to these market changes.

Methodology

This paper draws on findings from a study of recruitment practices in UK HEIs. In order to recruit from as many HEIs as possible, an email was sent out on a forum for professionals working in international higher education in early 2014. The only requirements were that participants had to be presently or very recently employed in international higher education recruitment in the UK. A total of 20 members of staff responded to the call for participants. However, primarily due to time constraints, only 10 decided to take up the offer of a semi-structured interview. To maintain their anonymity, all names used in this study have been changed for pseudonyms, and their universities have not been named directly.

The participants came from universities throughout England and Scotland, and could be considered representative of the diversity of the UK higher education system. This research captures the essence of this variety by including interviewees from a range of different HEIs. Two interviewees were from Russell Group institutions, a self-styled collective of the 24 most research intensive universities in the UK, and which often are ranked highly in both national and international ranking systems. Three were from post-1992 universities which were founded under the terms of the Further and Higher Education Act of 1992. One participant was from a Redbrick institution, a term which loosely refers to universities formed in the nineteenth and early twentieth centuries. One was from a New University formed after the post-1992 wave, but which was not a former polytechnic. The final three were from, what I have termed, specialist higher education providers such as arts colleges, music conservatoires or subject-specific HEIs. A number of participants had also worked at multiple universities or in private sector student recruitment and at least five had over 10 years' experience working in international student recruitment or admissions more generally. They were therefore well placed to offer their reflections on changing international student recruitment policies.

The universities were also diverse in terms of the proportion of international and EU (or overseas) students that they hosted. At one institution, over 50% of the registered students were classed as overseas or international according to the HESA statistics for 2014–2015, but at others there were significantly less. Two of the HEIs (a New University and a Specialist HEI) included in the sample had very small international student communities and in both cases less than 3% of their students were domiciled outside of the UK. On

average, 21.16% of the students registered at the HEIs in the study were overseas or international and again, this is broadly comparable to the UK average of just over 19% (HESA 2016). It is also important to note that within the analysis of the interviews with the international office staff they refer to international students as those from outside of the EU unless they state explicitly to the contrary (Table 1).

All of the interviews were conducted via Skype or telephone between August 2014 and June 2015 and lasted between 30 minutes and an hour. Using Skype and telephone as an interview method offered greater flexibility and the proposed timings of the interviews could vary if the availability of the participants changed (see Deakin and Wakefield 2014 for further discussion of the benefits of Skype interviews). There were some issues with this method, however, with the internet connection failing on occasion which affected the flow of the interview, at least temporarily. Questions have also been raised regarding the ability to develop a rapport with interviewees when not meeting face-to-face, particularly given that the non-verbal cues that interviewers use to make their participants feel more relaxed are often lost (O'Connor et al. 2008) although this is less the case with Skype where it is possible to use both audio and video to communicate. However, a number of the participants mentioned that they either used Skype or telephone to talk to prospective international students on a regular basis and as such seemed comfortable with this arrangement.

International student recruitment: policy and practice

As noted, a number of interviewees had extensive experience working in the international student recruitment sector. One of the participants, Luke, had been employed at his current Specialist HEI since 2012 and had worked at a post-1992 institution prior to that. He offered a vibrant picture of the 'industrialisation' of student migration and reflected that the emergence of the international student sector was almost organic. He discussed how, early in the 1990s, recruitment had been student driven and the university had no well-defined strategy for targeting these students.

> Luke: I became, whatever it was, Head of International around about ninety, well the late 90s and then the international office built up from one person … Now, think about that in terms of employment and development. A whole new industry developed from the early 90s through to the 2000s.

Table 1. Participants and their HEI type.

Name	HEI type	% International and overseas students[a]	% International students[a]
Simon	Russell Group	28.98	22.48
Judith	Post-1992[b]	20.62	11.71
Lois	Red Brick	26.88	20.98
Rhoda	Post-1992[b]	29.78	19.50
David	New University[c]	2.57	1.56
Sarah	Specialist HEI	13.99	10.72
Nathan	Specialist HEI	6.90	4.45
Candace	Post-1992[b]	12.85	10.17
Luke	Specialist HEI	2.56	1.28
Joel	Russell Group	66.51	48.54

[a]Adapted from HESA (2016).
[b]Former polytechnics.
[c]New University, formed after 1992, but not a former polytechnic.

The policies of Luke's former HEI were in stark contrast to his current employer. He stated that whereas in his prior appointment they perhaps had 30,000 students, the specialist institution in which he was now employed had fewer than 2000. He commented that in his current employment it was like 'going back in time'. He was, initially, 'the International Office of one' which offered an interesting case of *déjà vu* of his experience 15 years previously. In his new employment, he was dealing with issues and questions which he had dealt with long ago at his previous HEI. His experience offers interesting insights into the rapid development of the migration industry over a relatively short period of time and in response to growing student demand. Not only that, but it also demonstrates that internationalisation is now also a focus for smaller, specialist HEIs as well.

In response to these rapid changes the majority of universities had adopted a triad of recruitment methods. First, direct applicants who apply to the university with no, or limited external help. Second, by developing partnerships with universities overseas which may include exchange or other teaching and learning arrangements (such as a 'two-plus-two' programme where a student begins their degree in one location, but finishes it overseas, graduating with a degree from the host HEI). The third principle method was agent-led recruitment, whereby, as mentioned, the student comes to the university through a third party who is paid a commission for every student they recruit to the university (Matthews 2012). These would then be supplemented with a range of other activities such as academic visits or attendance at international student recruitment fairs which can be either based in the UK or within key markets globally. The two latter of these methods (and possibly the first) include a relationship of some description with 'migration entrepreneurs' (Hernández-León 2013) who facilitate the mobility of the students for financial gain – in these cases either the agents or the universities themselves.

In addition to these, two of the universities interviewed also mentioned how they were trying to encourage academics to use trips overseas (either for research or conferences) as opportunities to also engage with prospective international students, ensuring that they were making the most of their staff time abroad. Lois, who worked at a Redbrick institution in England, stated that this was a particularly good method for reaching out to potential postgraduate students:

> Lois: Often if we have academics that are travelling for conferences we will see if there are partner universities that … they can go and visit, so we can really sustain strong relationships with the universities that we already work with, even if it's giving a lecture in the department that the professor would be affiliated with … In the past we have seen a huge amount of success having an academic meet with faculty and also give one of these lectures and in return you see a lot of [postgraduate] interest.

This changing institutional policy could have interesting ramifications for the shape and size of international recruitment teams for the future. If there is a demand for this more specialised information, future trends may see a move away from large international teams towards greater reliance on academic faculty to drive the recruitment process, perhaps even at a departmental or subject group level.

Despite these potential changes, overwhelmingly universities cited direct and agent-led as the two key recruitment methods with some having substantial agent teams into which they invested considerable money and time. Simon, who worked at a Russell Group

institution and had over 15 years experience of international student recruitment, stated that his university worked with between 240 and 250 education agents and every year they conducted a performance review of those agents. The use of migration entrepreneurs was therefore central to their recruitment strategy and they invested considerable efforts in monitoring the performance of these third parties. He described how there was an expectation that certain markets, such as India and China, agents would bring large numbers of students to their university annually and this was primarily because these markets were agent-led. Simon discussed how, among Indian and Chinese students, the agent model is now so entrenched that it was almost accepted that they would make their higher education choices with the help of a third party. If an agent failed to perform in these cases, the university would then consider severing their relationship with them. By contrast, in other countries there was a significantly smaller agent market. Judith and Candace, who were both employed at Post-1992 universities stated that in Nigeria very few students would come to a university through an agent. Judith explained this by saying that in Nigeria there is 'a real suspicion of the middle person' and therefore it was more normal to have very small numbers of students coming through an agent. As such universities make decisions on whether or not to continue relationships with agents not only on the basis of the number of incoming students but also their recruitment expectations with regard to the prevalence and centrality of agents in those markets.

The introduction of a third party into student recruitment can cause difficulties because it has the potential to dilute the universities' messages and advertising. Therefore, to use agents also leads to a need for greater safeguarding. Amongst the interviewees it was a standard procedure to monitor agents or to visit them regularly. Rhoda, who also worked at a post-1992 university, said that building a relationship with an agent or agency is important, and they also encouraged agents to assist at recruitment fairs so that they could monitor how they sold their university:

> Rhoda: we try not to have such a big network that we don't visit those agents or aren't in contact with those agents on a more or less regular basis … [If] we do a British Council exhibition we would ask agents to come and help us on the stand … that's a great training opportunity but also a good quality control, because then we can hear what they are saying to the students.

One university did reflect on the risks inherent to the agent relationship. Simon stated that they were 'essentially able to use [their] name, [their] brand, and if they are not very closely engaged with [the university] that could … put [the university's] name at risk'. His university had received some negative publicity in the past on their use of agents and their recruitment methods. Consequently, they were now much more aware of how many agents their team could support and only established contracts if they were certain that they could observe the activities of those agents effectively.

Whilst agents were a key recruitment method for the majority of the universities that were interviewed, three of the universities stated that they did not have any agencies working for them at present. Two of these were small, specialist institutions. In her interview, Sarah said that at present there was no need for them to use agents because the markets in which they worked were relatively small and they were able to manage the applications on their own. They did not tend to work in the large, agent-led markets of India and China and, whilst they had experimented with agents some four years

previously, the returns from these efforts had not been great enough to warrant continuing the contracts. Similarly, the markets that Nathan was working with were also relatively small, and there was a focus in their institution on recruiting a number of students from Australia, the South-East Asia (especially Singapore), Canada and the USA. However, in the USA context, the use of agents and third parties in recruitment is illegal, primarily due to the ethics of incentivised recruitment, although it should be noted that at present this does not extend to universities recruiting international students into the USA (ICEF Monitor 2012). To counter their lack of agents, Nathan's HEI instead relied on attendance at some university fairs, partnerships with other institutions and higher education counsellors who did not have the same commission-based relationship with the university, and also focused on recruiting international students already in the UK for secondary education study.

By contrast, the third university was a Russell Group institution that consistently performs well in league tables. Whilst operating on a much larger scale than Sarah and Nathan's HEIs, the interest from students, and the reputation was enough to ensure a steady stream of applicants. Joel went on to say that he was 'surprised that larger universities with brilliant reputations use them', he said:

> I can very much understand from a university that may not be high profile … I don't see why a university that it is in the top ten would need to do that really.

This represents a stark contrast to Simon (mentioned earlier) who noted that agents were central to their recruitment strategy, despite also being a member of the Russell Group. This suggests that 'excellence' among students is perhaps focused more closely on the top performers in league tables rather than on other indicators of esteem – like Russell Group membership. In addition, Joel felt that the ease of communications now was such that there was really no need to involve a third party in the recruitment process, although was keen to point out that as he had only worked in one institution and he did not know whether this was the same experience for every HEI. These three exceptions aside, agents did appear to be an accepted method of recruiting students to UK universities. However, even those who choose not to employ agents directly, are still involved directly in activities designed to facilitate international mobility whether that be staff visits overseas, attending international recruitment fairs or prioritising contact with the students themselves. Thus, all took part in the wider migration industries of higher working to recruit students to their universities.

From this it is apparent that there are complex power relationships involved in maintaining and recruiting agents. Universities, in some cases feel bound by the agent relationship and the access this gives them to wider student markets. This is evidenced by the scale of the agent networks at some institutions (upwards of 200 agent partners in some cases) and the scaffolding that goes into monitoring agent partners' performances and understanding of the universities. However, the power in this case tends to lie with the universities themselves who can sever relationships on the basis of performance (in terms of the number of students recruited) or if they have a high number of rejections amongst the students applying through them, which Rhoda suggested was indicative of a misunderstanding of the 'product' on offer at the university.

The means by which universities and agents establish relationships with one another was less clear. As mentioned, agents work for private companies and may have no prior

relationship with a university. However, the British Council does provide a list of agents who have successfully passed their agent training programme and thus acts as one source of potential connections although none of the interviewees mentioned this directly. Rhoda, in her discussion of agent monitoring (of which tracking application success was a part), went into greater detail of their selection process which involved letters of reference from staff at other universities and relying on wider nationwide networks:

> there is a general email distribution list to all international staff across universities so quite often if there are issues cropping up with agents people send an email to their colleagues and say, "have you had this particular problem?" and then you can also see whether it's a specific counsellor that hasn't been trained properly or … whether it's an agency, whether it's just with us, or whether it's also spread across other institutions.

Her comment highlights that not only do these power structures operate on an institutional scale, but also on a wider national scale as well. Failure to perform or concerns regarding agent ethics will be shared more widely, potentially affecting multiple relationships which agents have with universities. In saying this, the powers of the agent should not be undervalued either. As the following section reveals agents can have significant sway in terms of where students choose to study, sending them elsewhere if market conditions change.

The end of the post-study work visa: changing student demands

Migration entrepreneurs in the form of higher education agents are a major factor influencing student recruitment, and, as noted above, they are widely used in UK HEIs (Huang, Raimo, and Humfrey 2014). Furthermore, agents tend to have considerable power over where students from certain countries, like China and India, are likely to study given that they are paid on a commission basis and are therefore incentivised to send students to particular locations. However, as middlemen, they also have to take account of students' desires and wishes as it is only with their mobility that they will get remunerated. This is most noticeable given the recent changes in higher education policy in the UK which have influenced the numbers of incoming international students and the decisions that they make regarding their study destinations. One of the most influential of these changes has been the ending of the Post-Study Work Visa in 2012. As Mavroudi and Warren (2013) suspected, this change from allowing graduates to stay for work without an initial sponsor for two years, to one which requires either a sponsor for a graduate level job has had a profound effect on both the courses that international students are interested in taking, and the countries from which those students are coming from.

Three of the universities mentioned either changing or decreasing interest from students, or a reformation of their target markets. Judith worked at a post-1992 institution. She noted that they had experienced a 70% drop in students coming to her university from India. She acknowledged that this was a steep decline, but noted that it was 'actually in line with a number of universities and a drop in interest from India to the UK as a study destination' (this is particularly significant when you take account of the human capital and potential international students which the country provides (Gopinath 2015)). Universities UK (2014) stated that the sudden decline was in part due to the changing visa policy in the UK, but that these changes had coincided with a period of change in the

higher education marketplace more generally, and there are now much greater opportunities for students to study overseas. David, who worked at a new university, also commented on this. He had joined his university about three years prior to the interview, and almost immediately decided to end their recruitment activities in India. This was in part because he felt that as a relatively small institution it would be very difficult for them to compete in such a large market, but that this had also been made worse by the changing perceptions of the UK as a higher education destination from an Indian perspective. He commented that increasingly the 'perception of coming to study and the welcome that they get in the UK has changed'.

There was speculation regarding why the Indian market in particular had been so affected by these reforms. David believed firmly that it was due to funding models that different countries subscribed to. He stated that students from India tend to take out a loan to study overseas for a masters, similar to students from the UK, and because of this they are interested in ensuring that they get a job quickly after graduation in order to pay off their debt. Whilst they aspire to graduate level employment, 'any job' would be welcome. Additionally, the ability to stay and work in the UK also meant access to employment with greater financial rewards than a job in their home country, thus they would be able to pay off their debts much more quickly. He contrasted this with the Chinese model of funding, a market which had been relatively unaffected by the changing visa policies:

> In China … you get a lot of … parents and relations who are paying for their nephews, nieces, sons and daughters to go and study in the UK and the reason is that they want them to come back and be the new finance manager for their small business.

For them the opportunity to remain in the UK would serve as further work experience prior to taking up a post at home or as a stepping stone to a better job when they did return home, rather than as a necessity as in the Indian case. Therefore, if Chinese students are not as bound by the opportunity to work on completion of their studies it is unlikely that the changed visa policy would be so critical.

These funding arrangements are also reflected in the fact that certain subject areas and universities appear to have, to a certain extent, buffered the downwards trend in student numbers. Judith and Candace, both of whom worked at Post-1992 universities which prided themselves in their vocational focus, noted that some subject areas were experiencing growing international student numbers, including from Indian student communities. Judith commented that whilst they did not notice a change in what students wanted initially, about a year after the reforms had come into being, students were increasingly more interested in the value of the degrees for which they were applying. They measured this by investigating more thoroughly their career prospects on graduation.

> Judith: they were interrogating us much more when they were visiting countries … there was increasing [interest] to get the course right. Whereas before a masters in business, any type of business, that was enough, or something like international business which takes in a lot of different elements … I think a lot of people thought that would give them more choice … but after a few years the reality became obvious that companies … for them to sponsor [someone] they really wanted to know that they were taking on somebody that knew their stuff and they wanted much more specific knowledge than perhaps a graduate with a masters that covered a wider base.

Candace noticed a similar trend. She commented that in many cases they had managed to buffer the downward trend in incoming international students from India. Instead it had continued to be one of their biggest markets and she commented that the recruitment officers for South Asia would spend around 70% of their time focusing on the India market. Like Judith, she reflected on the changing student demand, whereas before the changes in visa regulations students were very interested in MBA and masters in business programmes, now they were much more interested in more specialist degrees and even undergraduate options. She believed that this was due to a continued undersupply in India for these courses and increasing competition to study at public universities. It was, therefore, not so much a case of limited demand from India, but that the markets were changing, and universities had to respond quickly to capture that demand as in any other market.

Furthermore, Candace also commented on the importance of their international agents' conference to which they invite a number of delegates (perhaps as many as 50) every year. She felt that this was a crucial element of how they sold not only the university (including teaching styles) to their agent partners, who in turn sell it to the students, but also how they sell the city more widely and the student experience:

> we don't just put them in front of PowerPoint presentations but we actually allow them to engage with the style of lectures students might be taking or we show them the labs where they do practical based activities … we take them out for a meal … and we don't take them to a posh restaurant we take them to a restaurant … which is of a realistic budget for a student to go, so they can see the city through a student's eyes rather than through … a professional delegate's view because … we think that reinforces [the university] when they then talk to potential applicants in the future.

With so much effort going into the conference and the opportunities for agents to not only experience classes and nightlife, but also to meet students that they had recruited to the university was deemed to have an overall positive influence. Perhaps not surprising then that they had not suffered in the same way as other universities. All of this was at the expense of the university with the belief that showing them good hospitality and an excellent student experience would be reflected in future enrolments.

This research shows that it is possible to maintain or buffer the downward trend and this appeared to be easiest for universities which had a greater vocational focus, such as some of those which had formerly been polytechnics, or those who had adapted rapidly to the changing marketplace. The effects of the changing visa policy were also felt less keenly by universities at the top of the league tables who were perennially popular with international students and did not have to rely on agent-led recruitment because their reputations far exceeded this (note how this differs from the intermediaries involved in skilled migration who produce the reputation outcomes of certain locations (such as Harvey, Groutsis and van den Broek 2017)). In contrast to this, those that did not feature as highly on league tables, and nor were they renowned for their vocational focus, appeared to suffer more from the end of the post-study work visa. Agents and other similar migration entrepreneurs were therefore key to driving recruitment unless the university was at the top of the league tables, thus from this perspective the power relationship is reversed with universities reliant on agents to facilitate mobility.

Conclusions and new directions

This is only one study, and it needs to be investigated in a variety of different education contexts in greater detail, it nevertheless has drawn critical attention to the role of higher education recruitment agents within international student mobility, moving the focus away from the role of the student in this process. Whilst these are important, the student perspective ignores how mobility involves multiple actors (such as international education agents) who work on a transnational basis to support migration (Spaan and Hillman 2013; Spaan and Von Naerssen 2017). Given the role that these individuals play in encouraging mobility and the complex power relationships that evolve between international education agents and universities, it is crucial that we recognise the role they play in student recruitment, especially in markets such as India and China.

International student recruitment is a key migration industry with UK HEIs competing for international students on a global scale. In the UK, universities routinely establish agent relationships to promote their higher education offering, and will pay them commission for every student that they recruit on their behalf (Matthews 2012; Huang, Raimo, and Humfrey 2014). Given the strength of the agent relationships in the Indian market, it therefore comes as little or no surprise that this market has suffered in particular from the end of the Post-Study Work Visa. An agent's role is to advise and guide students in their decision-making and respond to their particular needs and demands (Collins 2012). They are able to offer suggestions to students and promote individual universities. Furthermore, research shows that students tend to follow predetermined 'pathways' to their mobility, following in the footsteps of their social networks in terms of destination (Beech 2015; see also Harvey et al. 2017). With this in mind, and as more and more students choose alternative higher education destinations other than the UK, there could be significant longer term recruitment issues which develop.

However, this research shows that having the 'right' degree programme can help to overcome this downward trend. It is notable that the two universities which stated that they had maintained their Indian student recruitment were post-1992 universities which prided themselves in their vocational focus and also emphasised work placement opportunities during their degrees. It appears that Indian students view this positively, and believe that such experiences will lead to better career outcomes which, given how they fund their university education, makes them an appealing prospective when choosing where to study. It is important to note that neither of these universities were high achievers in league tables (either on a national or international scale), a common issue with many post-1992 HEIs and the bias which persists towards research intensive and longer established universities within these tables (Bowden 2000). This suggest that whilst league table performance at the highest level was one way of maintaining healthy student recruitment in spite of visa changes, it was by no means the only way of ensuring a healthy international student community. It should also be noted, of course, that expectation of what was a good performance in terms of international student recruitment did vary depending on past performances and the existing international student community. Nonetheless, universities could potentially learn from this and tailor their university degrees or highlight placement opportunities to appeal to these students.

Whilst there is continued debate on the influence of the end of the Post-Study Work Visa in the UK tertiary education system,[2] we should not underestimate the speed with

which the expectation of an opportunity to stay in the UK for work took hold. Judith, who worked at a Post-1992 university, which had maintained international and Indian student communities articulated this when she discussed the sudden cultural shift in student expectations:

> I was based in the Indian subcontinent for a long time … there's a lot of people who came and studied in the UK 40 years ago, 30 years ago, 20 years ago, 10 years ago and … if you ask them about the Post Study Work Visa they laugh at you because it is such a foreign concept that you would automatically be given a right to [work] somewhere, but I suppose it's a real sign of the times. In a very short period of time people became accustomed and then accepted that you could stay after you had completed your studies.

Her reflections only serve to highlight that student mobility is now an industry driven by market forces of supply and demand. Students are interested in obtaining the best possible higher education qualifications available to them, but also in their longer term economic trajectories. Consequently, they have increasingly sought opportunities to study in destinations where they could pursue longer term migration opportunities such as Canada and Australia. Articulating opportunities to agents for vocational opportunities built into degree programmes may help to revive markets which have experienced recent decline as they pass these messages on to prospective international students, and facilitate their mobility to the UK.

Notes

1. EU policy states that any incoming students from elsewhere in the EU must be treated as local students, so there is no opportunity for variable fees.
2. The devolved Scottish Parliament has debated at length the need to reinstate the policy, citing significant losses in international student numbers and therefore significant financial losses, not only to the sector but to the economy more generally (BBC 2016).

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