## Marketization, marketing and the production of international student migration

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<td>Abstract:</td>
<td>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.</td>
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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

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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).
there are many intermediaries (just as in any other market). These include state education agencies, international organisations, recruitment agents and commercial and charity-based sponsors and funders. Not only is there great inequality between those seeking to purchase higher education (as well documented in the student migration literature) but there are also vast differences in power between those selling study opportunities, not least between those countries who seek to make significant financial gains from student tuition fees (Felbermayr and Reczkowski, 2014). The fundamental contention of the paper is therefore 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. Those engaged in providing education are social actors whose marketing, recruiting and branding practices selectively mould the nature of student mobility in the context of the marketization of higher education. Our aim is therefore to contribute to re-conceptualising international student mobility in relation to marketing and marketization.

The paper opens with a review of recent developments in the theorisation of student mobility in relation to the key themes of our research. The paper is structured around four themes: motivations for engaging in the marketization of higher education, student recruitment as a social practice, branding and the differentiation of the higher education market, and resolving tensions between the state and universities as stakeholders involved at different scales in the provision of higher education. The final section asks how the research has helped towards reconceptualising the business of selling international study opportunities.

The Marketization of International Study Opportunities.

Marketization refers to the process of creating new markets for products (such as health care) which were previously shielded from market exchange and price mechanisms. Higher education, like other sectors of many advanced economies, has faced increased marketization over recent decades in response to neo-liberal agendas. These agendas have been advanced by those believing that the free flow of goods and services in relation to market price mechanisms was in the interests of economic efficiency (Castree, 2010). In the process of pursuing this goal there has been a retreat from the meritocratic belief that Higher Education should be considered a public good available to all with the ability to study for a university degree (Robbins, 1963) rather than a private good accessible only to those able to pay (Hall, 2015). We do not devote further attention at this point to this important philosophical debate. Instead we focus on the consequences of the switch in terms of analysing the practices that have resulted from the marketization of higher education. In particular we concentrate on the practice of promoting higher education products to a global marketplace (Hemsley-Brown et al, 2006; Scott, 2015).
The academic literature within the disciplines of marketing and business studies have produced some interesting studies on student migration relative to traditional concepts about markets such as ‘product’, ‘place’ and ‘branding’ (Chapleo et al, 2011; Teng et al, 2015; Woeraas et al, 2009; Binsardi et al, 2003). Perhaps of greatest value from this literature is the observation that the general marketing literature is ill-suited to research on international students because the product being sold and the motives of those purchasing the product are very different from other aspects of ‘marketing’ (Helmsley-Brown et al, 2006). Moreover, most of this body of research is about ‘markets’ as opposed to ‘marketization’ and lacks critical social theorisation. ‘Marketization’, as defined above is distinctive from marketing, because it is a term that implies a strategy of ‘creating’ markets for products considered previously as public goods.

In what follows we concentrate on social science insights that suggest that the global market place is highly uneven (Gulson and Symes, 2007) and that the power differentials between those involved in providing higher education (nationally and internationally) are fundamental to understanding the uneven origin and destination patterns of international mobility. This said, we do not ignore the ‘marketing’ literature because it leads us to two important questions: first what exactly are the ‘products’ sold to international students, and what is the role of promotion and branding in shaping patterns of student mobility under conditions of marketization?

A useful starting point in understanding the promotion of higher education products in a globally uneven market is research on the internationalisation of higher education. Paradoxically the internationalisation of higher education (resulting from a range of powerful forces such as the adoption of English as the international language of science as well as political initiatives such as the Bologna process within the EU to standardise the nature of national higher education systems) has gone hand in hand with the increased differentiation of higher education. As more and more people received university degrees, so the cultural demand for the ‘distinction’ (Bourdieu 1986) that higher education used to bestow only on the elite, resulted in new processes differentiating the ‘best’ degrees and the top international universities. It was this process of cultural differentiation that researchers have pointed to as an explanation for why talented young people from less fortunate backgrounds attend local universities, while students from middle class homes are more likely to apply to study at leading institutions of higher education either nationally or internationally. The process therefore reproduces distinction through the credentials associated with where people study (Waters, 2008; Brooks and Waters, 2011).

At the level of universities, differentiation became evident both vertically and horizontally. Vertical differences reflected the different capacities of universities in terms of resources and
status to offer educational credentials bestowing cultural capital. At the pinnacle of the university hierarchy one finds immensely wealthy world class institutions renowned as ancient seats of learning and with global research reputations. Horizontal differences within the educational field of power have been produced by universities of similar capacity branding themselves as distinct from others in terms of their disciplinary range and specialisation or indeed the quality of the student experience that they could offer. Another horizontal distinction of ever greater significance has been the divide between state-funded and private educational institutions.

Differentiation of universities across the global landscape of higher education is a central feature explaining student mobility. From a demand-side perspective it has long been held to be important in explaining the geographical concentration of international students in the top institutions. From a supply-side perspective one would expect the best resourced universities to have the greatest capacity to recruit internationally and to project their brand to the highest paying educational markets, and this in turn would to some extent explain the correlation between top-ranked institutions and the presence of large numbers of international students (Findlay, 2011).

Arguments about the importance of difference between universities can also be applied to the marketization of study opportunities between countries. Thus to a considerable extent one might argue that those countries winning the largest share (Universities UK, 2014) of international students are those best able to resource the marketing of the international opportunities to study within their educational system in preference to elsewhere (National Academies, 2005; Sadlak and Cai, 2007; OECD, 2015). If these arguments are accepted, it implies that many universities actively engage in promoting the merits of studying in particular places/institutions largely because of the financial benefits that accumulate from hosting international students. This perspective therefore directs the researcher to investigate the ‘sites’, ‘actors’ and ‘rewards’ involved in a marketized international higher educational system in order to explain how marketization produces many of the prominent features of international student mobility. The ‘sites’ range from international education fairs where competing universities seek to ‘sell’ their educational products (desirable courses) to potential students, through to the ever growing number of satellite campuses of international universities where preparatory courses are provided to students with the prospect of later ‘progressing’ to studying abroad. Key ‘actors’ include international education recruitment agencies (Beech, 2014), whose profit comes from fees paid by foreign universities for visiting elite schools and operating a selection process that delivers appropriate quality candidates, as well as from funds provided by potential students to these agencies for assistance with the preparation of study visa applications. University international offices are
of course the key ‘actors’ in the process, pitching educational products in appropriate ways
(such as on university webpages), branding the distinctiveness of their university, visiting
target schools and recruiting potential students at educational fairs.

This review has focused on literature relevant to the marketization and marketing of higher
education. We would wish to signal to the reader that there are many other approaches to
studying student mobility, each making its own valuable contribution. These include studies
of student choices and experience (Woodall et al, 2014; Bilecen 2014; Van Mol, 2014),
narratives about ‘knowledge migration’ (Raghuram, 2013) and accounts of student mobility
set in the wider context of knowledge circulation (Jons, 2015). We do not dismiss any of
these contributions, but instead in this paper we intentionally limit our attention to supply-side
mechanism in higher education and how these produce student migration patterns. In
particular we would argue that marketization of higher education (Hall, 2015) has been the
key force responsible for many of the recruitment and marketing practices that have
emerged in the educational landscape. As we have hinted above, the social field of higher
education displays many power asymmetries and we would argue that these, along with the
tools used in branding and marketing, have been highly influential in determining which
young people have been given the opportunity to study internationally and at which
institutions. Our fundamental contention is therefore that international student mobility is not
so much the choice of individuals but that it is structured by multiple drivers including the
actors engaging in the marketization of higher education.

3. Defining international students and researching marketization

Researchers make a key distinction between international degree mobility and credit
mobility. International degree mobility refers to students registered for their entire degree at a
higher education institution in a country other than their place of normal residence. By
contrast credit mobility describes students who enrol for part of their degree in a foreign
university. It involves transferring credits gained during their temporary period of international
study to count as part of their degree (such as occurs within the EU Erasmus programme) in
their usual country of domicile. The distinction matters to universities in a variety of ways
including the fees earned from tutoring international students, and it matters to state
governments in relation to features such as their student visa policy. To researchers the
distinction is important in the way that student mobility is theorized. In this paper our focus is
only on degree mobility. This is analysed in relation to undergraduate, taught postgraduate
and research postgraduate degrees.

This paper discusses one particular aspect of our research on international student migration
to the UK. The wider project involved a) an online survey (to which we refer briefly) of 3328
international students from 119 different countries studying in UK universities, b) in-depth interviews with 30 international students and c) interviews with 14 key stakeholders from the international offices of UK universities, a number of inter-university organisations concerned with international student issues, and the British Council (the UK’s international organisation responsible for promoting cultural and educational opportunities). This primary research was supported by detailed analysis of secondary data sources on international student migration to the UK collected by the Higher Education Statistics Agency. The primary research was conducted between February and September 2015.

Analysis of marketization involved drawing in particular on our in-depth interviews with key stakeholders in the Higher Education sector. These interviews were between an hour and ninety minutes duration with most being undertaken on a face to face basis in an office environment. Anonymity of respondents from particular universities was guaranteed with quotations from these universities only described in terms of two attributes: a) university prestige (as judged using the Times Higher world university rankings – the term ‘prestigious’ was used for universities ranked in the top 150 in the world, and ‘less prestigious’ for other institutions) and b) the proportion of international students in the student body (over 25% being described as ‘international’, and under 25% referred to as ‘less international’). These attributes reflect the strategy used by the researchers to identify which universities should be approached to help with the project. First, we checked HESA records to ensure that we included a broad range of universities hosting large numbers of international students, as well as some where there were relatively few international students. Second we included universities from each of the four parts of the United Kingdom as well as some institutions located within the UK’s major global city of London. Finally, having considered the research literature on factors attracting international students to particular HEIs, we designed our sample to include six universities ranked in the top 150 HEIs in terms of their research rating and six institutions that were less well positioned in the World University Rankings. Of the twelve universities whom we approached, ten agreed to participate, circulating an online survey to international students and offering a detailed interview involving the researchers and staff from the international office.

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2 At the time of the survey design the most recent data from the UK Higher Education Statistics Agency (HESA) related to 2012/13. For this year HESA reports the average university as having 19% of enrolments recorded by students whose normal domicile was outside the UK. The distribution of international students was however highly skewed, with a large number of universities recorded disproportionately few international students and a small number having very large enrolments. As a result 19% was not selected as the threshold to divide our sample. Instead the researchers examined the distribution of international students in the universities covered by the online survey, choosing to select 25% as a meaningful statistical breakpoint.
Implicit in the research design is the suggestion that international student flows reflect much more than the choices of individual students. Educational, social and economic structures shape the context within which decisions about where to study (in terms of country and HEI) are taken. Above all the research design sought to recognise that mobility decisions are nested within a socially and geographically uneven education system that is produced by structural forces way beyond the control or understanding of the individual (whether that be the individual student or the individual stakeholder such as a recruitment offer in a university international office). In terms of the structuring of higher education, the research design sought to capture divisions between universities both in terms of vertical distinctions in the higher education system (e.g. between what might be considered highly prestigious institutions and other less well-known universities) and also horizontal differences between highly specialist units such as those offering only a limited range of subjects (for example in music or art or the humanities) and those institutions recruiting students to study from the traditional wide menu of disciplines offered by the large metropolitan universities established in most UK cities in the late 19th and early 20th century. Another horizontal differentiation that we were mindful of in selecting where to conduct research related to the site and campus diversity of the UKs 162 HEIs, ranging from traditional universities recruiting international students to the single home campus compared with HEIs with satellite and branch campuses both in other parts of the UK and also internationally (Waters and Leung, 2013). Capturing some of this diversity within the structure of higher education was therefore judged a very important methodological step if understanding was to be achieved of how universities seek to differentiate themselves in the international higher education marketplace, since the ‘product’ that they offer varies so greatly from institution to institution.

The interview transcripts were analysed using a thematic analysis approach. After re-reading the transcripts multiple times semiotic analysis was used to explore the signs and signifiers reported by interviewees in relation to the marketization of higher education. In the Saussarian tradition, our methodology was aimed at interrogating the cultural codes embedded in the transcripts that would reveal the ways in which marketization was ‘signed’, by our interviewees. Alden et al (1999) have applied this methodology to understand how companies market a brand globally to numerous markets, while Tindal et al (2015) have illustrated the value of the approach in deepening understanding of the signs and signifiers attached to educational products. Our methodological approach follows Findlay et al (2013) who used semiotics to interpret the relationship between the signifiers of the ‘ideal migrant’ and the social practices that resulted from interpretation of this signifier by international recruitment agencies. Our purpose in adopting this methodology was to uncover the cultural codes (signifiers) associated with marketing higher education opportunities to international
students and to explore the social practices that flow from the interpretation of these signals by key stakeholders in higher education. For illustrative purposes we have presented this analytic relationship between text, sign and signifier in the first of our tables, showing the diverse signifiers underpinning the recruitment of international students. This is followed by the codification of particular social practices (for example the differentiation of international students as consumers - Table 3).

Throughout the paper, interviewees' names are withheld, and the names of the HEIs where we conducted the research are replaced by generic descriptors. Beyond the HEI interviews, one of the other key stakeholders whom we interviewed (the British Council) suggested it would be impossible to anonymise their comments and kindly gave permission for quotes from the interview to be directly attributed.

4. The business of selling international study opportunities

a) Motivations for engaging in international student recruitment

While the research literature has devoted much effort to understanding why international students study abroad, there have been relatively few attempts to explore why providers of education look to other countries to recruit students. This is perhaps because the answer is thought to be self-evident: financial reward. There is certainly much evidence of the financial benefits to the UK of hosting international students (Murphy, 2014). Students from outside the EU are believed to contribute more than £7 billion to the British economy (Universities UK (2014), while individual university accounts show that the universities recruiting the largest numbers of international students gain very significant financial advantage over their competitors through the international fees (Tindal et al, 2014).

Our in-depth interviews affirmed the expected importance of financial gain, but suggested other less tangible drivers were also important. The tricky research conundrum is to disentangle the extent to which interviewees listed other motives for increasing international student numbers as an apologetic justification mitigating the need for most UK universities to derive significant financial gain from the process. Table 1 reports the voices of staff from the international offices of three universities as well as a pan-university stakeholder. Each of the voices report the goal of earning lucrative international fees as a means to an end and not an end in itself. At the most basic level the significance of fees was allowing income diversification, providing UK universities freedom to take decisions that were financially independent of UK government funding of higher education. Such motives would not be
unexpected in any market-driven sector, where government funding has had a long history of financial dominance.
Table 1: Drivers underpinning the recruitment of international students

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<th>Interviewee statement</th>
<th>Signifier</th>
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<td>at the heart of it the drive is for increased income from outside sources if we are honest' <em>(Pauline, Prestigious international university)</em></td>
<td>Increased income from 'outside sources'</td>
<td>Freedom from UK Government agendas</td>
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<td>one of the main drivers has to be income diversification. That does drive things and one has to be pretty realistic about that <em>(Pamela, Less prestigious and less international university)</em></td>
<td>‘Income diversification’ (ie less dependence on government funding)</td>
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<td>it’s at the heart of what we do and that’s driven by ...(hesitates) it’s not 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 <em>(Martin, Less prestigious international university)</em></td>
<td>Student ‘diversity on campus… Global contacts’</td>
<td>Being ‘a global and enterprising university’</td>
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<td>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 <em>(Esther, Pan-University stakeholder)</em>.</td>
<td>Part of ‘internationalisation’</td>
<td>‘a component of being excellent universities’</td>
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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
strategic partnerships in other parts of the world (which) contributes to being good universities' (Cameron, less prestigious, less international university).

The credibility of the claims made by interviewees in relation to the desire to be seen as globally excellent, is complemented by the results of our online survey of international students. This was the single most important driver of mobility reported by the 3328 students who participated in the online survey. No less than 82% reported that attending a world class university was ‘very important’ to them in the decision to engage in international mobility. It was also a key discriminator of which universities these students had applied to around the world. This symmetry between demand and supply side factors not only chimes with other research on the drivers of student mobility to other countries (Findlay et al, 2012), but more importantly it illustrates that international mobilities (of students, staff and of the associated knowledges embedded in the global higher education system) are constitutive elements of the differentiation of universities that have flowed from the internationalisation of education (Brooks and Waters, 2011). Thus international student mobility contributes to the production of the uneven spaces of higher education. Universities seek strategically to recruit international students as part of the production of the credential of being ‘globally excellent’, and success or failure in achieving this in turn shapes the pattern of student flows discriminating between the imaginary status of a world class university and institutions perceived to be less distinguished.

b) International student recruitment as a social practice

Table 1 has already provided evidence of the link between the motives held by universities for competing in the international market place for students and the existing of selective practices shaping the map of student flows. Thus Vivienne, from a prestigious but less international university, noted that international recruitment to her university did not occur in all countries, and that effort to diversify ‘in terms of the nations from which we recruit students’ meant focussing on recruitment in specific nations. One example must suffice to illustrate in more depth the selectivity of recruitment practice in relation to the specificity of the geographical ‘market’ in which they worked. Pauline speaking for an older prestigious university with a high proportion of international students, makes a direct link between the US as a market, the educational ‘product’ offered to this market by her university, and the emergence of a distinctive recruitment strategy:

‘You can probably summarise it by saying that by dint of having the almost perfect product we went west ... and that is down to all aspects of the product, the ... degree,
but also the smaller university size, the more personal teaching, beautiful location... and so it resonated. So the strategy at that point was very much following what other universities in the US would do to recruit students to US universities. It is very much a US model....' (Pauline).

The two most important features revealed from the interviews (presented in more detail in Table2) about the geography of recruitment strategies are, first, that they are product-linked and second, that they reveal a reciprocity between supply-side and demand-side processes. Marketization was discussed as a process producing selective supply-side practices in terms of the selection of the locations for student recruitment, while demand-side mechanisms determine which economies and cultures construct international study as desirable (Brooks and Waters, 2011). They therefore become lucrative and secure places for those supplying higher education to do business.

The interviewees revealed a wide range of ways in which recruitment was highly structured and regulated by marketing strategies. Table 2 illustrates the marketing approaches of a range of university international offices. Martin offers a generic list of how potential international students are contacted, while Vivienne offers more detail on how one particular marketing strategy was organised through the use of staff travelling to targeted global locations. These markets she notes match the university’s specialisms in terms of the imaginaries of what type of product is sought by students from these places. Vivienne also comments on the impossibility of achieving global coverage through individually-staffed recruitment trips and as a consequence the need to use educational recruitment agencies. This was a position shared by most universities (see for example Chloe’s comments). Agents and agencies from key markets such as China and India were considered especially important in the early phase of recruitment (see Pauline’s comment). Once market penetration was achieved universities shifted increasingly (but not exclusively) to relying on alumni and personalised contacts.

Table 2: Reaching potential international students

| Most of our activity is driven at local level through our outbound travel, through working with recruitment agents and through our international offices. So, that includes things like TV, radio, newsprint, advertising, newsletters, as I’ve said social media. Erm, that kind of broad gamut of traditional routes. We do participate on things like British Council Fairs (Martin, Less prestigious, international university) |
| So we have two people focused on the US and Canada because they’re comfortable and it plays to certain strengths in our emphasis on Arts and Humanities. So that works. We’ve also become active – as other institutions have – in Latin America. So |
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)
Both of these quotes point to the importance of the distinctiveness of the destination whether it be at national or university level. At national level, UK was perceived to have taken an early lead in marketing itself as a desirable study destination ‘positioning’ the country as a place to acquire high quality educational credentials by promoting the age and standing of the country’s oldest and most distinguished universities.

From a university perspective, Chloe affirmed the importance of branding and the ‘unique things’ offered by her university (not speaking for one of the ancient seats of learning) compared with others. Like so many of those interviewed in international offices she commented on the active role of building a brand, underscoring the way in which international student flows are selectively shaped by the ‘positioning’ of particular study opportunities as ‘unique things’. And the ‘unique things’ listed by those interviewed in the UK’s younger universities ranged from the disciplinary specialisms, through cultural heritage of surrounding areas, to the more ethereal opportunities to achieve global citizenship by studying in an English language location with global connections and proximity to London as a global city. To fulfil on these claims, universities had engaged in a remarkable range of practices. Perhaps of greatest interest from a geographical perspective was the finding that some provincially-located universities had opened London satellite campuses. This response to market opportunities affirms Beech’s (2014) research findings on the importance of proximity to London in the decision making processes of many international students in relation to where to study within the UK. To quote Martin’s description of his university’s London campus initiative:

‘It was to set up a campus, a completely self-sustaining and viable campus in A [area of London] that carried the [name of university] brand. It happened that early recruitment was driven internationally.’ (Martin)

Not only did the interviews reveal the extent of national and regional differentiation of education markets, but they also uncovered marketing strategies aimed at matching different education products to imaginaries of international student types. Table 3 offers evidence of how the marketization of higher education has produced a range of selective practices that are place specific. It is not surprising in view of this that the aggregate pattern of international student flows to the UK as elsewhere shows great differences between countries of origin in the quantity and qualitative characteristics of those that move (in terms of discipline, course type) as well as in the uneven patterning of student destinations (such as different university types selected within a country like the UK).
Table 3: Product pitching and the differentiation of the international student as consumer

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<th>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)</th>
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<tr>
<td>They (students from country A) are high quality, highly articulate, absolutely prepared .....and anything that doesn’t quite match with that, say a student coming from Y, they’re different and not as good (Vivienne)</td>
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<td>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)</td>
</tr>
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<td>(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)</td>
</tr>
<tr>
<td>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)</td>
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</tbody>
</table>

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
marketization. To quote the director of an agency designed amongst other features to coordinate UK university actions:

‘the diversity of the international student population...we really only recruit international students from about ten countries worldwide’ (Pan-UniUniversity stakeholder)

At least two points arise from this position. First, there is perceived to be a huge risk in recruiting across such a narrow range of countries, since this makes the UK’s Higher Education economy vulnerable to changes in demand. These changes can take hold very rapidly as illustrated by the recent dramatic downturn in the number of Indian students studying in the UK. Figure 1 illustrates, for example, just how dependent UK universities are on Chinese students as a revenue source.

The second point is a conceptual one. It is that the social practices underpinning recruitment are very powerful in producing the observed pattern of international student flows. If the pattern were a function of demand alone, then a much wider range of origin countries would be engaged in international student flows to the UK and elsewhere reflecting not only educational ‘need’ but also the global desire of many middle class parents to encourage their children to achieve the academic credentials associated with graduation from a world class English language university. Instead it is the power of marketization and the practices that flow from it that have been critical in narrowing the range of origin countries from which the main flows international students come.

d) Tensions around state immigration policy and adaptive behaviour by suppliers of higher education

The final theme that we choose to privilege is ‘global citizenship’. This is a ‘selling point’ that UK universities increasingly seem to offer students. This is part of the student ‘pathway’ referred to by Chloe (Table 3). Our interviewee at a less prestigious university noted for example:

‘we are in the business of creating global citizens’ (Pamela)

This was a claim made by many university spokespeople in the context of discussing the globalisation of higher education and the marketing of international study opportunities.

Of course many explained that this was a necessary objective because we:

‘live in an interconnected world so Universities are supposed to be a representation of that and preparing people to enter in to that world’ (Chloe), and

‘we talk about being ‘globally connected’ that’s a phrase that’s used a lot. The other one that has a lot of currency is the idea that ‘every student is an international student’. In that, home students should have [hesitates] well, if they come to University F they’re going to get an
international experience because it’s a very cosmopolitan campus, we’ve got students from all over the world, there are all sorts of opportunities for exchange and getting involved in international activities with groups and students societies, learning languages and so on. So the idea is that we’re equipping students to become global citizens’ (Malcolm, Prestigious, international university)

Suppliers of Higher Education therefore claimed to hold the worthy motive of seeking to offer students life skills relevant to participating in a global society, and marketed themselves as offering, in Bourdieus terms, the ‘habitus’ to develop global connections through engaging in social interactions on a cosmopolitan campus.

There is however also a need to recognise that to some extent universities as suppliers of Higher Education, operate within the context of nation states. In turn nation states embed their policies on international students within the wider frame of reference of their international migration policy. This in turn produces tensions, especially in countries such as the UK that have moved to adopt ever more strict controls on general immigration including setting targets on net immigration that would involve cutting net gains from immigration by more than a third. This impacts on international students, since these are the single largest migrant flow into (and out of) the UK. It is in this context that a tension has arisen between, on the one hand the neo-liberal desire to maximise earnings from international student tuition fees, while on the other hand seeking to curb immigration and discourage permanent settlement of international students.

As one of our university international office interviewees noted: ‘The perception rather than the reality is all important and the perception...is that it’s increasingly difficult to come to the UK and it is increasingly unattractive to do so. Students perceive the UK welcome mat to have been rolled up and put in the cupboard’ (Pauline)

One of the responses to this dilemma has been for UK universities to find a way of ‘selling’ international study opportunities without the prospect of subsequent residence or citizenship. The product of global citizenship in this context provides a resolution to the quandary. International students wishing to study abroad as part of a wider desire to move internationally for more than study (ie for access to employment in the global economy and other international life opportunities) can be sold the possibility of studying abroad as a launch pad for later mobility.

Many of the students we have here are often from a multi-cultural background, having lived in more than one place, having parents that are not necessarily from the country where
they’re resident. They seem to..see themselves as mobile. (Peter, Prestigious, international institution)

In summary, one of several tensions between the state and university providers of higher education is the wider significance of study abroad. To many students this equates to opportunities to live and work abroad after graduation (Packwood et al, 2015). One resolution to the tension for universities seeking to earn revenue from international student fees, but unable to market study in the UK as a way of gaining access to UK residence or even citizenship (a package luring students to other countries such as Australia), is therefore to market ‘global citizenship’. This ethereal yet important concept has gained widespread currency amongst those selling international study opportunities, and adds a new agenda to researching the marketization of higher education. This agenda requires wider research on the relation between international migration for study and the pattern of subsequent student moves, either back to their country of origin or onwards as upwardly mobile participants in the world economy.

**Discussion and Conclusions**

Much of the research literature on international student mobility focusses on the social and cultural meanings associated with international study from the perspective of those on the demand side of this selective process (Brooks et al, 2011; Van Mol, 2014). This paper has contributed to the much smaller body of work relating to supply-side mechanisms in Higher Education (Findlay, 2010). In particular it has argued that the international marketization of Higher Education is a key driver that helps explain both the geographical focussing of recruitment behaviour and the nature of many of the social practices underpinning the behaviour of universities and the state in seeking to attract international students.

Set within the wider context of the marketization of higher education (Hall, 2015), this paper has noted how HEIs, as key players in the process, are quite open in admitting to the powerful financial incentives behind international student recruitment. Analysis of the nuanced explanations of marketing, recruitment and branding strategies showed that financial gain was not the only driver. Other signifiers lending meaning to the practice included the justification that HEIs were wise to seek financial diversification from central state funding because it provided opportunities for some freedom of action. More important to HEIs was their self-identification with the ambition of being global universities. This they believed was evidenced by the presence of international students (along with a globally-sourced staff compliment and a ‘world class’ research standing). Some HEIs therefore argued that finance was only one aspect of their international strategy, and that the real driver was a desire to offer the very best opportunities for both staff and students by seeking
to be a globally-excellent, cosmopolitan site of Higher Education. Hosting large numbers of
international students was represented as constitutive of being a truly excellent university.
The inadequacy of this much repeated narrative can, however, be challenged given the lack
of global diversity in the composition of the UK HEI student population, with nearly all
universities having their campus dominated by international students from just one or two
countries (Figure 1).

There is evidence that supply-side mechanisms have had similar effects in other major
student-receiving countries, in terms of narrowing the range of origin states. This is not an
outcome unique to the UK. Findlay et al (2016) have shown from research with university
international officers in the USA and Australia that similar social practices exist in terms of
organising international recruitment and in terms of the branding of educational products for
a global marketplace. Competitive international behaviour in the marketing of international
study opportunities is not new (Hensley-Brown et al, 2006), but as the scale of international
student flows has grown, and the complexity of the international education landscape has
increased (Felbermayer et al, 2014), so too has the sophistication of the international
recruitment process.

The complexity of the social practices associated with international student recruitment
reported in this paper have included explanations of which countries are visited by staff,
which international sites are targeted at student fairs and in which circumstances
international student recruitment agents are used. Branding was presented as a careful
matching process, mapping degree types onto specific student ‘personas’. The tactic of
shifting pitch (in relation to study location type) was also reported as important in selling
effectively to different countries of origin. Interviews with key players in the marketization of
Higher Education also noted that international students enrolling for courses in UK did so in
the context of longer term plans relating to future work and citizenship aspirations.

In the very specific political and cultural context of the UK’s current anti-immigration rhetoric,
the packaging of the education product by HEI providers therefore required an offer to be
made of study as the first step towards potential global citizenship (in the absence of much
prospect for students from outside the EU of remaining in the UK after graduation). This
contrasts with the possibility in countries such as Australia to sell international education as
an opportunity to ‘learn, live and grow’ (Findlay et al, 2016) with the possibility of remaining
in the labour force after graduation and perhaps settling and gaining citizenship. While the
UK research presented in this paper is country-specific, the principles outlined here remain
generalizable. Marketization of international study in all countries is set within the frame of
national immigration policy. It is the role of those promoting international study to brand it relative not only to short-term educational outcomes but also to long-term mobility aspirations.

A further feature of the wider argument presented by this paper is that the global diversity of a student population is a constitutive element of the signifier of global educational excellence. While on the one hand universities may brand themselves as ‘internationally excellent’ offering prospects of global citizenship, on the other hand they recognize that a necessary pre-condition to being recognized as internationally excellent is the ability to attract large numbers of international students. It is access to this group that offers global reach to those that study there and a global reputation to the universities that give them degrees.

Ironically the same argument underscores the fragility of a marketization strategy built on highly selective social practices linked to recruiting international students from just a few countries. The risk is that an increasing number of key student origins switch to other HE destinations (for UK, Indian, EU and ‘other Asian’ student numbers are all lower now than in 2010/11 (HESA, 2016), thus stimulating a crisis in the UK HE sector. More seriously there is the risk that the narrative of UK universities being signified as ‘internationally excellent’ could be undermined in terms of their cultural credentials as sites of social practice bringing together students and staff from around the world, to the benefit of all in terms of lifetime global connections. If the narrative of international study as a precursor to potential global citizenship is lost, the effects on the UK HE sector would be serious. Some international student mobility would of course continue, but the UK’s position of privilege in the global higher education market place will be threatened. We posit that the marketization of higher education not only has been transformative in relation to the current geography of UK higher education but, as this paper has argued, it also has serious internal contradictions.

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