

INTERNATIONAL STUDENT MOBILITY: A MAJOR CASUALTY OF COVID-19

Global higher education is an enormous industry, valued as \$65.4 billion in 2019 and projected by Verified Market Research in 2020 to reach \$119.95 by 2027. But the patterns that prevailed for several decades in this sector were already beginning to change before the onset of the Covid-19 pandemic. The United States, the United Kingdom and Australia, three of the leading Anglophone countries in international higher education (the fourth is Canada), have been seeing a decline in their market share of international enrollments in recent years. One factor for this has been the rising competition from Asia – China in particular – and from continental Europe – France and Germany in particular. Restrictive visa policies in the U.S. and the U.K., added to the Brexit effect for the latter, are another. When the Covid-19 pandemic began early last year, multiple universities in these countries were therefore the first to sound the alarm about the impact the suspension of international travel would have on their international enrollments, which for years had supplied a substantial share of their revenue. Of particular concern was the potential drop in the numbers of Chinese students (33.7 percent of the foreign student population in the U.S.). By the end of 2020, some elite universities in the U.K. were projecting a 40 percent loss in income from overseas students for that year, while in the U.S. it was estimated that the contribution of international students to the national economy (38.7 billion in 2019-2020) would go down 4.4 percent the following year.

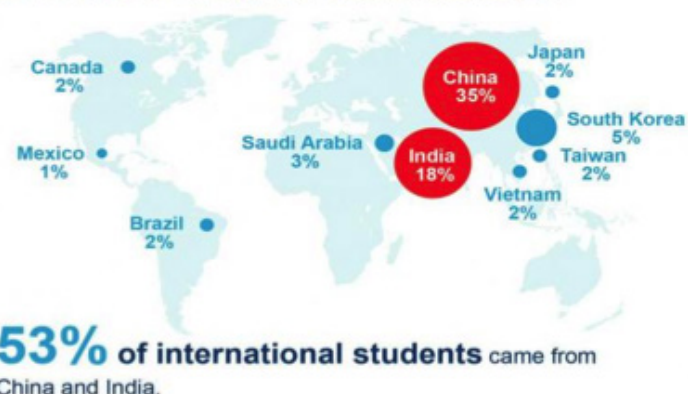
An assessment of what longer-term impact the pandemic may have on international student mobility, and more broadly on the internationalization of higher education, requires first an examination of the damage incurred thus far since the onset of the pandemic, and then a review of what data is available on how international enrollments and institutional international policies may evolve over the next two years.

2020: AN ALMOST BLANK YEAR

The global health crisis caused by Covid-19 made it difficult for students in the process of applying for programs abroad to proceed with the required administrative steps, as most countries in the European Union and across the OECD were closing their borders in an effort to contain the spread of the virus in their territory. Some countries in these two groups allowed higher education institutions to adapt their admission procedures and issued guidelines to facilitate the flow of international students within the framework of safety measures, while others encouraged those due to arrive as the pandemic was rising to pursue their program fully online. International students enrolled in brick-and-mortar institutions at the onset of the pandemic have generally been more affected. Some host countries compelled them to return home while others allowed them to stay and pursue their program online. A few European countries took temporary measures to grant them financial aid and other forms of assistance.

Though countries of destination applied varied approaches in addressing the issue of international students in the first weeks of the pandemic, the entire sector of student mobility and its multiple stakeholders have been grievously affected by Covid-19, with huge economic and financial repercussions for host countries and institutions of higher learning and extreme disruption for students, in ways even more acute than what their peers who were studying at home experienced.

TOP 10 PLACES OF ORIGIN FOR INTERNATIONAL STUDENTS



country-based figures for revenue loss and numbers of students affected, both in the course of their program abroad and regarding future plans do not yet exist, so the overall quantitative impact of the pandemic on the sector cannot be comprehensively assessed at this time. But a number of surveys provide some indication of the effects this 'blank' year has had, essentially in the United States and the United Kingdom.

A survey conducted in November 2020 by 10 major higher education organizations and based on data from over 700 U.S. colleges and universities found that while the total number of international students enrolled in the U.S. and studying online overseas at U.S. institutions had dropped by 16 percent in the fall semester of 2020, new recruitment for 2021-2022 had gone down by 43 percent (amounting to approximately 40,000 students). The previous month, in a Times Higher Education survey carried out among 659 prospective international students, only 32 percent of respondents agreed that online learning at an institution overseas would be better than taking in-person classes at home, and results broken down by host country showed that only 25 percent of those who had planned to study in the U.S. favored the online option, while 38 percent of those aiming for the U.K. did. The study also found that 37 percent of students surveyed had delayed their overseas school plans because of Covid-19, but only 8 percent had cancelled them altogether. Just 6 percent of those who had changed plans said they were going to study remotely instead. Both surveys clearly showed that, in the perception of most international students, whether enrolled in a program or planning to get enrolled, studying remotely elicited much lower interest than the prospect of participating in person and getting the full immersion experience.

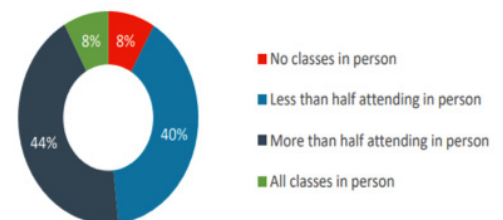
Covid-19 Effects on U.S. Higher Education Campuses, Preparing for the Future: The Path Forward for International Educational Exchange, a study released in June 2021 by the Institute of International Education, provides additional data on international students in spring and fall 2021 and on the recruitment of future international students. It finds that in spring 2021, 52 percent of institutions surveyed noted that most of their international students attended classes in person at some point during the semester. 90 percent of these institutions were planning to offer in-person study to international students in fall 2021.

In addition, 43 percent of institutions reported a sizeable increase in their international student applications for 2021-22 compared with the previous academic year (with a 59 percent increase in doctoral applications). Finally, a sizeable 77 percent reported funding recruitment of international students at the same levels or higher than before the pandemic. Regarding the risks attached to the virus itself, 64 percent planned to provide vaccines to students, including international, while 45

percent did not plan to require a vaccine for students coming in the fall.

This report therefore proposes a cautiously optimistic outlook whereby, with vaccination rates rising in the United States, all students will be encouraged to return to in-person study as campuses reopen in the fall. Yet institutions are aware that vaccination campaigns move forward at very different paces across the world and that the possibility of new outbreaks such as those currently affecting India and Latin America, added to the uncertainties of global travel that persist, will make it impossible to return quickly to the free international student flows of pre-Covid-19 days.

Figure 3. Enrolled International Students Attending Classes in Spring 2021



LOOKING AHEAD: BACK TO PRE-COVID OR NEW PARADIGMS?

Two, very distinct, broad pictures of how international student mobility will be affected over the next few years by the 2020-21 pandemic are emerging. One is based on the belief that once the world has moved past the crisis in every major respect, international enrollment will return to previous levels and universities will deal with it as they used to, and go back to fully benefiting from that source of revenue. The other posits that, as with most other dimensions of higher education, international student mobility will have to be redefined on the basis of lessons learned from Covid and beyond.

Many higher education professionals believe that the near freezing of international student flows this year and last will indeed build "pent-up demand" for studying abroad and may lead to an actual boom of international students starting in 2022. In this scenario, the Covid-19 pandemic should eventually come to be viewed as a moment of parenthesis that will in fact, a few years on, serve to reinforce the internationalization of higher education. This outlook is primarily typical of personnel associated with international relation activities at various – in particular leading – universities in the United States and in Europe. Among observers, analysts and experts of higher education not associated with a university though, the approach is markedly different as it focuses on factors of change that were already emerging in the years preceding the pandemic and as it speculates that these new patterns

will develop at greater speed because of the pandemic.

Emblematic of the latter position is Simon Marginson, director of the Centre for Global Higher Education at Oxford University, who assesses that international student mobility will take at least five years to return to pre-pandemic levels, and that East Asia (in particular China, South Korea and Japan) will emerge as a global destination in the intervening period while a “temporary shrinkage of the global middle class” reduces the flows of international students to Western universities. Marginson believes that international education will become a “buyer’s market” in which universities will be “hunting for scarce international students for some years to come” while health security will remain a major factor in the decision-making of families and students about where to go. The shift among part of the student traffic away from North America, Western Europe and Australia and into East Asia, Marginson argues, will likely be permanent. To stave off the drain, Western governments will have to step in with subsidies and more flexible policies.

Other voices are also pointing to China as a rising international player now seeking to attract foreign students rather than sending its own out to Western universities, and to the potential game change this may signal. Already in 2018, nearly half a million students from 196 countries were enrolled in mainland China universities. This reflects a strategic priority that China devised in 2010 as it began to seek an expansion of its global reach and soft power by way of establishing a global education brand. This government initiative has led to a proportion of foreign students in China twice as high today compared to 2009. Perhaps reflecting this emerging trend, a survey analyzed in an article published at the end of last year in the *International Journal of Educational Research*, *Impact of Covid-19 on international higher education and student mobility: Students perspectives from mainland China and Hong Kong*, found that 84 percent of the 2,739 student respondents had no interest in studying abroad after the pandemic.

Among other factors generally reported as possible signs that a change of paradigm in international student mobility and flows is under way is the lasting impact that the move to online learning and the increasing quality of virtual classes that many forecast may have in convincing student population segments that would have previously sought to go abroad that studying remotely at a foreign university, though not as fulfilling as the in-person experience, may be done at much lower cost and with much less hassle while providing an equally valuable degree or certification. The concern with climate change and the adverse effects of air travel, of which younger generations are the most acutely aware, may also constitute a

marginal disincentive.

International student mobility in the longer term will not be equally affected across the planet. Within the European Union for example, it is expected to shortly resume to pre-pandemic levels and broad patterns because the EU has long-established policies, in particular the Erasmus program, that have created – if not structured and expansive forms of cooperation between institutions among member states – something close to a single higher-education space where student mobility has been relatively easy for decades. But the outlook may be more somber for countries where universities are heavily dependent on revenue from international student recruitment such as the United States, the United Kingdom and Australia. In an article published on March 6 this year in *University World News*, *Over-optimism and under-investment in IHE export models*, Hand de Wit and Neil Kamp warn against business models that overly rely on international tuition fees, both from an ethical standpoint and because the pandemic has served to underscore the economic, social and academic risks involved in such a model. As the flow of incoming Chinese students is expected to decrease in the coming years, they recommend that institutions in this category deploy strategies aimed at diversifying funding sources rather than at doubling down on the anchoring in foreign student recruitment. They point out the fact that the international higher-education market is changing. While it is not clear yet who the winners and losers will be, they argue, most of the players involved are still focused on bringing students from the Global South to English-speaking countries in the Global North, but with previous exporters of students in the non-Anglophone world now vying to import their own share, the market is likely to become more diverse and more competitive. Universities that rely on decades-old funding models be on your guard.

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