



Marketization, marketing and the production of international student migration

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Abstract:	<p>International student migration is shaped by many forces including the marketization of higher education. Marketization drives higher education providers to compete using a range of marketing tools in a globally uneven market place. This paper interrogates the reasons driving recruitment of international students and reports on the social practices that education providers engage in based on a survey of international students and interviews with higher education providers in the UK. The fundamental contention of the paper is that the higher education system of many countries is significantly shaped by neo-liberal economic forces and that to understand international student flows it is necessary to think of education as a product that is both marketed and marketised.</p>

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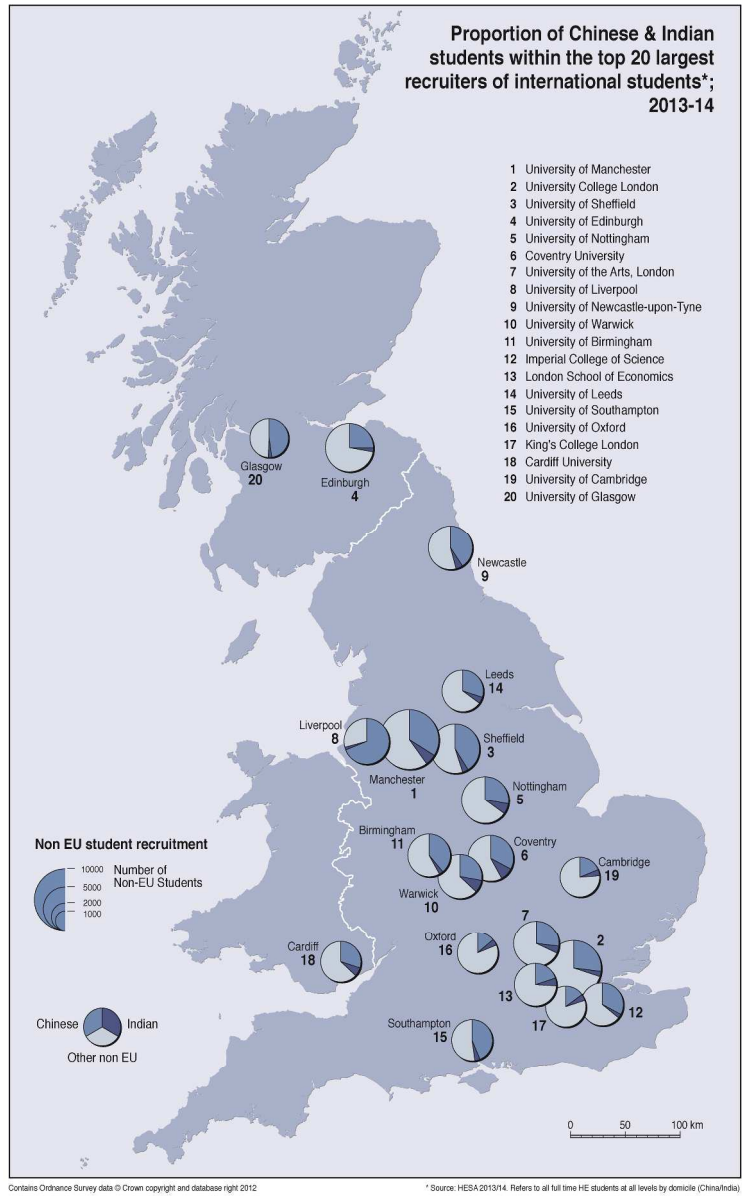


Figure 1: Proportion of Chinese and Indian students within the top 20 largest recruiters of international students, 2013/14

233x377mm (300 x 300 DPI)

Marketization, marketing and the production of international student migration

Introduction

The recent pace of growth of international student numbers has been extraordinary. There were already over two million international students in 2001 and since then the number of people enrolled for study outside their country of normal residence has more than doubled to 4.5 million according to the International Institute for Education (IIE, 2015). Moreover, this significant flow of students has been concentrated in just a few destination countries. The OECD (2015) suggests that over half of all international students were enrolled in just seven countries (Australia, Canada, France, Germany, Japan, UK and USA), with Australia and UK having particularly high ratios of international to domestic students.

While the reasons for the rapid expansion of international student mobility are complex, researchers agree that the pace of growth has been much greater than for other types of migration (King et al, 2012). In an era of rising political concerns about many aspects of international migration, this particular form of mobility has proved relatively uncontroversial. This is both because it is perceived as transient, and also because in many countries it is recognised as a means of generating significant revenues through student tuition fees¹.

A curious feature of research into the drivers of international student mobility is that it has been dominated by studies focussing on the explanations offered by students and their families for engaging in international study. This has fostered 'choice'-based understandings of student mobility (Alberts and Hazen, 2013; Binsardi et al, 2003; Cubillo et al, 2006; NUS, 2010). Even where social scientists have theorised the social and cultural drivers underpinning these choices (Brooks and Waters, 2011), the implicit understanding has been that mobility is 'demand-driven'. While there is great value in recognising the significance of cultural capital as a force offering deeper explanations for why those with social power seek to enhance the opportunities for their children through a search for academic distinction attained via international study, equally important is the recognition that 'supply-side' forces (controlled by those who provide and benefit from promoting international study opportunities) also shape the uneven pattern of international student flows. It is in this latter arena that this paper seeks to make a distinctive contribution.

By paying attention to the supply-side of higher education in relation to student mobility (Findlay, 2011), the paper maps how universities and other higher education providers attract and recruit students from a world market place. Within the global education market

¹ We recognize that not all countries charge fees. Amongst those that charge fees some do not differentiate fees for international and domestic students (Gerard and Uebelmesser, 2014). The majority of OECD countries do, however, charge higher fees to international students than to domestic students (OECD, 2015).

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3 there are many intermediaries (just as in any other market). These include state education
4 agencies, international organisations, recruitment agents and commercial and charity-based
5 sponsors and funders. Not only is there great inequality between those seeking to purchase
6 higher education (as well documented in the student migration literature) but there are also
7 vast differences in power between those selling study opportunities, not least between those
8 countries who seek to make significant financial gains from student tuition fees (Felbermayr
9 and Reczkowski, 2014). The fundamental contention of the paper is therefore that the higher
10 education system of many countries is significantly shaped by neo-liberal economic forces
11 and that to understand international student flows it is necessary to think of education as a
12 product that is both marketed and marketised. Those engaged in providing education are
13 social actors whose marketing, recruiting and branding practices selectively mould the
14 nature of student mobility in the context of the marketization of higher education. Our aim is
15 therefore to contribute to re-conceptualising international student mobility in relation to
16 marketing and marketization.
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25 The paper opens with a review of recent developments in the theorisation of student mobility
26 in relation to the key themes of our research. The paper is structured around four themes:
27 motivations for engaging in the marketization of higher education, student recruitment as a
28 social practice, branding and the differentiation of the higher education market, and resolving
29 tensions between the state and universities as stakeholders involved at different scales in
30 the provision of higher education. The final section asks how the research has helped
31 towards reconceptualising the business of selling international study opportunities.
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36 **The Marketization of International Study Opportunities.**

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38 Marketization refers to the process of creating new markets for products (such as health
39 care) which were previously shielded from market exchange and price mechanisms. Higher
40 education, like other sectors of many advanced economies, has faced increased
41 marketization over recent decades in response to neo-liberal agendas. These agendas have
42 been advanced by those believing that the free flow of goods and services in relation to
43 market price mechanisms was in the interests of economic efficiency (Castree, 2010). In the
44 process of pursuing this goal there has been a retreat from the meritocratic belief that Higher
45 Education should be considered a public good available to all with the ability to study for a
46 university degree (Robbins, 1963) rather than a private good accessible only to those able to
47 pay (Hall, 2015). We do not devote further attention at this point to this important
48 philosophical debate. Instead we focus on the consequences of the switch in terms of
49 analysing the practices that have resulted from the marketization of higher education. In
50 particular we concentrate on the practice of promoting higher education products to a global
51 marketplace (Hemsley-Brown et al, 2006; Scott, 2015).
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3 The academic literature within the disciplines of marketing and business studies have
4 produced some interesting studies on student migration relative to traditional concepts about
5 markets such as 'product', 'place' and 'branding' (Chapleo et al, 2011; Teng et al, 2015;
6 Woeraas et al, 2009; Binsardi et al, 2003). Perhaps of greatest value from this literature is
7 the observation that the general marketing literature is ill-suited to research on international
8 students because the product being sold and the motives of those purchasing the product
9 are very different from other aspects of 'marketing' (Helmsley-Brown et al, 2006). Moreover,
10 most of this body of research is about 'markets' as opposed to 'marketization' and lacks
11 critical social theorisation. 'Marketization', as defined above is distinctive from marketing,
12 because it is a term that implies a strategy of 'creating' markets for products considered
13 previously as public goods.
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20 In what follows we concentrate on social science insights that suggest that the global market
21 place is highly uneven (Gulson and Symes, 2007) and that the power differentials between
22 those involved in providing higher education (nationally and internationally) are fundamental
23 to understanding the uneven origin and destination patterns of international mobility. This
24 said, we do not ignore the 'marketing' literature because it leads us to two important
25 questions: first what exactly are the 'products' sold to international students, and what is the
26 role of promotion and branding in shaping patterns of student mobility under conditions of
27 marketization?
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33 A useful starting point in understanding the promotion of higher education products in a
34 globally uneven market is research on the internationalisation of higher education.
35 Paradoxically the internationalisation of higher education (resulting from a range of powerful
36 forces such as the adoption of English as the international language of science as well as
37 political initiatives such as the Bologna process within the EU to standardise the nature of
38 national higher education systems) has gone hand in hand with the increased differentiation
39 of higher education. As more and more people received university degrees, so the cultural
40 demand for the 'distinction' (Bourdieu 1986) that higher education used to bestow only on
41 the elite, resulted in new processes differentiating the 'best' degrees and the top
42 international universities. It was this process of cultural differentiation that researchers have
43 pointed to as an explanation for why talented young people from less fortunate backgrounds
44 attend local universities, while students from middle class homes are more likely to apply to
45 study at leading institutions of higher education either nationally or internationally. The
46 process therefore reproduces distinction through the credentials associated with where
47 people study (Waters, 2008; Brooks and Waters, 2011).
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56 At the level of universities, differentiation became evident both vertically and horizontally.
57 Vertical differences reflected the different capacities of universities in terms of resources and
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3 status to offer educational credentials bestowing cultural capital. At the pinnacle of the
4 university hierarchy one finds immensely wealthy world class institutions renowned as
5 ancient seats of learning and with global research reputations. Horizontal differences within
6 the educational field of power have been produced by universities of similar capacity
7 branding themselves as distinct from others in terms of their disciplinary range and
8 specialisation or indeed the quality of the student experience that they could offer. Another
9 horizontal distinction of ever greater significance has been the divide between state-funded
10 and private educational institutions.
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16 Differentiation of universities across the global landscape of higher education is a central
17 feature explaining student mobility. From a demand-side perspective it has long been held to
18 be important in explaining the geographical concentration of international students in the top
19 institutions. From a supply-side perspective one would expect the best resourced
20 universities to have the greatest capacity to recruit internationally and to project their brand
21 to the highest paying educational markets, and this in turn would to some extent explain the
22 correlation between top-ranked institutions and the presence of large numbers of
23 international students (Findlay, 2011).
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29 Arguments about the importance of difference between universities can also be applied to
30 the marketization of study opportunities between countries. Thus to a considerable extent
31 one might argue that those countries winning the largest share (Universities UK, 2014) of
32 international students are those best able to resource the marketing of the international
33 opportunities to study within their educational system in preference to elsewhere (National
34 Academies, 2005; Sadlak and Cai, 2007; OECD, 2015). If these arguments are accepted, it
35 implies that many universities actively engage in promoting the merits of studying in
36 particular places/institutions largely because of the financial benefits that accumulate from
37 hosting international students. This perspective therefore directs the researcher to
38 investigate the 'sites', 'actors' and 'rewards' involved in a marketized international higher
39 educational system in order to explain how marketization produces many of the prominent
40 features of international student mobility. The 'sites' range from international education fairs
41 where competing universities seek to 'sell' their educational products (desirable courses) to
42 potential students, through to the ever growing number of satellite campuses of international
43 universities where preparatory courses are provided to students with the prospect of later
44 'progressing' to studying abroad. Key 'actors' include international education recruitment
45 agencies (Beech, 2014), whose profit comes from fees paid by foreign universities for
46 visiting elite schools and operating a selection process that delivers appropriate quality
47 candidates, as well as from funds provided by potential students to these agencies for
48 assistance with the preparation of study visa applications. University international offices are
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3 of course the key 'actors' in the process, pitching educational products in appropriate ways
4 (such as on university webpages), branding the distinctiveness of their university, visiting
5 target schools and recruiting potential students at educational fairs.
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8 This review has focused on literature relevant to the marketization and marketing of higher
9 education. We would wish to signal to the reader that there are many other approaches to
10 studying student mobility, each making its own valuable contribution. These include studies
11 of student choices and experience (Woodall et al, 2014; Bilecen 2014; Van Mol, 2014),
12 narratives about 'knowledge migration' (Raghuram, 2013) and accounts of student mobility
13 set in the wider context of knowledge circulation (Jons, 2015). We do not dismiss any of
14 these contributions, but instead in this paper we intentionally limit our attention to supply-side
15 mechanism in higher education and how these produce student migration patterns. In
16 particular we would argue that marketization of higher education (Hall, 2015) has been the
17 key force responsible for many of the recruitment and marketing practices that have
18 emerged in the educational landscape. As we have hinted above, the social field of higher
19 education displays many power asymmetries and we would argue that these, along with the
20 tools used in branding and marketing, have been highly influential in determining which
21 young people have been given the opportunity to study internationally and at which
22 institutions. Our fundamental contention is therefore that international student mobility is not
23 so much the choice of individuals but that it is structured by multiple drivers including the
24 actors engaging in the marketization of higher education.
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34 **3. Defining international students and researching marketization**

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36 Researchers make a key distinction between international degree mobility and credit
37 mobility. International degree mobility refers to students registered for their entire degree at a
38 higher education institution in a country other than their place of normal residence. By
39 contrast credit mobility describes students who enrol for part of their degree in a foreign
40 university. It involves transferring credits gained during their temporary period of international
41 study to count as part of their degree (such as occurs within the EU Erasmus programme) in
42 their usual country of domicile. The distinction matters to universities in a variety of ways
43 including the fees earned from tutoring international students, and it matters to state
44 governments in relation to features such as their student visa policy. To researchers the
45 distinction is important in the way that student mobility is theorized. In this paper our focus is
46 only on degree mobility. This is analysed in relation to undergraduate, taught postgraduate
47 and research postgraduate degrees.
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56 This paper discusses one particular aspect of our research on international student migration
57 to the UK. The wider project involved a) an online survey (to which we refer briefly) of 3328
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3 international students from 119 different countries studying in UK universities, b) in-depth
4 interviews with 30 international students and c) interviews with 14 key stakeholders from the
5 international offices of UK universities, a number of inter-university organisations concerned
6 with international student issues, and the British Council (the UK's international organisation
7 responsible for promoting cultural and educational opportunities). This primary research was
8 supported by detailed analysis of secondary data sources on international student migration
9 to the UK collected by the Higher Education Statistics Agency. The primary research was
10 conducted between February and September 2015.
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17 Analysis of marketization involved drawing in particular on our in-depth interviews with key
18 stakeholders in the Higher Education sector. These interviews were between an hour and
19 ninety minutes duration with most being undertaken on a face to face basis in an office
20 environment. Anonymity of respondents from particular universities was guaranteed with
21 quotations from these universities only described in terms of two attributes: a) university
22 prestige (as judged using the Times Higher world university rankings – the term 'prestigious'
23 was used for universities ranked in the top 150 in the world, and 'less prestigious' for other
24 institutions) and b) the proportion of international students in the student body (over 25%
25 being described as 'international', and under 25% referred to as 'less international')². These
26 attributes reflect the strategy used by the researchers to identify which universities should be
27 approached to help with the project. First, we checked HESA records to ensure that we
28 included a broad range of universities hosting large numbers of international students, as
29 well as some where there were relatively few international students. Second we included
30 universities from each of the four parts of the United Kingdom as well as some institutions
31 located within the UK's major global city of London. Finally, having considered the research
32 literature on factors attracting international students to particular HEIs, we designed our
33 sample to include six universities ranked in the top 150 HEIs in terms of their research rating
34 and six institutions that were less well positioned in the World University Rankings. Of the
35 twelve universities whom we approached, ten agreed to participate, circulating an online
36 survey to international students and offering a detailed interview involving the researchers
37 and staff from the international office.
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52 ² At the time of the survey design the most recent data from the UK Higher Education Statistics Agency (HESA)
53 related to 2012/13. For this year HESA reports the average university as having 19% of enrolments recorded by
54 students whose normal domicile was outside the UK. The distribution of international students was however
55 highly skewed, with a large number of universities recorded disproportionately few international students and a
56 small number having very large enrolments. As a result 19% was not selected as the threshold to divide our
57 sample. Instead the researchers examined the distribution of international students in the universities covered
58 by the online survey, choosing to select 25% as a meaningful statistical breakpoint.
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3 Implicit in the research design is the suggestion that international student flows reflect much
4 more than the choices of individual students. Educational, social and economic structures
5 shape the context within which decisions about where to study (in terms of country and HEI)
6 are taken. Above all the research design sought to recognise that mobility decisions are
7 nested within a socially and geographically uneven education system that is produced by
8 structural forces way beyond the control or understanding of the individual (whether that be
9 the individual student or the individual stakeholder such as a recruitment offer in a university
10 international office). In terms of the structuring of higher education, the research design
11 sought to capture divisions between universities both in terms of vertical distinctions in the
12 higher education system (e.g. between what might be considered highly prestigious
13 institutions and other less well-known universities) and also horizontal differences between
14 highly specialist units such as those offering only a limited range of subjects (for example in
15 music or art or the humanities) and those institutions recruiting students to study from the
16 traditional wide menu of disciplines offered by the large metropolitan universities established
17 in most UK cities in the late 19th and early 20th century. Another horizontal differentiation that
18 we were mindful of in selecting where to conduct research related to the site and campus
19 diversity of the UKs 162 HEIs, ranging from traditional universities recruiting international
20 students to the single home campus compared with HEIs with satellite and branch
21 campuses both in other parts of the UK and also internationally (Waters and Leung, 2013).
22 Capturing some of this diversity within the structure of higher education was therefore judged
23 a very important methodological step if understanding was to be achieved of how
24 universities seek to differentiate themselves in the international higher education market-
25 place, since the 'product' that they offer varies so greatly from institution to institution.
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39 The interview transcripts were analysed using a thematic analysis approach. After re-reading
40 the transcripts multiple times semiotic analysis was used to explore the signs and signifiers
41 reported by interviewees in relation to the marketization of higher education. In the
42 Sausserian tradition, our methodology was aimed at interrogating the cultural codes
43 embedded in the transcripts that would reveal the ways in which marketization was 'signed',
44 by our interviewees. Alden et al (1999) have applied this methodology to understand how
45 companies market a brand globally to numerous markets, while Tindal et al (2015) have
46 illustrated the value of the approach in deepening understanding of the signs and signifiers
47 attached to educational products. Our methodological approach follows Findlay et al (2013)
48 who used semiotics to interpret the relationship between the signifiers of the 'ideal migrant'
49 and the social practices that resulted from interpretation of this signifier by international
50 recruitment agencies. Our purpose in adopting this methodology was to uncover the cultural
51 codes (signifiers) associated with marketing higher education opportunities to international
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3 students and to explore the social practices that flow from the interpretation of these signals
4 by key stakeholders in higher education. For illustrative purposes we have presented this
5 analytic relationship between text, sign and signifier in the first of our tables, showing the
6 diverse signifiers underpinning the recruitment of international students. This is followed by
7 the codification of particular social practices (for example the differentiation of international
8 students as consumers - Table 3).
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14 Throughout the paper, interviewees' names are withheld, and the names of the HEIs where
15 we conducted the research are replaced by generic descriptors. Beyond the HEI interviews,
16 one of the other key stakeholders whom we interviewed (the British Council) suggested it
17 would be impossible to anonymise their comments and kindly gave permission for quotes
18 from the interview to be directly attributed.
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22 23 **4. The business of selling international study opportunities**

24 25 *a) Motivations for engaging in international student recruitment*

26 While the research literature has devoted much effort to understanding why international
27 students study abroad, there have been relatively few attempts to explore why providers of
28 education look to other countries to recruit students. This is perhaps because the answer is
29 thought to be self-evident: financial reward. There is certainly much evidence of the financial
30 benefits to the UK of hosting international students (Murphy, 2014). Students from outside
31 the EU are believed to contribute more than £7 billion to the British economy (Universities
32 UK (2014), while individual university accounts show that the universities recruiting the
33 largest numbers of international students gain very significant financial advantage over their
34 competitors through the international fees (Tindal et al, 2014).
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41 Our in-depth interviews affirmed the expected importance of financial gain, but suggested
42 other less tangible drivers were also important. The tricky research conundrum is to
43 disentangle the extent to which interviewees listed other motives for increasing international
44 student numbers as an apologetic justification mitigating the need for most UK universities to
45 derive significant financial gain from the process. Table 1 reports the voices of staff from the
46 international offices of three universities as well as a pan-university stakeholder. Each of the
47 voices report the goal of earning lucrative international fees as a means to an end and not
48 an end in itself. At the most basic level the significance of fees was allowing income
49 diversification, providing UK universities freedom to take decisions that were financially
50 independent of UK government funding of higher education. Such motives would not be
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3 unexpected in any market-driven sector, where government funding has had a long history
4 of financial dominance.
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For Peer Review

Table 1: Drivers underpinning the recruitment of international students

Interviewee statement	Signifier	Signified
at the heart of it the drive is for increased income from outside sources if we are honest' (<i>Pauline, Prestigious international university</i>)	Increased income from 'outside sources'	Freedom from UK Government agendas
one of the main drivers has to be income diversification. That does drive things and one has to be pretty realistic about that (<i>Pamela, Less prestigious and less international university</i>)	'Income diversification' (ie less dependence on government funding)	
it's at the heart of what we do and that's driven by ...(hesitates) it's <i>not</i> only driven by the financial drivers associated with International Student recruitment but also we have a mission to be a global and enterprising University, to be seen and have that brand globally. To do that we need to have lots of diversity on campus... So, it is very much a strategic direction.. in terms of the nations from which we recruit students and (to) make sure that our UK-based students have access to that network of global contacts as well (<i>Martin, Less prestigious international university</i>)	Student 'diversity on campus.... Global contacts'	Being 'a global and enterprising university'
I see the importance of international students in the broader context of the internationalisation of UK higher education more generally. I think that is something that many countries around the world now recognise as being quite important, eh, as a component of being excellent universities (<i>Esther, Pan-University stakeholder</i>).	Part of 'internationalisation'	'a component of being excellent universities'

It is interesting that many of those interviewed suggested expressed aspirations to be globally excellent institutions (a cultural code worthy of further deconstruction), thus justifying international student recruitment as very beneficial in ways other than financial gain. Thus Martin reported that it was about offering (or 'being seen' to offer) a global education brand, while others noted that it was about seeking a normative performance as an 'excellent university'. Martin went on to note that 'excellence' was considered desirable because it offered 'UK based students access to that network of global contacts', while Esther interpreted the normative behaviour as part of a wider set of practices stemming from the internationalisation of higher education. These wider practices included 'recruitment of international staff, collaboration in research and eh opportunities to work ...and eh, in

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3 strategic partnerships in other parts of the world (which) contributes to being good
4 universities' (Cameron, less prestigious, less international university).
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8 The credibility of the claims made by interviewees in relation to the desire to be seen as
9 globally excellent, is complemented by the results of our online survey of international
10 students. This was the single most important driver of mobility reported by the 3328 students
11 who participated in the online survey. No less than 82 % reported that attending a world
12 class university was 'very important' to them in the decision to engage in international
13 mobility. It was also a key discriminator of which universities these students had applied to
14 around the world. This symmetry between demand and supply side factors not only chimes
15 with other research on the drivers of student mobility to other countries (Findlay et al, 2012),
16 but more importantly it illustrates that international mobilities (of students, staff and of the
17 associated knowledges embedded in the global higher education system) are constitutive
18 elements of the differentiation of universities that have flowed from the internationalisation of
19 education (Brooks and Waters, 2011). Thus international student mobility contributes to the
20 production of the uneven spaces of higher education. Universities seek strategically to
21 recruit international students as part of the production of the credential of being 'globally
22 excellent', and success or failure in achieving this in turn shapes the pattern of student flows
23 discriminating between the imaginary status of a world class university and institutions
24 perceived to be less distinguished.
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35 *b) International student recruitment as a social practice*
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38 Table 1 has already provided evidence of the link between the motives held by universities
39 for competing in the international market place for students and the existing of selective
40 practices shaping the map of student flows. Thus Vivienne, from a prestigious but less
41 international university, noted that international recruitment to her university did not occur in
42 all countries, and that effort to diversify 'in terms of the nations from which we recruit
43 students' meant focussing on recruitment in specific nations. One example must suffice to
44 illustrate in more depth the selectivity of recruitment practice in relation to the specificity of
45 the geographical 'market' in which they worked. Pauline speaking for an older prestigious
46 university with a high proportion of international students, makes a direct link between the
47 US as a market, the educational 'product' offered to this market by her university, and the
48 emergence of a distinctive recruitment strategy:
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55 *'You can probably summarise it by saying that by dint of having the almost perfect*
56 *product we went west ... and that is down to all aspects of the product, the ... degree,*
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3 *but also the smaller university size, the more personal teaching, beautiful location.. and*
4 *so it resonated. So the strategy at that point was very much following what other*
5 *universities in the US would do to recruit students to US universities. It is very much a*
6 *US model....'* (Pauline).
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11 The two most important features revealed from the interviews (presented in more detail in
12 Table2) about the geography of recruitment strategies are, first, that they are product-linked
13 and second, that they reveal a reciprocity between supply-side and demand-side processes.
14 Marketization was discussed as a process producing selective supply-side practices in terms
15 of the selection of the locations for student recruitment, while demand-side mechanisms
16 determine which economies and cultures construct international study as desirable (Brooks
17 and Waters, 2011). They therefore become lucrative and secure places for those supplying
18 higher education to do business.
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24 The interviewees revealed a wide range of ways in which recruitment was highly structured
25 and regulated by marketing strategies. Table 2 illustrates the marketing approaches of a
26 range of university international offices. Martin offers a generic list of how potential
27 international students are contacted, while Vivienne offers more detail on how one particular
28 marketing strategy was organised through the use of staff travelling to targeted global
29 locations. These markets she notes match the university's specialisms in terms of the
30 imaginaries of what type of product is sought by students from these places. Vivienne also
31 comments on the impossibility of achieving global coverage through individually-staffed
32 recruitment trips and as a consequence the need to use educational recruitment agencies.
33 This was a position shared by most universities (see for example Chloe's comments).
34 Agents and agencies from key markets such as China and India were considered especially
35 important in the early phase of recruitment (see Pauline's comment). Once market
36 penetration was achieved universities shifted increasingly (but not exclusively) to relying on
37 alumni and personalised contacts.
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47 **Table 2: Reaching potential international students**

48 *Most of our activity is driven at local level through our outbound travel, through*
49 *working with recruitment agents and through our international offices. So, that*
50 *includes things like TV, radio, newsprint, advertising, newsletters, as I've said social*
51 *media. Erm, that kind of broad gamut of traditional routes. We do participate on*
52 *things like British Council Fairs (Martin, Less prestigious, international university)*
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55 *So we have two people focused on the US and Canada because they're comfortable*
56 *and it plays to certain strengths in our emphasis on Arts and Humanities. So that*
57 *works. We've also become active – as other institutions have – in Latin America. So*
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we have somebody that is now hooked on Latin America. We have an east and South East Asia person and a Gulf person. Now it leaves some pretty big gaps. (Vivienne, Prestigious, less international university),

We don't have the resource or the people to be out there all the time in every event; agents can have huge offices and large networks. I think one of the largest agents in China has 23,000 staff members so they're big corporations and they can be out there promoting your brand.

(Chloe, Less prestigious and less international university)

As new markets emerge...we tend to start with a heavy reliance on agents, and then gradually migrate away from agents.

(Pauline, Prestigious, international university)

Erm, we look to establish our brand through a range of recruitment channels, including schools, partner universities, alumni groups. Obviously directly through our own activities, our agent network, through sponsors, through embassies, through the UKTI (Martin, less prestigious, international university)

The quotes in Table 2 provide a map of international student flows from a marketization perspective. It is a map that does not centre on explaining flows from countries of origin to countries of destination in relation to 'choice' and the 'student as decision maker', but instead it sets global student flows in a landscape of educational products, university brands, recruitment agents and key marketing stakeholders.

c) *Branding and the differentiation of the higher education market.*

At a national level the business of selling international study opportunities is discussed in terms of the impact on 'market share' and branding. Consider the following comments about branding, first by the British Council on the UK's higher education brand:

'the UK led the way by being the first country to have a national brand in positioning their nation as a study destination, be that Education UK and subsequently you've got Education USA and the "Study In brands" (John, British Council spokesperson)

Nested within national branding exercises, the interviewees attested the importance of individual university brands. Chloe explains:

Obviously as with anything, you're building a brand and you're trying to identify why people would want you're brand. It's a way of saying these are the unique things we offer. (Chloe, International office of a less prestigious and less international university)

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3 Both of these quotes point to the importance of the distinctiveness of the destination whether
4 it be at national or university level. At national level, UK was perceived to have taken an
5 early lead in marketing itself as a desirable study destination 'positioning' the country as a
6 place to acquire high quality educational credentials by promoting the age and standing of
7 the country's oldest and most distinguished universities.
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12 From a university perspective, Chloe affirmed the importance of branding and the 'unique
13 things' offered by her university (not speaking for one of the ancient seats of learning)
14 compared with others. Like so many of those interviewed in international offices she
15 commented on the active role of building a brand, underscoring the way in which
16 international student flows are selectively shaped by the 'positioning' of particular study
17 opportunities as 'unique things'. And the 'unique things' listed by those interviewed in the
18 UK's younger universities ranged from the disciplinary specialisms, through cultural heritage
19 of surrounding areas, to the more ethereal opportunities to achieve global citizenship by
20 studying in an English language location with global connections and proximity to London as
21 a global city. To fulfil on these claims, universities had engaged in a remarkable range of
22 practices. Perhaps of greatest interest from a geographical perspective was the finding that
23 some provincially-located universities had opened London satellite campuses. This response
24 to market opportunities affirms Beech's (2014) research findings on the importance of
25 proximity to London in the decision making processes of many international students in
26 relation to where to study within the UK. To quote Martin's description of his university's
27 London campus initiative:
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38 'It was to set up a campus, a completely self-sustaining and viable campus in A [area of
39 London] that carried the [name of university] brand. It happened that early recruitment was
40 driven internationally..' (Martin)
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44 Not only did the interviews reveal the extent of national and regional differentiation of
45 education markets, but they also uncovered marketing strategies aimed at matching different
46 education products to imaginaries of international student types. Table 3 offers evidence of
47 how the marketization of higher education has produced a range of selective practices that
48 are place specific. It is not surprising in view of this that the aggregate pattern of international
49 student flows to the UK as elsewhere shows great differences between countries of origin in
50 the quantity and qualitative characteristics of those that move (in terms of discipline, course
51 type) as well as in the uneven patterning of student destinations (such as different university
52 types selected within a country like the UK).
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For Peer Review

Table 3: Product pitching and the differentiation of the international student as consumer

As a good international office these are the practices that we need to employ in order to attract international students in general. Then I suppose as you drill down in to more specific action based strategies. You do have to be able to say 'well, in China we need to have a very strong PGT offering that is business-based'... or whatever those strategies are within that particular pathway and that particular market (Chloe)

They (students from country A) are high quality, highly articulate, absolutely preparedand anything that doesn't quite match with that, say a student coming from Y, they're different and not as good (Vivienne)

We worked out that we dealt with 12 different personas. So we based our website on these 12 personas (StA)So we have 12 persona that covered every product that we own (Pauline)

*(We) adjust what we're doing in terms of marketing to work in the places where there is funding for PGR students **and** there are students of the right quality (Vivienne)*

*If you're entering a very **fast developing Asian mega city**, [they say to me] it has a castle **it will be old**, people won't speak English, it'll be cold. It's a **different approach** depending on where we go and the messages we send out. (Chloe)*

Table 3 confirms that the pitching of educational products to the global market varied geographically depending on the actor's imaginary of the characteristics and capacity of the potential student consumer. Interviewees differentiated degree products – such as their 'PGT offering' (scarcely surprising), but also reported the importance of UK HEI study location types, origin market types and international student pathway types. We do not wish to labour the text here with repetitions of the quotes from Table 3 that provide detailed evidence of these dimensions. It is worth underscoring, however, the effort that appears to sell to each market was judged in relation to its capacity to fund international students. This is a direct result of marketization driving interest in finance rather than the intellectual quality of the candidates ('we adjust to... where there is enough funding'). In contrast, therefore, with the developmental motivations that might have underpinned the training of international students some decades ago in relation to the worthy ambition of international students returning home after graduation to participate in their country's development effort, the marketization of higher education has shifted interest to the financial returns that can be achieved by the host institution/nation.

One of the consequences, therefore, is that international recruitment to UK universities is far from global. It is certainly less diverse than would be the case in the absence of

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3 marketization. To quote the director of an agency designed amongst other features to
4 coordinate UK university actions:
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6 *'the diversity of the international student population...we really only recruit international*
7 *students from about ten countries worldwide'* (Pan-University stakeholder)
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10 At least two points arise from this position. First, there is perceived to be a huge risk in
11 recruiting across such a narrow range of countries, since this makes the UK's Higher
12 Education economy vulnerable to changes in demand. These changes can take hold very
13 rapidly as illustrated by the recent dramatic downturn in the number of Indian students
14 studying in the UK. Figure 1 illustrates, for example, just how dependent UK universities are
15 on Chinese students as a revenue source.
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19 The second point is a conceptual one. It is that the social practices underpinning recruitment
20 are very powerful in producing the observed pattern of international student flows. If the
21 pattern were a function of demand alone, then a much wider range of origin countries would
22 be engaged in international student flows to the UK and elsewhere reflecting not only
23 educational 'need' but also the global desire of many middle class parents to encourage their
24 children to achieve the academic credentials associated with graduation from a world class
25 English language university. Instead it is the power of marketization and the practices that
26 flow from it that have been critical in narrowing the range of origin countries from which the
27 main flows international students come.
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34 d) Tensions around state immigration policy and adaptive behaviour by suppliers of
35 higher education
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37 The final theme that we choose to privilege is 'global citizenship'. This is a 'selling point' that
38 UK universities increasingly seem to offer students. This is part of the student 'pathway'
39 referred to by Chloe (Table 3). Our interviewee at a less prestigious university noted for
40 example:
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44 *'we are in the business of creating global citizens'* (Pamela)
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46 This was a claim made by many university spokespeople in the context of discussing the
47 globalisation of higher education and the marketing of international study opportunities.
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49 Of course many explained that this was a necessary objective because we:
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51 *'live in an interconnected world so Universities are supposed to be a representation of that*
52 *and preparing people to enter in to that world'* (Chloe), and
53

54 *'we talk about being 'globally connected' that's a phrase that's used a lot. The other one that*
55 *has a lot of currency is the idea that 'every student is an international student'. In that, home*
56 *students should have [hesitates] well, if they come to University F they're going to get an*
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3 *international experience because it's a very cosmopolitan campus, we've got students from*
4 *all over the world, there are all sorts of opportunities for exchange and getting involved in*
5 *International activities with groups and students societies, learning languages and so on. So*
6 *the idea is that we're equipping students to become global citizens' (Malcolm, Prestigious,*
7 *international university)*
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11 Suppliers of Higher Education therefore claimed to hold the worthy motive of seeking to offer
12 students life skills relevant to participating in a global society, and marketed themselves as
13 offering, in Bourdieu's terms, the 'habitus' to develop global connections through engaging in
14 social interactions on a cosmopolitan campus.
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19 There is however also a need to recognise that to some extent universities as suppliers of
20 Higher Education, operate within the context of nation states. In turn nation states embed
21 their policies on international students within the wider frame of reference of their
22 international migration policy. This in turn produces tensions, especially in countries such as
23 the UK that have moved to adopt ever more strict controls on general immigration including
24 setting targets on net immigration that would involve cutting net gains from immigration by
25 more than a third. This impacts on international students, since these are the single largest
26 migrant flow into (and out of) the UK. It is in this context that a tension has arisen between,
27 on the one hand the neo-liberal desire to maximise earnings from international student
28 tuition fees, while on the other hand seeking to curb immigration and discourage permanent
29 settlement of international students.
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37 As one of our university international office interviewees noted:

38 *'The perception rather than the reality is all important and the perception...is that it's*
39 *increasingly difficult to come to the UK and it is increasingly unattractive to do so. Students*
40 *perceive the UK welcome mat to have been rolled up and put in the cupboard' (Pauline)*
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44 One of the responses to this dilemma has been for UK universities to find a way of 'selling'
45 international study opportunities without the prospect of subsequent residence or citizenship.
46 The product of global citizenship in this context provides a resolution to the quandary.
47 International students wishing to study abroad as part of a wider desire to move
48 internationally for more than study (ie for access to employment in the global economy and
49 other international life opportunities) can be sold the possibility of studying abroad as a
50 launch pad for later mobility.
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55 *Many of the students we have here are often from a multi-cultural background, having lived*
56 *in more than one place, having parents that are not necessarily from the country where*
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3 *they're resident. They seem to..see themselves as mobile.* (Peter, Prestigious, international
4 institution)
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7 In summary, one of several tensions between the state and university providers of higher
8 education is the wider significance of study abroad. To many students this equates to
9 opportunities to live and work abroad after graduation (Packwood et al, 2015). One
10 resolution to the tension for universities seeking to earn revenue from international student
11 fees, but unable to market study in the UK as a way of gaining access to UK residence or
12 even citizenship (a package luring students to other countries such as Australia), is therefore
13 to market 'global citizenship'. This ethereal yet important concept has gained widespread
14 currency amongst those selling international study opportunities, and adds a new agenda to
15 researching the marketization of higher education. This agenda requires wider research on
16 the relation between international migration for study and the pattern of subsequent student
17 moves, either back to their country of origin or onwards as upwardly mobile participants in
18 the world economy.
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20 21 22 23 24 25 **Discussion and Conclusions** 26

27 Much of the research literature on international student mobility focusses on the social and
28 cultural meanings associated with international study from the perspective of those on the
29 demand side of this selective process (Brooks et al, 2011; Van Mol, 2014). This paper has
30 contributed to the much smaller body of work relating to supply-side mechanisms in Higher
31 Education (Findlay, 2010). In particular it has argued that the international marketization of
32 Higher Education is a key driver that helps explain both the geographical focussing of
33 recruitment behaviour and the nature of many of the social practices underpinning the
34 behaviour of universities and the state in seeking to attract international students.
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41 Set within the wider context of the marketization of higher education (Hall, 2015), this paper
42 has noted how HEIs, as key players in the process, are quite open in admitting to the
43 powerful financial incentives behind international student recruitment. Analysis of the
44 nuanced explanations of marketing, recruitment and branding strategies showed that
45 financial gain was not the only driver. Other signifiers lending meaning to the practice
46 included the justification that HEIs were wise to seek financial diversification from central
47 state funding because it provided opportunities for some freedom of action. More important
48 to HEIs was their self-identification with the ambition of being global universities. This they
49 believed was evidenced by the presence of international students (along with a globally-
50 sourced staff compliment and a 'world class' research standing). Some HEIs therefore
51 argued that finance was only one aspect of their international strategy, and that the real
52 driver was a desire to offer the very best opportunities for both staff and students by seeking
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3 to be a globally-excellent, cosmopolitan site of Higher Education. Hosting large numbers of
4 international students was represented as constitutive of being a truly excellent university.
5 The inadequacy of this much repeated narrative can, however, be challenged given the lack
6 of global diversity in the composition of the UK HEI student population, with nearly all
7 universities having their campus dominated by international students from just one or two
8 countries (Figure 1).
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14 There is evidence that supply-side mechanisms have had similar effects in other major
15 student-receiving countries, in terms of narrowing the range of origin states. This is not an
16 outcome unique to the UK. Findlay et al (2016) have shown from research with university
17 international officers in the USA and Australia that similar social practices exist in terms of
18 organising international recruitment and in terms of the branding of educational products for
19 a global marketplace. Competitive international behaviour in the marketing of international
20 study opportunities is not new (Hensley-Brown et al, 2006), but as the scale of international
21 student flows has grown, and the complexity of the international education landscape has
22 increased (Felbermayer et al, 2014), so too has the sophistication of the international
23 recruitment process.
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31 The complexity of the social practices associated with international student recruitment
32 reported in this paper have included explanations of which countries are visited by staff,
33 which international sites are targeted at student fairs and in which circumstances
34 international student recruitment agents are used. Branding was presented as a careful
35 matching process, mapping degree types onto specific student 'personas'. The tactic of
36 shifting pitch (in relation to study location type) was also reported as important in selling
37 effectively to different countries of origin. Interviews with key players in the marketization of
38 Higher Education also noted that international students enrolling for courses in UK did so in
39 the context of longer term plans relating to future work and citizenship aspirations.
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46 In the very specific political and cultural context of the UK's current anti-immigration rhetoric,
47 the packaging of the education product by HEI providers therefore required an offer to be
48 made of study as the first step towards potential global citizenship (in the absence of much
49 prospect for students from outside the EU of remaining in the UK after graduation). This
50 contrasts with the possibility in countries such as Australia to sell international education as
51 an opportunity to 'learn, live and grow' (Findlay et al, 2016) with the possibility of remaining
52 in the labour force after graduation and perhaps settling and gaining citizenship. While the
53 UK research presented in this paper is country-specific, the principles outlined here remain
54 generalizable. Marketization of international study in all countries is set within the frame of
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3 national immigration policy. It is the role of those promoting international study to brand it
4 relative not only to short-term educational outcomes but also to long-term mobility
5 aspirations.
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9 A further feature of the wider argument presented by this paper is that the global diversity of
10 a student population is a constitutive element of the signifier of global educational excellence.
11 While on the one hand universities may brand themselves as 'internationally excellent'
12 offering prospects of global citizenship, on the other hand they recognize that a necessary
13 pre-condition to being recognized as internationally excellent is the ability to attract large
14 numbers of international students. It is access to this group that offers global reach to those
15 that study there and a global reputation to the universities that give them degrees.
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21 Ironically the same argument underscores the fragility of a marketization strategy built on
22 highly selective social practices linked to recruiting international students from just a few
23 countries. The risk is that an increasing number of key student origins switch to other HE
24 destinations (for UK, Indian, EU and 'other Asian' student numbers are all lower now than in
25 2010/11 (HESA, 2016), thus stimulating a crisis in the UK HE sector. More seriously there is
26 the risk that the narrative of UK universities being signified as 'internationally excellent' could
27 be undermined in terms of their cultural credentials as sites of social practice bringing
28 together students and staff from around the world, to the benefit of all in terms of lifetime
29 global connections. If the narrative of international study as a precursor to potential global
30 citizenship is lost, the effects on the UK HE sector would be serious. Some international
31 student mobility would of course continue, but the UK's position of privilege in the global
32 higher education market place will be threatened. We posit that the marketization of higher
33 education not only has been transformative in relation to the current geography of UK higher
34 education but, as this paper has argued, it also has serious internal contradictions.
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