



ASSOCIATION
OF COLLEGES

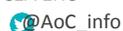
International Activity in Colleges

The 2017 Association of Colleges Survey

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The Association of Colleges

1. The Association of Colleges (AoC) represents nearly 95% of the 288 colleges in England incorporated under the Further and Higher Education Act 1992.
2. Colleges are transformational – they help people to make the most of their talents and ambitions and drive social mobility; they help businesses improve productivity and drive economic growth; they are rooted in and committed to their communities and drive tolerance and well-being. They are an essential part of England’s education system.
3. Colleges provide academic, technical and professional education for young people, adults and employers. Among other things, the 288 colleges in England provide education and training to:
 - 712,000 young people aged 16 to 18
 - 1.4 million adults including 150,000 taking higher education courses
 - 313,000 apprentices¹

The 2017 international survey

4. AoC conducted a survey of our members’ international activity at the end of the 2016/17 academic year. There is growing interest in the scale and nature of international activity in colleges but very little data. The UK decision to leave the European Union (EU) makes it more important than ever for colleges to be outward-looking. Meanwhile the UK’s changes to student immigration rules, particularly in 2015, have made international work more difficult.
5. AoC staff designed the survey to be a stocktake of international work at colleges with 23 questions relating to both EU and non-EU activity. We issued the survey to all colleges in AoC membership. Our definition of international activity was any kind of programme, project or work involving partners or students outside of the UK. Specific objectives for the survey were to:

¹ AoC Key Facts about colleges 2017

- Gauge the current level and range of international activity at colleges
 - Provide data on international student numbers and income
 - Highlight international education policy priorities for the college sector
6. AoC plans to issue the survey at the end of each academic year to provide annual comparison data. If you missed the survey or have comments for the 2018 survey, please contact Emma_Meredith@aoc.co.uk

2017 survey headlines

7. The survey provided valuable insights into current college international work. The top 10 headlines were:
- Student recruitment – across all visa types – is still the mainstay of college international work.
 - College international activity is very broad. Colleges identified over 20 different types of international activity that they are involved in, from international student recruitment to operating campuses overseas.
 - China is the most important international market for colleges. Colleges identified 66 different countries in their individual lists of top 5 markets
 - European Union countries constitute the second most important international market for colleges. Colleges who are active internationally enrol 353 EU27 students per year and generate an average of £105,000 in fee income from EU27 students.
 - Level 3 is the most popular level of study for international students at colleges.
 - English language programmes are the most popular subject of study for international students at colleges.
 - 85% of college Tier 4 sponsors issue fewer than 50 Confirmation of Acceptance for Study (CAS) per year. Colleges who are active internationally enrol an average of 121 non-EU international students a year – many on short-term study visas.

- Colleges want Government to take international students out of net migration targets.
- Colleges want the UK to stay in the Erasmus+ programme after the UK leaves the European Union
- Colleges want AoC to keep representing the sector and to source commercial opportunities

Sample size and nature

8. AoC issued the survey to college principals and international contacts (where applicable) in all 313 colleges and sent reminders to those known to be internationally active. Responding to the survey was voluntary. There were a large number of college-to-college mergers and sixth form college academy conversions between August and November 2017, after the survey had closed. At the time of writing, there are now 280 colleges.

Type	Number of responses	Number of colleges in England	Percent within type	Percentage of total responses in England
General Further Education College	65	202	32%	77%
Sixth Form College	14	85	16%	17%
Specialist College	5	26	19%	6%
Total colleges in England	84	313	27%	100%
Other*	6			
Total number of responses	90			

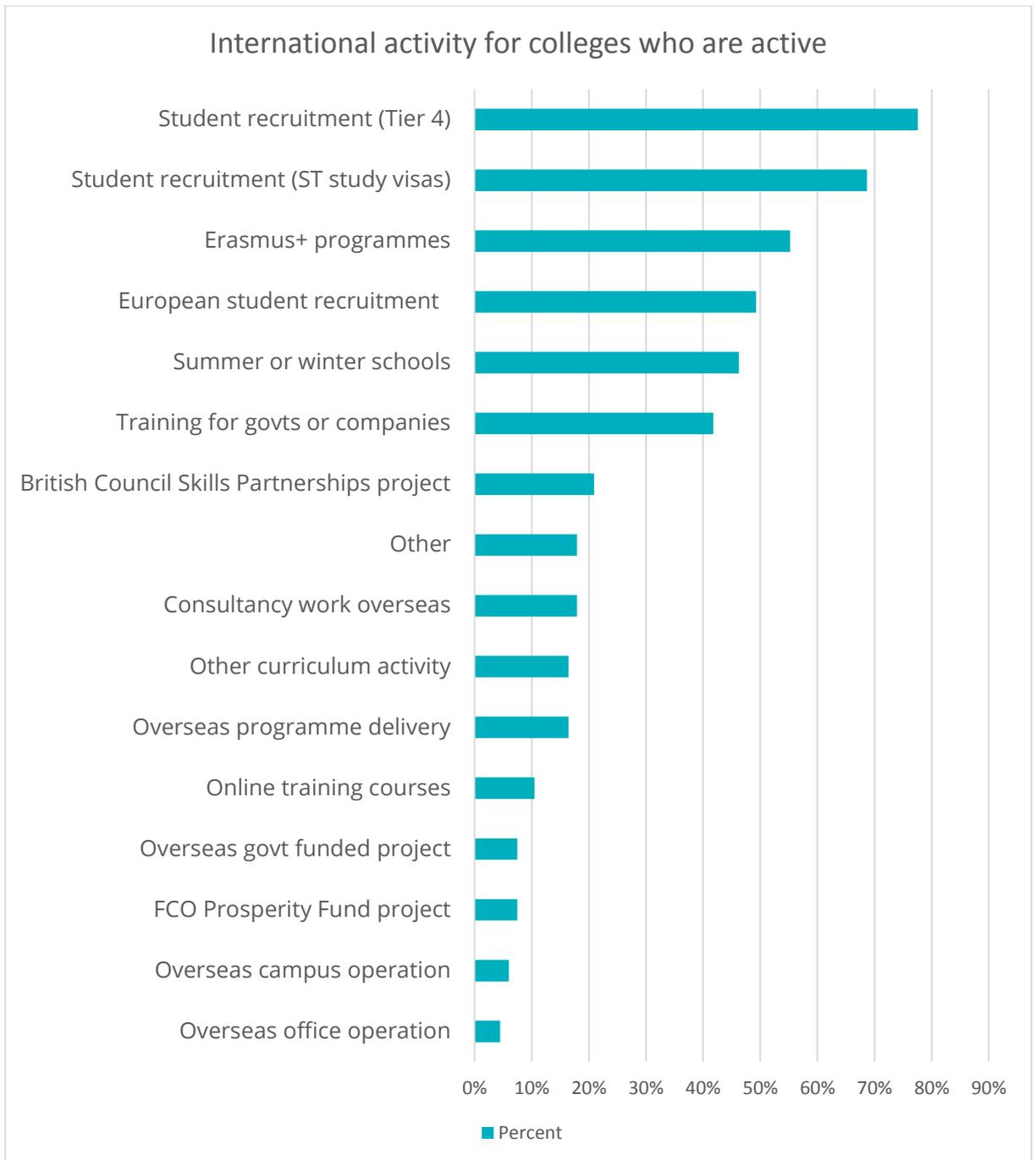
* Other = 2 Wales, 1 Northern Ireland, 3 Independent Specialist Colleges

9. There were 90 responses, 84 of whom were from English colleges and 6 from the rest of the UK. This represents a 27% response rate for England. Having reviewed the list of colleges who responded, AoC is confident that the vast majority of internationally active English colleges (with about 10 exceptions) responded.
10. Of the 90 colleges who responded, 68% are actively engaged in some form of international activity and 28% have dropped out in the last five years. 8% of those who responded have no international activity. AoC believes

that many of those who did not respond at all have some limited international activity (for example staff or student exchanges) but, as explained above, we also believe that the majority of colleges with substantial international activity submitted a response to the survey.

Range and nature of college international activity

11. Colleges are involved in over 20 different types of international activity, highlighting the breadth and range of the sector's capacity. Question 6 in the survey asked colleges to indicate which of the following types of international activity their college engages in. There were broadly 5 different types of international activity detailed under 'Other'.



12. International student recruitment predominates with 78% of those active having Tier 4 licences and 69% using Short Term Study visas for courses of less than 6 months. Exchanges supported by Erasmus + funding and European student recruitment were the third and fourth most popular activities.

13. Question 7 asked about Tier 4 licences. 85% of Tier 4 licence holders issue fewer than 50 CAS per year. At the time of going to print, there are 112 AoC members on the Tier 4 sponsor register (including a small number of legacy and probationary sponsors).

14. There is no firm data on the number of international students in colleges. Questions 9 to 13 asked colleges to report data against a number of headings. The survey is not a comprehensive census so this data is incomplete but it nevertheless gives an indication of scale. Home Office controls on student recruitment below degree level have significantly reduced international student recruitment to colleges. Colleges have responded to international demand for a high quality UK further education by using short term study visas and by teaching European students. 5 colleges reported positively that they offer programmes overseas on a transnational basis. One college educates 4,500 students overseas on this basis.

	Sum	Number of responses
Q9. How many international (non-EU) students are studying at your college in the academic year 2016/17, across all visa types ?	7,760	64
Q10. How many international (non-EU) students are studying at your college in the academic year 2016/17 on Tier 4 visas ?	1,709	65
Q11. How many international (non-EU) students are studying at your college in the academic year 2016/17 on Short-Term Study (STS) visas ?	3,576	63
Q12. If you have transnational education programmes , for the academic year 2016/17 how many international (non-EU) students are enrolled on your college programmes delivered overseas?	4,928	35 (includes '0' responses)
Q13. How many EU students paying Home tuition fees on full-time and part-time college courses are enrolled at your college for the academic year 2016/17?	18,708	53

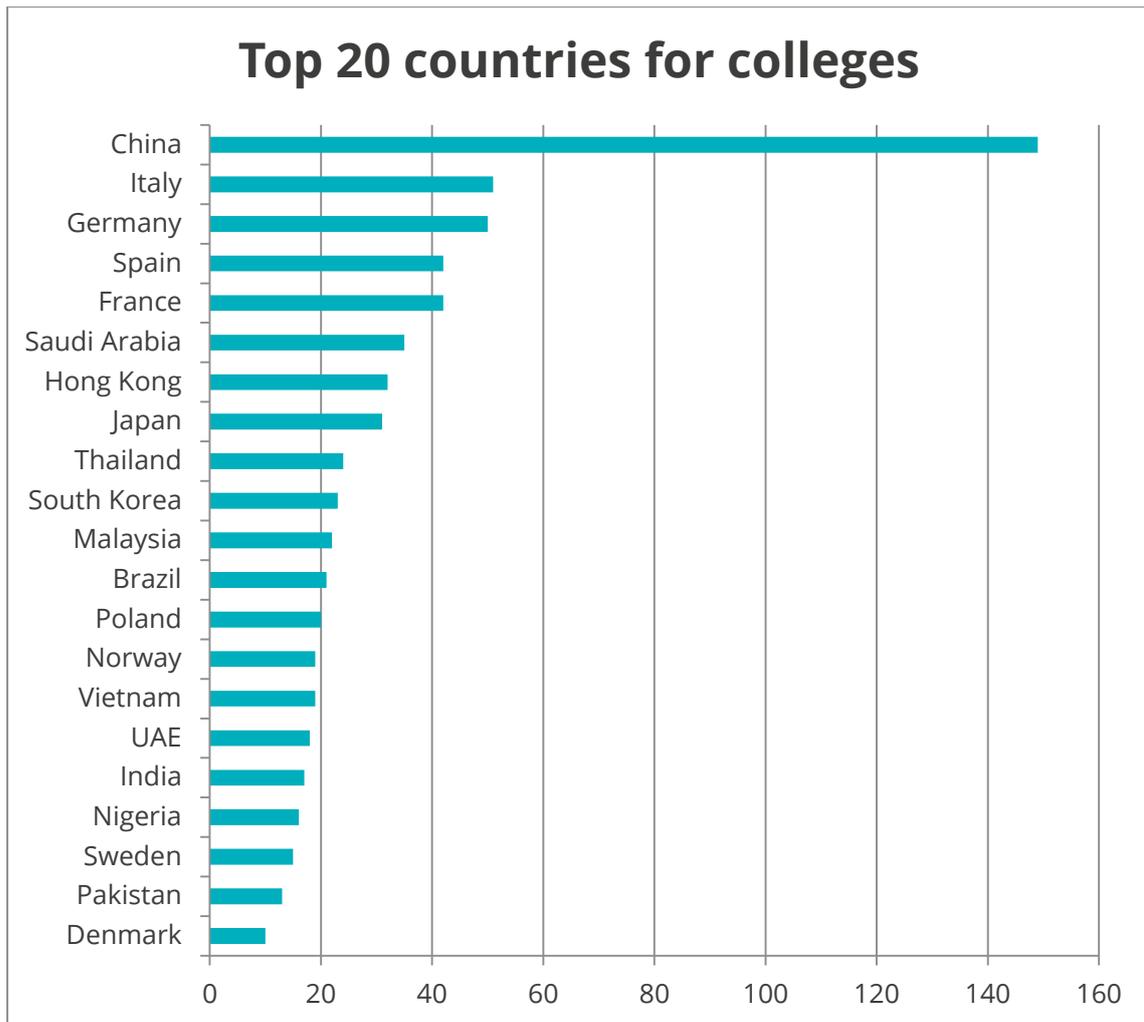
15. Colleges were asked to report the income from international activity. Two key figures for this come from survey questions 14 and 16. Colleges also report income from international students in their annual financial statements. The combined international and EU income reported in 2016-17 was nearly £57 million. Colleges who are active internationally generate an average of £800,000 in international income.

Q14. What is the total estimated income (£) value of your international activity (excluding EU students paying Home fees, Erasmus+ and ESF) for the academic year 2016/17?	£52,002,670	62	£838,753
Q16. What is your estimated income (£) from EU students paying Home tuition fees (on full-time and part-time college course for the academic year 2016/17?	£4,449,805	42	£105,948

16. Colleges were asked to describe the main course level that their international students study at. The most popular level is Level 3 (which includes A levels) but there are substantial numbers at higher levels. Colleges offer pathways to university and into employment, including higher education courses. Almost half of colleges engaged in international education offer English language programmes, highlighting the UK's place as the home of the English language.

Q17. What are the main course levels that your international (non-EU) students study at? (Please tick all that apply)	Number of responses	Percent
Level 3	52	90%
Level 4	21	36%
Level 5	19	33%
Level 6	12	21%
Range of English language proficiency levels (e.g. Beginners to Advanced)	27	47%
Professional qualification level e.g. ILM, CIM	6	10%
Other	4	7%
Total	58	

17. Question 18 asked respondents to list and rank the top 5 countries which were most important to the college's international work. The 61 responses produced a list of 66 countries in the top 5. The most popular by a long way was China but there was a strong presence of EU27 countries, all but one of which appeared on the list. The question did not ask colleges to put a figure on the importance but AoC assigned points (ranging from 5 to 1) for the ranks given by colleges and have added up the points to produce a top 20 list as follows:



18. Colleges were asked about the services they offer students. 51 (77%) reported they employ staff with dedicated responsibility for international work. 41 (65%) offer homestay accommodation. 17 (27%) offer on-campus residential accommodation.

19. Colleges were asked at questions 21, 22 and 23 to comment on AoC services, to provide contact data and to offer other comments. The majority of respondents would like AoC to continue to represent the sector in international issues, to provide market intelligence, to support consortium working, to identify commercial opportunities and to provide advice and training. The two major policy issues identified are first a more sensible approach to the regulation of international student recruitment – by excluding international students from immigration figures – and secondly continuing access to Erasmus+ funding for UK students after Brexit.