
Mapping international student mobility from Pakistan at the province / territory and city level

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The British Council thanks Enroly for its contribution to this study by providing anonymised admissions data for students from Pakistan for the 2022/23 academic year



Enroly is a provider of enterprise automation software supporting the CAS, visa and arrival stages of international student recruitment and admissions in the UK. Over one quarter of international students coming to the UK currently use Enroly's CAS Shield platform.

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Executive summary

The British Council commissioned research into the home province / territory and city origin of international students from Pakistan in the UK, and how the geographical distribution of demand for study abroad is evolving and changing. The research provides market insight into the main locations with growth potential for international student demand and the main drivers.

Key findings

Pakistan's urban development is increasing the supply of higher education provision for tertiary learners. Pakistan is home to the world's third largest university age population (after India and China). However, the size of the tertiary education sector is comparatively small. UNESCO Institute of Statistics places the country's gross tertiary enrolment rate at 12 per cent in 2019.

International student mobility at province / territory and city levels

Demand for international education is mainly at the postgraduate level of study. Province / territory with the highest levels of tertiary provision tend to be the top senders of international students overall, but there is significant variation in the overall propensity to study in the UK (outbound mobility rate):

Punjab – Pakistan's most populous province which accounts for around 60 per cent of issued visas and Confirmation of Acceptance for Studies (CAS) according to the available data. This is equivalent to 0.22 per cent of the local tertiary student population, higher than the 0.14 per cent nationwide average.¹

Khyber Pakhtunkhwa – accounts for around 18 per cent of visa / CAS issuances, equivalent to 0.23 per cent of local tertiary students.

Pakistan-administered Kashmir – relatively lower student numbers (around 15 per cent of the total), but a significantly higher outbound mobility rate, with available visa / CAS data equivalent to 1.4 per cent of domestic tertiary students.

Six large cities account for approximately half of the student mobility to the UK. In order of importance, **Lahore, Karachi, and Islamabad** are the three largest sending cities, with Lahore accounting for 13-15 per cent of all students. These are followed by **Rawalpindi, Faisalabad, and Peshawar**.

The main variations between cities relate to their size, i.e., big metropolitan cities versus smaller second-tier cities. Lahore, Karachi, and Islamabad will continue to provide the bulk of outbound students simply because of their population size. Second-tier cities, however, are proliferating. Faisalabad is large and fast-growing. Peshawar has begun to emerge as the next major city for outbound students.

Some 36 per cent of the surveyed students said they had considered a transnational education (TNE) programme from a foreign university as an alternative to a local university.

There are some regional differences in terms of which country students choose for overseas study:

- Punjab, the largest and most populated region in Pakistan, is the largest contributor to student mobility to the UK. The UK has consistently been the top study destination, mainly through strong family connections with many fourth-generation families having well-established businesses in UK cities. Many political and business leaders of Pakistan from the region have also studied in the UK.

1. As the available data only accounts for around 15 per cent of visa / CAS issuances, the actual outbound mobility rate is likely to be significantly higher.


- In Islamabad and Khyber Pakhtunkhwa, students mainly choose between the UK, North America and Australia. Often, the UK is not the top destination choice.
- Pakistan's south region has the smallest population and includes Karachi and a few smaller cities. Students from this region mainly choose the US as a study destination.

Critical “push” factors for international students from Pakistan

The “push” factors are similar for all students, regardless of their home city or region. The impact may differ depending on family wealth and extended family overseas.

Enhanced career prospects is the most important factor, followed closely by quality of education. These are closely linked in students' minds. Studying overseas is about attending universities and courses with world recognition. Students see this as their passport to a successful future career (either abroad or at home). They generally do not perceive any of Pakistan's universities to be offering this. Post-study work opportunities are critically important. Students see international work experience as important in building their CVs and enhancing their career prospects. Different countries' visa regulations are therefore an important decision-making factor.

Funding is also an important factor. Pakistan is a highly price-sensitive market with study overseas subject to economic fluctuations. Families are the main source of funding for overseas study and economic downturns inevitably affect this. Agents identify two groups of students – those with extended families overseas and those who are “standalone”. The latter are growing in number. Extended families in the UK are a very strong push factor for the first group. They are often an important source of financial help, providing low-cost accommodation and subsistence. They may also offer work opportunities during and after study. Scholarships are a significant “push” factor for all students. There is a strong preference for destinations and courses with a link to scholarships. The online survey found 12 per cent of students were on government scholarships, and 7 per cent had university scholarships.



Six large cities account for approximately half of the student mobility to the UK. In order of importance, Lahore, Karachi, and Islamabad are the three largest sending cities, with Lahore accounting for 13-15 per cent of all students. These are followed by Rawalpindi, Faisalabad, and Peshawar.



Conclusions

The six large cities will continue to be the main senders of students to the UK. Pakistan, however, is an extremely price-sensitive market and is currently affected by a significant economic downturn. This puts student mobility to the UK under pressure. Competition from other recruiting countries is increasing. Visa regulation streamlining (particularly for post-study work) and availability of scholarships are significant factors for students who are either self or family funded.



Rationale

The British Council commissioned this research to get a better understanding of the home province / territory and city origin of international students from Pakistan in the UK, how the geographical distribution of demand for overseas study is evolving, and what is driving this change. Improving the body of knowledge in this area will enable the British Council to provide timely and insightful analysis and advice to the UK HE sector, as well as the UK Government and international governmental and sectoral partners.

Research objectives

The purpose of the research is to develop market insight into the main locations with growth potential for international student demand. The research aims to address the two-fold objectives:

- **To help policymakers in Pakistan to understand better the factors driving outbound student mobility, including how this varies across regions and cities.**
- **To assist UK HEIs in mapping existing and emerging growth potential at a regional level and allocate resources more effectively to capture growth.**

This research endeavours to develop a conceptual framework to enable year-on-year tracking of student demand at the province and city levels in Pakistan. In this sense, this is baseline research against which shifts in demand at the city level will be captured.

Research Methodology

The research started with a review of the secondary data resources at the province / territory level. This aimed to inform the context surrounding the international mobility of Pakistani students.

An extensive data collection was carried out, which included:

- **Quantitative data consisting of the following:**
 - Data requests with selected HEIs active in student recruitment from Pakistan. HEIs were asked to share aggregate figures on Pakistani students' home provinces and cities for the academic year 2021/22. A total of five UK HEIs provided data.
 - Data from the company Enroly, which handles the visa and confirmation of acceptance for studies (CAS) data² on behalf of a number of UK universities. The data supplied was for students starting courses in the 2022/23 academic year and was taken from the Enroly CAS Shield platform, which covers a large cross-section of UK universities and pathway providers.

- This research maps the location of International English Language Testing System (IELTS) centres in Pakistan. These provide a good indicator of demand for English language testing typically associated with studying abroad.
 - Data on UCAS Apply centres, which were mapped according to their business address. These were used as a proxy of locations popular with globally mobile students.
 - An online survey of Pakistani students in the UK was administered to get a better understanding of student decision-making factors and the students' home cities.
- **Qualitative data collection through semi-structured in-depth interviews with stakeholders in Pakistan. The main audiences included education agents and international schools in Pakistan.**

The outcome of these data collections is summarised in the table below.

Data Collection Channels	Coverage
Quantitative data collections	
<ul style="list-style-type: none"> • Selected HEIs' data on Pakistani students' home province / territory and cities 2021/22 	Data on 350 students from 5 UK HEIs (around 2% of total Pakistan-domiciled enrolments)
<ul style="list-style-type: none"> • Enrolly data on Pakistani students with issued UK student visas or CAS – 2022/23 	4,228 students (around 15% of student visas issued to Pakistani citizens in 2022) ³
<ul style="list-style-type: none"> • UCAS Apply centres – the data mainly includes education agents and international schools in Pakistan 	Locations of 453 UCAS Apply Centres
<ul style="list-style-type: none"> • Online survey with currently enrolled Pakistani students on student decision-making factors 	65 qualifiable student responses
Qualitative data collections	
<ul style="list-style-type: none"> • Semi-structured interviews with education agents and student counsellors based in Pakistan 	6 interviews
<ul style="list-style-type: none"> • Semi-structured interviews with UK HEIs active in student recruitment in Pakistan 	3 interviews

2. For details see <https://www.gov.uk/student-visa/course>

3. Enrolly's data does not correspond exactly to 2022 visa issuances, but the large majority of students starting a UK HE course in 2022/23 academic year will have applied for and received their visa in 2022.

Setting the context: tertiary education enrolments in Pakistan at the province / territory level

This section examines the connection between urbanisation, economic growth and higher education provision, showing how urban infrastructure facilitates the growth of local higher education provision and demand for overseas study. These findings are contextualised with in-depth interviews with local HE stakeholders.

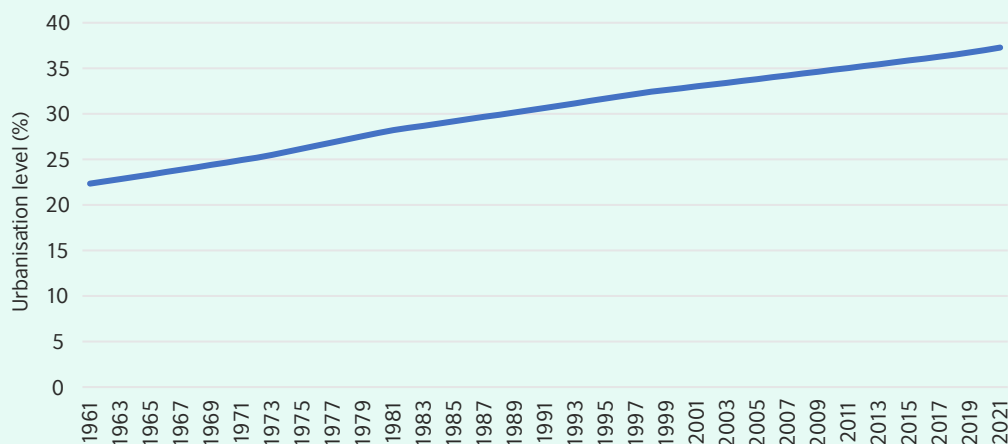
Urban development and demand for higher education

World Bank data shows the proportion of urban dwellers in Pakistan has increased from 23 per cent in 1961 to 37 per cent in 2021.

Recent urbanisation growth has been slow, with an increase of only 2.2 percentage points over the whole of the past decade.

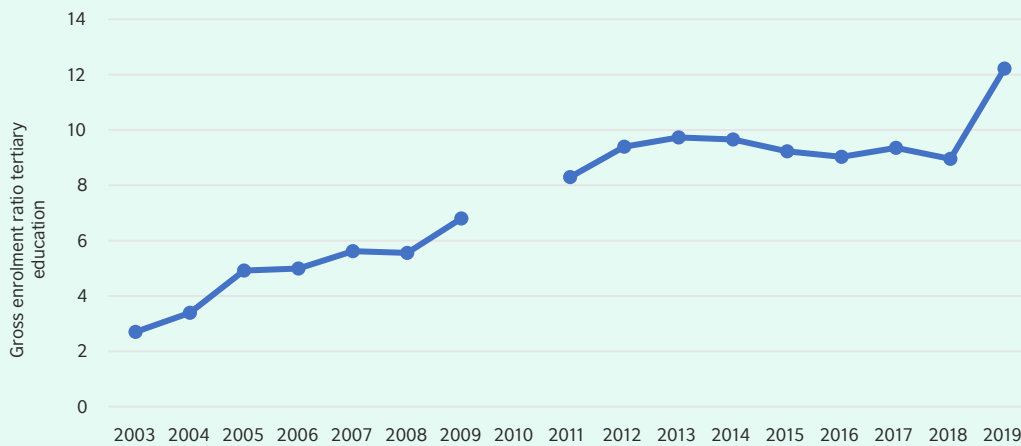
In comparison, World Bank estimates show that 56 per cent of the world's population lives in cities, and they produce more than 80 per cent of the global Gross Domestic Product (GDP).⁴ Globally, there is a strong association between income and urbanisation.

Figure 1: Urbanisation of Pakistan, 1961-2021



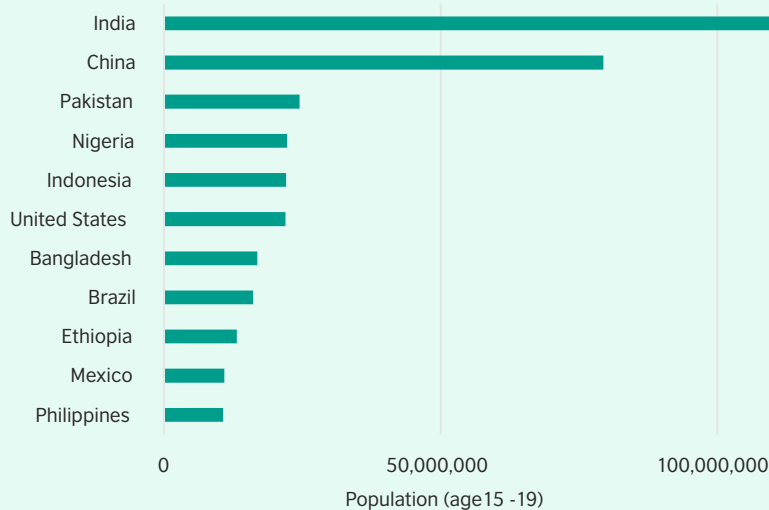
Data source: <https://data.worldbank.org/indicator>

4. World Bank (2022). Urban Development. <https://www.worldbank.org/en/topic/urbandevelopment/overview>

Figure 2: Pakistan's tertiary education participation rate, 2003-2019

Data source: Data extracted on 12 Nov 2023 12:45 UTC (GMT) from UIS.Stat

While Pakistan is the world's 5th largest nation by population, its estimated number of 15–19-year-olds places it in third place behind India and China. The country's demographic dividend is a huge asset but also creates growing pressure for university places and the need for Pakistan to upskill its youth.

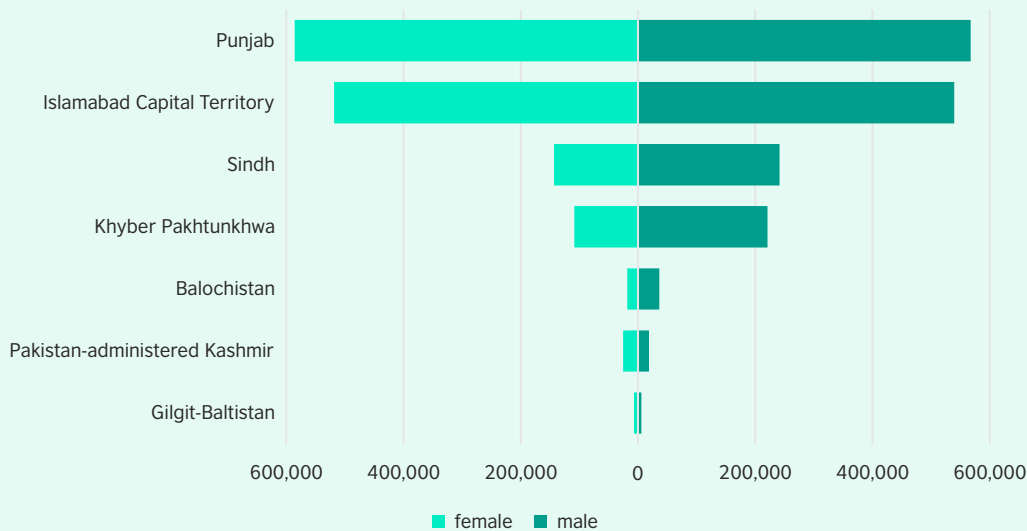
Figure 3: Countries with the largest youthful population (15-19 year olds)

Data source: <https://data.worldbank.org/indicator>

Despite having one of the world's largest university-age populations, the size of Pakistan's tertiary education sector is comparatively small. UNESCO Institute of Statistics places the country's gross tertiary enrolment rate at 12 per cent in 2019. The number of tertiary learners is marginally behind that of the UK at 2.6 million. While Pakistan has the third largest youthful population in the world, the size of its tertiary learners puts it in 19th place globally, which may imply unmet domestic demand.

More recent statistics from the Higher Education Commission in Pakistan show 3,035,909 tertiary learners in 2020/21.⁵ The data shows that Punjab, Islamabad and Sindh enrolled 85 per cent of the country's tertiary learners, collectively accounting for 2.2 million students. The figure below shows tertiary enrolments at the province / territory level by gender.

Figure 4: Pakistan's tertiary education enrolments by province/territory and gender, 2020/21



Data source: www.hec.gov.pk/english/universities/hes/Pages/HEDR-Statistics.aspx

The United Nations predicts a continued expansion of urban populations globally, with an additional 416 million urban dwellers by 2050.⁶ In Pakistan, increasing urbanisation will continue to drive the country's economic growth and its youthful population will be a critical contributor.

International student demand from Pakistan at the province / territory level

The following data sources on students' home province / territory were used:

- Selected UK higher education institutions popular with Pakistani students. The data refer to 2021/22 academic year.
- Data on students with granted student visas or CAS from Enroly.⁷ The data population refers to the 2022/23 academic year, the latest year with a complete enrolment cycle running from 1 August 2022 to 31 July 2023.
- A proxy for popular locations for learners likely to seek international study was sourced from IELTS – the data illustrates the number of IELTS takers.

5. Given the UNESCO Institute for Statistics data definitions, which aim to draw international comparisons, there may be differences between the data sets reported by countries' national statistics and those by UIS. We have used UIS data where international comparisons are drawn. National statistics from Pakistan are used for the country-specific analysis.

6. United Nations (2018), World Urbanization Prospects: The 2018 Revision. <https://population.un.org/wup/Publications/Files/WUP2018-KeyFacts.pdf>

7. For information on Enroly see <https://www.enroly.com/>

- Data on student decision-making was collected through an online survey administered to current international students from Pakistan in UK higher education. Contextual information was sought through in-depth interviews with local stakeholders.

Data on students' home province / territory and cities was requested from five UK higher education institutions popular with Pakistani students. The data population refers to the 2021/22 academic year, which is the latest year with complete data available, running from 1 August 2021 to 31 July 2022.

Data from these universities shows a high concentration of students in the UK from Punjab, Khyber Pakhtunkhwa and Islamabad. Punjab and Khyber Pakhtunkhwa account for similar proportions of students – 40 and 39 per cent respectively – while the majority of the country's remaining students came from Islamabad.

Figure 5: Home addresses of full-time Pakistani students at selected UK HEIs by province / territory and city, 2021/22



Note: Only cities with over 50 students are displayed for data protection purposes.
Data source: Selected UK HEIs

Data was also requested from Enrolly,⁸ who supplied statistics on Pakistani students granted student visas or CAS covering the 2022/23 academic year – one year after the universities' data. The top province / territory were the same as those in the data supplied by UK HEIs, but the Enrolly statistics show a significantly higher concentration of students from Punjab.

8. For information on Enrolly see <https://www.enrolly.com/>

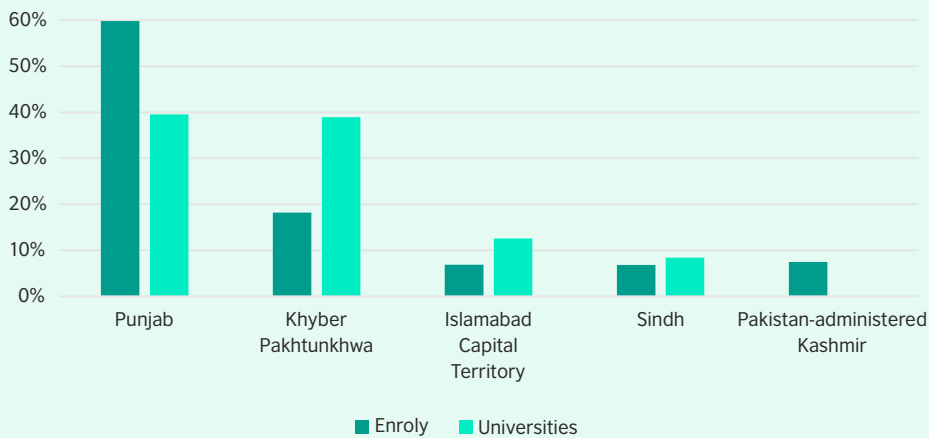
Figure 6: Home addresses of Pakistani student visa / CAS recipients by province / territory and city, 2022/23



Note: Only cities with over 50 students are displayed for data protection purposes.
Data source: Enrolly

The relatively higher proportion of students from Punjab in the Enrolly data may suggest faster growth in outbound mobility from this province. On the other hand, the two data sources might simply refer to different groups of institutions with different geographical locations for their student recruitment.

Figure 7: Comparison of province / territory level distribution of Pakistani student enrolments at selected UK HEIs (2021/22) and UK student visa / CAS recipients (2022/23)

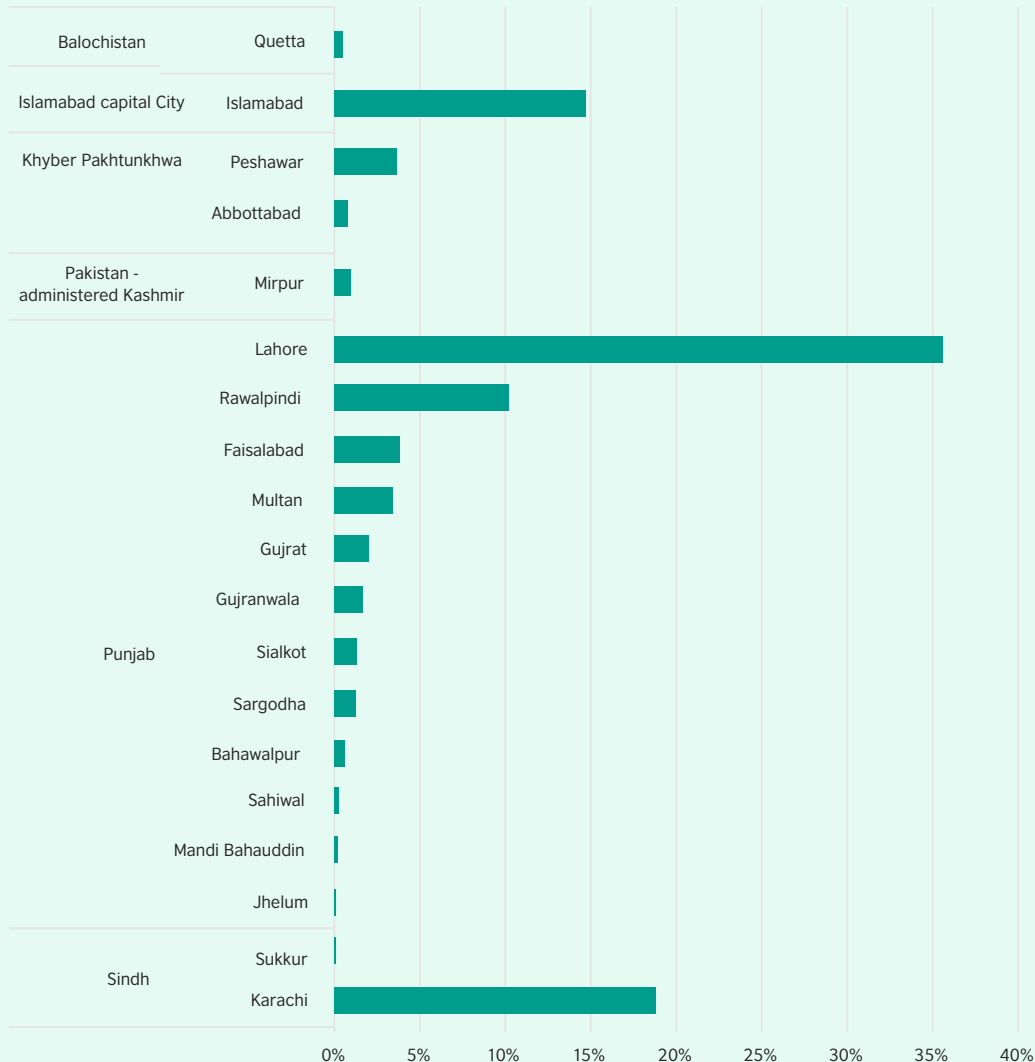


Data sources: Selected universities (2021/22); Enrolly (2022/23)

A third data source is the location of IELTS candidates in Pakistan, which shows an even stronger concentration in Punjab. This data is not entirely comparable with the other two sources, as not all IELTS candidates plan to study in the UK, and in addition the data sourced is through the location of the respective IELTS centres and not the students' home address. However, our assumption is that IELTS students will normally choose a location nearest to where they live. As such, this is a good proxy of the wider urban areas where the prospective international student demand is likely to be concentrated.



Figure 8: Distribution of Pakistani IELTS candidates by province / territory and city, 2022



Data source: British Council IELTS

Some of Pakistan's provinces and territories are considerably larger than others. For example, Punjab is Pakistan's largest administrative unit with a population of almost 110 million and has the largest share of outbound mobility to the UK.

The table below calculates an outbound mobility rate based on the available data for residents issued UK student visas or CAS as a proportion of the relevant domestic tertiary student population.

This analysis shows that Pakistan-administered Kashmir is over-represented in terms of the proportion of the domestic tertiary students deciding to study in the UK. While the overall nationwide total of 4,228 UK student visa or CAS recipients corresponds to around 0.29 per cent of domestic enrolments, the relevant rates in Pakistan-administered Kashmir is 1.42 per cent.

Readers should note that the datasets for domestic enrolments at the province / territory level shown in the table below have significant time lags. As such, they are only a rough proxy for province/territory level student populations. It should also be noted

that the visa data only accounts for a relatively small proportion of all Pakistani student visa recipients – compared to the total number of UK student visas issued in 2022, Enrolly's figures only capture around 15 per cent of the total. This means that the true outbound mobility rate for each province or territory is likely to be significantly higher than the estimates in the table and charts below.

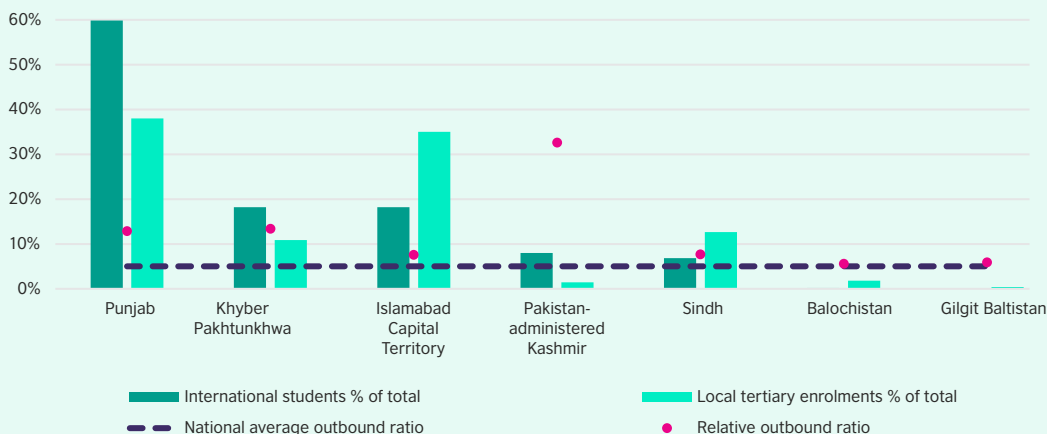
Table 1: Home province/territory of Pakistani students issued student visas or CAS, 2022/23

State	International students	Local enrolments	Outbound mobility rate
Punjab	2,530	1,153,006	0.22%
Khyber Pakhtunkhwa	770	329,524	0.23%
Pakistan-administered Kashmir	625	43,947	1.42%
Sindh	290	384,776	0.08%
Balochistan	10	54,666	0.02%
Gilgit Baltistan	5	12,138	0.02%
Islamabad Capital Territory	295	1,057,852	0.03%
Total	4,230	3,035,909	0.29%

Source: www.hec.gov.pk/english/universities/hes/Pages/HEDR-Statistics.aspx; Enrolly data on issued visas and CAS. Numbers of students with issued visas or CAS are rounded to the nearest 0 and 5 for data protection purposes.

The chart below shows the proportional contribution (in percentages) of each province or territory to the overall students with issued UK visas or CAS, and to the overall domestic tertiary enrolments. The dotted green line shows the national average outbound mobility rate. The red dots show the relative outbound mobility rates of province/territory – the further above the outbound mobility rate is from the national average, the higher the propensity of students in the respective province/territory to study in the UK. Pakistan-administered Kashmir has the highest relative rate at 5.5, followed by Khyber Pakhtunkhwa at 1.7 and Punjab at 1.6.

Figure 9: Comparison of each province/territory's proportion of UK student visas or CAS and domestic tertiary enrolments



Source: www.hec.gov.pk/english/universities/hes/Pages/HEDR-Statistics.aspx and Enrolly data on issued visas and CAS

International student mobility from Pakistan at the city-level

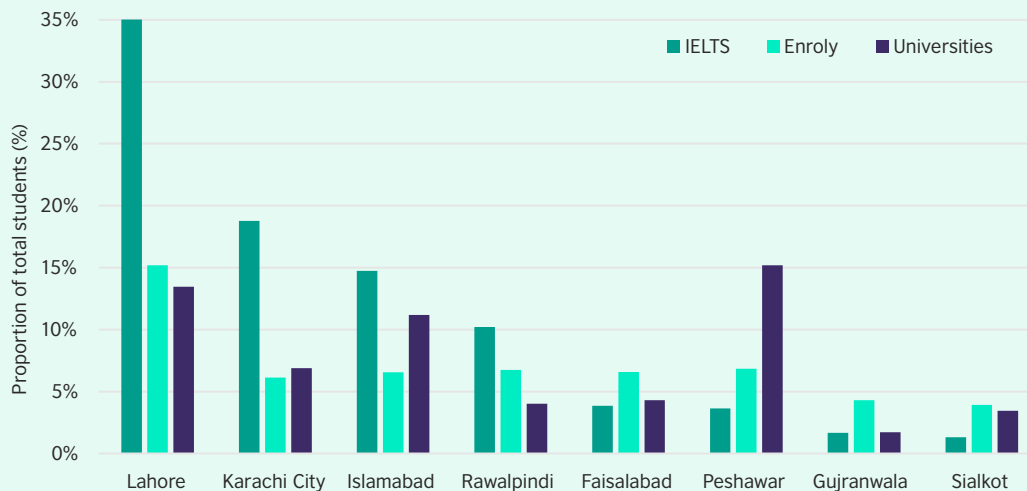
While province / territory level data gives some insight into student mobility trends, students are not evenly distributed across each administrative unit. Instead, students are disproportionately concentrated in major cities as opposed to more rural areas.

Analysis of data from Enrolly shows that Lahore is the largest sending city for international students by a substantial margin, accounting for 15 per cent of issued student visas and CAS in this dataset. This is similar to the data reported by the selected universities, where 13 per cent of Pakistani students originated from Lahore.

Data from student visas, university enrolments and IELTS candidates all identified the same six cities as the top student sources:

- **Lahore**
- **Karachi**
- **Islamabad**
- **Rawalpindi**
- **Faisalabad, and**
- **Peshawar**

Figure 10: Leading home cities of Pakistani students in different data sources



Data sources: British Council IELTS; Enrolly; Selected UK HEIs

Comparing the three data sources, Peshawar is relatively over-represented in the universities' data, where it accounts for 15 per cent of all students, compared to 7 per cent in the Enrolly data and 4 per cent of IELTS candidates.

One difference in the three sources is that IELTS data is likely to over-represent the larger cities, where most tests are administered; this is partly because test centres are not present in all cities across the country. More granular data is available in the data

from Enrolly and UK universities, covering a larger number of smaller cities which are the students' home locations. The Enrolly data, for example, shows approximately 170 geographical locations for the students.

Contextualising international student mobility from Pakistan

Interviews with education agents and experts offer further insights in understanding student demand for UK education at the province / territory and city levels.

The education agents reported a clear split in the international student demand into three regions:

1. Punjab is the largest and most populated region in Pakistan and is also the largest contributor to international student mobility to the UK. Major cities are Lahore, Faisalabad, Gujrat, and Sargodha. The region has a population of over 100 million with demographics that create a strong demand outlook. Collectively, the top 7-8 cities in Punjab account for half of Pakistan's overall population. The UK has consistently been considered a top international study destination. There are strong family connections with the UK and many fourth-generation families have well-established businesses in UK cities. Many business and political leaders of Pakistan from the region have studied in the UK.
2. In the north region (Islamabad and Khyber Pakhtunkhwa), students mainly choose between the North America and Australia; often the UK is not the top destination choice.
3. The south region includes primarily Karachi and a few smaller cities. This region has the smallest population and students mainly chose the US as a study destination. The US has a consulate in the area and US universities are better connected with the local networks; they are more visible and engaged with key local stakeholders. There is a regular presence of US universities to market their courses and make links with international baccalaureate providers.

As summarised by one interviewee, *“Punjab, Lahore and surrounding cities have the highest number of students going to the UK and the demand is only going to grow because the population dynamics are very aligned to the need for education.”*

As noted above, agents observed that large cities like Karachi, Lahore and Islamabad will always send most students because of the size of their population. Faisalabad is large and demand for study abroad has grown rapidly in recent years. Peshawar is also emerging as a major city for outbound students.

Comments from the interviews highlight how the rapidly expanding big metropolitan cities are shaping student demand for overseas study. As one interviewee summarised: *“The main difference between cities is not geographical. It's the difference between big metropolitan cities and smaller regional cities. Students are more switched on and better connected in the big cities. They're very aware of other countries and the opportunities there. They also usually have better English. Social media is a huge part of their life”.*

The importance of these cities is reflected in the concentration of schools teaching a Cambridge international curriculum in Pakistan. Overall, 286 schools teach Cambridge programmes and qualifications. Most of these are in Lahore, Karachi, Islamabad,

Rawalpindi, Faisalabad and Peshawar. This concentration of schools also mirrors the cities with the largest cohorts of students reflected in the data reported by the universities and Enroly.

Table 2: Schools in Pakistan offering Cambridge qualifications by city

City	No of schools
Lahore	75
Karachi	68
Islamabad	41
Rawalpindi	15
Faisalabad	9
Peshawar	9
Multan	6
Jhelum	5
Gujranwala	4
Quetta	4
Abbottabad	3
Jhang	3
Mardan	3
Mirpur	3
Bahawalpur	2
Burewala	2
Gujrat	2
Mandi Bahauddin	2
Muzaffarabad	2
Okara	2
Rahim Yar Khan	2
Sialkot	2
Other	22
Total	286

Source: www.cambridgeinternational.org/

Second-tier smaller cities are also seeing strong growth in demand for study abroad, especially in the Punjab (Gujranwala, Sialkot, Gujrat, Multan). These cities appear in a similar ranking order as they do in the data from the selected universities and Enroly. Their economic growth lies in their connection to the bigger metropolitan areas, with a four or five-hour drive seen as an acceptable connection time. Important and growing industries in these second-tier cities mean that families have money to pay for education. Hence, industry growth has been matched by rapidly growing education provision. Large private school networks are also spreading out from the major cities to the smaller ones. These feed students directly into higher education. The UK has some advantage here since Pakistan's secondary education system is still heavily influenced by its historical ties to the UK system. As one agent commented, "Students do GCSEs, so it makes sense for them to continue to a UK university".

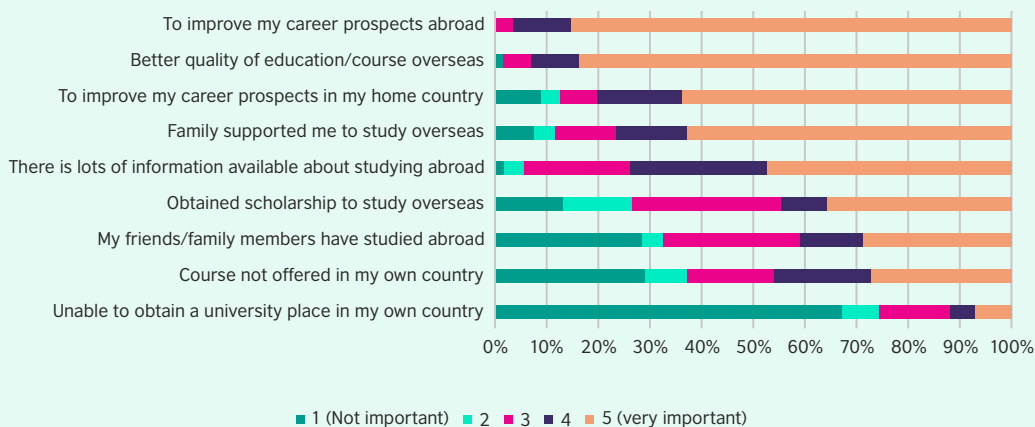
Most prominent push factors for international students from Pakistan

This section studies the most prominent “push” factors for students seeking overseas study. It draws, firstly, on the data from the online survey and secondly, on the interviews with education agents and experts. The interviews were designed to probe the same areas as the survey and, as such, they help to contextualise the survey responses. Limited response to the survey means that it has not been possible to draw valid conclusions at the city level. However, it has been possible to draw some general conclusions across cities. Education agents did not perceive significant differences at the city level. Instead, they suggested that the prominent push factors were similar for students in all the cities they recruited from.

The chart below summarises the main push factors from the survey responses. These, together with the interview findings, are discussed below.

Figure 11: Importance of push factors in Pakistani students' decisions to study overseas

How important were each of the following push factors in your decision to study overseas (n=55)



Data source: Student survey respondents (n=55)

Enhanced career prospects⁹ were the most important push factor, followed closely by **the quality of education**. The interviews strongly supported this, pointing also to the links between the two in students' minds. In studying overseas with students seeking quality higher education with world recognition, they saw this as enhancing their career prospects abroad and at home. They did not generally perceive any of Pakistan's universities to be offering this.

Education agents noted slight differences between the push factors for undergraduates and postgraduates. For undergraduates, it was mainly about getting into a “good” university in the UK because they believed that international study “would be better for them and their future”. For postgraduates, it was usually less abstract. They placed

9. This chimes with the findings from previous studies. For example, i-Graduate (2023), THE GLOBAL STUDENT EXPERIENCE 2023: insights and analysis from the world's largest student survey. <https://2007157.fs1.hubspotusercontent-na1.net/hubfs/2007157/i-graduate/Blogs%20reports%20and%20whitepapers/2022%20The%20global%20student%20experience.pdf>

greater importance on the programme curriculum since they were looking for postgraduate qualification to enhance their chances of gaining entry into their chosen professions or specialist careers. However, at both undergraduate and postgraduate levels, universities and courses with world recognition were seen by students as their passports to a successful future career.

Some students identified the push factor as enhancing their career prospects in Pakistan. Agents confirmed that many of the big companies focussed on employing Pakistani nationals who had graduated from foreign universities, often because company managers had studied overseas themselves and could see the value of the experience.

Many students identified enhancing their career prospects abroad as their main push factor. Agents said that for some of these, studying overseas was seen as an opportunity to settle in the country. In their experience, this was more at the postgraduate level. However, it also applied to some undergraduate students whose extended families were settled and running businesses in the country where they planned to study. For most students, the agents reported the main push factor was the opportunity to work for a few years overseas to gain international experience and build their CVs.

The interviews emphasised the importance of countries' visa regulations as a factor in decisions students' make about their choice of countries for study. Agents said that students are generally exceptionally well informed about visas (*"their good contacts on social media give them the latest information as it's happening. Often, they know more than we do!"*) and this affected where they apply to study.

The UK's biggest competitor in Pakistan over the past ten years has been Australia. Students knew there were opportunities to work both during and after study and that, after two years study, they could apply for a two-year work visa. Canada has been a difficult country for Pakistani nationals to obtain a study visa. However, in 2019, the Canadian government included Pakistan in their streamlined system (SDS),¹⁰ The interviews suggested that this has improved the speed and success rate. As a result, agents expect Canada to soon become a competitor to the UK.

In terms of UK visas, agents agreed that these are generally not a barrier for students. One agent summarised – *"The UK has a well-structured application process. The points-based system is transparent, so students know what points they must collect. The financial requirement is easy to meet for most families because it only requires sufficient funds in the bank account for the student's first year. The work regulations during study and post-study are a plus factor – students can work in their family's companies in the UK while studying and after completion"*. Agents reported that UK visas are easier to obtain than those of some other countries. As a result, they were very much on their guard for fake students "because they would be bad for our reputation". On a less optimistic note, agents agreed that students "are very clued up" on any reports about the UK's intention to become stricter on visas and immigration. This could potentially shift demand to Australia and other countries.

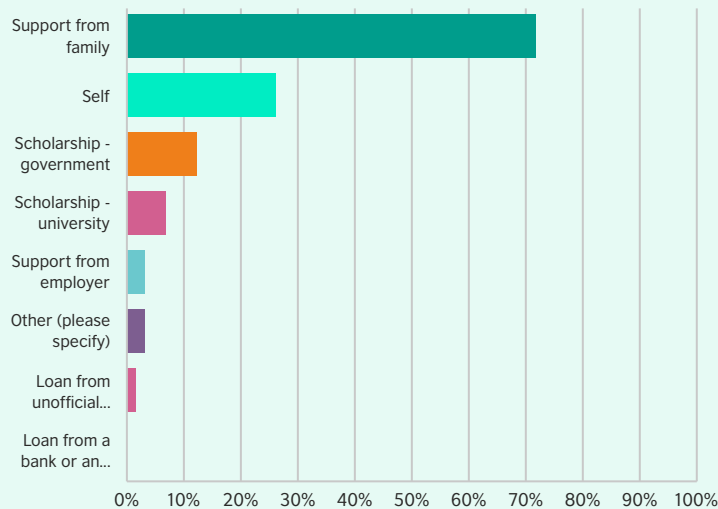
Agents estimated that 95 per cent of students only apply to study in one country – "and usually, they've made up their minds before they come into the agency". A few may consider two – a main choice and a back-up – but this is quickly funnelled down to one. Students do not apply for visas before they have a place in their choice of country. There are no major differences by city.

10. <https://mofa.gov.pk/canada-includes-pakistani-international-students-in-its>.

Funding source is an important push factor. The survey identifies that most student funding comes from several sources, with all students being supported by their family (73 per cent) or self-funded (27 per cent). Government (12 per cent) and university scholarships (7 per cent) were listed as other major funding sources.

Figure 12: What is the main source of funding for your current studies? (tick all that apply)

Answered: 57 Skipped: 6



Data source: Student survey respondents (n=57)

The interviews identified Pakistan as a price sensitive market, with study overseas subject to economic fluctuations. Downturns in the economy inevitably affected families' capacity to provide financial support for their children to go abroad. There were exceptions, with some families who were wealthy enough to be cushioned against economic change. One agent referring to some of the students he dealt with from Punjab said "They are from middle-class well-off families. The economy doesn't have a great impact. Expense is not really an issue – somehow, they always manage to find the money".

Agents distinguished two main groups of students - those with family/friends settled in an overseas country and those who were "standalone" students without overseas families. The push factors and priorities were slightly different between the two. Extended families provide a supplementary source of financial and personal support for the former group. Agents stressed that family ties are a significant push factor for these students. They only consider the country where their family is. The UK has a large Pakistani diaspora with many fourth-generation families running successful businesses. (Agents noted that the UK has an advantage here over Australia, where families are second generation and less well established). Students going to the UK apply to universities where their family lives. The only exception is where they have particular subject interests which is not available in these universities. Families in the UK often provide cheap accommodation and subsistence. In many instances, they also offer ready-made opportunities for students to work during and after studying in the family business, providing an additional source of income for them.

Within this group, agents highlighted the importance of family background (status, wealth, privilege) and where the extended family is located in the UK and what line of business it is in. These relate to rural/urban divisions in Pakistan. They dictate where students study in the UK and what subjects they study. Agents reported, for example, that from Pakistan-administered Kashmir – Mirpur and Muzaffarabad – students predominantly go to Bradford, Lancashire, Slough. Students from North Punjab – Gujrat, Rawalpindi, Gujranwala - go to Newcastle or Leeds. Class divisions in Pakistan are a key factor in student choice. In the central cities – Lahore, Islamabad, Karachi – many students come from wealthy, high-status families who own major companies dealing in logistics, warehousing, and food wholesale. Extended families in the UK are part of this network and are based in the big centres of industry and commerce in the UK. Going into these businesses in the UK is usually much more attractive for students than staying on to do a research degree. At the other end of the scale are cities such as Faisalabad, where extended families (mostly rural labourers) emigrated to the UK in the 1960s and 70s to work as labourers in the fabric manufacturing mills. Students from these families usually are less wealthy and have less financial support. Typically, they choose shorter courses with the intention of getting into work and earning a living as soon as possible. Financial considerations (costs, scholarships, work opportunities) are essential factors for them.

The second group of students – the “standalone” - do not have families in the UK. Costs, scholarships, visa regulations (post-study etc.) and work opportunities are vital in their decision-making. Agents reported that the number of “standalone” students is increasing.

Scholarships are a push factor for all students. Generally, students prefer destinations and courses with a link to scholarships - *“The availability of scholarships can tip the balance – this is a big plus factor for the US. The main reason for those students who go to Germany are the scholarships offered in some subject areas”*.

On costs, agents commented that the price difference between a local and foreign university is small. Students they deal with would only be considering the top universities in Pakistan. These are often private and charge high fees. Undergraduate courses are four years in Pakistan, as opposed to three in the UK, so considering this, the universities in Pakistan can be as expensive as UK universities.

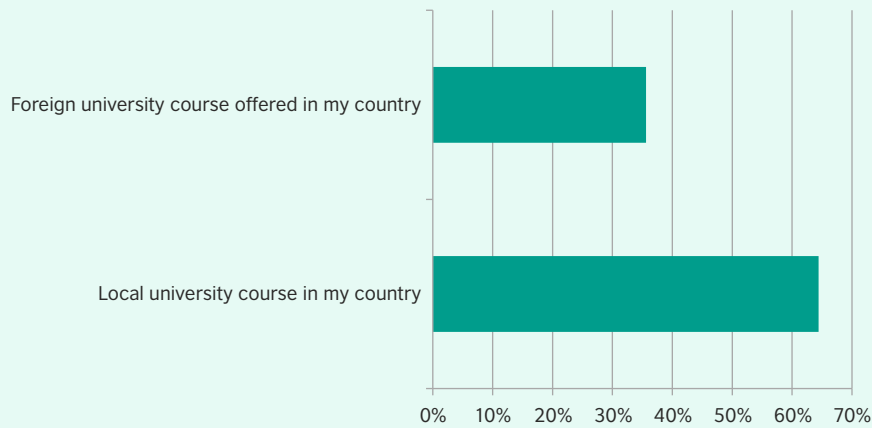
University rankings are not an essential factor for most students, although some students who can afford to do choose to go to the best-ranked universities.

Courses that were not offered in Pakistan were not a significant push factor. Agents elaborated on this, explaining that local higher education capacity (“lack of courses”) relates to the quality of local provision and its quantity. Students are seeking courses where the content is relevant to the modern employment market. Such courses may often not be available locally.

The surveyed students were asked whether they had considered studying a course in Pakistan and, if so, whether this was a course provided by a local university or a foreign university. Some 36 per cent of the surveyed students said they had considered a TNE programme from a foreign university as an alternative to a local university. This response may equally reflect the economic downturn preventing students from studying overseas. One agent observed that TNE could prove to be an economical alternative to overseas study at the undergraduate level. Students could then progress to the UK for postgraduate study.

Figure 13: Course types considered as an alternative to overseas study

What type of course did you consider studying in your home country?



Data source: Student survey respondents (n=59)

Agents said that among the students they dealt with, lack of capacity in the local system usually equated with a lack of places available at the top universities in Pakistan. There were always solutions – *“For the students we deal with, lack of capacity in the local system is not an issue – families counter this by moving to the big metropolitan cities.”*

Other comments suggest that information is readily available and that peer groups on social media are the primary source for students.

A further, and unrelated, comment made by one agent was that security and crime in some parts of Pakistan could be problematic. For some families, this pushed them to wanting their children to study overseas rather than locally.

Summary and conclusions

Pakistan's university-age population is the third largest in the world, after India and China. Nevertheless, there is limited education provision at the tertiary level with participation rates significantly below the world average. The gap between demand and supply provides opportunities for UK HEIs to provide UK study programmes to meet that demand.

Urbanisation in Pakistan – the expansion of large metropolitan cities and the development of second-tier cities - is a significant factor in driving the growing demand for tertiary education. The research tried to gain market insight into the province / territory level in Pakistan with growth potential for international student demand. It drew on extensive data collections to develop an understanding of the prominent areas in the country, using data from Enrolly, selected universities in the UK and IELTS centres in Pakistan.

The research attempted to establish a baseline against which international student demand from Pakistan can be monitored and tracked. The data triangulation used gives an accurate estimate of the order of importance of cities in Pakistan in relation to the demand for UK higher education. This can be used to inform student recruitment strategies.

There is consensus across the different data sets that six large cities account for approximately half of the student mobility to the UK. In order of importance, Lahore, Karachi, Islamabad are the three largest sending cities with Lahore accounting for 13-15 per cent of all students. These are followed by Rawalpindi, Faisalabad, and Peshawar. The main variations between cities are related to their size, i.e., big metropolitan cities versus smaller regional cities. So, while the size of the populations of Lahore, Karachi, and Islamabad means that these three cities will continue to provide the bulk of outbound students, the rapid growth of Faisalabad, Peshawar and Rawalpindi should also be noted.

As well as city level differences, this research attempted to calculate province / territory level outbound mobility rate to the UK. Given the data limitations and inaccuracies, these estimates should be treated with caution. Demand for international education is primarily at the postgraduate level of study. Provinces / territories with the highest levels of tertiary provision are, therefore, also the top senders of international students. The research pinpoints the home provinces and territories for students who are likely to start their study in the UK in 2023-24 and indicates those where students are more likely to study abroad (outbound mobility rate):

- Punjab – estimated 2,500 students starting study in the UK in 2023/24; outbound mobility rate of 0.22 per cent.
- Khyber Pakhtunkhwa - estimated 760 students in 2023/24; outbound mobility rate of 0.23 per cent.
- Pakistan-administered Kashmir - estimated 625 students in 2023/24 has the highest outbound mobility rate of 1.42 per cent.

Findings from the data collection sets were contextualised by interviews with education agents and experts in Pakistan and with university representatives in the UK. An online survey with Pakistani students in the UK was also conducted. These identified the most prominent “push” factors for students seeking overseas study. No significant differences were found between students from different cities. Interviewees agreed that the “push” factors were common to all students. The main differences were between students from the big metropolitan cities and those from smaller regional cities. The former group were generally much better connected and

networked. Consequently, they were usually better informed about overseas study, including institutions, programmes, visa regulations etc.

The top “push” factors are enhanced career prospects followed closely by quality education. In most students' minds, these are inextricably linked. Studying overseas means attending universities and courses with world recognition. Students see this as their passport to a successful future career (either abroad or at home). They do not perceive any of Pakistan's universities to be offering this.

Post-study work opportunities are critically important because students see international work experience to build their CVs as essential to enhancing their career prospects. Different countries' visa regulations are, therefore, an important decision-making factor. Agents reported that most students they deal with are extremely well informed about visas, often having more up-to-date information than them.

Funding is the third most important “push” factor. Pakistan is a highly price sensitive market and overseas study is subject to economic fluctuations. The research found that families are the main source of funding for overseas study. This is followed by self-funding. Downturns in the economy, such as the current one, affect these. Agents identify two groups of students – those with extended families overseas and those who are “standalone”. They report that the number of standalone students, as a proportion of the whole, is growing. Extended families in the UK are a very strong push factor for the first group. They are often an important source of financial help, often providing free or low-cost accommodation and subsistence. Many have established businesses and are able to offer work to students, during or after study.

Scholarships are a significant “push” factor for all students and there is a strong preference for destinations and courses with a link to scholarships. The online survey found 12 per cent of Pakistani students were on government scholarships, and 7 per cent had university scholarships.

Agents pointed to transnational education as an economical alternative to overseas study at the undergraduate level. Students could then progress to the UK for postgraduate education. Thirty-six per cent of the surveyed students said they had considered TNE as part of their decision-making about higher education.

We draw the following topline conclusions from the research:

The six metropolitan cities, in particular, Lahore, Karachi and Islamabad, will continue to be the main senders of students to the UK. The size of their populations makes this inevitable. Faisalabad, Peshawar and Rawalpindi, while unlikely to challenge these three, are growing fast. Urbanisation means that the big metropolitan cities are spreading out, exerting a gravitational pull on cities within a four or five-hour drive. This will continue to increase the demand for quality tertiary education and, in turn, overseas study and provide increased opportunities for UK study.

Pakistan, however, is a very price-sensitive market, currently affected by a significant economic downturn. This puts student mobility to the UK under pressure. Competition from other recruiting countries is strengthening. Post-study work opportunities and the availability of scholarships are significant factors, especially where students are either self or family funded.

Annex

Schools in Pakistan teaching Cambridge international curricula

Centre	City
Beaconhouse Abbottabad Campus	Abbottabad
The City School Abbottabad	Abbottabad
Upstream School System	Abbottabad
The City School Attock Campus	Attock
Army Public School & College	Bahawalpur
The City School, Bahawalpur	Bahawalpur
The City School Burewala	Burewala
United Charter School	Burewala
Daharki School System	Daharki
The City School, Dera Ghazi Khan	Dera Ghazi Khan
Aims (Al-Mustafa Institute of Management And Sciences), Faisalabad	Faisalabad
Beaconhouse Faisalabad Campus	Faisalabad
British Council, Faisalabad	Faisalabad
Kohinoor Grammar School & College	Faisalabad
Resource Academia Shaheen Campus	Faisalabad
The City School	Faisalabad
The Democratic School	Faisalabad
The Learning Circle	Faisalabad
The Legacy School	Faisalabad
LACAS	Gujranwala
Lets Think Learning System	Gujranwala
RILLS	Gujranwala
The City School	Gujranwala
Beaconhouse Gujrat Campus	Gujrat
The City School Gujrat Campus	Gujrat
Cadet College Hasan Abdal	Hasan Abdal
Public School Hyderabad	Hyderabad
AIMS Education System, Islamabad	Islamabad
AMN School	Islamabad
APSI DCI	Islamabad
Bahria College Anchorage	Islamabad
Beaconhouse Bahria Enclave Campus, Islamabad	Islamabad
Beaconhouse Educational Complex - Girls, Islamabad	Islamabad
Beaconhouse Karakoram Campus, Islamabad	Islamabad
Beaconhouse Margalla Campus - Boys, Islamabad	Islamabad

Beaconhouse Margalla Campus, Islamabad	Islamabad
Beaconhouse Newlands, Islamabad	Islamabad
Beaconhouse Potohar Campus - Girls, Rawalpindi	Islamabad
British Council, Islamabad	Islamabad
Commodore's Learning Foundation	Islamabad
Edu21 - The 21st Century School	Islamabad
Elite International School	Islamabad
Fazaia Education System School	Islamabad
Fazaia Inter College, Islamabad	Islamabad
Future World School, Signature Campus F10, Islamabad	Islamabad
Global System of Integrated Studies	Islamabad
International Grammar School	Islamabad
Islamabad Alma	Islamabad
Islamabad College of Arts & Sciences	Islamabad
Islamabad Model College for Boys F.7/3	Islamabad
NUST Creative Learning School and College (NCLS&C)	Islamabad
Pak-Turk Maarif Int'l Schools & Colleges H-8 Islamabad	Islamabad
Pak-Turk Maarif Int'l Schools & Colleges Islamabad	Islamabad
Red Oak High	Islamabad
Resource Academia, Capital Campus	Islamabad
Roots Millennium Schools, One World Campus	Islamabad
Sisa (School Of International Studies In Sciences & Arts)	Islamabad
Skans International Islamic School	Islamabad
Super Nova School	Islamabad
The City School	Islamabad
The City School	Islamabad
The City School - Bahria Campus	Islamabad
THE CITY SCHOOL DHA CAMPUS	Islamabad
The City School E-11 Campus Islamabad	Islamabad
The Play School	Islamabad
The Thinking School Ambassador Campus	Islamabad
Westminster Academy Islamabad	Islamabad
Chenab College Jhang	Jhang
Garrison School System	Jhang
The City School, Jhang	Jhang
APSACS Boys Campus	Jhelum
Beaconhouse Jhelum Campus	Jhelum
Roots Millennium School, Notting Hill Campus Jhelum	Jhelum
The City School	Jhelum
The Lyceum LGCS Jhelum	Jhelum
Fazaia Inter College Minhas	Kamra
Academia Civitas	Karachi

Academus International School	Karachi
AES SCHOOL FOR GIRLS - OVERSEAS CAMPUS	Karachi
Al-Madrasa-Tus-Saifiyah-Tul-Burhaniyah T/A MSB Educational Institute Shabbiraba	Karachi
Bahria Town School & College Golf City Campus	Karachi
Bay View Academy P.E.C.H.S. Campus	Karachi
Beaconhouse PECHS Campus, Karachi	Karachi
British Council, Karachi	Karachi
British Overseas School	Karachi
Cedar College	Karachi
Cedar College PECHS	Karachi
Civilizations Public School	Karachi
Clifton High School	Karachi
Cornerstones School	Karachi
Credo School	Karachi
Dawood Public School	Karachi
Denning College	Karachi
Eden College Karachi	Karachi
Eureka School System	Karachi
Fajr Academy	Karachi
Fazaia Degree College, Faisal	Karachi
Foundation Public School O Levels	Karachi
Gda Public Higher Secondary School, Gwadar	Karachi
Habib Public School	Karachi
Happy Home School	Karachi
Happy Palace Grammar School	Karachi
Haque Academy	Karachi
Head Start School System	Karachi
Hexis College New Educational Order	Karachi
ILMESTERS ACADEMY	Karachi
Inspire School of Advanced Studies	Karachi
Iqra University School System	Karachi
IUSS	Karachi
Keystone Academy	Karachi
KN Academy International Campus	Karachi
Lahore Grammar School Karachi	Karachi
Mama Baby Care Girls And Secondary School	Karachi
Meritorious College A- Level	Karachi
Meritorious Schools Network	Karachi
Metropolitan Academy, O Levels	Karachi
Nixor College	Karachi
Origins School	Karachi
Pak-Turk Maarif International Schools & Colleges 'Gulshan Campus'	Karachi
Peace International School	Karachi

Profectus International School	Karachi
River Oaks Academy	Karachi
Roots International Schools Hamilton	Karachi
Sceptre College	Karachi
Seneca Academy	Karachi
TFS Schooling System	Karachi
The Benchmark	Karachi
The Brighton School	Karachi
The City School (Darakshan Campus -B)	Karachi
The City School A Level Darakhshan Campus	Karachi
The City School North Nazimabad A-Level	Karachi
The City School, North Nazimabad	Karachi
The City School, O/L PAF Chapter	Karachi
The City School, University Road Campus	Karachi
The Graceful Grammar School O Level	Karachi
The Horizon High	Karachi
The Lab School	Karachi
The Orchid School	Karachi
The President School	Karachi
The Vantage - A British Curriculum School	Karachi
Titan College	Karachi
VERITAS SCHOOLING SYSTEM	Karachi
Wynwood College	Karachi
Z International School	Karachi
Beaconhouse Kharian Campus	Kharian
District Public School & Inter College	Khushab
The City School KAPCO Chapter	Kot Addu
Adabistan-E-Soophia	Lahore
Aitchison College (Junior School)	Lahore
Alma Mater School	Lahore
American Lycetuff Junior & Upper School	Lahore
Army Public School for International Studies	Lahore
Avalon High	Lahore
Bahria Town School	Lahore
Bahria Town School Premier Campus (Boys)	Lahore
Beaconhouse Defence Campus, Lahore	Lahore
Beaconhouse Garden Town, Lahore	Lahore
Beaconhouse Johar Town Campus - Girls, Lahore	Lahore
Beaconhouse Liberty Campus, Lahore	Lahore
Beaconhouse Model Town Campus - Boys, Lahore	Lahore
Beaconhouse Newlands, Lahore	Lahore
Beaconhouse Ring Road Campus, Lahore	Lahore

Blackstone School Of Law & Business	Lahore
Blessed Islamic Grammar School	Lahore
British Council, Lahore	Lahore
Crescent Model Higher Secondary School Girls Campus	Lahore
Customs Public School System	Lahore
Dha Senior School For Girls Lahore	Lahore
House Of Juniors School Pvt Ltd	Lahore
Ibne Sina College	Lahore
International School Lahore	Lahore
Ivy College Of Management Sciences	Lahore
Kaizen High School	Lahore
Keynesian Institute of Management & Sciences	Lahore
Kingston College	Lahore
Kips School Bahria Town Campus	Lahore
LACAS Milestone	Lahore
Lahore College of Arts & Science	Lahore
Lahore Grammar School	Lahore
Lahore Grammar School - Junior Girls Campus	Lahore
Lahore Grammar School Defence	Lahore
Lahore Grammar School Johar Town International	Lahore
Lahore Grammar School Sheikhpura	Lahore
Lahore Grammar School Township	Lahore
Lahore Grammar School, Middle Section for Girls	Lahore
Lahore Learning Campus	Lahore
Lecole	Lahore
L'Ecole Mondiale	Lahore
Message Grammar School	Lahore
Misber School	Lahore
National Grammar School, Lahore	Lahore
Nordic International School, Lahore	Lahore
Novaquest International School	Lahore
Pak-Turk Maarif International Schools & Colleges, Lahore	Lahore
Premier American School	Lahore
Roots International Schools, Lahore	Lahore
Roots IVY International School/College	Lahore
Roots Millennium Schools, Future World Campus, Lahore	Lahore
Rosans Islamic School Paragon Campus	Lahore
Sarwar Institute of Professional Studies	Lahore
Scarsdale International School	Lahore
Scholastic Ibne-Umar Campus	Lahore
School For Contemporary And Islamic Learning	Lahore
SICAS	Lahore

Soar Stem School	Lahore
The City School Dha Campus, Lahore	Lahore
The City School Network	Lahore
The City School Paragon Campus	Lahore
The City School Ravi Campus	Lahore
The City School, Lahore	Lahore
The Institute of Legal Studies	Lahore
The Lahore Lyceum School	Lahore
The Message School System	Lahore
The National School	Lahore
The National School (Park View Campus)	Lahore
The Oneiro Schoolhouse	Lahore
Beaconhouse Mandi Bahauddin Campus	Mandi Bahauddin
Enterprise School System Lgs Mandi Bahauddin	Mandi Bahauddin
Beaconhouse Mardan Campus	Mardan
Quaid-e-Azam Group of Schools and Colleges	Mardan
The City School, Mardan	Mardan
The City School, Capital Campus, Islamabad	Mianwali
Beaconhouse Mirpur Campus	Mirpur
Haleema School Of State	Mirpur
The City School	Mirpur
Beaconhouse School System Potohar Campus	Model Town Humak
Beaconhouse Cantt Campus, Multan	Multan
Beaconhouse Officers Colony Campus, Multan	Multan
British Council, Multan	Multan
KAIMS International School System	Multan
Konya School System	Multan
The City School	Multan
Roots International Schools, Muzaffarabad	Muzaffarabad
The City School Muzaffarabad Campus	Muzaffarabad
The City School, Nowshera Campus	Nowshera
Beaconhouse Okara Campus	Okara
The City School Okara Branch	Okara
Premier Public High School. Pakpattan	Pakpattan
Beaconhouse Frontier Campus - Boys, Peshawar	Peshawar
Beaconhouse Frontier Campus, Peshawar	Peshawar
British Council, Peshawar	Peshawar
Fazaia Degree College Peshawar	Peshawar
Frontier Scouts Cadet College Warsak, Peshawar	Peshawar
Pak-turk Maarif Int'l Schools & Colleges, Peshawar	Peshawar
Peshawar Model School, Girls 5	Peshawar
School of Excellence In Educational & Developmental Studies (Seeds)	Peshawar
The City School, Peshawar (Senior Branch)	Peshawar
The City School Parco Chapter	Qasba Gujrat

Alhamdian (The School of Thoughts)	Quetta
British Council, Quetta	Quetta
Garrison O' Level Campus Quetta	Quetta
Learninghouse School System	Quetta
Lahore Grammar School	Rahim Yar Khan
The City School, Senior Branch, Rahim Yar Khan	Rahim Yar Khan
The Guidance House School & College System	Rawalakot
Apsis Hamza Camp Rawalpindi	Rawalpindi
Beaconhouse Civil Lines Campus, Rawalpindi	Rawalpindi
Beaconhouse Educational Complex - Boys, Islamabad	Rawalpindi
Beaconhouse Satellite Town Campus - Boys, RWP	Rawalpindi
Beaconhouse Satellite Town Campus - Girls, RWP	Rawalpindi
Beaconhouse Tipu Sultan Campus, Rawalpindi	Rawalpindi
Beaconhouse Wah Campus	Rawalpindi
City Grammar School	Rawalpindi
Fauji Foundation College For Boys, New Lalazar,Rwp	Rawalpindi
Fazaia Inter College Nur Khan	Rawalpindi
Future World School & College, Bahria Town Rawalpindi	Rawalpindi
Lincolns School of Education	Rawalpindi
Sheikh Zayed International Academy	Rawalpindi
The City School	Rawalpindi
The Lynx School	Rawalpindi
Beaconhouse Sadiqabad Campus	Sadiqabad
The City School Senior Branch, Sahiwal	Sahiwal
The City School	Sargodha
Tall Pines School, Sheikhpura	Sheikhpura
The City School of O & A Level, Sialkot	Sialkot
The College Of Arts And Sciences	Sialkot
Quaid-e-Azam Divisional Public School Wazirabad	Sodhra
Army Public School and College Swat	Swat
The City School, Vehari Campus	Vehari



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