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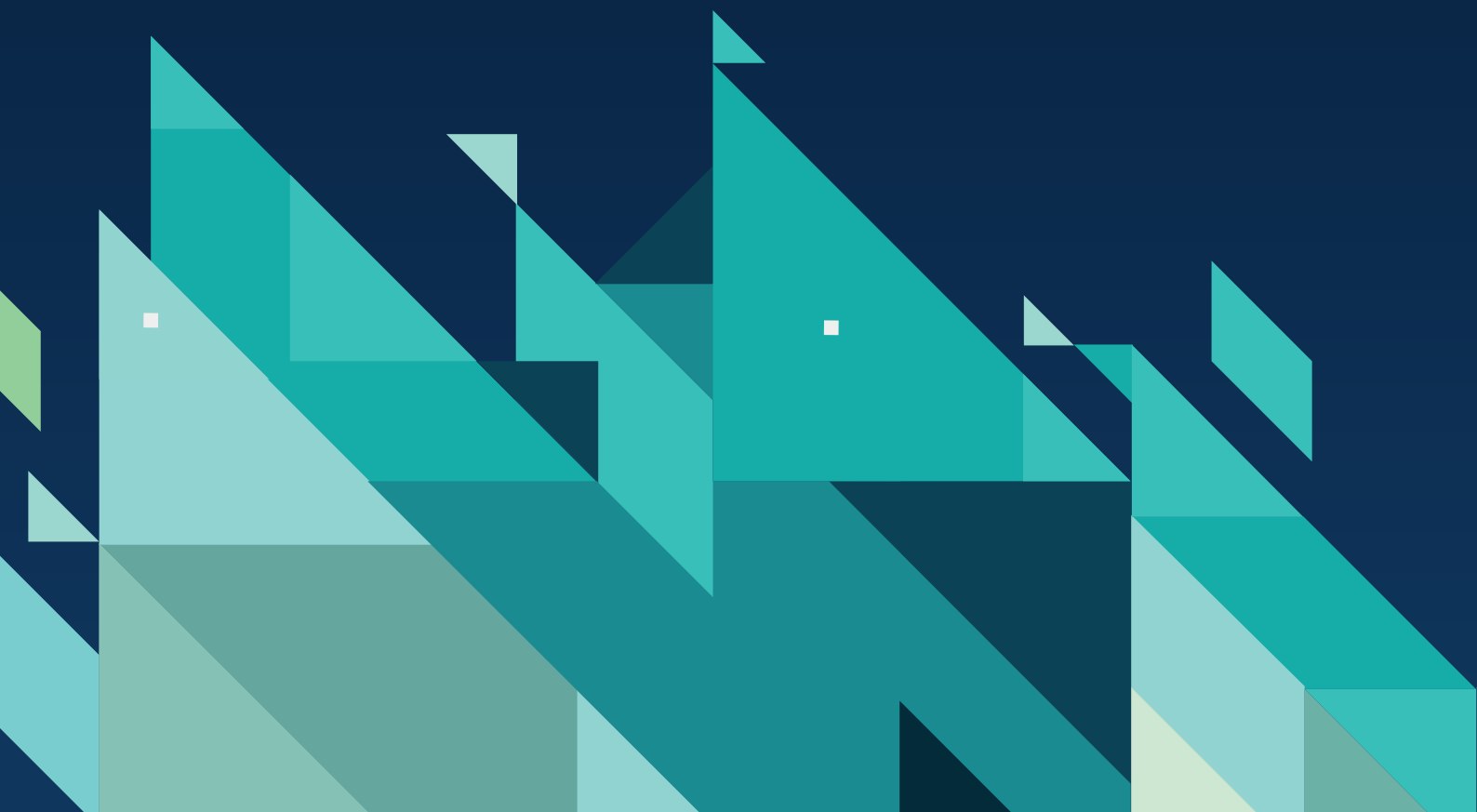
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Student mobility into and out of Northern Ireland: What brain drain?

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Abbreviations

ALC	Area Learning Communities
APS	Annual Population Survey
ATU	Atlantic Technological University
CAO	Central Applications Office
DEL	Department for Employment and Learning
DfE	Department for the Economy
ESRI	Economic and Social Research Institute
FE	Further Education
GAA	Gaelic Athletic Association
HE	Higher Education
HEA	Higher Education Authority
HEI	Higher Education Institute
HESA	Higher Education Statistics Agency
HLA	Higher-Level Apprenticeships
ICL	Income-contingent loans
IFS	Institute for Fiscal Studies
LGD	Local Government District
MaSN	Maximum Student Number
NEET	Not in Education, Employment, or Training
NI	Northern Ireland
NIAC	Northern Ireland Affairs Committee
NISRA	Northern Ireland Statistics and Research Agency
NWRC	North West Regional College
ONS	Office for National Statistics
OU	Open University
PLC	Post Leaving Certificate
QUB	Queen's University Belfast
RoI	Republic of Ireland
SAAS	Student Awards Agency Scotland
SEN	Special educational needs
SME	Small and Medium Enterprise

STEM	Science, Technology, Engineering and Mathematics
TCD	Trinity College Dublin
UCAS	Universities and Colleges Admissions Service
UK	United Kingdom
UU	Ulster University
UUEPC	Ulster University Economic Policy Centre

Executive summary

Student mobility in Northern Ireland is a recurring topic in media coverage and policy debate, and among higher education stakeholders such as universities, schools, and further education providers. Despite this attention, the supporting evidence base remains limited. This study aims to address this gap in the knowledge base using a mixed methods study which includes Universities and Colleges Admissions Service (UCAS) applicant data, student surveys, and stakeholder engagement to gain a full understanding of student mobility to and from Northern Ireland.

The general perception is that the region experiences a ‘brain drain’ which poses risks for long term economic performance. However, the evidence presented in this research suggests a more nuanced picture. Comparative analysis indicates that, once regional patterns are examined appropriately, Northern Ireland does not differ markedly from other UK regions in terms of participation in higher education or the proportion of students studying outside their home region. Around 78 per cent of Northern Ireland students study locally, with approximately 22 per cent studying elsewhere. When compared with Wales and many English regions, outward mobility from Northern Ireland is not unusually high. Rather, the findings from this research indicate that outward mobility is broadly in line with other regions, while a distinguishing feature is comparatively low inward student flows. Understanding this imbalance requires better data and understanding of students who leave and those who come here to study, their return decisions, and the longer-term career impacts of mobility.

The wider context of higher education in NI is also relevant. Northern Ireland has relatively high levels of demand for and participation in higher education. Around 49 per cent of 18-year-olds apply to university, compared to around 41 per cent across the UK. Around 38 per cent enter higher education, broadly in line with or above other UK regions. This points to particularly strong engagement with higher education among young people in Northern Ireland. Within this context, the Maximum Student Number (MaSN) cap limits the number of publicly funded places available locally and may influence the decisions of some students, particularly those on the margin of entry requirements or course availability. However, the evidence presented

in this research suggests that outward mobility cannot be understood through capacity constraints alone. Many students choose to study elsewhere for academic, personal and social reasons, while outward mobility overall remains broadly comparable to a number of other UK regions when regional patterns are taken into account.

At the same time, the findings highlight the importance of considering the balance between the supply of graduates and the availability of graduate level employment. Around one-third of graduates in Northern Ireland are employed in roles that do not require graduate-level qualifications (Davies and Felstead, 2025). Graduate earnings in Northern Ireland are among the lowest in the UK. Taken together, this highlights that the challenge is not solely about retaining students, but about ensuring that skills are effectively matched to local labour market demand.

Understanding student mobility therefore requires consideration of both supply side and demand side factors. The research shows that student decision making is shaped by a wide range of influences, including course availability, institutional reputation, cost of living, and the broader student experience. The findings also highlight the role of information and guidance, with variation in careers advice across schools influencing choices about whether and where to study. The range of factors influencing student decision making mean that no single policy lever will suffice in addressing the issues.

This research also points to the potential value of reframing the discussion towards ‘brain gain’, focusing on attracting students to Northern Ireland. Increasing inward student flows could support university finances, contribute to local economic activity, and help offset the impact of demographic decline. Northern Ireland’s relatively low cost of living and the attractiveness of cities such as Belfast and Derry/Londonderry may provide a basis for strengthening this position, although this would require coordinated policy and institutional efforts.

Further Education (FE) and Higher Level Apprenticeships (HLAs) also have an important role to play in supporting a diverse range of pathways and improving alignment between skills provision and labour market needs. HLAs are delivered through partnerships between employers and providers across the further and higher-education

sectors and provide work-based pathways to higher-level qualifications. As highlighted in this research, these routes can complement higher education and contribute to addressing skills mismatches. In addition, targeted support for students pursuing courses not available locally can help ensure equitable access to opportunities.

Overall, the findings from this research suggest that Northern Ireland combines high participation in higher education with outward mobility patterns that are broadly comparable to other regions, while challenges remain in relation to inflows of students, graduate opportunities and the effective utilisation of skills. Addressing these issues will require a balanced approach using multiple policy levers that considers both the supply of skills and the demand for graduate level employment. There is also a need for robust data to track the full student experience from where they attend university through to their labour market outcomes long after graduation to have a full understanding of the picture.

Chapter 1

Introduction

The Northern Ireland (NI) economy is typically portrayed as an underperforming economy relative to other parts of the United Kingdom (UK), as well as Ireland. There is a myriad of reasons for this, but one key issue is the low levels of productivity. Productivity in the UK is poor on a global scale, and within that, NI is even weaker (The Productivity Institute, 2025). The NI ‘brain drain’ is often cited as a significant problem which feeds into productivity¹ and on this basis there are arguments that efforts should be made to retain more students. This discussion of ‘brain drain’ comes at a time when the higher-education landscape in many developed countries, including the UK, is facing growing pressures due to demographic and labour market changes, coupled with broader societal shifts, which are impacting the demand for HE. By ‘brain drain’ we refer to those who leave their home region or country for third-level education, but in other contexts it can refer to graduates leaving following completion of degree-level education for employment opportunities.

Recent figures find that enrolments of NI-domiciled students at UK universities is at its lowest level since 1999/2000 (NISRA, 2025a). Seventy-six per cent of those students are enrolled at institutions in NI. As later sections demonstrate, the availability of graduate-level employment and the effective utilisation of skills emerge as more binding constraints on economic outcomes than patterns of student mobility alone.

The discussions of the ‘brain drain’ in the media and in policy tend to focus on the negative impact it has on the NI economy.² The figures cited, which suggest that a large proportion of the NI student population leaves for study, are often compared to those of England. However, England and NI are not comparable and when we compare

¹ At least part of the productivity problem in NI has been attributed to the ‘brain drain’; this appears to stem from research elsewhere which finds that places with higher numbers of graduates tend to have higher productivity. However, in NI this relationship does not hold in the same way (Bergin and McGuinness, 2022).

² For example, see [Professor Sir Ian Greer: Queen’s University chief warns NI ‘brain drain’ will continue without more student places | Belfast Telegraph](#) or [Brain drain: Why the exodus of graduates from Northern Ireland must be stopped | The Independent](#)

2 | Student mobility into and out of Northern Ireland: What brain drain?

NI to Scotland, Wales and the nine English regions, we find that in fact NI has a much lower proportion of people leaving for study than the English regions. More simply, the headline figure for England is masking significant movement between English regions. In this study we begin by examining the figures behind the ‘brain drain’ and then go on to examine who leaves for study and why. We also explore who comes to NI for third-level education. The headline figures show that while NI does not have an above-average number leaving, there is a very low number of students coming to study in NI compared to all other regions or countries of the UK. It is also worth noting that NI has the highest university applicant rate of the UK constituent countries. Recent Universities and Colleges Admissions Services (UCAS) applicant data found that 41 per cent of 18-year-olds in the UK apply to university. This varies from 33 per cent in Wales to 49 per cent in NI (UCAS, 2025a).

Despite the importance of this to individuals as well as to the HE sector and the labour market, and how often it is cited by academics, policymakers, activists and other stakeholders, there is a dearth of up-to-date research in this space to follow on from the extensive work of Osborne and Cormack. Since that previous work on student mobility from NI was undertaken there have been substantial changes which may have impacted young people’s decision making: tuition fees have increased in England and Wales leading to differential rates across the UK, HE participation has increased globally, Brexit has reduced inward flows of EU students but it has not closed off RoI students coming to NI for third-level education, UK universities across the board have begun to recruit more students internationally, and the end of the conflict in NI has hopefully changed views of NI among those in GB.

Given the lack of up-to-date research in this area we take a mixed-methods approach allowing us to examine what is happening with student mobility as well as why it is happening. Understanding the decision making behind the mobility numbers is important in allowing

for evidence-based policymaking. This research is particularly timely as debates continue around HE in NI but also in other parts of the UK.³

As there is no single data source which could resolve the disputed views on student mobility to and from NI we undertake a mixed-methods approach. We utilise a range of data sources including (UCAS) data,⁴ Higher Education Statistics Agency (HESA)⁵ data as well as data from the Irish Higher Education Authority (HEA). To gain greater clarity as to why students might leave their home region (or not), we also conducted an online survey (N=300) with university students in Higher Education Institutions (HEIs) in NI, GB and Ireland. Extensive stakeholder engagement was also undertaken with careers teachers in schools, FE and HE representatives, and policymakers. As such this is a comprehensive study of student mobility to and from NI for higher education and there is a plethora of policy implications which arise from this work.

³ For example, see: [The existential threat facing UK universities | Universities | The Guardian](#); [University boss calls for major review of Scottish higher education](#); [Reform pledges new law as it issues funding threat to all Welsh universities](#); [Wales needs ‘systemic reform’ s universities lose £100 million | Times Higher Education \(THE\)](#); [Higher education funding: Trends and challenges](#).

⁴ The UCAS dataset used was the secure access dataset accessed via the SafePod Network.

⁵ As HESA statistics relate to higher education institutions, they capture provision delivered through universities but do not include higher-level provision delivered through further education colleges or CAFRE, which also contribute to programmes such as Higher Level Apprenticeships.

Chapter 2

Current policy context

2.1 Higher-education funding

The Education Act 1962 granted a university fee exemption for ordinarily resident, full-time students in the UK, alongside the introduction of the right to receive a means-tested maintenance grant. Part-time and overseas students were still liable for fees. At this point, fees were not standardised, with fees dependent on subject and institution. This policy remained in place until 1998, when a new bill was passed: the Teaching and Higher Education Act 1998. This introduced an annual tuition fee of £1,000. The only exception to this was that low-income students would be exempt from the newly introduced fee. Low-income earners were classified as families earning less than £23,000 a year, whereas middle-income earners earning between £23,000 and £35,000 would be liable for a percentage of the new fee, based on a scale. Those earning over £35,000 would be liable for the full amount. The UK government aimed to offset the fee increase with an increase in the maintenance loan so that despite the introduction of fees, the expense to students would remain the same. Scotland already had longer undergraduate degrees (4 years compared to 3 years in the UK), which caused problems in creating UK policy in this space; however, this was short lived as the Scottish Government utilised its devolved powers to abolish fees for Scottish-domiciled students studying in their home region from 2000.

As a result of the Labour Government's White Paper, *The Future of Higher Education*, full-time undergraduate fees were raised in 2006, although were subject to a maximum of £3,000 per annum (House of Commons Education and Skills Committee, 2003). While naturally a fee increase would be both politically and socially unpopular, the UK government counteracted this with the simultaneous introduction of income-contingent loans which all students qualified for. Here it is evident how policy changes in England give rise to a multitude of different policy responses from the other constituent countries motivated by financial but also political considerations. Scotland leveraged its devolved powers and diverged on HE funding policy as illustrated above. Wales did too with its tuition fee arrangements

remaining unchanged until 2007/08 when a fee of £3,000 was introduced, underwritten again by these income-contingent loans (ICLs). In contrast to England and NI, Wales made its fee grant non-means-tested, and so this grant of £1,845 reduced the de facto liability of Welsh students (although this was then abolished in 2010).

From 2012 to 2017, Welsh-domiciled students studying in Wales were subject to much lower fees, only £3,465, as well as being eligible for ICLs to cover such a fee. While Welsh students studying elsewhere in the UK were subject to a £9,000 fee, they still paid lower fees than their English peers because of a dedicated fee grant covering all fee costs over £3,465, which effectively capped fees (HEPI, 2023).

2.2 Northern Ireland and higher-education funding

As NI has maintained lower fees that are subsidised by the NI Executive the number of full-time undergraduate places at each university in NI is subject to a cap. The MaSN cap was introduced in the 1994/95 academic year, and has been rolled forward each year since (NI Assembly, 2013). The policy emerged during a period of rapid expansion in higher-education participation across the UK, when rising student numbers created pressure on public expenditure. In Northern Ireland, the introduction of the MaSN reflected a policy decision to balance widening participation with the fiscal sustainability of a publicly subsidised system (FactCheckNI, 2025).

In practice, the MaSN functions as a control on the number of publicly funded undergraduate places that can be allocated across institutions. Its primary purpose is therefore to manage the cost to government associated with student support and higher-education funding. While the cap influences the volume of locally funded provision, it should be understood primarily as a fiscal instrument rather than solely as an access mechanism. It is also important to clarify what the MaSN does not cover. The cap applies to funded undergraduate places but operates alongside separate commissioning and quota arrangements for certain professional programmes such as medicine, dentistry, social work and initial teacher education. These programmes are typically subject to workforce planning and differing funding arrangements, usually with the relevant departments, and should not

be conflated with the MaSN in policy debate. Students from RoI are included in the MaSN count, whereas students from GB are not.

Table 2.1 Annual MaSN, 2000/01–2024/25

Year	MaSN	18-year-old population
2000/01	23,621	24,408
2001/02	22,123	26,192
2002/03	22,802	26,194
2003/04	22,928	26,986
2004/05	23,284	27,242
2005/06	23,530	27,175
2006/07	23,754	26,925
2007/08	23,822	26,360
2008/09	23,904	26,155
2009/10	23,954	26,184
2010/11	23,979	25,585
2011/12	23,930	25,316
2012/13	23,935	25,258
2013/14	24,258	24,870
2014/15	24,608	24,770
2015/16	24,054	25,354
2016/17	23,558	24,678
2017/18	22,844	24,205
2018/19	22,844	23,048
2019/20	23,314	22,731
2020/21	25,108	22,379
2021/22	25,255	22,586
2022/23	25,321	23,418
2023/24	24,958	23,684
2024/25	25,584	23,845
% Change over time	8.31	-2.31

Source: DfE.

Table 2.1 illustrates the evolution of the MaSN over time. In 2024/25 the cap stood at 25,584 places, split between 11,742 places at Queen’s University Belfast and 13,842 places at Ulster University. The overall level of the MaSN has remained relatively stable since 2000/01, with modest adjustments reflecting fiscal conditions and policy decisions. There has been a small overall increase in the allocation, while there has been a marginal decrease in the number of 18-year-

olds during the same period, which as we discuss later is due to continue to fall.

However, it is worth noting that while other jurisdictions and countries do not have an MaSN in the same way, this is not to say that funding or resources are unlimited and that every student who applies gets in. In Scotland, which is often held up as desirable as it funds home-domiciled places fully so there are no direct costs for students as well as more generous support for living costs, there is a cap on the number of places funded by the Scottish Government and the amount of funding per student has been eroded significantly over the last decade (IFS, 2024). While there are more places than home students, on the ground this plays out as some institutions being oversubscribed while others are undersubscribed and the same can be said for certain courses, e.g. medicine. The real cuts to funding over time have increased the reliance of Scottish universities on international students. However, where Scotland differs considerably from NI is that it attracts international students in much higher numbers and thus benefits from the financial rewards resulting from recruiting students from the UK or from outside the UK in a way which NI has not been able to do.⁶ However, there are issues with this strategy, which have become more apparent in recent years. The Institute for Fiscal Studies (IFS) report on higher education (2024) noted: ‘The sustainability of the university funding model in Scotland also depends partly on the UK’s immigration policy, over which the Scottish Government does not have control.’ Inward migration is also heavily interlinked with politics, macroeconomics and other global shocks and thus can be volatile. England and Wales do not subsidise places in the same way. Therefore caps on student places are no longer utilised, as England and Wales do not rely on government funding for places in the same way as Scotland or NI. The NI Executive does not subsidise each university place, i.e. they do not pay the difference between cost and the capped student fee. Rather HEIs receive an institutional allocation and other supports from DfE.

⁶ Approximately 41 per cent of students at Scottish universities are from outside of Scotland (HESA). The comparative figure for NI is 30 per cent (DfE).

2.3 Other relevant costs

While tuition fees are a factor in students' decision making, for many fees are covered by student loans, which may make that specific cost of HE less salient. However, the same cannot be said for living costs. While some students receive grants and loans for day-to-day living costs, this is unlikely to cover the costs completely and must be supplemented by part-time (or full-time) jobs or family support. Table 2.2 shows the accommodation fees of various universities across the UK. Not surprisingly, costs are highest in London at £12,533 for a year in 2025/26. NI is nearly half the cost, at £6,780 for Queen's University Belfast (QUB), and in line with those in Wales. Costs are higher in the North of England, despite the economies often being broadly similar. Costs in Dublin are also higher than in NI but, interestingly, not to a huge degree and are similar to those in Liverpool, despite the concerns around housing costs in Ireland and especially Dublin at present.

Table 2.2 Accommodation fees for a representative university across the UK and Ireland

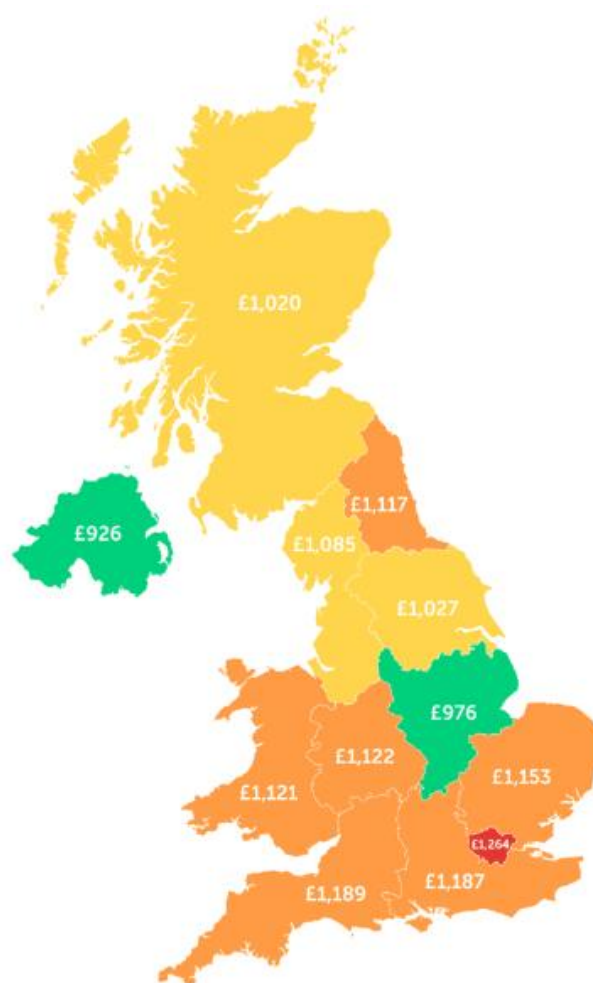
Location of University	University	Price of on campus ensuite accommodation 2025/26
South of England	University College London	£12,533
North of England	University of Liverpool	£7,589
Northern Ireland	Queen's University Belfast	£6,780
Wales	Cardiff University	£6,417
Ireland	Trinity College Dublin	£7,498

Source: Figures sourced from university websites and based on a standard single ensuite room provided by the university.

Figure 2.1 maps monthly student living costs across the UK and again a north/south divide is clear with London and surrounding areas having much higher costs of living than other regions. Northern Ireland has the lowest living costs of all areas, about £200 less than monthly costs in Wales. Average student living costs are high, with students in almost all regions reporting a figure exceeding £1,000 a month. Figure 2.1 emphasises the higher costs associated with studying in the south of England, to the extent that 'London' is the most expensive (shown in

red), closely followed by the South East and South West. This is driven for the most part by the difference in the cost of rent exemplified by Table 2.2. What is critical to note here is that the least expensive region to live in is NI, where average costs are accounted for at £926 a month. From these descriptive figures alone, student movement and costs do not appear to have the obvious relationship that might be expected, and students clearly leave low-cost regions to attend university in higher-cost regions. Cost is not the determining factor.

Figure 2.1 Monthly student living costs by region, UK, 2024



Source: National Student Money Survey 2024.

Notes: Survey of 1,000 university students.

2.4 Demographics and participation in higher education

The HE sector is also reliant on the population of young people and thus demographic change will have an impact on the demand for places. The Institute for Fiscal Studies report (2025) *Demographic change and schools across the UK: Lessons from history* highlights a significant forthcoming fall in the UK's child population. Across the UK as a whole, the number of children aged 0–15 is projected to decline by around 7 per cent, roughly 800,000 fewer children, between 2025 and 2035. This shift is driven primarily by a sustained fall in fertility, with the UK's total fertility rate dropping from around 1.9 in 2010 to about 1.4 today. The projected decline is not evenly distributed, and Northern Ireland stands out sharply. The IFS (2025) finds that Northern Ireland is expected to experience the largest drop in number of young people of any UK nation, with the number of children aged 0–15 forecast to fall by around 15 per cent between 2025 and 2035, more than double the UK average. In the longer-term, Northern Ireland's child population in 2035 will be approximately 34 per cent lower than in 1971. Crucially, NISRA's 2022-based population projections show that migration is not expected to play a significant role in Northern Ireland's future population growth. Instead, almost all future population change will be driven by natural change and ageing. This means the decline in the youth population is unlikely to be offset by inward migration, making the demographic shift more certain and potentially more acute.

These trends have important implications for further and higher education in Northern Ireland. As smaller cohorts move through the school system, the number of school leavers will gradually fall, leading to reduced domestic demand for university and college places unless increased participation rates (already relatively high) or alternative recruitment strategies compensate. Universities may face pressure to broaden their applicant base, through attracting more students from Great Britain, Ireland or overseas, or by expanding provision for mature learners. At the same time, a shrinking youth cohort could offer policymakers an opportunity: if funding per pupil is protected, albeit unlikely given current financial pressures in NI, the school system could deliver smaller class sizes and better educational outcomes, strengthening the pipeline of students entering further and higher education. However, if constrained public finances continue to cause resource reductions instead, the sector may see both falling numbers

and rising pressures simultaneously. These issues are currently being seen in the HE sector across GB.

Chapter 3

Literature and theory

While recent research specifically focused on HE mobility in NI is relatively limited, the extent of literature on broader HE-related mobility has grown exponentially in parallel with the rapid expansion of this sector in recent years, both internationally and closer to home. Two key frameworks have shaped this debate for some time: human capital theory and push–pull factor theory.

3.1 Human capital theory

Human capital theory frames education as an investment in skills and knowledge that raises an individual's productivity and lifetime earnings. Early models by Becker (1964) and Porath (1967) emphasised life-cycle earnings as a central determinant of the decision to invest in education; Turner (2004) formalised this into a choice model in which an individual selects among higher-education options (degree type, duration and perceived quality) to maximise lifetime utility, mainly through expected earnings.

Geographic factors enter this framework through transaction and information costs. Greater distance from a higher-education institution increases the direct and indirect costs of participation, reducing the likelihood of enrolment (Spiess and Wrohlich, 2010). Local provision can also produce neighbourhood spillovers – positive effects such as labour-market links and social capital, or negative effects such as congestion – that shape young people's choices. Finally, information network effects matter: proximity to a local HEI often improves access to reliable information and peer networks, which in turn influence perceptions of returns and the decision to study locally or to migrate for study.

It should be noted however that while a degree is seen as a strong investment in human capital, the returns to third-level qualifications have been falling in the UK while third-level education has expanded (Britton et al., 2022).

3.2 Herding behaviour

Peer influence and social norms also play a role in how students make decisions about where to study for higher education. There is a significant focus in the UK on university rankings as well as other quantitative data like employment rates of graduates. Many institutions use these in their marketing to students, yet a recent study by Heathcote et al. (2020) found that students are driven in part by data and information but also by social influences and behavioural tendencies around them, leading to a 'herding' effect. Similarly, Poole et al. (2023), who focus on widening participation students, find that students rely on numerous actors in making their decisions, including their peers and social networks. Again this showed clear patterns of socially-influenced behaviour. These specific works build on wider international literature which identifies clear peer effects not only in deciding where to study but in whether to pursue higher education or not and what courses or subjects to study. There is clear evidence in America of application clustering among school leavers going to college whereby groups of students cluster around certain institutions and courses (Rubineau et al., 2024).

In their seminal work, Bikhchandani et al. (1992) argue that individuals are not necessarily rational. Instead, they can ignore information and imitate the actions of those around them, which then leads to fads, fashionable choices, social norms and herding behaviour. They refer to this as an information cascade, whereby information cascades between people based on what they have observed and individuals make choices based on these public actions rather than on their privately held views until a point where individuals assume the norm is the best option and ignore any private information. The authors also argue however that these cascades can both form and collapse quickly.

3.3 Push–pull theory

Push-pull theory explains broad migration but also international student mobility as the outcome of pressures that 'push' students away from their home country and attractions that 'pull' them toward a host country. The literature highlights economic, social, cultural and institutional factors shaping these flows, with relevance for

understanding student mobility to and from Northern Ireland. Push–pull theory was first applied to migration studies and later adapted to international education. It posits that students’ decisions to study abroad are influenced by a combination of push factors (conditions in the home country that encourage departure) and pull factors (features of the destination country that attract students). This framework remains one of the most widely used models in higher-education mobility research (Yue and Lu, 2022; Gutema et al., 2024).

Push factors tend to be limited educational opportunities, economic constraints, political or social pressures, or language and other social barriers (Simpson, 2022). Pull factors can be academic reputation, employment opportunities, financial incentives as well as cultural and social appeal. Policy also has a role to play with immigration policy, accessibility of student visas and other government initiatives also important for international student mobility. While some of these factors are not relevant for NI, closer to home the role of HEIs and their marketing efforts are important pull factors. In an examination of student mobility across European countries of different types of students, Perez-Encinas et al. (2020) find that across the students studied, the offerings of the city they move to, the social life and academic matters all play a role in their international experience.

Donnelly and Gamsu (2018) in a study of student mobility within the UK find that mobility is strongly correlated with family background, in particular financial resources, with those from more affluent family backgrounds more likely to move away from home for HE. Perceptions of opportunities also play an important role. It is also worth noting that those who are most mobile are often most likely to find success (Sir Peter Lampl in Donnelly and Gamsu, 2018).

Human capital theory complements push–pull frameworks by explaining how individual cost–benefit calculations interact with destination attributes (pull factors) and home-country constraints (push factors) to produce observed patterns of student mobility.

On a more practical note, quality of universities are a key push–pull factor for student mobility. This is seen particularly for Wales where many of the universities are lower ranked than English universities

within travelling distance. This leads to an outflow of students from Wales seeking better opportunities. We note that there is no low-tariff university in NI⁷ and HEIs in NI are of high quality and ranking, which suggests this is unlikely to be a key factor for the overall outflow of students from NI, although there will remain high-performing students who seek out the most prestigious and high-ranking opportunities for third-level education.

3.4 Northern Ireland literature

The existing literature focusing specifically on student mobility from NI is at this stage relatively dated. And while it is frequently mentioned in policy debate and media there is little up-to-date robust research on which to build an evidence base.

Osborne (2001) outlined the 204 per cent increase in participation of full-time undergraduate entrants from NI between 1985 and 1999. However, much of this increase can be attributed to those who do not study locally, with HE-related migration settling between 31 per cent and 39 per cent. While historically, there was a pattern of NI-domiciled students going to Trinity College Dublin (TCD) (until the 1960s), this changed in the 1980s. In his analysis of participation trends, Osborne (2001) found Scotland to be particularly attractive for NI students, with Edinburgh and Dundee having many NI entrants. For England, there was a natural trickle of students to Oxbridge, but the majority of students attended university in the North, namely Liverpool, Manchester and Newcastle. Past focus groups revealed a perception from students that the further south in England they went, the more likely they were to face discrimination (Cormack et al., 1997). The RoI in more recent years struggled to attract NI-domiciled students as it was highly competitive with very high entry grades. The primary pull of RoI universities was the offering of disciplines such as veterinary science that were not available in the North. There are two key takeaways in Osborne's work. Firstly, students may be categorised according to whether they stay in NI or leave NI, and whether this outcome is by choice or by constraint, as follows (Osborne, 1999):

⁷ As designated by UCAS.

The desire of some students to leave NI under all circumstances – the determined leavers.

The desire of some students to stay under all circumstances – the determined stayers.

The forced departure of some students from NI because of the perceived high entry grades sought by the NI universities – the reluctant leavers.

The emerging importance of finance as new funding arrangements begin to strike home – the reluctant stayers.

And secondly, the role of personal characteristics in explaining who left NI for third-level education. In terms of social class, NI recorded the highest proportion of entrants from lower social classes among all UK universities; this may be a reflection of the class structure of the NI population or the tendency of middle-class students to leave NI (Osborne et al., 1984; Osborne, 2006). Religious background has also been found to play a substantial role in mobility. Students from Protestant backgrounds have been found to be more likely to leave for higher education or come from schools which encouraged leaving NI for university (Cormack et al., 1997; Osborne, 2006). In 1991, 43.9 per cent of Protestant students attended a HEI in GB compared to just 26.7 per cent of Catholics (Cormack and Osborne, 1994). Schubotz (2008) also finds that Protestant young people are less inclined to want to go away overall but more inclined to want to go away for education. However, he also argues that religion may be a proxy for other factors which hold more weight such as a desire to leave somewhere which is quite religiously conservative. He also notes that NI is small and unlikely to provide everyone with the academic opportunities they desire, and further suggests that as NI is within the UK, student mobility from NI is a very localised form of mobility.

Religion also played into social class patterns, with evidence that higher education provided significant social mobility opportunities for Catholics from unemployed or manual backgrounds, with slower increases in the representation of Protestants from working-class backgrounds (Cormack and Osborne, 1994). NI also differed in the age profile of students, with fewer mature students compared to other UK constituent countries (Cormack et al., 1997).

The work of Osborne and colleagues has also reflected the debate surrounding the MaSN and the supply of university places in NI. They noted the supply of places not matching demand, with the result being higher asking grades, pushing modestly qualified applicants to apply for courses outside of NI (Osborne, 2006). This under-supply may have been partly caused by the higher HE participation rate in NI compared to other regions of GB (Cormack et al., 1997). The Department for Employment and Learning (DEL) carried out analysis of UCAS data which showed that most who left NI and most who stayed received their preferred course choice, suggesting the supply of places was adequate, though this of course does not capture the role of reluctant leavers who apply for courses outside NI as they don't believe they would secure a place in NI (Osborne, 2006). Cormack and Osborne (1994) note that the higher-than-average Age Participation Index in NI was sustained by the substantial number of students receiving modest A-Level results obtaining places in GB institutions.

The literature on education mismatch is also relevant to this debate, particularly in terms of calls to expand HE places in NI, with overeducation an existing concern in the NI labour market. Overeducation typically leads to wage disadvantages when compared with similarly educated individuals in appropriately matched jobs. Additionally, those who are overeducated for their role are likely to have lower levels of job satisfaction (McGuinness et al., 2025). Recent work by Davies and Felstead (2025) found 27 per cent of workers in NI are overqualified for their job while earlier work found overeducation to be even higher especially among graduates (ONS, 2023). Using the Annual Population Survey in 2022 they found 35.6 per cent of NI graduates in employment were not employed in graduate roles, higher than the UK average of 30 per cent (Vecchia et al., 2023).

Recent work by Pivotal (2021) examined the motivations for young people leaving NI for education. They found that community relations in NI, graduate opportunities and the social and student experience available elsewhere were key motivations for leaving NI for HE. In follow-up in-depth interviews aimed at understanding exactly how these topics motivated decision making, young people spoke of wanting to live where party allegiance mattered less and concerns like the environment were not eclipsed by 'orange and green' politics.

Chapter 4

Data analysis

4.1 Recent debates on the role of the Maximum Student Number

Debate surrounding the MaSN has intensified in recent years as universities face additional cost pressures, although this is not restricted to institutions in NI. Some commentators have argued that the cap restricts opportunities for local students and is the key driver of outward student mobility. The Northern Ireland Affairs Committee (NIAC), for example, described the cap as ‘a handbrake on the NI economy’ in its discussion of skills and productivity challenges in the NI economy (NIAC, 2022). In public debate, claims about unmet demand often cite the volume of university applications relative to available funded places:

At Queen’s, we receive nearly 28,000 applications every year, with the vast majority from Northern Ireland. Yet due to the funding cap imposed here by the Executive, known as maximum student number, we are limited to offering approximately 3,500 places to students from here.

Professor Sir Ian Greer on A-Level Results Day 2025

However, it is important to distinguish between applications and applicants. UCAS allows prospective students to apply for multiple courses, meaning that headline application figures do not directly translate to the number of individuals seeking places. FactCheckNI has highlighted this important distinction in its analysis of recent claims about the scale of unmet demand. Application volumes clearly indicate strong interest in HE but they do not in themselves demonstrate that outward mobility is solely the result of constrained local capacity as a result of the MaSN.

QUB supplied us with the number of **individual undergraduate applicants** to the university from both NI and RoI in each of the past five years, as seen in Table 4.1.

Table 4.1 QUB Applicants, 2021–2025

	NI	RoI	Combined
2021	11139	1279	12418
2022	10649	1886	12535
2023	10320	2003	12323
2024	9975	2109	12084
2025	10115	2275	12390

Source: QUB via FactCheckNI.

Using applicants rather than applications substantially narrows the apparent gap between demand and available places. However, the number of applicants to QUB still remains significantly higher than the number of potential new entrants permitted under the MaSN. However, FactCheckNI also point out that it is possible that QUB applicants also apply to Ulster University (UU).

Earlier research on student mobility distinguished between ‘reluctant leavers’ and ‘determined leavers’, with a modest majority deemed to be the latter (Osborne, 1999). Therefore, increases in local capacity may reduce outward migration at the margin by enabling some reluctant leavers to remain. On the other hand, mobility among students seeking institutions outside Northern Ireland for academic, reputational or personal reasons is less likely to be affected by changes in local capacity alone.

It is also worth noting what an across-the-board expansion of the MaSN might mean. It would mean that HEIs in NI may need to lower entry requirements to fill additional spots, which may have implications for perceived quality and may also call for pedagogical adaptations to teaching in larger classes of varied abilities. Secondly, given the NI Executive’s financial pressures any increase in numbers must be traded off with increased costs, which could discourage some people from attending university.

Despite the MaSN, NI has the highest entry rates to HE of all UK countries. In 2025 38 per cent of 18-year-olds in NI entered HE compared to 37 per cent in England (ranging from 30 per cent in the South West and the North East to 51 per cent in London), 30 per cent in Scotland and 29 per cent in Wales (Bolton, 2026). This is a substantial

increase in HE participation over time, but is below the record entry rates of 2022. High participation rates have been a consistent feature of NI (Cormack et al., 1997; Osborne, 2006).

It is also worth considering the role of HE within wider society. We do not assume that everyone wants to go to university nor would that be beneficial for society. Many young people in NI forego university and this is for a range of reasons. In a recent survey (DfE, 2025), 46 per cent of students who didn't study at degree level put it down to either wanting to start work straight away or because their chosen career didn't need a degree, whereas 17 per cent did not get the grades they needed for HE. Only 1 per cent said they didn't go to university because the course they wanted wasn't available and they didn't want to leave.

4.2 Entry requirements

Entry requirements are an important mechanism in aligning demand and supply within the HE system, not just in NI or the UK. Should the MaSN be placing a significant constraint on places, entry requirements at NI HEIs would be considerably higher than in universities of a similar standard in other parts of the UK. Not only do entry requirements align demand and supply, but they also play an important role in signalling the academic profile which HEIs seek of their students. This is key to the MaSN debate as any significant increase in the MaSN cap would see institutions have to lower entry requirements to fill the additional places.

However, we must also note that entry requirements as advertised are not always what is needed to get in to universities, with a significant number of places each year available through the UCAS clearing process.⁸ There are also complexities in the local context, with Ulster University as a multi-site campus having different grades for the same course at different campuses, particularly in respect of the expansion of Magee. A key element of the Magee expansion has involved enrolling

⁸ Clearing allows for HEIs to fill places they still have available after the initial round of applications and offers due to a number of reasons: lack of demand, students not meeting entry requirements, adjustments to intake size, etc. It benefits students who don't get the necessary grades, don't have any offers or have changed their mind and no longer want to go to their first choice. Clearing opens in July but is typically used following examination results when students are confirming their plans for the new academic year. For more on clearing see [What is Clearing? Find out when Clearing happens and how it works](#)

students at the Magee campus who did not meet the entry requirements for the same course at the Belfast campus. The DfE Magee Taskforce report in 2024 notes that this has resulted in a reduction in the overall entry grade profile of Ulster University and subsequently a lower league table position, and while this has worked well as an approach to recruitment it is not sustainable (DfE, 2024). Times Higher Education notes that students being offered places despite not meeting entry requirements is becoming increasingly common in the UK (Pearson and Jenkins, 2024) and undergraduate students are also increasingly coming from entry pathways other than directly from school (Dilnot et al., 2023).

Despite these issues and the complexities around grade requirements, entry requirements remain an important signal in the higher-education landscape. Therefore it is useful to get an idea of how the NI universities’ entry requirements compare to other universities of a similar ranking and to universities which have high inflows from NI. Interestingly, as we discuss later, universities with high student inflows from NI (Table 4.5) overlap with universities with similar rankings (Table 4.2).

Table 4.2 Entry requirement comparison, 2026/27

	Subject				
	Ranking	Law	Economics	Medicine	Sociology
University of Liverpool	23	AAA	AAB	AAA	BBB
Queen’s University Belfast	24	AAA	ABB	A*AA	BBB
University of Manchester	28	A*AA	AAA	AAA	ABB
Northumbria	37	BBB	BBC	NA	BBC
Manchester Metropolitan University	50	BBB	BBC	NA	BCC-BBC
Ulster University	54	AAB	BBC	NA	BCC

Notes: Ranking based on the Complete University Guide University League Tables 2026. Available online from: University Rankings and League Tables 2026. Ulster University ranking is for the whole multi-site university while the entry

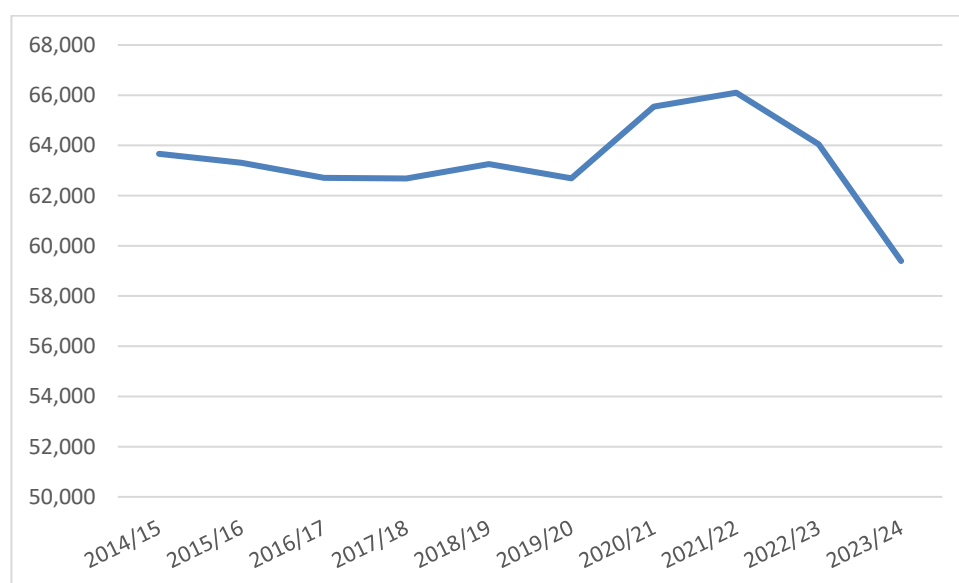
requirements are reflective of the Belfast campus; as discussed, grades are typically lower in Magee to encourage demand.

Table 4.2 presents entry requirements for Ulster University and Queen’s University Belfast alongside HEIs of a similar ranking in GB which are also HEIs often attended by NI students. Comparative analysis of published entry requirements does not reveal a consistent pattern of systematically higher tariffs across subjects. However, medicine at QUB is slightly higher than comparable institutions while law at UU is also slightly higher. But overall, given that entry requirements are broadly similar, this does not suggest that demand and supply for university places in NI are being excessively manipulated by the constraint on places through the MaSN. Published entry tariffs should be interpreted with caution, as they do not necessarily correspond directly to the actual grades achieved by admitted students.

4.3 NI-domiciled enrolment flows

The remit of the Higher Education Statistics Agency (HESA) is to collect, publish and utilise data on HE across the UK. They produce a wealth of official statistics for public use. We present some key information from these data below. HESA presents information on where students come from and what HEI they attend. We examine the headline student enrolment figures regardless of mode of study, institution type, qualification level or the year the students are in as we are interested in overall enrolment flows.

For the academic year 2023/24 there were 59,395 NI-domiciled students at HEIs in the UK. Figure 4.1 tracks NI-domiciled student enrolment at UK HEIs over time. The number of NI students at UK universities peaked in the 2021/22 academic year as a result of the pandemic. The job market was unattractive, assessment changed and students were getting in on predicted grades, and universities were keen to take in more UK students as international enrolment dropped off significantly. Numbers however have continued to fall below pre-pandemic levels. which has been a trend across the UK as students think about alternative career pathways. There are also ongoing cost-of-living pressures and concerns around student finance.

Figure 4.1 NI-domiciled students enrolled at UK HEIs, 2014/15–2023/24

Source: Higher Education Statistics Agency (HESA).

Notes: All NI-domiciled students in higher education are included in this figure regardless of qualification type or mode of study.

Twenty-two per cent of these were studying outside of NI while 78 per cent were studying within Northern Ireland at Queen's University Belfast, Ulster University (three campuses – Belfast, Coleraine, Magee (Derry/Londonderry)), Stranmillis, St Mary's or with the Open University (OU). In comparison 96 per cent of HE students from England study at an institution within their constituent country of permanent residence, 94 per cent for Scotland and 71 per cent for Wales. It is these figures which are often cited when discussing the problem that is the 'brain drain' from Northern Ireland. However, that is done without caveating that comparing NI to Scotland makes little sense given the very different higher-education landscape in Scotland. Students who are ordinarily resident in Scotland and wish to continue into higher education there qualify for a tuition fee waiver, whereby the full cost of university tuition is covered by the Student Awards Agency Scotland (SAAS). Other notable differences include Scottish students leaving school at 17 to attend university and engaging in a 3-year undergraduate degree, as compared to 18-year-olds completing 4-year undergraduate courses in the rest of the UK. England has policies that are more similar to those of NI, aside from funding, but on the other hand it has a population nearly 30 times that of NI, is geographically much larger, and has significantly more universities and courses.

Table 4.3 HEI Enrolments by UK Domicile and Place of Study, 2023/24

Location of domicile	% Enrolled at HEI within domicile	% Enrolled at HEI outside domicile	Total enrolments
England	96%	4%	1,814,355
Scotland	94%	6%	184,735
Northern Ireland	78%	22%	59,415
Wales	71%	29%	103,185

Source: Higher Education Statistics Agency (HESA).

Notes: NI OU is included within NI HEIs. All students in HE regardless of institution or study type are included in this table.

Given the differences between England and NI it is more practical to examine English regions rather than England as a single homogeneous unit. Table 4.4 displays the enrolment flows from NI, Scotland, Wales and the nine English administrative regions. Such a comparison changes the landscape considerably. While Scotland remains an outlier, this is to be expected given the funding arrangement. England, on the other hand, has considerable student mobility which was previously masked. Indeed, the proportions leaving NI now appear low by comparison with Wales and English regions. Seventy-five per cent of those in the East Midlands are enrolled at institutions outside their home region, while the same figure for London is 42 per cent.

Table 4.4 HEI Enrolments by UK domicile (English regions) & place of study, 2023/24

Location of domicile	% Enrolled at HEI within domicile	% Enrolled at HEI outside domicile	Total enrolments	Number of HEIs
East Midlands	25%	75%	152,145	14
South West	36%	64%	169,810	20
South East	38%	62%	251,235	34
East of England	43%	57%	112,800	18
Yorkshire and The Humber	45%	55%	171,625	20
North East	46%	54%	87,770	6
West Midlands	47%	53%	200,470	17
North West	56%	44%	212,805	21
London	58%	42%	333,225	116
Wales	71%	29%	103,185	9

Northern Ireland	78%	22%	59,415	5
Scotland	94%	6%	184,735	19
England	96%	4%	1,814,355	266

Source: HESA.

Notes: The Open University is present in Scotland, Wales, NI and the South East region of England as per the data. Therefore the five HEIs in NI are QUB, UU, Stranmillis University College, St Mary's Teaching College and the Open University. The figures above include all students in HE in the UK regardless of institution or study type.

Not surprisingly, the HEIs most attended by NI students are UU and then QUB. This is followed by OU and then Liverpool John Moores University. In fact, there are more NI students enrolled at Liverpool John Moores (1,770 students) than at Stranmillis University College (1,395) and St Mary's University College (940), both in Belfast. The 20 HEIs in the UK with the highest number of NI-domiciled students are presented in Table 4.5.

Table 4.5 NI-domiciled students enrolled at UK HEIs, 2023/24

HEI	No. of enrolments	HEI	No. of enrolments
Ulster University	20,545	The University of Edinburgh	460
Queen's University Belfast	17,385	Newcastle University	405
The Open University	4,595	The University of Manchester	390
Liverpool John Moores University	1,770	The University of Dundee	320
Stranmillis University College	1,395	The Manchester Metropolitan University	280
St Mary's University College	940	The University of Stirling	275
The University of Liverpool	790	Cardiff University	260
The University of Glasgow	650	Edge Hill University	255
University of Northumbria at Newcastle	535	Harper Adams University	230
Liverpool Hope University	470	The University of Strathclyde	230

Source: HESA.

Notes: The figures above include all NI-domiciled students in HE in the UK regardless of mode of study or level of qualification.

There are also geographic patterns in terms of where in NI those who leave NI for HE come from. Table 4.6 presents the number of enrolments at UK universities of those domiciled in NI for the 2024/25 academic year. Not surprisingly, in absolute terms the largest number of students come from the Belfast Local Government District (LGD) (1,905 students) with the large majority going to the North West region (715 students). These data are also presented in map format as percentages so as to better represent the geographic distribution of leavers and stayers in the NI-domiciled student population, accounting for the number of students leaving each LGD. Figure 4.1 shows the share of university students in each LGD who study at a HEI in NI.

Table 4.6 Enrolments at UK HEIs by domicile LGD, 2024/25

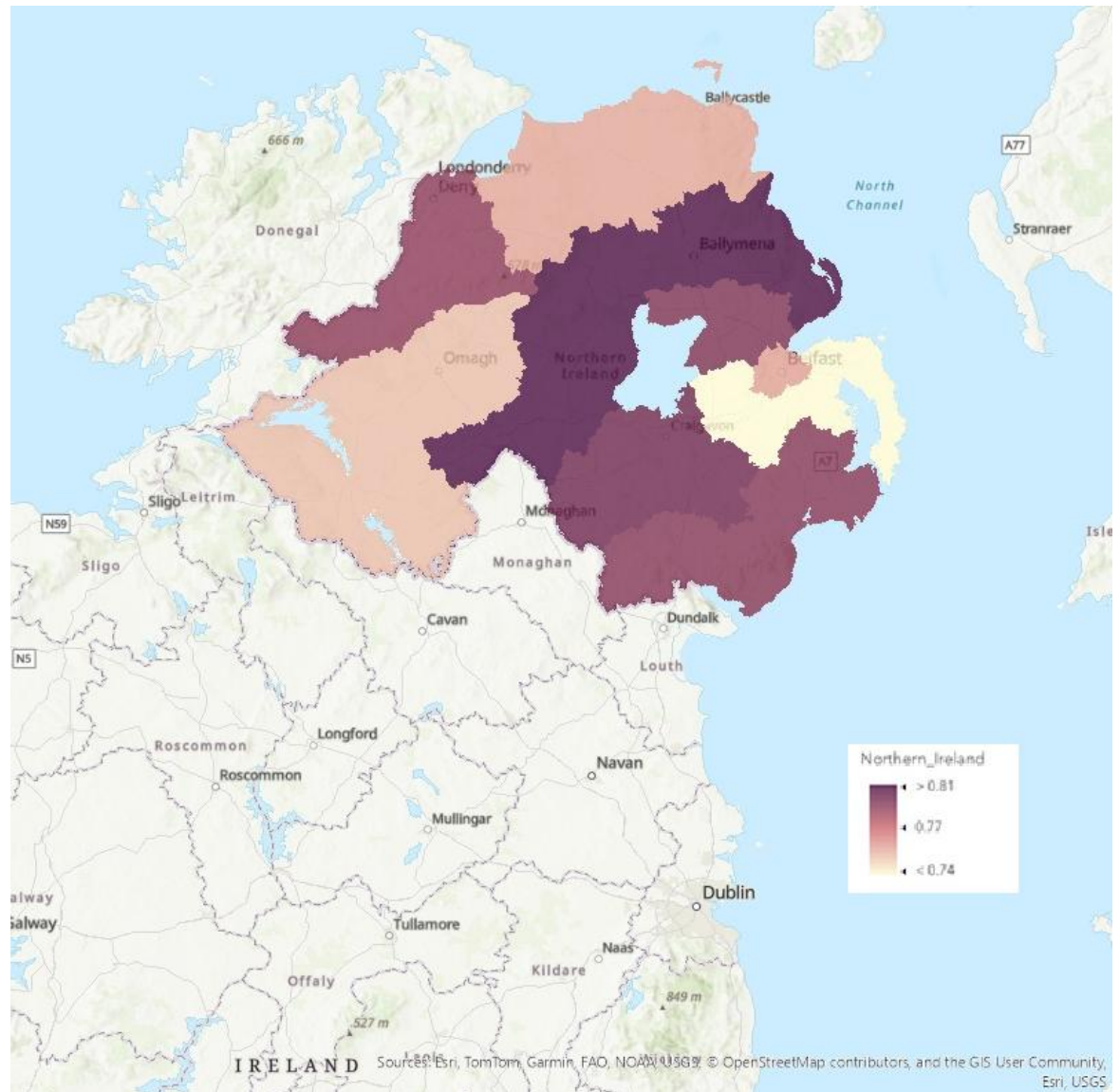
Home Domicile	Region of HE provider													
	North East	North West	Yorkshire and Humber	East Midlands	West Midlands	East of England	London	South East	South West	England	Wales	Scotland	NI	UK
Antrim & Newtownabbey	105	295	45	55	60	20	70	70	40	755	50	195	3,800	4,795
Armagh, Banbridge & Craigavon	85	415	50	80	110	30	100	80	105	1,060	80	235	5,385	6,765
Belfast	260	715	105	110	110	90	200	150	160	1,905	95	570	7,995	10,560
Causeway Coast & Glens	100	370	40	45	65	25	55	55	65	820	45	155	3,155	4,175
Derry & Strabane	85	440	40	45	55	15	60	45	45	830	40	190	3,980	5,045
Fermanagh & Omagh	110	335	35	50	65	15	45	50	50	755	40	140	2,815	3,750
Lisburn & Castlereagh	170	390	70	70	75	45	105	105	95	1,125	65	300	3,855	5,345
Mid-Ulster	40	265	35	45	65	15	55	55	40	625	45	120	3,920	4,710
Mid- & East-Antrim	70	225	40	50	50	15	60	40	40	590	30	175	3,350	4,145
Newry, Mourne & Down	75	450	55	40	80	40	85	85	75	985	50	215	4,720	5,970
North Down & Ards	165	295	60	60	65	45	100	95	120	1,005	65	400	3,475	4,945

Source: HESA.

Notes: The figures above include all students in HE in the UK regardless of mode of study or level of qualification.

Figure 4.2 shows clear differences in terms of the share who stay for third-level education in NI; however, there does not appear to be a clear east/west divide.

Figure 4.2 Share of NI-domiciled students who attend a HEI in NI, 2024/25

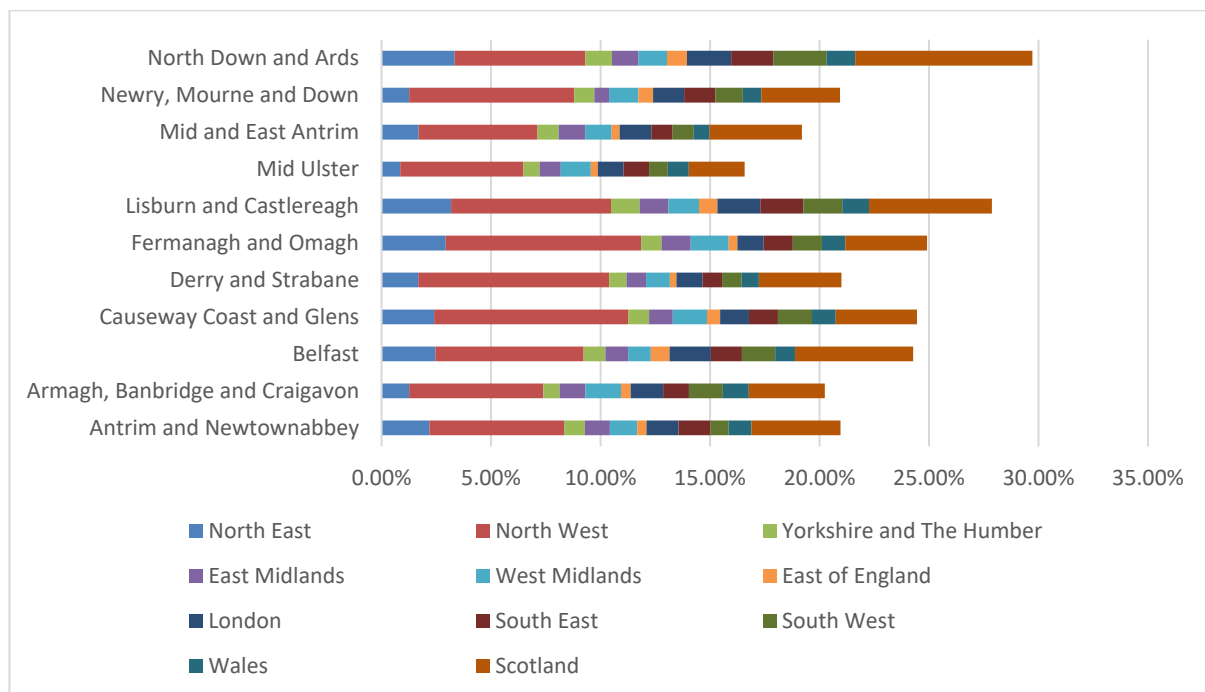


Notes: Map is authors' own created using HESA data on where students come from for the 2024/25 academic year. Darker colours represent higher share of students staying in NI for third-level study.

We also examine the share of students in each LGD who go to GB for HE to better compare across LGDs as the population differs substantially. Figure 4.3 presents the share of all HE students from each LGD who attend university in GB. The highest share of HE students going to GB are from North Down and Ards, followed by

Lisburn and Castlereagh, and Belfast. Mid-Ulster has the lowest share leaving. Sixty-eight per cent of those from North Down and Ards stay in NI compared to 83 per cent from Mid-Ulster.

Figure 4.3 Enrolments at GB HEIs by domicile LGD, share of all students, 2023/24



When we look at these figures proportionally, the North West of England is the most popular destination for all LGDs. Nearly 10 per cent of HE students from Fermanagh and Omagh go to a HEI in the North West. The North East is the second most popular region with 3.6 per cent of all North Down and Ards HE students going to a HEI in the North East. There is also sharp variation in the share who go to a HEI in Scotland. Of those from North Down and Ards, 8.1 per cent go to a HEI in Scotland compared to only 2.8 per cent from Mid-Ulster. Belfast and Lisburn and Castlereagh LGDs also show higher-than-average shares of students going to Scotland: 5.4 per cent and 5.6 per cent respectively. It may be that these patterns are reflective of spatial differences in religion, socio-economic background or a combination of both.

4.4 Cross-border student flows

Cross-border student flows fell off following the Great Recession with a dramatic fall between 2011/12 and 2013/14 before stabilising. This

was driven by a fall in RoI to NI numbers while NI to RoI numbers have stayed fairly stable over the last 15 years (Smyth and Darmody, 2023) with a slight increase since 2016/17 (HEA, 2025). In 2022/23, there were 2,765 RoI students in NI and 1,660 NI students in RoI HEIs. This is up substantially from 133 NI students in RoI in 1990 (Cormack and Osborne, 1994).

Across the RoI, 2023 and 2024 data reveal a regionalised higher-education landscape in which student mobility is shaped by geography, proximity and local institutional ecosystems, rather than by national-level factors.⁹ The dominant pattern is that most students attend institutions located within, or close to, their own region. Counties with major university hubs (Dublin, Cork, Limerick and Galway) exhibit very low outward mobility. Conversely, counties without a university of their own, particularly in the north-west and Border regions, display much higher levels of mobility, yet even here movement is regional rather than national. This uneven landscape produces clear clusters: a self-contained Dublin–Leinster system, a south-western Cork–Kerry system, a mid-western Limerick zone, a Galway-centred western cluster, and a distinct north-western/Ulster catchment that behaves differently from all others.

Within this spatial pattern, the multi-campus Atlantic Technological University (ATU) stands out as the most regionally dominant institution in RoI. ATU attracts exceptionally high proportions of entrants from Donegal, Sligo, Leitrim, Mayo and Roscommon. These are counties that consistently send between 30 per cent and 57 per cent of their school leavers to ATU each year. No other Irish university draws such a high share from its neighbouring counties. Families, schools and communities in the north-west of RoI treat ATU as the natural, default progression route for higher education. At school level, the top feeder schools to ATU are almost exclusively in Donegal and Sligo. These patterns show that ATU’s role in the region is structural; it functions as the principal provider for an entire quadrant of the country where alternative university options are distant, time-consuming and costly to access. ATU’s footprint also extends into the north midlands and

⁹ Source: North South Engagement Centre (ATU).

Border counties, though more modestly, indicating a wider but still geographically coherent catchment area.

Parallel to ATU's strong localised role, the data also highlight the distinctive position of QUB and UU. While cross-border mobility equates to only about 2 per cent of all entrants nationally, the distribution is extremely concentrated in certain areas. Donegal alone accounts for over 40 per cent of all students from the Republic entering Northern institutions, with significant additional contributions from Monaghan, Louth, Cavan and Sligo. As with ATU, the key feeder schools for QUB and UU are also located overwhelmingly in Donegal. This overlap between ATU and cross-border feeders is striking and demonstrates that the north-west region forms a unique higher-education zone within RoI that looks both westwards (to ATU) and northwards (to NI universities) rather than southwards to Dublin or Limerick.

Taken together, these data reveal a national system that is not unified but is made up of regional higher-education ecosystems, each with its own pull. ATU's dominance in the north-west of RoI and the strong cross-border flows (in relative terms in the Border areas) into QUB and UU show that where geographic distance is greatest from the major Irish university hubs, students construct alternative and highly localised routes to HE. In this context, Donegal emerges as the most distinctive county in Ireland: it is the single largest feeder area for ATU and, simultaneously, the primary source of cross-border entrants to Northern institutions. This dual pattern underscores the broader conclusion that Irish student destinations are shaped by place, proximity and regional relationships, producing clear and enduring spatial patterns in higher-education participation. In addition to universities, further education institutions in the Border region also contribute to higher-level education pathways and cross-border progression. North West Regional College (NWRC), for example, delivers higher-education and supports progression routes from further education to higher-level qualifications for students from both Northern Ireland and the Republic of Ireland. These pathways form part of the wider cross-border education ecosystem in the north-west of RoI.

It is also worth noting the recent announcement that Dundalk Institute of Technology will become a University College of QUB, which may influence cross-border student flows in the future (QUB, 2025). Issues sourcing accommodation in ROI cities and increasing cross-border employment flows (McGuinness et al., 2024) may also impact future student flows.

4.5 A focus on Atlantic Technological University

ATU has campuses in Donegal, Sligo, Mayo, Connemara, Mountbellew and Galway City. The 2024/25 HEA returns show that ATU had a total registered student population of 30,475, of whom 404 were from NI. This means NI students represented 1.3 per cent of the entire ATU population. Their enrolments were concentrated in a small number of fields, with Business, Administration and Law accounting for 239 students, followed by Engineering, Manufacturing and Construction (63) and Health and Welfare (26). All other disciplinary areas enrolled between 5 and 19 NI students. This distribution indicates that ATU attracts a modest but stable cross-border cohort primarily into broad, vocationally oriented programmes.

When viewed alongside national patterns, ATU's cross-border share is broadly in line with, but slightly lower than, the wider Irish higher-education system, which is about 2 per cent. This reinforces the earlier discussion that cross-border study is a niche but regionally significant phenomenon, driven largely by the north-west and Border counties rather than by the higher-education system as a whole.

ATU will be introducing a Veterinary Medicine and Surgery course in 2026.¹⁰ This is one of the subjects not offered in NI, and will be of particular interest to those in the north-west as the course will be delivered in the Letterkenny campus of ATU. This may be reflective of local need or a recognition that there is a cross-border gap in the market.

¹⁰ [Veterinary Medicine and Surgery \(BVMS\) – Atlantic Technological University](#)

4.6 Universities and Colleges Admissions Service data

We sought access to the Universities and Colleges Admissions Service (UCAS) Data, 2007–2021: Secure Access dataset. This dataset is not publicly available and was accessed via a Secure access setting at Ulster University, Coleraine campus. The UCAS dataset provides comprehensive information on all applicants to HEIs in the UK. The data include information on secondary-level qualifications obtained and anticipated grades, applicants' socio-economic status, ethnicity, region of residence, deprivation marker, entry year, course information, HE provider and HE provider decisions. These data are used to compare applicants who apply to local HEIs, those who apply exclusively outside the region, and those who apply to both. Unfortunately, the UCAS data do not include the religion of the respondent, which may remain an important factor in determining student mobility from NI and was found to be important by Osborne (2006) in previous work. We also use the school type variable in the data as it is provided by UCAS but acknowledge that it does not accurately reflect the secondary school system in NI, which differs from that elsewhere in the UK. However, we do not believe that this will impact our overall findings in any meaningful way.

The UCAS data include all applicants to UK HEIs and therefore also include applicants from outside the UK. We restrict our sample to those from the UK to allow for better comparisons as these applicants can access similar student funding arrangements and the education system is similar (bar the differences discussed earlier).

We generate a set of three binary variables which indicate whether individuals apply to study only in their home region, only to regions other than their domicile, or to their home region as well as other regions. We then use these as outcome variables in a set of regression analysis, and given the outcomes are binary, we utilise probit regressions.¹¹ We use these variables to align with some of the standard terminology that has become embedded in the debate on

¹¹ A multinomial logit model would also be appropriate for the analysis but we are of the view that probit models offer clearer interpretability of marginal effects across regions whereas multinomial logit models must be interpreted relative to reference categories of the variable of interest as well as relative to the base outcome. A robustness check of the NI model was run using a multinomial approach and results were consistent.

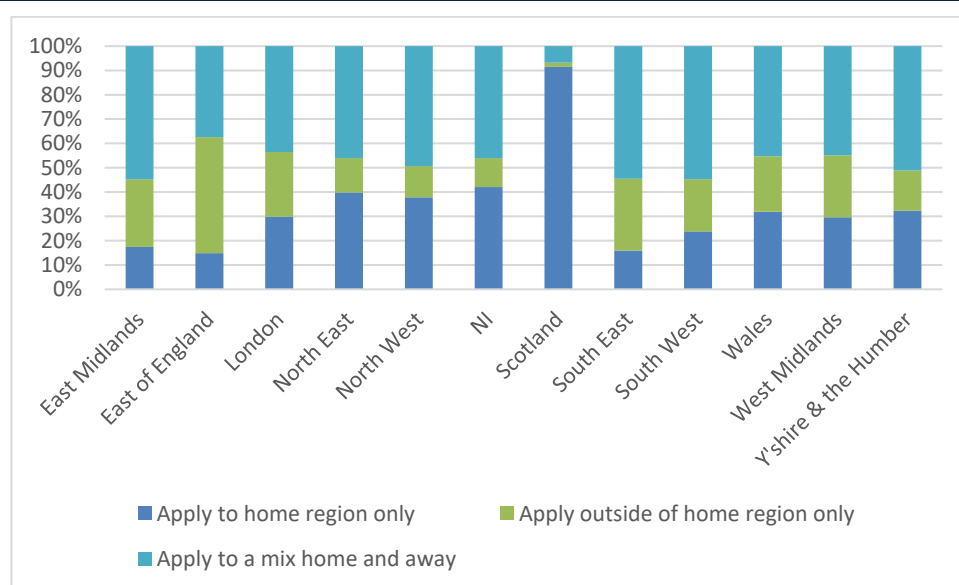
student mobility, namely ‘determined stayers’ and ‘determined leavers’. These terms have become synonymous with how student mobility patterns are discussed. However, in this work, our definitions diverge somewhat from the definitions used in previous work by Osborne (1999) as outlined in the literature discussion above. Table 4.7 presents the number of applicants in the UCAS data who apply only to the region in which they live, only to other regions, or to a mix of both as well as the total number of UCAS applicants. While the number is important, particularly as it relates to supply constraints, the proportions allow us to compare across regions. Figure 4.4 shows the relative share of students who apply at home, away or a mix for each of the regions.

Table 4.7 UK-domiciled UCAS applicants, 2020 application cycle

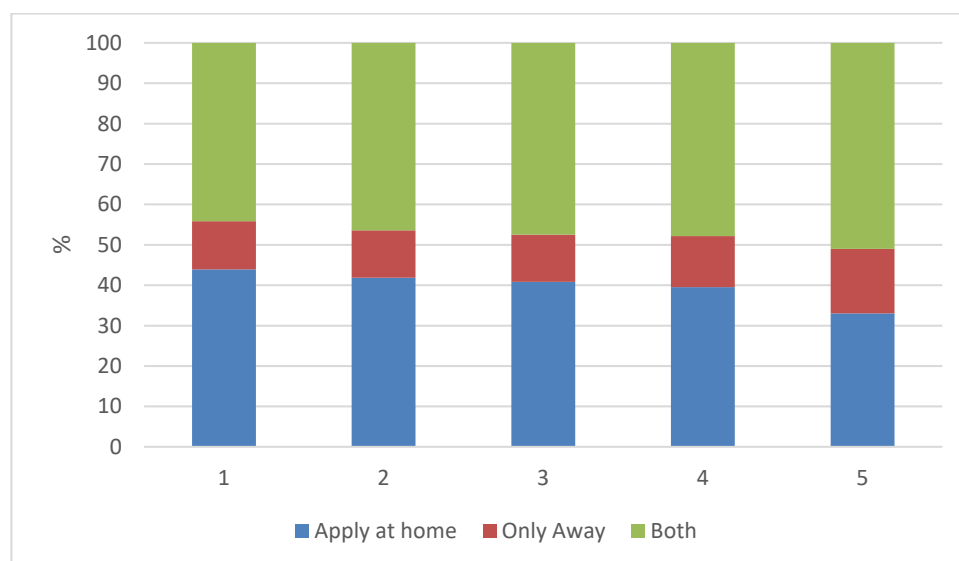
	East Midland s	East of England	London	North East	North West	NI	Scot- land	South East	South West	Wales	West Midlands	Y'shire & the Humber
Apply to home region only	6,098	7,007	30,585	7,732	23,366	7,808	46,398	11,832	9,740	7,383	15,015	13,830
Apply outside of home region only	9,697	22,475	27,201	2,737	7,962	2,218	868	21,924	8,786	5,271	12,949	7,096
Apply to a mix of home and away	19,106	17,612	44,493	8,938	30,458	8,552	3,456	40,424	22,375	10,472	22,773	21,841
Total	34,901	47,094	102,279	19,407	61,786	18,578	50,722	74,180	40,901	23,126	50,737	42,767

The share who apply only at home differs widely across the UK. Not surprisingly, 91 per cent of applicants in Scotland apply only to Scottish HEIs. NI has the next highest share with 42 per cent of NI UCAS applicants applying only to HEIs in NI. This compares to the East Midlands where only 17 per cent of UCAS applicants apply to HEIs at home. Twelve per cent of NI-domiciled students apply outside of NI while the remaining 46 per cent apply to a mix of HEIs in NI and in GB.

Figure 4.4 Share of UCAS applicants who apply at home, away or a mix, 2020 application cycle



Within NI there are also stark differences in terms of social class and where students apply to for HE. Figure 4.5 displays where students apply to for HE by deprivation quintile from the UCAS applicant data for NI. Forty-six per cent (43 per cent) of those in the most deprived quintile apply only locally (to both home and away) compared to 34 per cent (51 per cent) of those who live in the most affluent areas. Eleven per cent from the most deprived areas apply only away, but 15 per cent of those from the most affluent areas. Descriptively, a socio-economic gradient in preferences for location of further study is clear.

Figure 4.5 Location of applications by deprivation quintile, NI-domiciled students, 2020

Notes: Applicants are classified into deprivation quintiles using the NIMDM 2017; 1 represents the most deprived quintile while 5 is the most affluent.

In the subsequent analysis, we classify those who apply only to HEIs in their home region as determined stayers, and those who apply only to HEIs outside of their home domicile as determined leavers. Given students can make five choices in their UCAS application, we take the view that any student with a strong underlying preference to remain at home would be expected to use at least one choice on a local application even if they believed their chances of success to be low. We acknowledge that some students with lower predicted grades, or less confidence in achieving the entry requirements they need, may feel compelled to study outside of their domicile due to lack of lower-tariff options locally. However, these applicants are still choosing to pursue higher education even if that means leaving their domicile. As mentioned above, 1 per cent of students in NI not in HE attribute their lack of participation to the course they wanted to study not being available locally and not wanting to go elsewhere (DfE, 2025). By contrast, students with a strong preference to remain in their domicile but who do not believe they will be able to access a suitable HE opportunity locally may instead choose to pursue alternative pathways, to employment or to accessing HE. In much the same vein, those who leave their home region because their desired course is not available may be classified as a reluctant leaver as per Osborne (2001) but in this case we consider them to be determined leavers. Their

preference to study a particular subject outweighs their desire to remain in their home domicile. This reflects our broader view that all students balance preferences for staying or leaving, and that their eventual application behaviour indicates which consideration ultimately carries greater weight for them. We must note however that we examine applications in their total; we do not examine preferences within that, i.e. first and second choices out of the five.

We also examine those who make a mixed set of applications, combining local and non-local choices in their UCAS application. As our focus is on applicant behaviour at the point of applications rather than on where students finally enrol we do not classify individuals as reluctant stayers or reluctant leavers as was done in previous work. Table 4.8 presents the results of econometric analysis examining how those who only apply locally differ across UK regions. Marginal effects are presented. These can be interpreted as how much the probability of only applying locally (or whatever the outcome variable is) changes when a variable increases by 1 unit or when a category changes, all else being equal. The regression specifications are extensive and control for gender, ethnicity, disability status, age, school type attended and year of application. Variables are defined as per the definition used by UCAS. While there is a wide range of information in the table, it is clear that NI is relatively similar to other regions in terms of who wants to stay in their home domicile and who does not.

We begin by looking at NI in isolation. Females in NI have a marginal effect of -0.04 relative to males; we interpret this as females being 4 percentage points less likely than their male counterparts to only apply locally. This is a change in patterns observed previously, where no difference in male and female leaving rates was found (Osborne et al., 1984). All ethnic minority groups are less likely to only apply locally compared to those who are white. A U-shape pattern exists in terms of socio-economic status. Socio-economic status is measured using socio-economic classification as per parental occupation and is divided into eight categories with SES8 representing those who come from households which are deemed to be of a lower social class based on parental occupation compared to those from higher social class

backgrounds.¹² Lower supervisory and technical occupations¹³ are the reference category in the regression models. We find that those from more deprived background are less likely to only apply at home but so are those from the most affluent backgrounds and those in the middle are most likely to want to stay locally, consistent with previous analysis by Osborne (2006). The relationship is stronger among the more affluent, however. There could be a range of opposing factors at play which cause this U-shape. It could be that those from more deprived backgrounds are less confident in their application and are applying elsewhere as a back-up or to hedge their bets; it could also be that they come from more deprived areas which they want to leave due to a lack of opportunities. Those from more affluent areas may have greater levels of social capital, which supports applying to prestigious universities, most of which are outside NI, and have the family support to live away from home, which can be costly and a barrier to others.

Disability status is also considered as this is likely to play a role in decision making among young people. Those with autism, long-term illnesses, multiple disabilities or mobility issues are more likely to stay at home than those without disabilities.¹⁴ This is reflected in our student engagement, discussed later, and explains some of the nuance around why these young people are more inclined to study locally. Those with learning difficulties and those with mental health conditions are less likely to apply locally. This may be due to a desire to hedge their bets and apply to a mix of institutions.

Interestingly, state schools are most likely to have students apply only in NI. Students from grammar schools (11 percentage points) and independent schools (15 percentage points) are much less likely to only apply in NI compared to those from state schools. We caveat that with the knowledge that the definition of school type in the UCAS data is GB-centric and does not align as well for NI. However, our findings are in line with a narrative around leaving being perceived as the ‘successful’ option. In addition, certain schools promote prestigious

¹² This uses the National Statistics Socioeconomic Classification (NS-SEC). See: [The National Statistics Socio-economic classification \(NS-SEC\) – Office for National Statistics](#)

¹³ As is usual, the most common category is set as the reference category by Stata as default.

¹⁴ Disability is defined and measured as per the UCAS data, which differs from other data sources for disability whereby having a condition/limitation does not automatically infer a disability. This would be how disability is collected in the Census for example.

universities in England and Scotland in particular. This is something which also comes through in our student survey, discussed in the next section of the report. However, it is important to note that the secondary school system in NI differs from that in England, Scotland and Wales, yet the same categories are used in the data.

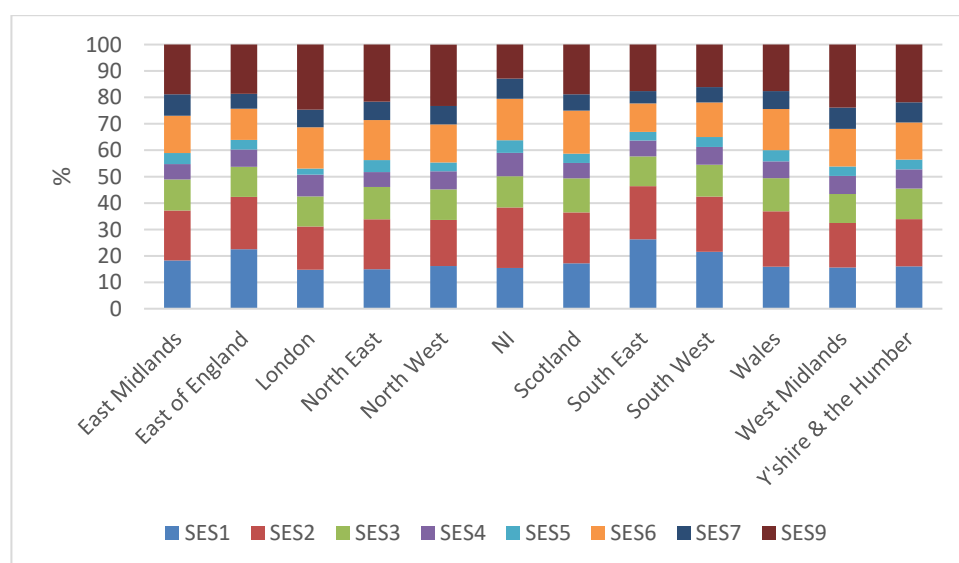
Age plays an important role in where someone applies and again this is something which is discussed in the student engagement piece later. Those who are 22 years of age or older are much more likely to apply only locally than those who are school-leaving age (17/18 years of age). More specifically, those who are aged 22–25 are 7 percentage points more likely than 18-year-olds to only apply locally. This relationship is positively linear, people over the age of 40 who are applying to university from NI are 32 percentage points more likely to only apply locally than those who are 18 years old.

We also control for the year that the applicant applied to account for trends over time. The likelihood of only applying at home is fairly consistent over time with a few exceptions. The likelihood of only applying within NI is lower in 2011 than it was in 2007. Yet in 2012 and the few years prior, the likelihood of applying locally increases. It is possible there are a range of factors at play. It could be that the Great Financial Crash and subsequent austerity reduced people's appetite for risk and staying at home was more comfortable. Secondly, and somewhat relatedly, 2012 marks the divergence in fees between NI and England/Wales. An increase in the likelihood of staying at home, although not by a great magnitude, may reflect this change in the cost of student fees. In 2021, students were a lot less likely to only apply locally than was the case previously. This may be due to concerns around competition as a result of COVID-19 grade inflation or overall higher levels of uncertainty.

Looking now at other regions, NI, Wales and English regions appear to be relatively similar. Scotland has much flatter relationships than other regions, which reflects its different HE system. One difference is that NI is the only place where females are less likely to only apply locally; everywhere else there is either no difference or females are more likely to apply locally. London and the West Midlands have very different results for ethnicity than all other places, with ethnic minorities in

these regions more likely than their white peers to only apply locally. But again, this may go back to the point about cosmopolitan locations and finding student populations where you fit in. The results for socio-economic status are also fairly consistent across the UK (with the exception of Scotland). That socio-economic patterns in UCAS applicants don't differ considerably in NI suggests that the argument that the MaSN disproportionately impacts those from poorer socio-economic backgrounds and pushes them out of HE due to increased competition may not be accurate. In fact, it suggests that those from more affluent backgrounds apply elsewhere in greater numbers, which would then reduce competition under the MaSN for those from less economically advantaged backgrounds. This was historically found by Osborne (1999). Figure 4.6 displays the socio-economic mix of UCAS applicants. NI has a more socioeconomically mixed profile of HE applicants than many other regions. And especially relative to the North East and North West of England, which are often described as comparable to NI, Osborne (1999) argued that as middle-class young people, especially middle-class Protestants, were able to access better opportunities in GB, as they did so it created space for working-class young people locally. This is pertinent as in stakeholder engagement with both schools and HEIs it was felt that the MaSN particularly squeezed out those from less affluent backgrounds.

Figure 4.6 Socio-economic background of UCAS applicants by region, 2020 application cycle



The results as regards disability are also consistent across regions (again, except Scotland). Those with autism in NI are 10 percentage points more likely to only apply locally than their peers with no disability. The comparable figure is 12, 6 and 12 percentage points for the North East, North West and Wales respectively.

The results for school type differ somewhat but this is more likely to be reflective of the different school systems in NI and England than any difference in HE decision making. For most English regions, those who attend academies, grammar schools and independent schools are much less likely to only apply locally, similar to NI. This again lines up with perceptions about prestige or ability to afford relocation as well as higher living costs.

Our multivariate regression analysis is limited by data availability as has been discussed. As mentioned, religion may play an important role in NI, and perhaps elsewhere, due to cultural differences for which religion stands as proxy, but the data is not available in UCAS. School types differ in NI as well. The quantitative analysis also does not allow us to account for social norms, peer networks, personal preferences, etc., which is why we supplement with qualitative data collection to paint a more nuanced picture. However, despite these limitations, which are standard in such regression analysis, we believe our results provide important insight into patterns of mobility across the UK.

Table 4.8 Probit regressions of who applies to institutions only within their home domicile, UK regions, 2007–2020

	NI		East Midlands		East of England		London		North East		North West		South East		South West		Wales		West Midlands		Yorkshire	
Female	-0.04	***	0.03	***	0.05	***	0.05	***	<0.01		0.04	***	0.01	***	0.02	***	0.01	***	0.05	***	0.03	***
Ethnicity (Ref: White)																						
Asian	-0.17	***	0.07	***	-0.04	***	0.18	***	<0.01		-0.01	***	-0.09	***	-0.10	***	-0.07	***	0.16	***	0.12	***
Black	-0.25	***	-0.02	***	-0.11	***	0.05	***	-0.19	***	-0.10	***	-0.17	***	-0.14	***	-0.11	***	0.06	***	-0.09	***
Mixed	-0.17	***	-0.01	***	-0.05	***	0.06	***	-0.08	***	-0.05	***	-0.07	***	-0.07	***	-0.10	***	0.03	***	-0.04	***
Other	-0.22	***	0.04	***	-0.04	***	0.17	***	-0.07	***	-0.01	***	-0.05	***	-0.07	***	-0.06	***	0.11	***	-0.01	
Socioeconomic Status (Ref: Lower supervisory and technical occupations)																						
Higher managerial, admin and professional occupations	-0.12	***	-0.10	***	-0.09	***	-0.09	***	-0.12	***	-0.13	***	-0.09	***	-0.10	***	-0.14	***	-0.14	***	-0.13	***
Lower managerial, administrative and professional occupations	-0.06	***	-0.07	***	-0.06	***	-0.05	***	-0.06	***	-0.06	***	-0.06	***	-0.06	***	-0.06	***	-0.08	***	-0.07	***
Intermediate occupations	-0.04	***	-0.03	***	-0.03	***	-0.03	***	-0.01	***	-0.01	***	-0.04	***	-0.04	***	-0.01	***	-0.02	***	-0.03	***
Small employers and own account workers	-0.01		-0.02	***	-0.01	***	0.05	***	-0.01		0.01	***	-0.01	***	-0.01	***	-0.02	***	0.01	***	<0.01	
Semi-routine occupations	-0.02	***	<0.01		0.01	***	0.02	***	0.03	***	0.03	***	<0.01		<0.01		0.02	***	0.03	***	0.01	***
Routine occupations	-0.01	***	0.02	***	0.01	***	0.06	***	0.03	***	0.04	***	0.01	**	0.02	***	0.04	***	0.04	***	0.03	***
Never worked & long-term unemployed	-0.05	***	-0.03	***	<0.01		0.04	***	0.01	***	0.01	***	-0.03	***	-0.02	***	0.02	***	0.02	***	0.01	***
Disability (Ref: No Disability)																						

	NI		East Midlands		East of England		London		North East		North West		South East		South West		Wales		West Midlands		Yorkshire	
Autistic Disorder	0.10	***	0.14	***	0.14	***	0.10	***	0.12	***	0.06	***	0.12	***	0.10	***	0.12	***	0.12	***	0.12	***
Blind/partial sight	0.04	*	0.02		0.04	***	0.02	*	0.03		0.05	***	0.04	***	0.03		-0.03		0.07	***	0.08	***
Deaf/partial hearing	0.03		0.03	**	0.03	**	0.02	**	0.01		0.01		0.03	***	0.01		0.04	***	0.02	*	0.03	**
Learning diff	-0.06	***	-0.01	***	-0.01	***	-0.03	***	-0.04	***	-0.02	***	-0.01	***	<0.01		-0.03	***	-0.04	***	-0.03	***
Long-term illness	0.02	**	0.02	***	0.03	***	0.02	***	0.01		0.02	***	0.02	***	0.03	***	0.03	***	0.03	***	0.02	***
Mental health condition	-0.03	***	0.02	***	0.02	***	<0.01		-0.02	***	-0.02	***	0.04	***	0.02	***	-0.02	***	-0.02	***	-0.01	
Multiple disabilities	0.05	***	0.04	***	0.05	***	<0.01		0.03	**	0.01		0.06	***	0.02	**	<0.01		0.02	**	0.01	
Other	0.01		0.02	***	0.05	***	0.01		0.03	***	0.03	***	0.03	***	0.04	***	0.05	***	0.02	***	0.02	***
Unseen	0.03		0.06	***	0.05	***	0.01		0.04		0.02		0.04	***	0.01		-0.03		0.04	**	-0.01	
Wheelchair/mobility	0.08	***	0.05	***	0.08	***	0.04	***	0.07	***	0.04	***	0.10	***	0.09	***	0.05	***	0.06	***	0.07	***
School type (Ref: State)																						
Academy	-0.07	***	<0.01	*	-0.05	***	-0.08	***	<0.01		-0.12	***	-0.05	***	-0.06	***	-0.18	***	-0.07	***	0.05	***
FE	-0.08	***	0.10	***	0.15	***	0.09	***	0.17	***	0.08	***	0.06	***	0.06	***	0.07	***	0.13	***	0.12	***
Grammar	-0.11	***	-0.07	***	-0.10	***	-0.15	***	-0.20	***	-0.17	***	-0.07	***	-0.07	***	-0.24	***	-0.14	***	-0.16	***
Independent	-0.15	***	-0.19	***	-0.16	***	-0.19	***	-0.24	***	-0.32	***	-0.17	***	-0.19	***	-0.28	***	-0.28	***	-0.21	***
Other	-0.10	***	0.10	***	0.13	***	0.14	***	0.15	***	0.08	***	0.05	***	0.08	***	0.13	***	0.11	***	0.16	***
6th form	-0.01		0.05	***	0.04	***	0.06	***	0.01		0.01	***	0.03	***	-0.01	***	0.04	***	-0.01	***	0.07	***
N	271,762		485,814		651,037		1,326,112		275,809		873,079		646,023		1,009,621		580,832		337,644		677,733	
Pseudo R2	0.03		0.06		0.13		0.13		0.10		0.09		0.11		0.07		0.08		0.11		0.09	

Notes: Marginal effects are displayed. *** $p<0.01$, ** $p<0.05$, * $p<0.1$. <0.01 denotes marginal effects which are not detectable to two decimal places.

Disabilities are self-reported by respondents and as such may be subjective and person-dependent. Year and age group are also controlled for but not presented here in the interests of brevity.

We then run the same specification but this time the outcome is only applying to universities outside the home domicile – ‘determined leavers’. While in some ways this is the antithesis of the previous specification, there is also the option of applying to a mix of regions. For example, those with learning difficulties in NI are less likely to only apply to NI universities but this could be that they apply to a mix or only apply away. In Table 4.9 when the results are displayed from this specification we can see that those with learning difficulties are more likely than those with no disability to only apply away. This suggests that those with learning difficulties are more likely to be determined leavers than their peers, as opposed to simply taking a risk-averse option of applying across regions, home and away. It could be that this is because NI does not have a low-tariff university option and this is something which is discussed later in our stakeholder engagement. It may also be due to an element of selection bias, as those with learning difficulties who apply to university may differ considerably from those with learning difficulties who do not go through the application process. In terms of this determined leavers cohort, one other variable stands out. When we look at the role time plays there isn’t much difference between 2007 and 2011. From 2012 and up until 2021 (COVID-19), students from NI were less likely to apply only to institutions in GB than had been the case prior to 2012. This shift aligns with the increase in fees in England and Wales which occurred in 2012. That we didn’t see this noticeable change in the determined stayers in Table 4.8 suggests that post-2012, students from NI are more inclined to apply to a mix of institutions across regions after the change in fees. Although this does show a relationship at the same time as the fee change, it does not prove causality.

Table 4.9 Probit regressions of who applies to institutions only outside of their home domicile, UK regions, 2007–2020

	NI		East Midlands		East of England		London		North East		North West		South East		South West		Wales		West Midlands		Y'rshire	
Female	0.00		-0.02	***	-0.05	***	-0.04	***	-0.01	***	-0.02	***	-0.01	***	-0.01	***	-0.01	***	-0.03	***	-0.01	***
Ethnicity (Ref: White)																						
Asian	0.07	***	-0.10	***	-0.02	***	-0.18	***	-0.02	***	-0.03	***	0.05	***	0.04	***	0.00		-0.16	***	-0.08	***
Black	0.13	***	-0.08	***	0.02	***	-0.08	***	0.06	***	0.02	***	0.10	***	0.05	***	0.03	***	-0.10	***	0.02	***
Mixed	0.13	***	0.00		0.04	***	-0.07	***	0.06	***	0.02	***	0.05	***	0.06	***	0.08	***	-0.03	***	0.02	***
Other	0.14	***	-0.05	***	0.02	***	-0.14	***	0.01		-0.02	***	0.02	***	0.03	***	-0.01		-0.10	***	-0.02	***
SES (Ref: Lower supervisory & technical occupations)																						
Higher managerial, admin & professional occupations	0.08	***	0.11	***	0.12	***	0.09	***	0.10	***	0.09	***	0.08	***	0.08	***	0.11	***	0.12	***	0.09	***
Lower managerial, administrative & professional occupations	0.04	***	0.08	***	0.08	***	0.06	***	0.06	***	0.04	***	0.05	***	0.05	***	0.05	***	0.08	***	0.05	***
Intermediate occupations	0.03	***	0.03	***	0.04	***	0.04	***	0.02	***	0.01	***	0.03	***	0.03	***	0.01	***	0.02	***	0.02	***
Small employers & own account workers	0.01	*	0.03	***	0.03	***	-0.02	***	0.02	***	0.00		0.02	***	0.01	***	0.03	***	0.01	***	0.01	***
Semi-routine occupations	0.02	***	0.00		-0.02	***	-0.01	***	-0.01	**	-0.01	***	0.00		0.01	**	-0.01	***	-0.01	***	0.00	
Routine occupations	0.02	***	-0.01	***	-0.02	***	-0.03	***	-0.01	***	-0.01	***	0.00		0.00		-0.02	***	-0.03	***	-0.02	***
Never worked & long-term unemployed	0.05	***	0.07	***	0.04	***	0.02	***	0.02	***	0.02	***	0.05	***	0.04	***	0.02	***	0.03	***	0.02	***
Disability (Ref: No disability)																						
Autistic Disorder	-0.04	***	-0.08	***	-0.14	***	-0.08	***	-0.04	***	-0.02	***	-0.07	***	-0.05	***	-0.05	***	-0.09	***	-0.05	***

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	NI		East Midlands		East of England		London		North East		North West		South East		South West		Wales		West Midlands		Y'rksire	
Blind/ partial sight	-0.03	*	0.00		-0.06	***	-0.02	**	0.00		-0.02	**	-0.03	***	0.01		0.05	***	-0.05	***	-0.04	***
Deaf/ partial hearing	-0.03	*	-0.02		-0.06	***	-0.04	***	0.01		0.00		-0.03	***	0.01		-0.02		-0.01		-0.02	**
Learning diff	0.05	***	0.01	***	0.03	***	0.02	***	0.04	***	0.02	***	0.01	***	0.00		0.02	***	0.03	***	0.03	***
Long-term illness	-0.01	**	-0.02	***	-0.03	***	-0.03	***	0.01		-0.01	***	-0.03	***	-0.02	***	-0.01		-0.03	***	-0.01	**
Mental health	0.03	***	0.01	**	-0.02	***	0.00		0.02	***	0.02	***	-0.03	***	0.00		0.03	***	0.02	***	0.02	***
Multiple disabilities	-0.01		-0.02	***	-0.05	***	-0.01		0.03	***	0.00		-0.03	***	0.00		0.01		-0.02	***	0.01	
Other	-0.01		-0.01	**	-0.05	***	-0.01	*	0.00		-0.01	***	-0.03	***	-0.01	**	-0.03	***	-0.01	***	0.00	
Unseen	0.00		-0.07	***	-0.06	***	-0.02	*	-0.01		0.00		-0.02		0.01		0.03	***	-0.02		-0.01	
Wheelchair /mobility	-0.02	*	-0.03	***	-0.08	***	-0.02	***	-0.03	***	0.00		-0.05	***	-0.04	***	0.01		-0.06	***	-0.02	*
School type (Ref: State)																						
Academy	0.02		-0.01	***	0.06	***	0.04	***	-0.01	***	0.07	***	0.04	***	0.03	***	0.17	***	0.05	***	-0.03	***
FE	0.05	***	-0.07	***	-0.15	***	-0.08	***	-0.08	***	-0.04	***	-0.02	***	-0.04	***	-0.03	***	-0.08	***	-0.06	***
Grammar	0.04	***	0.02	***	0.14	***	0.08	***	0.19	***	0.08	***	0.08	***	0.05	***	0.23	***	0.09	***	0.10	***
Independent	0.15	***	0.23	***	0.26	***	0.12	***	0.16	***	0.26	***	0.20	***	0.13	***	0.26	***	0.27	***	0.17	***
Other	0.15	***	0.01	***	-0.01	***	-0.03	***	0.00		0.03	***	0.08	***	0.06	***	0.02	***	0.01	***	-0.01	***
6th form	0.03	**	-0.02	***	-0.04	***	-0.05	***	-0.02	***	-0.02	***	-0.02	***	0.01	***	-0.01	***	0.01	***	-0.04	***
N	271,672		485,814		651,037		1,326,112		275,809		873,079		646,023		1,009,621		580,832		337,644		677733	
Pseudo R2	0.04		0.04		0.07		0.13		0.06		0.07		0.03		0.02		0.05		0.09		0.05	

Notes: Marginal effects are displayed. *** $p<0.01$, ** $p<0.05$, * $p<0.1$. <0.01 denotes marginal effects which are not detectable to two decimal places. Year and age group are also controlled for but not presented here in the interests of brevity.

Table 4.10 presents the results of the specification when the outcome variable is those who apply to a mix of regions.

Turning to those who apply both within their home region as well as outside, those who perhaps are unsure or are hedging their bets. NI sees a much larger gender differential than all other regions. Females in NI are 6 percentage points more likely to apply to a mix of regions for HE; in all regions bar Yorkshire & the Humber the marginal effect varies between 0.01 and -0.01 (Yorkshire & the Humber is -0.02). This may be due to a variety of reasons with one potential factor being that women are more inclined to be risk averse and given the lack of HE options locally, they may hedge their bets. It may also be that females are more likely to study subjects such as nursing and teaching and as such their views on subject choice are more important than their views on location.

The marginal effects on the ethnicity indicator are similar to those seen elsewhere while the socioeconomic status findings differ in NI. In NI, students from lower socioeconomic backgrounds are more inclined to apply home and away than their peers from more affluent backgrounds. Again, this may back up that students are hedging their bets. The only other region where this holds true is the South East of England. Those with autistic disorder, multiple disabilities, and those who use a wheelchair as a result of mobility limitations are all less likely to apply home and away than those with no disability. Those in academies and grammar schools are more likely to apply home and away. However, these results are tentative due to the differing school system in NI.

Table 4.10 Probit regressions of who applies to a mix of institutions, UK regions, 2007–2020

	NI		East Midlands		East of England		London		North East		North West		South East		South West		Wales		West Midlands		Yorkshire	
Female	0.06	***	0.00	***	0.01	***	0.01	***	0.01	***	-0.01	***	0.00	***	0.01	***	0.00	***	0.01	***	-0.02	***
Ethnicity (Ref: White)																						
Asian	0.11	***	0.00	***	0.08	***	0.15	***	0.05	***	0.11	***	0.06	***	0.05	***	0.07	***	0.10	***	0.11	***
Black	0.18	***	0.00	***	0.16	***	0.13	***	0.21	***	0.19	***	0.15	***	0.10	***	0.14	***	0.16	***	0.15	***
Mixed	0.02	**	0.00	***	0.01	***	0.08	***	0.02	***	0.04	***	0.07	***	0.01	***	0.00		0.00		0.03	***
Other	0.07	***	0.01	***	0.03	***	0.13	***	0.09	***	0.09	***	0.09	***	0.05	***	0.05	***	0.12	***	0.08	***
SES (Ref: Lower supervisory and technical occupations)																						
Higher managerial, admin and professional occupations	0.04	***	0.00	***	-0.08	***	-0.05	***	-0.03	***	0.00		0.07	***	-0.03	***	-0.01		0.00		-0.05	***
Lower managerial, administrative and professional occupations	0.02	***	0.00	***	-0.06	***	-0.05	***	-0.02	***	0.00		0.03	***	-0.02	***	-0.01	*	0.00		-0.03	***
Intermediate occupations	0.02	***	0.00	***	-0.03	***	-0.02	***	-0.02	***	-0.01	***	0.01	***	0.00		0.00		-0.01		-0.01	***
Small employers and own account workers	0.00		0.00	***	-0.02	***	-0.03	***	-0.03	***	-0.02	***	0.02	***	-0.02	***	0.00		-0.02	***	-0.04	***
Semi-routine occupations	0.00		0.00	***	0.00		-0.03	***	-0.04	***	-0.03	***	0.01	***	-0.01	***	-0.02	***	-0.03	***	-0.02	***
Routine occupations	0.00		0.00	*	0.00		-0.04	***	-0.04	***	-0.04	***	0.01	**	-0.03	***	-0.03	***	-0.03	***	-0.02	***
Never worked and long-term unemployed	0.00		0.00	***	-0.08	***	-0.12	***	-0.09	***	-0.09	***	0.02	***	-0.08	***	-0.06	***	-0.08	***	-0.10	***
Disability (Ref: No Disability)																						
Autistic Disorder	-0.12	***	0.01	***	0.03	***	0.02	***	-0.13	***	-0.10	***	-0.01	*	-0.05	***	-0.09	***	-0.08	***	-0.01	
Blind/partial sight	-0.02		0.02	*	0.02		-0.01		-0.05	*	-0.04	***	0.00		0.01		-0.06	***	-0.04		-0.02	
Deaf/partial hearing	-0.02		0.02		0.03	**	0.02	*	-0.05	**	-0.02	**	-0.01		0.01		-0.04	***	-0.04	**	-0.02	*
Learning diff	0.00		0.00	***	-0.01	***	0.00		-0.01		0.00		0.01	***	0.00	*	0.00		0.01		-0.01	**
LT illness	0.00		0.01	**	0.03	***	0.02	***	-0.01		-0.01		-0.01	**	0.01	*	0.00		-0.02	*	0.00	

Mental health	-0.01		0.01	***	0.00		0.00		-0.02	**	0.00		0.01	***	-0.01	***	-0.03	***	-0.03	***	0.00	
Multiple disabilities	-0.05	***	0.01	***	0.02	**	0.00		-0.07	***	-0.04	***	0.00		-0.02	**	-0.03	***	-0.04	***	0.01	
Other	-0.02	*	0.01	***	0.01	*	-0.01		-0.02	**	-0.03	***	0.00		0.00		-0.03	***	-0.02	**	-0.01	
Unseen	-0.02		0.02		0.01		0.00		-0.01		0.00		-0.02	**	-0.02		-0.05	**	-0.05	*	-0.03	*
Wheelchair/mobility	-0.04	*	0.02	**	0.00		-0.03	***	-0.05	**	-0.08	***	-0.02	**	-0.05	***	-0.06	***	-0.08	***	0.01	
School type (Ref: State)																						
Academy	0.07	***	0.00	***	-0.04	***	0.03	***	0.01	**	0.02	***	0.09	***	-0.02	***	0.01	***	-0.06	***	-0.01	***
FE	0.02	***	0.00	**	0.04	***	0.04	***	-0.11	***	-0.03	***	-0.01	***	-0.05	***	-0.01	***	-0.05	***	-0.04	***
Grammar	0.08	***	0.01	***	-0.11	***	0.05	***	-0.15	**	0.07	***	0.24	***	-0.05	***	0.00		-0.23	***	0.02	***
Independent	-0.03	**	0.00	***	-0.19	***	-0.03	***	-0.08	***	-0.10	***	0.29	***	-0.15	***	-0.04	***	-0.13	***	-0.15	***
Other	-0.13	***	0.00	***	-0.17	***	-0.18	***	-0.25	***	-0.23	***	-0.01	***	-0.21	***	-0.22	***	-0.25	***	-0.20	***
6th form	0.01		0.00	***	0.02	***	0.00	***	0.03	***	0.05	***	0.11	***	0.00	***	0.01	***	-0.03	***	-0.01	***
N	271,672		485,814		651,037		1,326,112		275,809		873,079		646,023		1,009,621		580,832		337,644		677,733	
Pseudo R2	0.06		0.06		0.04		0.06		0.12		0.13		0.12		0.06		0.09		0.10		0.07	

Notes: Marginal effects are displayed. *** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$. <0.01 denotes marginal effects which are not detectable to two decimal places. Year and age group are also controlled for but not presented here in the interests of brevity.

We carry out an additional specification which controls for subjects applied for, with the results displayed in Table 4.11. Not surprisingly, those who only apply for courses that are known to be unavailable in NI (e.g. veterinary science) and courses that are often oversubscribed in NI (e.g. medicine and teaching¹⁵) are more likely to be determined leavers or to apply to institutions home and away, perhaps hedging their bets of being accepted. The overall representation of medicine, allied medicine courses and teaching among those who are applying outside of NI may also explain why females from NI are more likely to apply outside the region. This indicates that subject choice is a more important factor in the decision making process than the location for their studies is or many of the other factors which have been cited in the media and other places. For competitive courses, e.g. medicine, students across the UK are more likely to apply only outside their home domicile than are those applying for a mix of subjects, which suggests that this competition for places and decision making based on that are not unique to NI. Again, this is somewhat a departure from previous patterns, where there was no obvious difference in the subject choices of those leaving and of those staying (Osborne et al., 1984).

¹⁵ It is worth noting that these courses are over-subscribed in many places.

Table 4.11 Probit regression of UCAS applicants based on where they apply, UK versus NI

Subject Choice	Only Apply to Away				Only Apply at Home				Apply Home & Away			
	NI		UK		NI		UK		NI		UK	
Group A Medicine & Dentistry	0.15	***	0.17	***	-0.34	***	-0.25	***	0.22	***	0.15	***
Group B Subjects allied to Medicine	0.01	***	-0.06	***	-0.13	***	0.02	***	0.13	***	0.05	***
Group C Biological Sciences	0.12	***	0.02	***	-0.23	***	0.03	***	0.11	***	-0.05	***
Group D Vet Sci, Ag & related	0.26	***	0.14	***	-0.04	***	0.05	***	-0.24	***	-0.18	***
Group F Physical Sciences	0.14	***	0.07	***	-0.17	***	-0.08	***	0.03	**	-0.03	***
Group G Mathematical Sciences	0.18	***	0.06	***	-0.29	***	-0.11	***	0.09	***	0.01	***
Group H Engineering	-0.01	***	0.03	***	-0.03	***	0.04	***	0.04	***	-0.07	***
Group I Computer Sciences	-0.03	***	-0.05	***	0.13	***	0.18	***	-0.10	***	-0.12	***
Group J Technologies	0.05	**	0.08	***	0.24	***	0.28	***	-0.36	***	-0.38	***
Group K Architecture, Build & Plan	-0.03	***	0.02	***	-0.03	***	0.05	***	0.06	***	-0.07	***
Group L Social Studies	-0.04	***	0.02	***	0.08	***	0.07	***	-0.04	***	-0.09	***
Group M Law	0.06	***	-0.01	***	-0.17	***	0.01	***	0.11	***	-0.01	***
Group N Business & Admin studies	0.05	***	0.02	***	-0.06	***	0.07	***	0.01	**	-0.09	***
Group P Mass Comms & Documentation	0.21	***	0.05	***	-0.10	***	0.10	***	-0.11	***	-0.14	***
Group Q Linguistics, Classics & Related	0.08	***	0.09	***	-0.06	***	-0.06	***	-0.02		-0.06	***
Group R European Langs, Lit & Related	0.09	***	0.14	***	-0.15	***	-0.09	***	0.05	**	-0.10	***
Group T Non-European Langs, Lit & Related	0.86	***	0.25	***	omitted		-0.14	***	-0.44	***	-0.14	***
Group V Hist & Philosophical Studies	0.08	***	0.10	***	-0.13	***	-0.09	***	0.05	***	-0.05	***
Group W Creative Arts & Design	0.14	***	0.09	***	-0.14	***	0.00	***	-0.01	**	-0.08	***
Group X Education	0.33	***	-0.07	***	-0.28	***	0.18	***	-0.03	***	-0.12	***
Y Combined Arts	0.20	***	0.12	***	-0.20	***	0.07	***	-0.01		-0.19	***
Y Combined Sciences	0.04	***	0.07	***	0.22	***	0.29	***	-0.33	***	-0.39	***
Y Combined Social Sciences	0.20	***	0.04	***	0.09	*	0.26	***	-0.40	***	-0.31	***

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	Only Apply to Away				Only Apply at Home				Apply Home & Away			
Y Sciences Combined with Social Scien.	0.45	***	0.05	***	-0.14	***	0.31	***	-0.45	***	-0.37	***
Y Social Sciences Combined with Arts	0.32	***	0.10	***	-0.09	***	0.15	***	-0.27	***	-0.26	***
Z General, Other Combined & Unknown	0.15	***	0.08	***	0.10	**	0.24	***	-0.38	***	-0.33	***
Mixed	Ref											
N	271672		7721804		271672		7721804		271672		7721804	
	0.07		0.07		0.08		0.18		0.07		0.09	

Notes: Marginal effects are displayed. *** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$. All other controls are included as per previous specification in Table 4.8.

We recognised when looking at enrolment flows that NI does not differ that much in terms of ‘brain drain’ from other parts of the UK (with the exception of Scotland) but that it does differ in terms of the reciprocal ‘brain gain’. We ran a regression using the UCAS data to gain a better understanding of the small number of students who do apply to NI from GB. As in previous models, we control for gender, socio-economic background, ethnicity, school type attended, region of domicile and year. The marginal effects of these probit models are presented in Table 4.12. Across the board, the marginal effects are very small even when they are precisely estimated. A further specification also included subject choice (Table 4.13) and again there were no clear pattern of what might be driving this decision.

Table 4.12 Probit regression of those from GB who apply to NI

	Marginal effects	
Female	<0.001	
Ethnicity (Ref: White)		
Asian	0.000	***
Black	-0.001	***
Mixed	0.000	
Other	0.000	
SES (Ref: Lower supervisory and technical occupations)		
Higher managerial, admin and professional occupations	0.002	***
Lower managerial, administrative and professional occupations	0.001	***
Intermediate occupations	0.001	***
Small employers and own account workers	<0.001	
Semi-routine occupations	<0.001	
Routine occupations	<0.001	
Never worked and long-term unemployed	0.001	***
Disability (Ref: No Disability)		
Autistic Disorder	-0.001	***
Blind/partial sight	-0.001	
Deaf/partial hearing	-0.001	
Learning diff	0.001	***
LT illness	<0.001	
Mental health	<0.001	***
Multiple disabilities	<0.001	
Other	<0.001	
Unseen	<0.001	
Wheelchair/mobility	<0.001	
School type (Ref: State)		
Academy	0.001	***
FE	-0.002	***
Grammar	0.005	***
Independent	0.003	***
Other	-0.002	***
6th form	-0.001	***
Home Region (Ref: North East)		
East Midlands	-0.002	***
East of Eng	-0.002	***
London	-0.002	***
North West	<0.001	***
Scotland	-0.002	***
South East	-0.002	***
South West	-0.001	***
Wales	-0.002	***
West Midlands	-0.002	***
Yorkshire & The Humber	-0.002	***
N	7450132	

Pseudo R2

0.029

*Notes: Marginal effects are displayed. *** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$. < 0.001 denotes marginal effects which are not detectable to three decimal places. We utilise three decimal places in this specification because, although the estimated effects are indeed small in magnitude, they exhibit substantial statistical significance. Reporting results to three decimal places provides the necessary precision to reflect these statistically meaningful differences without overstating their substantive size. Year and age group are also controlled for but not presented here in the interests of brevity.*

Interestingly, GB students who are only applying to study medicine are more likely to apply to NI than those doing a mix of subjects. There are no other noteworthy results. This is important as those young people in NI who are applying for medicine are more likely to leave NI, which presents an important contrast. It is possible that QUB as a Russell Group university that is medium tariff could provide an option for GB students who are keen to study medicine. They apply as a strategy to spread risk for their applications in what is a competitive field.

Table 4.13 Probit regression of those applying to NI from GB, subject choice

Subject Group (Ref: Mix of subjects)	Marginal effect	
Group A Medicine & Dentistry	0.01	***
Group B Subjects allied to Medicine	<0.01	***
Group C Biological Sciences	<0.01	***
Group D Vet Sci, Ag & related	<0.01	***
Group F Physical Sciences	<0.01	***
Group G Mathematical Sciences	<0.01	***
Group H Engineering	<0.01	***
Group I Computer Sciences	<0.01	***
Group J Technologies	<0.01	***
Group K Architecture, Build & Plan	<0.01	***
Group L Social Studies	<0.01	***
Group M Law	<0.01	***
Group N Business & Admin studies	<0.01	***
Group P Mass Comms and Documentation	<0.01	***
Group Q Linguistics, Classics & related	<0.01	***
Group R European Langs, Lit & related	<0.01	
Group T Non-European Langs, Lit and r..	<0.01	***
Group V Hist & Philosophical studies	<0.01	***
Group W Creative Arts & Design	<0.01	***
Group X Education	<0.01	***
Y Combined arts	<0.01	***
Y Combined sciences	<0.01	***
Y Combined social sciences	<0.01	***
Y Sciences combined with social scien.	<0.01	***
Y Social sciences combined with arts	<0.01	***
Z General, other combined & unknown	<0.01	***

Notes: Marginal effects are displayed. *** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$. <0.01 denotes marginal effects which are not detectable to two decimal places. All other controls are included as per previous specification.

4. 7 Overeducation and demand for graduates

While much of the MaSN debate focuses on the supply of university places, the capacity of the labour market to absorb graduates is also a relevant consideration. Recent UK-wide research shows a persistent and growing problem of graduate overeducation and skills mismatch, with around one-third of UK graduates working in roles that require less than a degree and the UK recording the highest overqualification rate in the OECD (2024). Vecchi et al. (2025) find that the expansion of higher education since the 1980s has outpaced the creation of suitable graduate-level jobs and that not all degrees translate into the mix of cognitive, interpersonal and job-specific skills employers require. What is even more worrisome is that overqualification is not a short-lived early career issue. Many graduates remain mismatched for some time after completing university, which can lead to wage penalties, weak progression opportunities, and lower job satisfaction (McGuinness et al., 2025). This literature also highlights underlying structural issues such as uneven geographical distribution of high-skilled work and the concentration of graduate type jobs in a limited number of UK city regions.

This UK-level evidence provides important context for understanding brain drain in NI because it underscores the broader labour market pressures graduates face. Pressures that can be even more pronounced in smaller regional economies. Northern Ireland's labour market is characterised by lower productivity (Donaldson et al., 2025), high economic inactivity (Devlin et al., 2023), more low paid work (NISRA, 2025b) and a business landscape dominated by small firms (NISRA, 2025c), all of which constrain the overall availability of higher-skilled and graduate-level opportunities.

The 2023 Annual Population Survey provides stark and consistent evidence that Northern Ireland's labour market presents a challenging environment for graduates (ONS, 2024). Across all indicators, Northern Ireland emerges as one of the most constrained regions in the UK in terms of graduate job opportunities, graduate utilisation and alignment between education and employment.

A central finding is that only 37.9 per cent of all employees in Northern Ireland work in graduate roles, the lowest proportion of any UK nation or region. This reflects a labour market with a limited volume of high-skilled, knowledge-intensive work, setting Northern Ireland apart from regions such as London, the South East, and the East of England, where graduate roles make up a much larger share of employment.

Turning to qualification levels, 42.9 per cent of employees in Northern Ireland hold a degree. This is slightly below the UK average, but the key point is that Northern Ireland does not have an unusually large graduate population. Instead, the difficulty arises because the proportion of graduates in the workforce exceeds the proportion of graduate jobs in the economy. The challenge, therefore, is not an oversupply of graduates but an under-supply of graduate-level roles, meaning the labour market cannot absorb even the current stock of graduates, let alone those who might wish to stay in or return to Northern Ireland.

This imbalance is most visible when looking specifically at employed graduates. Only 63.2 per cent of graduates in Northern Ireland are working in graduate-level roles, while 36.4 per cent are in non-graduate jobs. Northern Ireland forms a low-matching cluster with Scotland and Wales at the bottom of the UK distribution, well behind the strongest regions where more than 70 per cent of graduates secure graduate-level work. This points to comparatively high levels of graduate underemployment or overeducation among those who remain in the region.

Crucially, this underemployment is not driven by non-graduates 'taking' graduate jobs. Only 17.1 per cent of non-graduates in Northern Ireland work in graduate-level roles, the lowest share in the UK. This means the issue is not credential inflation, a phenomenon where employers raise qualification requirements for jobs that have not changed in complexity. If credential inflation were occurring, we would expect to see more non-graduates occupying graduate roles or employers demanding higher credentials than necessary. The APS data show the opposite: the problem is not qualification drift but the structural shortage of graduate-level employment relative to the number of graduates.

Taken together, the four APS tables paint a coherent picture. Northern Ireland has fewer graduate jobs, a below average share of graduates, and the lowest rate of matching graduates to appropriate employment among the UK nations. For many young people with degrees, the local labour market does not offer sufficient opportunities to use their skills. Outward migration becomes a rational response, not merely a lifestyle choice. The APS 2023 data therefore offer robust quantitative evidence that structural labour market constraints are a strong consideration in any discussion around student retention in Northern Ireland.

Scotland's APS figures show a distinctive pattern: it has one of the most highly educated workforces in the UK, with 51.9 per cent of employees holding a degree, and a comparatively high share of graduate jobs (43.1 per cent of roles). Yet despite this stronger graduate pipeline and larger pool of graduate-level employment, Scotland still sees only 63 per cent of its graduates working in graduate roles, leaving 36.9 per cent in non-graduate jobs. This means Scotland's ability to match graduates to appropriate work is almost identical to Northern Ireland's: 63.2 per cent of NI graduates are in graduate roles, with 36.4 per cent underemployed, even though Northern Ireland has a far smaller graduate workforce (42.9 per cent) and the lowest proportion of graduate jobs (37.9 per cent) in the UK. Around one in three graduates in both regions ends up in a non-graduate job, despite their very different higher-education systems and student-retention patterns. Scotland's experience shows that even a much stronger HE system doesn't fix underemployment if the labour market doesn't expand graduate-demand sectors.

The APS data suggests that Northern Ireland's graduate underemployment is caused by the scarcity of graduate-level jobs, not by an oversupply of graduates. The NI labour market is weaker than the UK average and there is a high reliance on service sector jobs as well as a large number of jobs in the public sector for both graduates and non-graduates (NISRA, 2025d). The MaSN cap limits the number of locally trained graduates, but the labour market would still be unable to absorb even the current number without structural economic change. The decisive issue is not how many graduates NI produces, but how many graduate-level opportunities the economy creates.

It is also worth noting that despite this lack of opportunities, NI has the highest levels of graduate retention in the UK and by a substantial margin. For example, in Science, Technology, Engineering and Mathematics (STEM) subjects (the pattern holds for other subject areas) 90 per cent of graduates in NI remain in NI compared to 53 per cent in the UK on average (Kollydas, 2022). As was seen with student mobility NI performs well in retention but also has low levels of graduate attraction, i.e. graduates who studied in GB are not moving to NI for employment opportunities. The latter is likely reflective of the relatively weaker labour market while the former may suggest the importance of family connections, community and local motivations to stay in NI.

NI also has low graduate starting salaries. Median earnings are around 93 per cent of the UK average, while graduate entry salaries average £27,955.¹⁶ This pattern may indicate a relatively limited supply of graduate-level employment opportunities locally. Where graduate job creation is weaker than graduate output from universities, labour markets typically experience higher levels of overeducation as is the case in NI, with degree holders entering roles that do not formally require higher education. In such contexts, the wage premium associated with graduate employment may be relatively modest, which reduces the economic penalty associated with working outside graduate occupations. As a result, accepting non-graduate employment may be a more economically viable or acceptable outcome than in regions where the graduate wage premium is larger. Additional factors such as lower living costs, family ties and lower student debt (given lower student fees) could all play a part.

The NI Skills Barometer (UUEPC, 2025) on the other hand argues that between 2023 and 2033 the NI HE system will undersupply the labour market with graduates. However, it also forecasts an undersupply at all bar the lowest levels of educational attainment. This is more reflective of the stage of the NI economy, whereby growth must come from an expansion of the economically active population regardless of qualification level or from an increase in migration to NI. This is seen in many developed countries and is primarily driven by rapidly ageing

¹⁶ [Graduate salaries in the UK](#)

populations. The greatest imbalance for graduates is forecast by UUEPC to be in subjects allied to medicine, STEM and business and management. Taken together with our overeducation findings, this suggests that it is not across the board graduate expansion that is needed but expansion in line with the needs of the local labour market.

While overeducation suggests we do not need mass expansion of HE in NI, it does not mean we don't need more graduates in certain areas (and perhaps fewer in others). Better alignment is needed between the NI labour market, which is rapidly changing, and the output from our HEIs. Increasing pressures on healthcare services, the green transition, and the expansion of AI will all impact the labour market in years to come.

Chapter 5

Qualitative analysis

5.1 Student engagement

We conducted an online survey targeting HE students in NI, GB and RoI. While we were aware of the wealth of secondary data available and their propensity to shed light on the characteristics associated with staying or leaving, that data could not portray the nuances behind these decisions in the same way that primary data collection could. This follows on from the use of focus groups by Cormack et al. (1997) and surveys by Pivotal (2021)¹⁷ to understand these nuances. The survey contained 35 or 37 questions depending on routing, whereby those domiciled in NI for secondary education were also asked about school type and location. The survey was hosted on Microsoft Forms. A copy of the survey questions is presented in Appendix A.

The research team used a rolling, multi-channel recruitment strategy to disseminate the survey, with a recognition that reaching students for an online survey with no reward would be tricky. LinkedIn and Twitter/X were both used, with the survey shared by all researchers within the team to expand reach. However, from the responses it was clear that given overlap across networks we were reaching similar people, e.g. Business and Economics students at the universities in NI. A concentrated effort was then made to reach students elsewhere and personal networks in RoI and GB were used. Clubs and societies at GB universities were also used to reach out to students. Difficulties arose as some organisations were reluctant to share surveys with their members.

The survey garnered 300 complete responses but considering the prominence of our networks, the majority of students were either from RoI or NI, with a near equal split between the two. The composition of our sample allows us to understand some of the reasons why some students choose to stay in NI and why others opt to leave. We also have a small number of insights from those who chose to move to NI for university. While we recognise the findings are not representative of

¹⁷ N=316.

the entire student population they do shine a light on some of the nuances associated with young people's decision making for HE that primary data sources alone do not pick up. Many of the returned responses provide backing for anecdotal conversations on the topic of student mobility in NI. It also allows us to pick up the opinions of those students who are making the mobility decisions we are aiming to understand.

Respondents were asked which factors influenced their choice of regions to apply to for university. They were given a list of potential reasons and asked to select all that applied, with the option to also add other reasons as well. Keeping to a subsample of responses, comprising solely of those from NI who are currently studying at a university in NI (101 respondents), individuals' preference of staying close to home is the main driver, with this nearly twice as popular as the second rationale given (as shown in Figure 5.1). Other key reasons include not being able to afford to leave NI, and the attractiveness of both the quality of universities and the course availability in NI. It becomes clear that while cost acts as a significant barrier, this is less to do with HE fees, and more closely linked with living or 'transaction costs'. These include costs such as accommodation associated with living a further distance from the HEI as in the aforementioned literature. Students wanted to be able to maintain the part-time jobs they already had, take advantage of support being available from family, or in some cases, perceiving courses in NI as better value for money as they were in essence incurring a lower cost for the same qualification they could have received from an institution in GB. For example, the following are direct quotes from the open text box responses of individual participants:

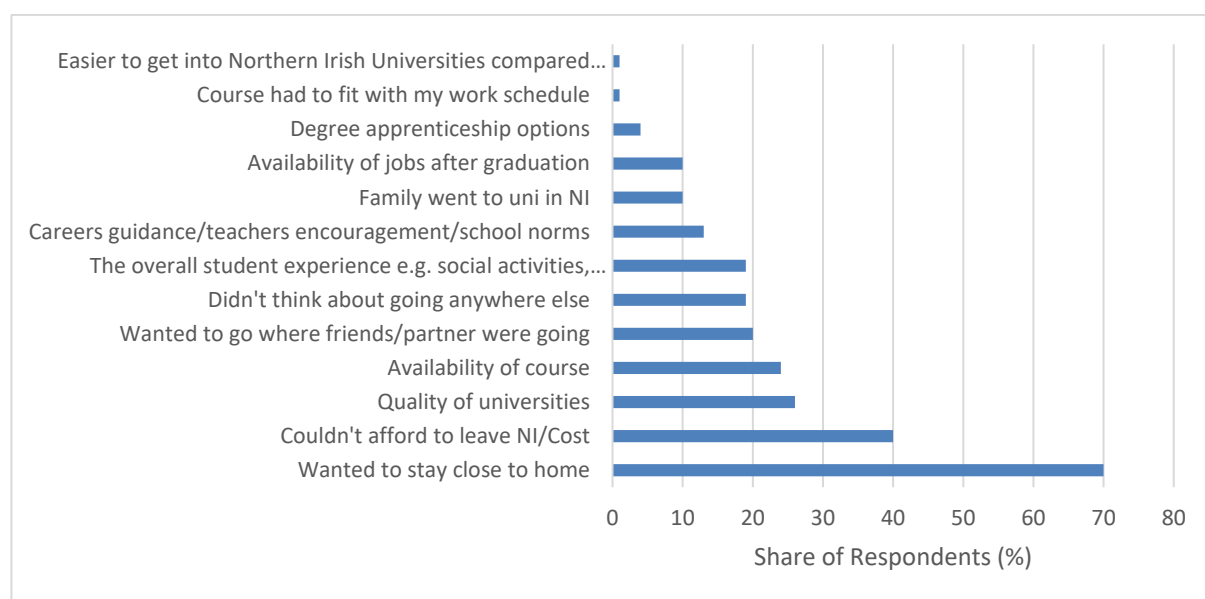
"Cost had a big role to play. I already have a part-time job here which helps finance my personal life. I wasn't ready to give that job up to look for a different one in another country."

"I stayed because my part time job is here, my family are here, and I physically couldn't afford to leave. I still can't. If I could have afforded it, I would have left."

“With the rising cost of living, if maintenance loans don’t start increasing, people will be priced out of university. They will either have to find employment right out of school or study locally to receive support from family members.”

“Primarily cost related. It just doesn’t make sense to pay almost £5,000 extra per year for a similar level of qualification.”

Figure 5.1 Why NI students choose to stay in NI



Note: As the sample size was 101 respondents, the share of respondents (%) and respondent counts can be viewed as the same.

Respondents were also asked open-ended questions about whether any factors influenced their choice of where to apply for university other than those stipulated by the researchers. One factor that came out in these responses was from students with disabilities or additional support needs. For those with self-declared autism, attention deficit hyperactive disorder (ADHD) or other health issues, there was a concern that leaving NI would mean losing out on the support they were currently receiving:

“Support for those with mental health issues. That was the most important aspect for me.”

“Costs were primary but secondary to that was access to health care relating to learning difficulties- IE ADHD. greater

risks to loosing access to medication and treatment if I left the health care network in NI (could not afford to go private in Scotland, England, or Dublin)”

“My family consistently encouraged me to look more at universities close to home, they wanted me close to home, and I had no real desire to apply to universities on the mainland/ROI. I also have autism, and thus this affected my judgement of how I would cope with possible/hypothetical difficulties so far away from home + familiar people.”

Some of the other open-ended reasons given related to extracurricular activities, such as Gaelic Athletic Association (GAA) training,¹⁸ comparative entry requirements, and better knowledge of NI universities compared to those in GB or ROI:

“Wanted to continue playing Gaelic Football at a high level which I couldn’t do if I moved away.”

“Money, also unsure about other unis, didn’t know other cities and didn’t have the flexibility and funds to fly out for open days”.

*“I would’ve considered studying in ROI but I didn’t even apply because universities of similar quality to QUB (e.g. UCD) have grades that in my opinion are far too high when using the CAO conversion system e.g. you might have to get A*A*A at A Level to go to UCD say for example to study economics whereas you only need ABB for QUB”*

“Requirement for Languages at GCSE to go to other places, Handiness of being able to go home at the weekend, other commitments i.e. a couple of jobs, playing sport for local club.”

¹⁸ While religion was not mentioned per se, given the large majority of GAA members in NI are Catholic there was evidence that the GAA played an important role in keeping young people in NI. We note this in light of the work by Osborne (2006), which finds religion to be an important factor in whether young people studied at home or away.

“It was a very stressful process of making the personal statement and thinking it wasn’t good enough for other unis other than ulster or queens so didn’t bother with them.”

Of those NI students who study in NI, 39 per cent had also applied for courses outside NI. Course availability (18), quality of universities (12) and connection to family or friends (9) were the main reasons given for this.

Then, for factors driving students away from NI, we restricted the survey sample to students who attended university elsewhere (21 respondents). We can look at both those who also applied for courses in NI (N=14), and those who did not apply to NI at all (N=7), the determined leavers. For those who did not apply to NI at all, the reasons centred largely around students being set on leaving NI, the quality of universities, and the overall student experience, such as social activities and nightlife. Many respondents noted they felt they had already experienced Belfast and wanted to experience a new city.

“Wanted to leave Belfast as had grown up there and wanted to experience a new city.”

“I wanted to live away from home to gain independence and experience some cultural differences to aid my development as a person.”

“After growing up in Belfast, I was ready to move on to something new and exciting, other Northern Ireland locations didn’t have this appeal. Social media may also have been an influence as I watched older students from my school move away for university and wanted to experience it for myself.”

“Wanted to get away, had felt I had grown out of Belfast and there is no opportunity there.”

“All but 1 of my friend group of around 12 girls went to England or Scotland for university. I would have felt left behind if I didn’t follow this trend.”

For those who applied to NI universities, but did not attend university there, they had also applied for universities in GB. There was a mix of some students having a preference for staying in NI for financial reasons or to be close to family, while others simply applied to NI due to course availability, to fill a spot on their UCAS application or as a safety net. Their reasons for ultimately leaving again come down to course availability, quality of universities, overall student experience, and the availability of jobs after graduation. Connection to home and ease of travel was also important for them.

“I was encouraged to go away for uni as it’s a short period of time which allows you to experience a different life outside your home town. It has allowed me to gain many valuable lessons with living alone and being independent.”

“NI only has two universities really, one being a Russell group uni. Not much choice if your course isn’t offered by both.”

“I chose Liverpool as it seemed like a decent university in a nice enough city. It is also a very easy city to fly home from when needed. There is a large number of students from NI in Liverpool, so it doesn’t feel so far from home as everywhere you walk there’s someone’s accent you recognise.”

“Course Availability. Universities in Great Britain (Particularly Wales) had better variety of courses that were better tailored to what I wanted to do.”

About a third of respondents were from RoI (N=92), so we can also gain some insight to the mobility choices of students from there. Only a small number (N=12) applied for courses in NI, with the main reason for doing so being able to stay close to home, both from the perspective of being close to family and cost savings of being close to home, with some also noting course availability and it offering a sense of security as UCAS offers came out before CAO offers. For the remainder of the RoI respondents who did not apply for NI courses (N=80), they all attended university in RoI. A range of reasons for not leaving RoI were given, with the main factors being the cost of moving away from home, no desire to move away from home, and a lack of knowledge or willingness to complete a UCAS application. Despite

being in two different jurisdictions and economies, a common theme from respondents across the island is the role cost plays in their decision of where to study, with this being a driving influence for many to stay in their home region.

All those respondents who were attending a university outside of their home region were also asked if they considered themselves determined leavers, reluctant leavers or neither/unsure, with definitions for each supplied. Seventy-one per cent classed themselves as determined leavers, with the majority of the rest falling into the neither/unsure category. There were a range of reasons people considered themselves to be determined leavers, and these mostly centred around wanting new experiences or independence. There was also evidence of peer networks playing a role, with some commenting that the experience of siblings or older friends who had gone away for university encouraged them to do the same.

“I knew that I wanted to study in England and ideally in London from early in high school, around 13/14 years old. I wanted the experience of living in a large cosmopolitan city and meeting people from different backgrounds.”

For those who classified themselves as reluctant leavers, their reasons for not wanting to leave were mainly that they did not want to move away from their family or friends. One reluctant leaver noted the course they wanted to do had only 20 places, so when they didn't get one, they had no choice but to go elsewhere.

For those who classified themselves as neither reluctant nor determined leavers, there were a mix of reasons for doing so. Some said they were unsure as they felt nervous about moving away even though they were choosing to do so. For others it was simply a case that they had applied to courses both in and out of their home region and so did not mind whether they stayed or left.

We also asked those completing the survey who were studying outside their home region if they planned to return to their home region within 5 years of graduation. The vast majority were still unsure, but of those who had made a decision, the preference was to return. While the numbers of students studying or domiciled elsewhere were limited in

the survey (N=72), the open-ended answers were nuanced and thus provided useful information. For example, one respondent was keen to return but it depended on opportunities post-education:

“The main factors would be availability of jobs and career options. NI is great, but albeit a small place with limited career options in my chosen career path (Environmental Science). NI will be my preferred area, but will definitely expand my job search to the rest of the UK and maybe even abroad.”

We also asked participants to leave contact details, if they were comfortable doing so, with two primary objectives: firstly, sense-checking findings where necessary and also conducting some more in-depth interviews.

There were seven in-depth interviews undertaken. Table 5.1 sets out the profile of the students recruited from the survey for these interviews.

Table 5.1 Profile of students who took part in in-depth interviews

Home region	University region
Northern Ireland	Northern Ireland
Northern Ireland	Scotland
Northern Ireland	Northern Ireland (for BSc), Wales (for MSc) and Republic of Ireland (for PhD)
Northern Ireland	England
England	Northern Ireland
Republic of Ireland	Republic of Ireland
Republic of Ireland	Northern Ireland

These in-depth interviews highlight how personal and multifaceted decision making is for students in terms of where they choose to attend university. The discussions allowed us to understand how students approached the process of applying for university, and one key factor which emerged was how decision making was very dependent on the information provided by the careers teacher in school. For all those who attended, or at least applied to, a university outside of their home region, the university or course information available from their careers teacher was limited. It was often a case of

students being shown university rankings and told to use that as their guide.

“I remember sitting down with my guidance counsellor and she had cut out of the Guardian Top 50 and that was it.”

“I know for friends and stuff who did look at applying to the UK, it was kind of, they were very much on their own in that respect.”

“I knew I was sort of trying to mainly apply the Russell Group universities. But you know, also looking at the rankings.”

Cost also consistently came up in the discussions, but playing different roles for different people. For some, cost and perceived value for money was the motivation for them to stay in their home region as they felt going away would be paying more money or incurring more debt to ultimately come away with the same degree. For those who were determined to leave their home region, they recognised that this would come at a higher cost so were either being influenced by the cost of living in the regions they applied to or by wanting to get what they perceived as a better quality degree to justify the cost of going away.

“So, it was very much like if I was going to go across because of the sheer expense of it, it was Russell Group and the Top 20.”

“Looking at the cost of living in Belfast compared to the rest of the UK is definitely a factor. It’s definitely more affordable than a lot of places where my friends went to uni. We’ll be talking about how much food is in their shops or how cheap my rent is compared to their student house.”

For those coming to NI, the lower cost of living compared to other regions was also noted as a selling point. It was also noted by an English student studying at Queen’s that the GB scholarship they offer was an extra incentive as it further reduced the cost burden. The English student at Queen’s also commented that an extra advantage offered by NI was the comparatively smaller size, meaning that a short journey takes you from a city to the countryside or coast, so there were

lots more options for things to do with your spare time compared to other big university cities such as London or Manchester.

For a student from NI attending university in Scotland, the reason for leaving was entry requirements. They wanted to study architecture, and to do this in NI required A-Level Art, a subject they didn't have. Had this barrier not been in place, they said they likely would not have left. However, despite the fact most of their friends stayed in NI, and they noted there was bigger financial pressure in going away, overall they were glad they had done it, and it was the right decision for them. They also commented on the similarities between NI and Scotland in terms of culture and humour, and the relative ease of travel between the two areas, which made the adjustment of moving away from home easier. They said they felt they may not have had the same experience in some parts of England.

“If I had been in England, I just think things are a bit different and the people are a bit different, so yeah, it would have felt a bit more alienating, I think.”

We also asked their intentions for when they finished their course. The student needs to complete a Master's in Architecture, and is deciding between doing this at their current university or coming back to NI. They noted that the friends they have made will be finishing university and heading off to work so the incentive to stay where they are may not be that strong.

The student from NI attending an English university was a determined leaver, noting they did not apply for any course in NI as they were set on leaving. This decision was influenced by personal and family matters, with a desire to move away from friends they felt they had 'outgrown' and the fact that their family could financially support the decision to move away from NI. Had this financial support not been there, their decision process about where to attend university may have been different.

One student we spoke to was from NI, had completed their undergraduate degree in NI before taking a career break to go to Wales for their Master's, and is now undertaking a PhD through a university in Rol. For them, motivations for where they studied were very much

driven by the course offering more than the location, especially as they had long periods of work in between their studies. The flexibility of the offering was key, and they noted they weren't always aware of the variety of flexible offerings that were available across courses and universities. They did note that one drawback of going to Wales compared to England or Scotland was the limited transport connection, and this made visiting home more difficult compared to what they may have experienced elsewhere.

“Swansea was really positive, but if I had a looked a bit more smartly at it, I would have realised how challenging it is to get back home. If you were in Liverpool, London, Scotland etc there's a lot more flights. However, for Wales it's challenging.”

For the students from Rol, something that both mentioned was the fact that the UCAS application was separate from the CAO application, and this was somewhat of a barrier. Some schools appear to have a good knowledge of the UCAS system and how it works, while others do not, meaning the guidance students get is also very school specific. This was strongly linked to proximity of the schools to the Border.¹⁹ The difference in timing of Leaving Cert results compared to A-Level results was also perceived to impact offers for places in the UK.

“We got our Leving [sic] Cert results in early September and the course that I had as my firm told me that they could only keep my place until the mid to end August and that if I'm at the grades, I could be offered a place for the year after.”

“Would I do anything differently now? I think I might have actually looked at the UK a bit more. But I think now it probably would have been a better second option for me than going to somewhere in Europe. Closer to home, much easier to probably fly home at the weekend or Belfast is not actually that far. But I just didn't know enough about it to really apply for that and to look at it.”

¹⁹ Better information and cross-border links in border areas is a common theme in areas of research regardless of topic (e.g. Smyth et al., 2022).

An interesting point which came out in the discussion with the two students from Rol was that both had considered European universities as much as they had considered UK universities, with information on these sometimes more readily available compared to information on applying to the UK.

“Italy was kind of my backup.”

“I actually wanted to go to university in Germany. But because I had studied there three years before I sat my leaving cert rather than two years, I would have had to sit a very expensive proficiency test during the leaving cert.”

“The guidance counsellor, she had a great knowledge of Ireland and what was here. And she had a good understanding of the Netherlands as well”

A final point noted by the student from Rol who was studying in NI was that courses in the UK were attractive to them as the typical course length was 3 years as opposed to the average 4 for a course in Rol. UK courses also offered a range of assessment types that were seen as better suited to different learning styles than a large exam focus.

“The three-year degree did appeal to me in terms of the actual structure of the year.”

“Having now studied at University, I think looking back I wish I’d done more research about what options were available to me in Ireland in terms of like learning styles that would have suited me. I think that’s something that I have personally really benefited from my degree is that I knew I didn’t test well coming out of school and I’ve never sat an exam at Queens. I don’t think I would have done well at Trinity to be honest. I think I would have crumbled under the pressure of exams.”

Some of the survey responses and follow-up discussions also tie in with findings in existing literature and trends shown by the UCAS data. Comments from some that they worried they would not get the grades for their preferred course in NI links in with Osborne (2006) and the discussion of those with modest A-Level grades being pushed to GB

institutions. As previously discussed, distance also is playing a myriad of roles. For some students, the cost associated with moving away from their home region means it is not a viable option, while others feel they have grown up in Belfast and therefore already had the student experience they would get at QUB or UU and therefore want to experience somewhere different, away from NI. Our analysis of UCAS data found students with autism were less likely to leave NI. This was echoed by some respondents who noted they were worried about leaving NI for university as they feared they would drop out of their current system of support. The UCAS data also showed higher rates of applications for universities outside of NI for students coming from grammar schools, with a hypothesis being that going away may be perceived as a more ‘successful’ option. Some of the survey respondents from grammar schools who applied for courses outside of NI note ‘school norms’ as one of the reasons for doing this, with one even noting ‘I felt it was expected or required of me to attend a prestigious university, and these are mostly in England’. Work by Donnelly and Gamsu (2018) was referenced in the literature section which discussed the role that perceptions of opportunities play in determining where students attend university. This was somewhat picked up in the survey as well. For many of the students who responded to the survey from outside NI who did not apply to NI universities (n=137), availability of jobs after graduation, school norms or quality of universities were often cited as reasons. This seems to somewhat contradict a point later raised in the stakeholder engagement section, that NI has no low-tariff university offering. It does appear that for some, there is a perception that NI doesn’t offer the same quality of opportunities that may be available elsewhere, even if this is not necessarily the case in practice.

Pivotal carried out a survey in 2021 of students who had left NI for study and their reasons. Poor community relations, political instability, broader choice and place availability, and graduate opportunities were the main reasons cited for leaving. While the sample of students in our survey from NI who left NI is comparatively smaller (N=21), we can still compare responses. Community relations or political instability are cited as reasons only by an extremely small number of respondents. The Pivotal survey was carried out in a period of frequent Stormont Executive collapse, which may have played a bigger role for students

making decisions then compared to the cohort in our survey. Course choice, place availability and potential job opportunities are also common reasons given by respondents to our survey.

As has been highlighted in work by Osborne and Cormack discussed in the literature section, religion has historically been found to play a role in student mobility, with those from Protestant backgrounds more likely to move away for university. Our survey does capture the religion of respondents from NI, with a near equal split between Catholic and Protestant backgrounds. However, given the nature of the survey and the fact it is not a representative sample, it would not be appropriate to draw conclusions about the role of religion from the responses as there is currently no discernible pattern between the two.

The overall survey is not a representative sample of the total student population, and is biased toward students in NI institutions, particularly those studying business-related courses. However, the survey responses, while not generalisable, do offer valuable qualitative insight into the thought processes of some university students. These insights complement our quantitative data analysis and particularly try to fill evidence gaps which cannot be examined in the data. Although the survey sample is small and non-random, the fact that it contains a wide range of views rather than a homogeneous set of similar responses, enhances its value. The diversity within the sample suggests we are not capturing the views of one narrow subset of students but rather gaining broader insight into young people and how they thought about university applications. What it does highlight is that it is a very individualised choice, influenced by a range of factors. A person's ability to finance their cost of living, their relationship with their family, the guidance they receive in school, what their peers are doing, the course they want to study and its requirements, the value they place on university ranking or student experience all play a role and influence each person differently. Student mobility is therefore a highly nuanced issue.

5.2 Stakeholder engagement

We also spoke to a range of stakeholders from a number of organisations across NI, the rest of the UK and Ireland. To maintain

anonymity we do not provide any additional information on the respondents. The engagement draws on a series of semi-structured interviews and engagement sessions conducted with representatives from higher and further education institutions, schools, careers services, policymakers and employers between 2024 and 2025. The questions were agreed beforehand among the research team based on the role and organisation of each participant. An example question guide is presented in Appendix A. The purpose of the engagement was to explore how different actors within the education and labour market systems perceive the causes, dynamics and implications of the so-called ‘brain drain’. The following discussion synthesises those views, reflecting the range of experiences and perspectives offered by stakeholders, without attributing them to specific individuals or institutions.

The stakeholder engagement overall revealed a complex and contested picture of the so-called ‘brain drain’. What we uncovered is less a single problem, and more a set of overlapping but contradictory perspectives. There is no single viewpoint which represents how those closest to HE view the issue of student mobility. There was agreement that there is an outflow of students but whether or not this was seen as a negative was mixed. And perhaps more importantly views as to why students leave were also debated. For some, students leaving was viewed as a structural constraint as a result of the MaSN policy, and this tended to be those engaged in the HE sector, while for others it was seen as a result of more personal characteristics such as social background, aspirations, social norms or where young people come from. Thus, there were a range of factors which potentially influence mobility discussed, such as government policies, student personal backgrounds and wants, as well as institutional responses.

In terms of the MaSN this was frequently mentioned as a key structural feature of the NI HE system. However, this was mainly among stakeholders directly engaged in the HE sector. While some considered it a crucial defining constraint – one participant called it a ‘structural choke point’ – others saw it as less worrisome and as being used more as an organising mechanism. The former group argue that the cap limits the number of local students who are able to access HE and therefore pushes applicants to universities elsewhere, primarily

GB. One participant argued that ‘more student places available meant more would stay’. It was also projected that growth in the number of young people was going to further increase demand for places while the MaSN remains fairly constant.

On the other hand, others noted that while the MaSN plays a role in rationing subsidised university places, it also has a key role to play in distribution of places. It was noted that the system allows policymakers to support growth geographically: ‘Hypothetically MaSN has worked – having to have places in Derry helps regional balance but Belfast will always fill first.’ For context, UU had an additional 339 MaSN places in 2025/26 which were for the Magee campus specifically.

This section sets out the perspectives gathered from universities, further education colleges, employers, policymakers and careers teachers. Careers teachers were engaged specifically through Area Learning Communities²⁰ and careers teachers networks, which enabled efficient coverage across different regions and school types. More specifically, we held focus groups with three Area Learning Communities (ALCs); these ALCs are not identified for anonymity reasons but they were from different area types and the various school types were represented at each. Overall this engagement via the ALCs meant we gathered the views of careers teachers from more than 20 schools across NI. The findings reflect the lived experience of those who operate within the system. They should therefore be interpreted as informed perspectives rather than definitive evidence of causation. The account that emerges is multifaceted, revealing a system shaped by structural pressures, cultural expectations, regional disparities and labour market dynamics that differ markedly across Northern Ireland and across sectors.

Across discussions stakeholders recognised that outward student mobility is not a new phenomenon. However, they also noted that the drivers of mobility have changed over time. Several commented that the public debate often fails to capture the complexity of student

²⁰ Area Learning Communities are networks of schools in local areas that work together to enhance the educational opportunities for students, to share resources and overall to improve student outcomes through collaboration. Within ALCs there are Careers Teacher Networks which meet regularly to share knowledge.

decision making and that headline statistics offer only a partial view. One explained that current data systems do not follow students long enough to reveal long-term patterns, and that many graduates return to Northern Ireland many years later (particularly noting the role relationships and children had). This contributed to a shared concern that policy discussions sometimes focus narrowly on point-in-time measures rather than on the broader context in which decisions are made.

We note that some perspectives are NI-wide while others are very local considerations. This is to be expected as there are clear geographical considerations in terms of student decision making, for example, those motivated by student experience will make very different decisions if they are from Mid-Ulster or from Belfast. This was particularly the case when engaging with school teachers.

5.3 MaSN and capacity

The MaSN cap was raised in almost every institutional and policy interview, though stakeholders interpreted its effects in very different ways. A number of participants described the cap as a clear constraint on opportunity. From this perspective the existence of a fixed number of funded places inevitably results in qualified applicants being displaced. Some stakeholders felt this had become more acute in recent years and would intensify as larger cohorts of school leavers come through the system. They emphasised that this dynamic is particularly pronounced in high-demand subjects and in Belfast where competition for places is strongest.

However, other interviewees presented an entirely different reading of the situation. Senior university staff reported growing difficulty in attracting local students, despite high demand in general. They described a cohort of students who achieve the grades required for entry to Northern Ireland institutions but still choose to study elsewhere. These students were often referred to as determined leavers. Stakeholders said their decisions are influenced by preference rather than constraint and that they leave even when a place is available locally. Careers teachers in the ALCs recognised the same pattern, explaining that some students are focused on leaving from an

early stage and that this choice is reinforced through peer networks and community norms.

These contrasting interpretations of the MaSN illustrate why stakeholders sometimes appear to be talking past each other. Those who work at system level tend to see the cap as a numerical limit that produces unmet demand. Those who work directly with applicants often focus on the personal motivations and expectations that lead students to seek opportunities elsewhere even when local places exist. Neither account contradicts the other, but they highlight the limitations of evidence currently available to stakeholders and the different vantage points from which each group views the issue.

Stakeholders also described the important role the cap plays in shaping regional provision. Several interviewees highlighted the use of hypothecated numbers to protect subjects and courses in Derry/Londonderry. They saw this as an example of how targeted allocation can sustain a more balanced system. It was noted that Law at Derry/Londonderry has grown significantly, and stakeholders attributed this growth in part to the way that numbers have been managed. However, universities explained that managing the allocation creates pressures elsewhere, particularly in Belfast. They have raised tariffs to avoid exceeding capped numbers, which means some applicants who wish to study in Belfast are redirected to other campuses or to Great Britain.

Despite these complexities some interviewees were cautiously optimistic about the recent increase in applications to Derry/Londonderry. They felt this suggested that regional provision may be strengthening, though they also noted that this progress remains fragile and is shaped by broader factors such as perceptions of opportunity in the North West and the availability of accommodation.

An issue that generated considerable discussion was the inclusion of students from the Republic of Ireland within the MaSN allocation. This has been cited as a potential issue and conflict of interest in previous research (Smyth and Darmody, 2023). Careers teachers explained that many were unaware that RoI students draw on the same capped places as NI applicants. Stakeholders were divided on the implications

of this. Some argued that rising interest from the Republic could reduce the number of places available to Northern Ireland applicants unless overall numbers expand; however, cross-border flows are relatively low. Others warned that removing ROI students from the allocation could undermine courses in the north-west where cross-border enrolment contributes to course viability which benefits local students. These views highlight a broader uncertainty among stakeholders about whether the current distribution of numbers best supports Northern Ireland's needs.

5.3.1 Cultural and social dynamics

Stakeholders across the ALCs placed strong emphasis on the cultural factors that shape student decisions. Teachers described patterns of movement that appear to repeat year after year. In some ALCs groups of friends apply to the same destinations in GB and travel together. Teachers explained that these patterns often develop over time within particular communities and become a form of tradition or expectation. This was seen as a powerful influence on decision making that sometimes operates independently of the availability of local courses.

Teachers distinguished between two broad groups of students who leave Northern Ireland. The first group leave because the subjects they wish to study are not offered locally, such as veterinary medicine, or because they want to attend Oxford or Cambridge. There is a clear social gradient in terms of that first group as they are likely to come from more affluent backgrounds. The second group members leave because they want the experience of living elsewhere. Stakeholders noted that the latter group can come from any background and any level of academic achievement. For these students, mobility is driven by preference rather than necessity. They seek a different experience than that offered locally and are often influenced by their peers. Teachers stressed that this reflects a cultural aspiration, rather than a structural barrier. It was also noted though that cost is playing an increasingly important role in influencing those who go versus those who stay, with many students deterred by the cost of moving away from home and their ability to afford this. Those who already have part-time jobs do not want to move away as they are concerned they will not be able to get another job.

These insights from the ALCs suggest that outward mobility cannot be attributed solely to capacity or policy design. It is also shaped by the expectations and desires of young people within their school communities. Teachers described this cultural dimension as particularly strong in some rural areas but emphasised that it is not confined to any single part of Northern Ireland.

5.3.2 Regional inequality and local variation

Stakeholders in the north-west expressed concern that the region continues to face significant challenges in relation to higher-education provision and wider economic opportunity. They welcomed efforts to expand provision but emphasised that lack of student accommodation is now the most significant barrier to further growth. Local interviewees described accommodation as a limiting factor that affects both recruitment and the ability of the campus to grow. They argued that without new investment this constraint would undermine the effectiveness of any expansion in student numbers.

Several stakeholders noted that many students from the north-west leave to study subjects that are available locally. Psychology was frequently cited as an example. Interviewees pointed to the large number of Northern Ireland students studying this subject in Liverpool and argued that a substantial proportion could form a viable cohort in Derry/Londonderry if they remained. This was presented as an illustration of how local provision does not automatically translate to local uptake.

5.3.3 Pathways and progression

Despite a very clear focus on HE, across the interviews stakeholders described growing interest in apprenticeships. Employers and educators alike felt that apprenticeships are increasingly seen as credible alternatives to traditional university routes. The recent figures which show historically low levels of HE enrolment may line up with this (NISRA, 2025a). However, stakeholders also emphasised that the availability of apprenticeships varies considerably. Teachers explained that opportunities depend heavily on employer willingness and on the capacity of schools to build local partnerships. They noted that this uneven availability limits genuine choice for some students. It was frequently commented that there was a need for one single place for

all apprenticeship opportunities to be advertised to ensure all students had equal opportunity.

Stakeholders also highlighted that many students face obstacles much earlier in their school careers. Teachers expressed concern that pupils who struggle to attain key GCSE grades have far fewer progression options and may disengage before formal decisions are made. They also pointed to limited English proficiency among newcomer pupils and inconsistent support for young people with special educational needs after they leave school. These factors were seen as significant constraints on later choice, which operate independently of the structure of higher education. They also noted some students were hindered by changes in subject requirements for courses. An example was given of an AI engineering course at UU that has added A-Level maths as an entry requirement for 2026/27, but it was not a requirement when that intake cohort were picking their A-Level subjects.

Interviewees expressed mixed views on whether Northern Ireland needs a lower-tariff university. Some believed that this could help widen participation. Others argued that Northern Ireland students generally perform well at Level 3 and that lowering entry requirements would require a very large expansion in funded places. They also emphasised that further education already provides important pathways into higher education and that students often progress successfully into degree-level study through this route.

5.3.4 Careers guidance and information

Careers teachers across all interviews described considerable variation in the quality and depth of careers guidance available. They noted that schools rely on different information systems and that many platforms do not contain Northern Ireland-specific data. Teachers explained that this creates challenges in providing accurate and up-to-date advice. They also highlighted that individual support from the Careers Service has reduced, which places additional pressures on schools. Concern was also expressed that this problem was likely to worsen in the future. A Master's in careers teaching has not been available in NI since 2006. Careers teachers noted that this, coupled with reduced platforms and support from the Careers Service, would

impact future teachers who take on the careers role, hindering the support available for students. Many also raised the issue of filling the role of careers teacher, with struggles to replace those currently in the role when they retire.

The issue is that when you are gone you are gone, there is no one left to disseminate skills in this careers field.

The absence of a central platform covering apprenticeships, further education courses and university opportunities was reported as a continuing barrier. Teachers said that pupils often struggle to understand the full range of pathways available to them and that this affects their ability to make informed decisions. These concerns were felt most strongly in schools with fewer dedicated careers staff or those serving more diverse student populations. Careers teachers were also under significant pressure themselves with many also teaching other subjects and thus facing significant time pressures.

Careers teachers also highlighted variation in engagement from universities in GB. There appeared to be strong engagement from Scottish universities, with representatives coming to lots of schools and events for prospective students. Engagement from universities in England was more limited. Some noted they could have up to five universities visit per year, such as Liverpool and Durham, while others could not get any engagement from English universities. One school commented that a representative from a university in England came due to luck as they happened to be visiting NI for something else. From the discussion, it appears GB universities are more likely to engage with schools whose pupils have gone on to study there. This highlights the strong links between past students moving away and current students moving away: ‘People are happy to go to places where there is an established NI community.’ This was also reflected in our survey of students.

5.3.5 Labour market alignment and retention

Employers and educators described a number of labour market factors that shape student choices and influence retention. They pointed to persistent shortages in areas such as health and engineering and argued that the number of training places has not kept pace with

demand. Employers also highlighted the difficulty of expanding placement capacity and said that some businesses view placements as a cost. They noted that students from Northern Ireland who study in Great Britain often return to secure local placements, which increases competition for opportunities.

Stakeholders viewed this alignment between education and the labour market as essential for long-term retention. They argued that without adequate training capacity in key professions Northern Ireland is likely to continue experiencing shortages and outward mobility in specific fields. Employers emphasised that the availability of placements often determines whether students can gain the experience required to enter their chosen careers locally.

5.3.6 Overarching findings

The stakeholder interviews reveal a complex and sometimes contradictory set of perspectives. Stakeholders emphasised different aspects of the system depending on their role, whether structural constraints such as the student number cap, social norms within school communities, regional inequalities or labour market limitations. These differences do not form a single explanation for outward mobility but instead reflect the varied positions stakeholders occupy. They also highlight the limitations of the evidence currently available to them and the ways in which these limitations shape their interpretations.

Across interviews stakeholders stressed that outward mobility is not inherently negative. Many described leaving Northern Ireland as a positive and sometimes necessary choice for young people. Their concern was that not all students reach the point of making fully informed decisions. Some leave because they lack accurate information about local options. Others leave because uneven regional opportunity or limited placements reduce the choices available to them. A number leave because they do not meet key academic thresholds and become disengaged before they are aware of the full range of progression routes. Others simply have a keen desire to leave.

Despite differing views stakeholders articulated a shared priority. They want a system in which young people are able to make informed and meaningful choices whether they decide to stay in Northern Ireland or

study elsewhere. The interviews suggest that strengthening the quality of information, improving regional opportunities, ensuring sufficient training capacity and addressing the barriers that prevent some pupils from reaching the point of choice are all essential to achieving that goal.

Although the stakeholder engagement presented complex and sometimes contradicting perspectives, this diversity of opinions is a finding in itself. Stakeholders we engaged with are operating in different parts of the system, in distinct local contexts, and with different goals. As such they observe student mobility differently. We would not expect a single, unified explanation for outward mobility to emerge with such varied actors. Rather than diminishing the value of the stakeholder engagement, the lack of a singular discrete narrative reinforced the complexity and nuance associated with student mobility.

5.4 Synergies and contradictions between student and stakeholder engagement

There were interesting synergies between the student and the stakeholder engagement as well as obvious differences in the views and perceptions held. At times, the same topics or issues were raised but differences in opinions were evident. For example, cost was something that came up in all engagement; stakeholders spoke about the issues HE was facing in terms of financial sustainability particularly for high-cost courses (e.g. medicine courses or maintaining labs) and this then tied in to discussion about the MaSN and the role it played in capping numbers. However, for students it was very much about affordability and more so in terms of accommodation and cost of living as opposed to student fees per se. They also spoke about the cost of travel as an important factor and the role debt played in decision making. So, cost and finances are important considerations for both students and institutions and there is a balance to be met here. This is important as the Department for the Economy provides a teaching grant and allocates the MaSN cap, which then allows fees to remain lower in NI than in England and Wales while also contributing significantly to the finances of the local HEIs.

Stakeholders and students also discussed the push–pull factors for those making decisions about HE and where to study. The survey found there to be ‘determined leavers’ – those who are attracted to GB by prestigious institutions and a student lifestyle that is not available in the same way in NI. Other stakeholders emphasised that reluctant leavers are forced into leaving by lack of places and the competition for places in NI. The stakeholders debated these factors. Schools in particular spoke of the former and students going to certain places within GB and certain institutions in particular. The HE sector was more likely to discuss the push factor of the MaSN and the limited supply.

Stakeholders and students also spoke about the role of peer groups, family and broader community connections. Students spoke about making decisions about university in line with their peer groups and groups of school friends transitioning to HE together. They also spoke about proximity to family, and this was particularly the case for older students as well as students with special educational needs or disabilities. Part-time jobs and existing commitments (sports and other extracurricular activities or clubs) also had a role to play. Teachers and those in the secondary education space also spoke of seeing these factors as important when students were making decisions. All in all, this reflects the nuance and the key role of personal factors in the decision, rather than structural factors. One interesting factor that came up in the stakeholder engagement was the religious dimension with Protestants more inclined to go to GB given cultural links and how they view their ‘world’ compared to Catholic students, who are more likely to stay in NI or go to RoI. When Catholics do leave there are certain cities in particular that they move to, e.g. Liverpool. While views sometimes differed it was clear that social networks as well as existing commitments play an important role in shaping decisions. Some stakeholders added in that very NI-specific community background layer. This has also been found in recent research (Smyth and Darmody, 2023).

Both students and stakeholders spoke about course availability and subject gaps in NI. Veterinary science was often cited as a subject gap (there are currently 330 students from NI enrolled in HEIs studying veterinary sciences), although its planned introduction in ATU could

provide a potential option for NI students, particularly those in the north-west. Creative industries were raised as an issue by stakeholders, while students mentioned youth work, psychology and other desired courses. It is difficult to gauge, given the range of courses available within NI, how many of these are obvious gaps (in the way veterinary science is for example) and how many are just competitive entry programmes. So, while scarcity or capacity constraints were not necessarily a significant concern for students it became more salient when specific subjects were being discussed.

Careers advice and perceptions were also raised by both groups. Students spoke of patchy guidance and a reliance on family and peer networks. There was little awareness of Rol options among NI school leavers, which is not surprising given the low levels of cross-border mobility (Smyth and Darmody, 2023). Stakeholders, including careers teachers and guidance counsellors, spoke of the issues careers advisors face with schools often not having dedicated careers staff and staff being overstretched. Universities suggested that some Northern Ireland schools, particularly grammar schools, were not always encouraging students to consider staying in NI, thereby contributing to a 'go-away' culture. This seemed especially relevant for Protestant grammar schools, where the perceived prestige of well-regarded institutions in Great Britain, along with a view of the UK as one unified system, may have influenced student choices. This has been consistent over time, as the issue of more affluent young people leaving for HE dates back to the 1980s (Osborne et al., 1984). Overall, there is agreement that careers advice could be improved and we have seen policy in this space in recent times but students and stakeholders framed this weakness very differently.

Overall, students highlight living costs, peer groups and choice as key to decision making about where they study. Stakeholders, particularly those from HE, were most concerned about the current funding system in place and the constraint on capacity that the MaSN caused. Both perspectives are important to understanding the outflow of students and interact with one another to create an interesting case. Students bring an additional level of nuance and context to the debate that is missing from the perspective of stakeholders and also missing from the dominant narrative that has been experienced in NI for a

considerable period of time. Stakeholders had a tendency to minimise complex decisions being made by young people to single, institutional explanations.

Chapter 6

Overall findings

The ‘brain drain’ from NI is often discussed as a significant issue for the local economy yet there is little recent research on the issue. In this report we undertake a mixed-methods study to provide an evidence-based critique of the dominant narrative in the discourse. Utilising a mixed-methods approach allows us to examine how NI may differ from other parts of the UK quantitatively while also examining the reasons behind student mobility using qualitative methods. We undertake a survey of students, in-depth interviews with students, and stakeholder engagement with a range of actors within FE, HE, careers guidance and policymakers. As such we must also consider the conflicting perspectives these stakeholders have. This work updates the literature from the seminal work of Osborne and Cormack which has been cited throughout.

The evidence presented challenges the prevailing narrative of a Northern Ireland ‘brain drain’. Stakeholder engagement also raised the point that student outflows are not necessarily a negative and in the NI context could contribute to normalisation of community relations when students return after being elsewhere. When benchmarked against Wales and the English regions, outward mobility from Northern Ireland is not disproportionately high. Instead, the more salient issue is the comparatively low inflow of students into Northern Ireland’s higher-education institutions from GB. This imbalance limits the potential funding streams available to NI institutions as GB students do not fall under the MaSN cap. This is particularly important as NI also brings in significantly less international student recruitment than GB or RoI, with international fees having become a critical funding stream for many HEIs despite its volatility and reliance on (often changing) government policy in a range of areas.

Outward mobility largely reflects rational student choice shaped by push–pull factors such as course availability, social experience and perceived opportunities, with the majority of leavers we engaged with considering themselves to be determined leavers. Meanwhile, inward mobility is hampered by limited awareness of NI, prevailing attitudes in

GB, and the separation of the UCAS and CAO application systems, which deters students from applying from RoI.

Patterns of student mobility are not unique: across the UK, subject choice plays a central role in decisions to leave or stay, and this is reflected in both the quantitative analysis and qualitative insights. Costs matter to young people, but primarily in relation to living expenses rather than tuition fees, which are often viewed through the lens of the student loan system. It is worth mentioning that our engagement with students and stakeholders predated the recent debates on student loans, which may increase the salience of loans to students.

Our analysis demonstrates that NI is not an outlier in terms of outward mobility. For example, the East Midlands experiences a 75 per cent outflow of students to other regions, despite having relatively low living costs and high-ranking universities. Wales provides a particularly instructive comparison: although it experiences large outflows, it also attracts significant inflows, despite having a relatively weaker economy. This reflects historical mobility patterns, close ties with England, and the perceived homogeneity of the English and Welsh education systems. Welsh HEIs also tend to be lower tariff on average, attracting lower-grade entrants from England while high-performing Welsh students pursue prestigious institutions elsewhere. NI could draw lessons from Wales in terms of marketing, transport connectivity and enhancing the student experience.

Using UCAS data, we find that NI mirrors other regions in terms of who wishes to leave or stay. Students leave NI for subjects unavailable locally – such as veterinary science – or where places are limited, such as in medicine and teaching. This is consistent with patterns in other smaller or resource-constrained regions, where it is neither feasible nor efficient to offer all high-cost or specialist courses. Qualitative findings highlight the personal and social dimensions of decision making: many young people wish to stay close to home for reasons ranging from family ties and relationships to affordability, part-time work, or additional support needs. These insights align with existing literature showing that students' perceptions of tuition fees are intertwined with their broader views of higher education and its value.

Across the study methodologies, we find significant overlap. Stakeholders and students were largely unconcerned about the structural constraint created by the MaSN, with personal preferences outweighing system-level factors. The data support this: NI behaves similarly to other regions, suggesting that the MaSN is not a primary driver of student mobility at an aggregate level. Its role is better understood as a strategic mechanism for aligning provision with labour market needs and regional priorities, rather than as a determinant of student behaviour. Recent targeted expansions, such as the uplift for Ulster University to support the Magee campus, illustrate how the MaSN can be used to advance specific policy objectives.

We must also consider the role overeducation has to play. Recent data suggest NI has high levels of overeducation among graduates, which further reinforces the need to think about student places in a strategic manner that aligns with the needs of the local economy particularly at a time of significant change in the NI labour market.

These challenges are compounded by demographic pressures, with Northern Ireland facing the sharpest decline in youth population of any UK nation. The debate should therefore shift from a narrow focus on reducing outward flows to a more comprehensive strategy that expands capacity in strategic and meaningful ways, enhances the attractiveness of NI as a study destination, and ensures that graduates can access meaningful opportunities in the local labour market.

Overall, the findings point to a more nuanced picture of student mobility in NI. Personal, social and subject-related factors dominate decision making, while structural constraints play a secondary role. The evidence suggests a connected pipeline from school through higher education and into employment, in which the availability of graduate-level jobs and clear career pathways ultimately shapes both mobility and long-term outcomes. At present, the NI economy does not have the capacity to absorb the graduates it creates so there must be a reconsideration of the subject and qualification mix that the system is providing.

Policy responses should pay closer attention to the needs of the local labour market, focus on enhancing NI's attractiveness as a study

destination to improve the inflow of HE students, leverage advantages such as lower costs of living, and position the region more effectively within the HE landscape in both GB and RoI.

Chapter 7

Policy implications

The policy implications that follow focus on three interconnected areas: understanding graduate trajectories, improving alignment between skills and labour market demand, and supporting a more balanced pattern of student mobility.

A critical gap that remains in the evidence base concerns the trajectories of students who leave Northern Ireland to study elsewhere. We lack robust data on whether and when they return, the role of trailing spouses or children in shaping mobility decisions, and the career impacts of these choices. Without a clearer understanding of these dynamics, it is difficult to assess the long-term implications of any level of outward mobility for the regional labour market and to design policies that encourage return migration or mitigate potential losses. Tracking of students to account for normal age of marriage and family formation should continue until individuals are in their thirties. At present, the HESA Graduate Outcomes survey²¹ collects information on graduates 15 months after they graduate; this is an improvement on the previous Destination of Leavers from Higher Education survey,²² which was undertaken 6 months after graduation, but is still not long enough to account for the dynamic period post-graduation.

Equally important for the labour market is the issue of skills mismatch and qualification alignment. Overeducation levels are high among Northern Ireland graduates, although the cause may not be the number of graduates in and of itself, but the subject and qualification mix currently being generated by the market. This mismatch not only undermines the returns to higher education but also contributes to lower job satisfaction and productivity, issues we know prevail in Northern Ireland. This suggests that policies focused solely on increasing participation or retaining graduates risk exacerbating skills mismatch unless they are accompanied by stronger demand for graduate skills within the labour market. Furthermore, graduate opportunities appear to be falling. Closer examination of how

²¹ [Graduate Outcomes open data repository | HESA](#)

²² [Destinations of Leavers from Higher Education Longitudinal survey | HESA](#)

qualifications align with labour market needs is essential to ensure that investment in education translates into meaningful economic outcomes. It is also worth bearing in mind that NI remains an economy with significant numbers of SMEs who do not necessarily need graduates but who do face difficulties finding the right skills. There is scope to link this into investment within careers education as well. The student engagement revealed that student decision making was heavily influenced by information provided by their careers teacher, while stakeholder engagement highlighted the significant variation in careers provision across schools. Investment in careers teaching can help align student choices to the areas of skills needed within the economy.

Linked to this, investment in graduate jobs is another pressing concern. While the Windsor Framework offers Northern Ireland the potential advantage of dual market access, ongoing political and economic uncertainty continues to deter inward investment. Without a stable investment environment that attracts high-value employers, the region risks producing graduates whose skills cannot be absorbed locally, perpetuating both underemployment and outward migration. In this context, the graduate route functions less as a guaranteed pathway into high-skilled employment and more as a potential point of friction, when labour market demand is insufficient.

The MaSN cap is often cited as the central barrier to higher-education expansion and was frequently mentioned by a section of stakeholders, but it is not the only issue. Simply increasing the MaSN could lower entry requirements significantly, raising questions about whether this aligns with the quality and competitiveness objectives of the sector.

The MaSN operates within a publicly subsidised funding framework, and any increase in funded places has direct fiscal implications. Expanding the cap would require either additional public expenditure or reallocation within a constrained Executive budget.¹¹ As a result, decisions regarding the MaSN involve trade-offs between participation, skills supply, labour market demand and public finances as well as broader economic policy objectives.

As highlighted throughout this report, student decision making itself is far more nuanced than current policy debates often acknowledge. Choices are shaped by a complex interplay of institutional, structural and personal factors, ranging from course availability and financial considerations to cultural experiences and perceptions of opportunity. This complexity means there is no quick fix policy solution; interventions must be multifaceted and sensitive to the diverse motivations driving student mobility.

Rather than framing the issue solely as a ‘brain drain’, there is scope to reconceptualise it as a reciprocal ‘brain gain’. A coordinated effort between the Department for the Economy and tourism bodies could promote Belfast and Derry/Londonderry as vibrant student cities with affordable living costs, attracting more students from Great Britain. Such flows would provide universities with a more sustainable financial base than reliance on international students, which is vulnerable to volatile immigration policy. At the same time, greater inward mobility would support local hospitality and nightlife sectors and contribute to a more diverse youth population, which could be an important asset in a post-conflict society.

Demographic change must also be factored into policy design. Northern Ireland faces a sharp decline in its youth population, alongside challenges related to special educational needs. These shifts will reshape demand for higher education and the supply of future graduates, requiring proactive strategies to adapt provision and maintain participation.

In this context, HLAs offer a valuable mechanism for bridging gaps in provision. Northern Ireland’s lack of a third, lower-tariff university^{23,24} creates space for the further education system to expand HLAs and other pathways. Ireland’s Post Leaving Certificate (PLC) programmes provide a useful model, having successfully supported attainment, reduced NEET (Not in Education, Employment, or Training) rates, and aligned skills with labour market needs. Work-based learning is particularly effective in reducing mismatch, improving job satisfaction

²³ Although we note that some 9,000 students in NI study Higher Education in Further Education (DfE, 2025).

²⁴ Although Magee offering lower grades than the Belfast campus of Ulster University also provides an opportunity for those who do not meet the grades for UUBelfast or QUB.

and enhancing earnings, and the FE sector is well placed to scale such opportunities across industries and qualification levels.

Finally, additional funding could be made available for Northern Ireland students who must study outside the region to access qualifications not offered locally, such as veterinary science. Without such support, students from less affluent backgrounds risk exclusion from these careers. The planned introduction of veterinary science at ATU in the west of Ireland presents a significant opportunity, but equitable access will depend on targeted financial assistance to ensure that all young people can pursue their chosen paths.

As with any area of economic policy, it is complex, and there are numerous policy levers that could be used and that could work together in different ways. Overall, the findings in this report point to the need for greater consideration of the full student journey, from school through higher education and into employment, and for policies that support Northern Ireland's young people to access opportunities wherever they are located.

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Appendix A

Stakeholder Engagement

Student Survey

The student survey is shown below, the survey included routing logic, meaning participants were directed to different follow-up questions depending on their earlier responses. This reduced burden on participants and ensured they were only asked questions applicable to their circumstances.

1. Country/region you are domiciled in?
2. School type attended prior to university.
3. Where was your school located?
4. Enter the home postcode where you are domiciled.
5. What is the home address where you are domiciled?
6. Country/region you attend university in.
7. Religion/community background you were brought up in. (NI only)
8. Do you consider yourself to belong to this religion now? (NI only)
9. What study did you undertake before university?
10. What university do you attend?
11. What level of study?
12. What subject are you studying?
13. Did you apply to university in Northern Ireland?
14. Why did you apply to university in Northern Ireland?
15. Why did you not apply to university in Northern Ireland?
16. Did you apply to university in Scotland?
17. Why did you apply to university in Scotland?
18. Why did you not apply to university in Scotland?
19. Did you apply to university in England?
20. Why did you apply to university in England?
21. Why did you not apply to university in England?
22. Did you apply to university in Wales?
23. Why did you apply to university in Wales?
24. Why did you not apply to university in Wales?
25. Did you apply to university in the Republic of Ireland?
26. Why did you apply to university in the Republic of Ireland?
27. Why did you not apply to university in the Republic of Ireland?
28. Did you apply through UCAS Clearing?
29. Are you a reluctant or determined leaver?
30. Explain why neither.

31. Explain why determined.
32. Explain why reluctant.
33. Any other reasons influencing decision?
34. Did your parents/carers go to university?
35. Did your parents/carers expect you to go to university?
36. How do you finance your university fees?
37. How do you finance your living costs?
38. Are you/were you a member of sports/organisations?
39. What clubs or organisations?
40. Engagement in local community (Agree/disagree scale)
 - I feel a strong sense of attachment to the local area where I am from.
 - I actively participate in community events and activities in my local area.
 - I frequently interact with my neighbours.
41. Do you agree that voting is an important part of your civic duty?
42. Did your family play a role in where you went to university?
43. Do you plan to return to your home region?
44. Why unsure?
45. Why return?
46. Why not return?
47. Final thoughts.
48. Gender.
49. Year of birth.
50. Month of birth.
51. Do you consider yourself to have a disability/SEN?
52. Contact details (for follow up)

The following questions were used as a guide in the follow-up interviews with students:

1. How did you approach applying for university/choosing courses?
2. What sort of support or guidance did you receive from family/friends?
3. What sort of support or guidance did you receive from school?
4. Looking back, is there any information you would have liked to be available to you but wasn't?
5. Why did/didn't you choose to apply to universities in your home region?
6. Why did/didn't you choose to apply to universities outside of your home region?
7. Do you feel your choice was the same as the majority of your school mates or were you in the minority?

8. Has your experience of university so far made you wish you had made any different decisions in terms of where you study or is there anything you would have done differently?

Stakeholder Potential Questions

As discussed in the stakeholder engagement section in Chapter 5 the questions asked of the stakeholders varied depending on the role and organisation of participant. While a semi-structured interview was agreed amongst the researchers in advance due to the heterogeneity of the stakeholders interviews were participant-led.

Below represents a sample of the agreed questions which were utilised with careers teachers from a range of schools in NI.

1. Thoughts in the room on the brain drain – is it something you see amongst your school leavers? Do these differ across schools, particularly based on religion or whether the school is selective or not.
2. What do young people base their decisions on whether staying or leaving? What in your experience is important to them?
3. Some people have spoken to us about going away being viewed as the best/successful pathway. Is that something that you see amongst your students?
4. As careers teachers do you suggest all options or just home or just certain unis? Do you have much knowledge of CAO and the Irish HE system?
5. Do you see cost of living playing in to decision making in recent years?
6. How much influence do you think family & friends have on young people's decisions?
7. In your opinion if there were more spaces would everyone stay? Or are there determined leavers?
8. If the cap increases, entry requirements decrease which may be a signal to university quality and class size increases. How would this impact students decision making?
9. Do you think there is enough for support for careers teachers to be able to support young people in making decisions?

Below represents a sample of the agreed questions which were utilised with HEIs in NI.

To understand university perspectives on the outmigration of students from Northern Ireland (brain drain), institutional strategies for student retention and attraction, and opportunities for system-wide responses.

Section 1: About Your Role and Institutional Context

1. Can you describe your role at the university, especially in relation to student recruitment, engagement, or policy?

2. How would you describe your university's current student profile — in terms of NI-domiciled students, students from GB/ROI, and international students?

Section 2: Understanding Brain Drain – Definitions and Causes

3. When you hear the term 'brain drain' in the Northern Ireland context, what does it mean to you?

4. To what extent do you believe NI is experiencing a brain drain? What evidence or trends inform that view?

5. In your view, what are the primary reasons students leave Northern Ireland to study elsewhere?

(Prompts: Lack of courses, university prestige, job opportunities, cost of living, cultural or social reasons)

6. Are there differences between students who leave and return versus those who leave permanently? What factors shape their long-term decisions?

Section 3: University Role in Student Retention

7. What role do you think universities in NI should play in helping students stay and study locally?

8. Has your institution implemented any strategies to improve retention of NI-domiciled students? What has worked or not worked?

9. What are the main barriers your university faces in attracting or retaining local students?

10. How do you think the wider NI education system (including schools and careers services) contributes to or mitigates student outmigration?

Section 4: Attracting Students from Outside Northern Ireland

11. What role does your university play in attracting students from outside NI (e.g. GB, ROI, EU, international)?

12. What strategies have been most effective in attracting non-NI students?

13. What are the main challenges in marketing Northern Ireland as a destination for higher education?

14. How do incoming students typically perceive NI before choosing to study here — and how can that perception be improved?

15. What more could be done (by government, universities, or other stakeholders) to boost NI's attractiveness as a study destination?

Section 5: Economic and Labour Market Dimensions

16. To what extent do graduate job opportunities in NI influence student decisions to leave or stay?

17. Are there sufficient links between universities and employers to support student retention after graduation?

18. Does the current funding and policy environment help or hinder your efforts to retain and attract students?

Section 6: Solutions, Opportunities, and Final Reflections

19. What do you think are the most promising solutions to reduce student outmigration and build a more attractive offer for local and external students?
20. Are there successful examples (from NI or elsewhere) that NI could learn from in tackling brain drain?
21. If you could implement one policy or initiative tomorrow to address this issue, what would it be?
22. Is there anything else you'd like to add about your institution's role or your views on the brain drain?

These questions were used as a guide and the discussion were driven by the participants.



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