BRITISH COUNCIL

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East Asia Education Insights

2023 Student Mobility Review

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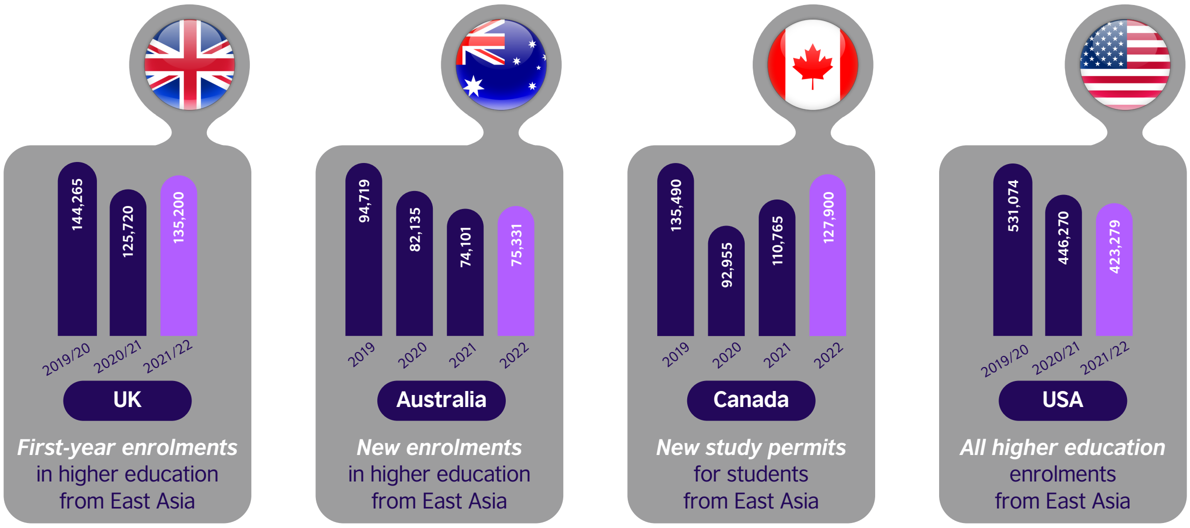
Two years after the pandemic, the student mobility picture from East Asia remains in flux



This report surveys the student mobility landscape in East Asia, drawing from the latest data to assess enrolment trends from across the region. The overall picture, however, is mixed, with signs that student mobility from East Asia recovered somewhat in the second year of the pandemic (2021/22) but remains below pre-pandemic levels.

Newly released HESA data gives a fuller picture of the extent to which the pandemic depressed student mobility from East Asia to the UK. While overall enrolments in UK higher education from East Asia rebounded in 2021/22 – hitting an all-time high – the region's recovery was far more muted than in other parts of the world, notably South Asia and Sub-Saharan Africa. In terms of sheer number of students, the region's significance has been **eclipsed** by higher growth markets; but in terms of quality, East Asia's students remain world class.

Compared with the overall student mobility picture from a year **ago**, things also appear to be looking up for the UK in East Asia. In 2021/22, first-year enrolments in UK higher education increased over the year before in 12 out of the region's 16 education markets[1]. The UK also issued more study visas in 2022 (across all study levels) in 12 out of the region's 16 markets than it did in 2021.

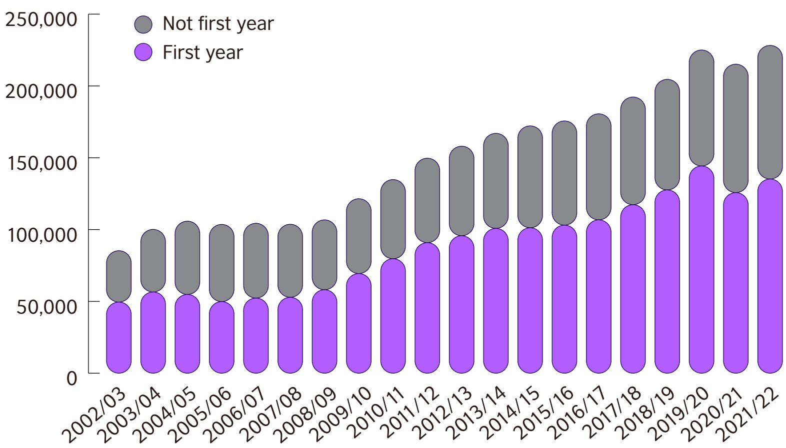
However, recovering pre-pandemic levels will be more challenging. First-year enrolments in UK higher education remained below pre-pandemic levels in 11 out of the region's 16 education markets in 2021/22. In 2022, the UK issued fewer study visas than before the pandemic in 10 out of the region's 16 markets. The UK is not alone in its struggles though; outbound mobility from East Asia remains below pre-Covid levels in Australia, Canada and the United States as well.

This report examines both how mobility from the region has changed since Covid-19, as well as where East Asia appears to be headed in 2023 and beyond.

1. This report considers the following 16 markets as part of East Asia: Australia, Brunei, Cambodia, China, Hong Kong, Indonesia, Japan, Korea, Laos, Malaysia, Myanmar, Philippines, Singapore, Taiwan, Thailand and Vietnam.

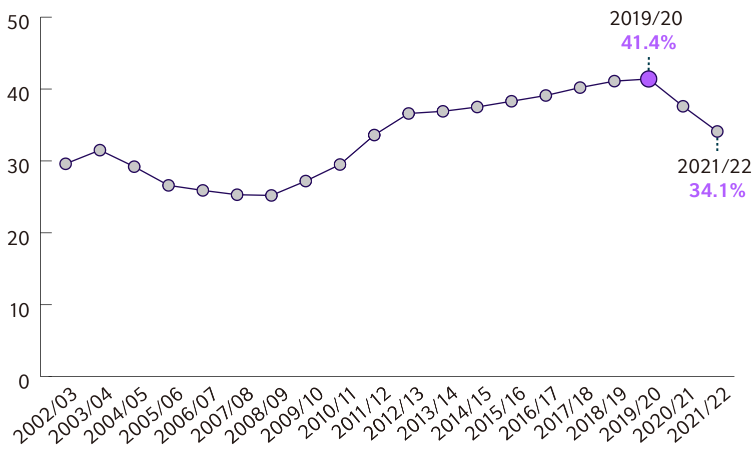
East Asia's share of first-year students in UK continued to fall in 2021/22, even as overall enrolments from region reached all-time highs

Enrolments from East Asia in UK higher education



Global share of first-year enrolments from East Asia

As % of all first-year enrolments



Source: HESA via British Council, Austrade, Canada Immigration and Citizenship, Institute of International Education

1. Based on higher education commencements in Australia in 2022, new study permits in Canada in 2022, and total enrolments in higher education in the USA in 2021/22

Total enrolments in UK higher education from East Asia hit a record high in 2021/22, with more than 228,000 students studying at UK HEIs. However, first-year enrolments from East Asia remained more than 9,000 students below the pre-pandemic peak (2019/20), largely due to the lingering effects of international travel restrictions and other Covid-related dislocations, particularly in China

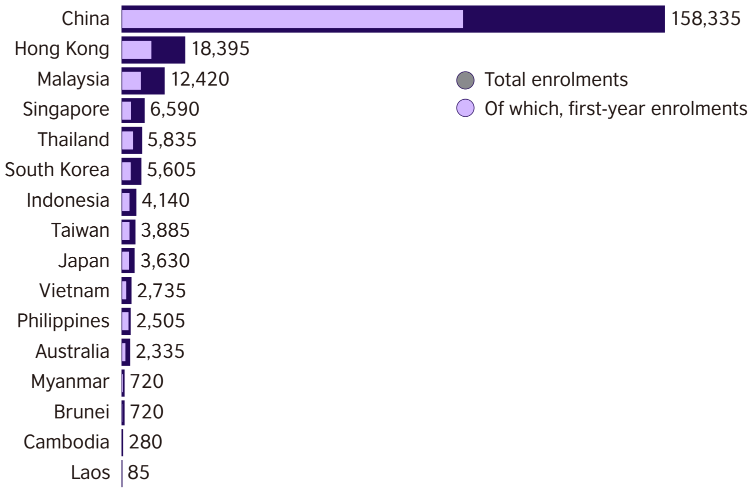
As a result, East Asia's share of all first-year international student enrolments dropped sharply in 2021/22, falling to levels last seen in 2011/12. Overall, 34.1% of first-year international enrolments in UK higher education came from East Asia in 2021/22, compared with 41.4% before the pandemic struck.

The latest UK enrolment data shows that the impact of Covid-19 on student mobility from East Asia was deeper and longer lasting than in many other regions of the world. While new enrolments were falling from East Asia, they rose from the rest of the world by more than 57,000 in 2021/22 over 2019/20.

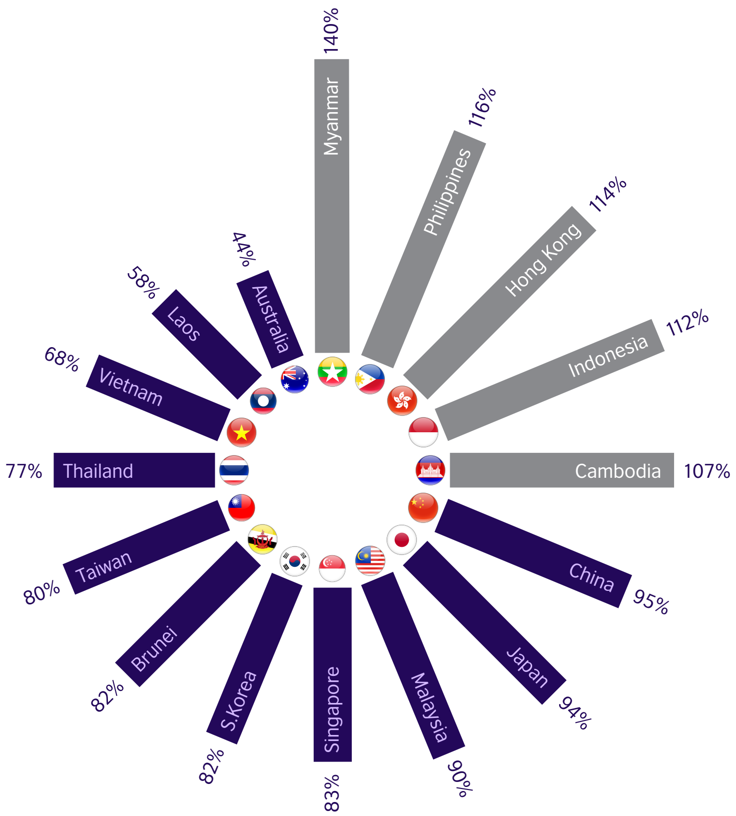
However, outbound mobility from East Asia remains below pre-Covid levels in other major host markets as well. New enrolments in higher education in Australia were down 20% in 2022, new study permit holders were down 5.6% in Canada in 2022, and enrolments in US higher education were down 20% in 2021/22[1] compared with pre-pandemic levels. The drop-off in mobility from East Asia to all of these markets indicates that the drivers behind the downturn are largely outside of the UK's control.

Two-thirds of student markets in East Asia enrolled fewer new students at UK HEIs in 2021/22 than before the pandemic struck

Enrolments from East Asia in UK higher education 2021/22



First-year enrolments from East Asia in 2021/22 as % of 2019/20



The story of the downturn in student mobility from East Asia to the UK goes far beyond China. Eleven of the region's 16 student markets enrolled fewer first-year students at UK HEIs in 2021/22 than in the year before the pandemic struck (2019/20). While China is one of these markets that has yet to recover pre-pandemic mobility levels, the country's share of first-year enrolments from East Asia actually ticked up in 2021/22 compared with 2019/20. This relative shift in China's share was caused by steeper downturns in many other student markets in the region.

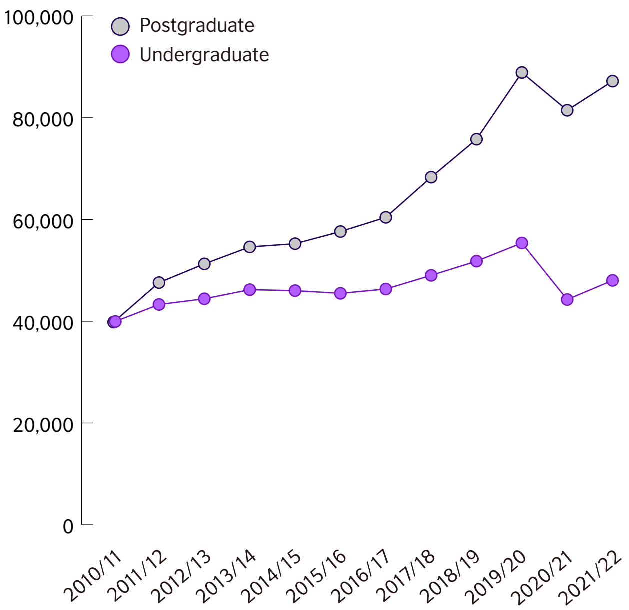
China remains by far the single largest outbound student market in East Asia, accounting for 69 per cent of total enrolments from the region in UK higher education in 2021/22, and nearly 74 per cent of first-year enrolments. China's outsized student market means that falling demand in the Middle Kingdom is felt more acutely, but it's important to remember that demand for UK higher education remains even more depressed in 10 other student markets in East Asia.

Notably, many of these other markets that continued to feel the effects of the pandemic into 2021/22 are also among the largest student markets in the region. In fact, of the 10 largest sending markets in East Asia to the UK in 2021/22 – which accounted for 97 percent of all enrolments from the region that year – eight enrolled fewer first-year students in 2021/22 compared with 2019/20. Only Hong Kong and Indonesia bucked this trend, the former likely driven by push factors at home while the latter remains a relatively **small** market given the overall size of the country's youth population.

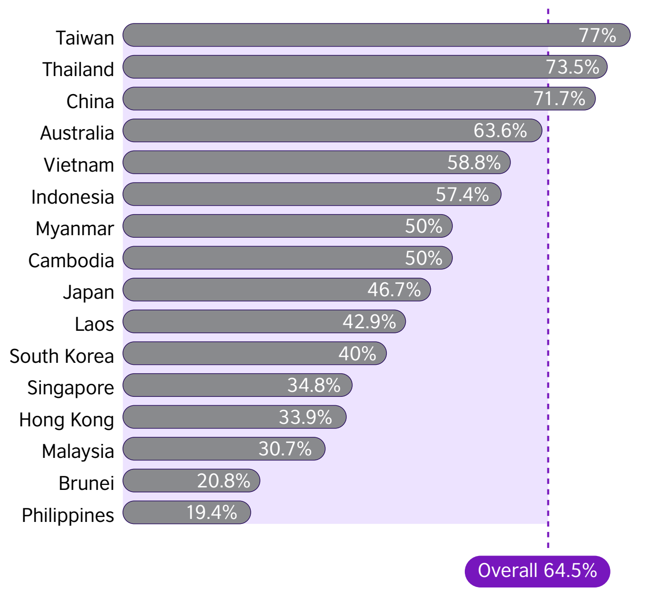
Source: HESA via British Council

Nearly two-thirds of all first-year students from East Asia now enrol at postgraduate levels in UK, continuing decade-long trend

First-year enrolments from East Asia, by level of study



PG share of all first-year enrolments, 2021/22



Source: HESA via British Council

Postgraduate enrolments from East Asia have rebounded more quickly from the pandemic than undergraduate ones. In 2021/22, the number of new enrolments at PG levels were only 1,700 below 2019/20 figures, while first-year undergraduate enrolments remained 7,300 students below pre-pandemic peaks.

While this discrepancy in recovery at different study levels may have been exacerbated by the pandemic, the trend pre-dates Covid-19. In fact, the share of postgraduate enrolments among all first-year students from East Asia has increased every year since 2010/11, rising from 50% in 2010/11 to 64.5% in 2021/22.

The growing preference for UK postgraduate education among outbound students from East Asia is likely driven by considerations over value for money, as PG programmes are shorter in duration. But this trend also speaks to potential differences in employment expectations among outbound students from East Asia, who after having completed their undergraduate studies at home are more likely to return back to their own countries to seek employment after completing their postgraduate education in the UK.

Furthermore, given shorter durations, the growing proportion of students from East Asia enrolling at postgraduate levels also puts more pressure on UK HEIs to maintain a steady recruitment flow from the region. The value to UK HEIs of each inbound student from the region is falling over time, necessitating a greater number of marketing and recruitment resources be dedicated to maintaining enrolment levels from East Asia.

HESA data

Not all UK HEIs have fared the same in East Asia, with a number of top UK universities increasing enrolment despite the pandemic

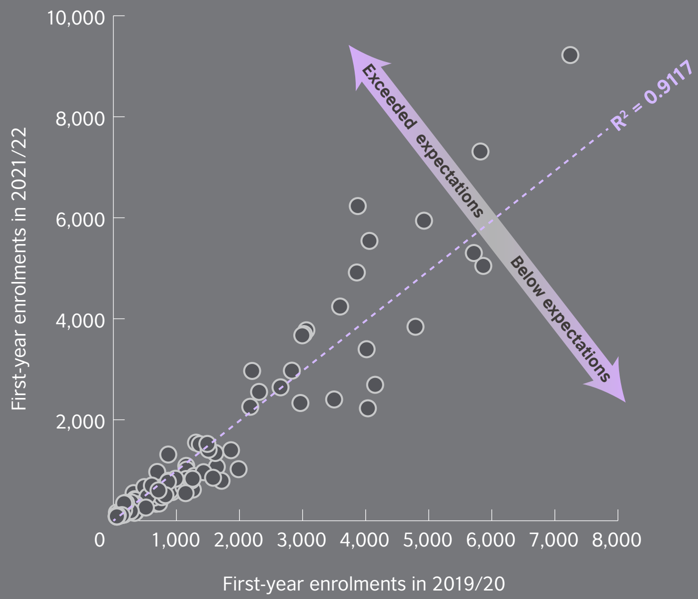
The effect of the pandemic on enrolment from East Asia varied widely by UK HEI, just as Covid-19 affected student mobility from different regions differently. While the overall number of first-year enrolments from the region at UK HEIs fell by 9,000 students from 2019/20 to 2021/22, a significant number of UK HEIs managed to increase net enrolment from East Asia over this period. All told, 21 UK HEIs boosted first-year enrolments from East Asia by more than 100 students from 2019/20 to 2021/22, with 11 HEIs increasing new enrolments from the region by more than 600 students.

Comparing the number of first-year enrolments at individual UK HEIs in 2019/20 with the same figure in 2021/22 reveals wide disparities in performance. More UK HEIs struggled than not to recruit students from East Asia during the pandemic, including universities that typically enrol thousands of students from the region every year. Yet many also flourished, and rankings appear to have played a role.

The HEIs which fared best in East Asia are also among the UK's highest ranked universities, indicating that students from the region grew more selective as overall outbound mobility declined. However, rankings do not explain everything, as five of the seven UK HEIs that saw net first-year enrolments from East Asia decline by the largest amount from 2019/20 to 2021/22 are also members of the Russell Group.

Rank	UK HEI	First year enrolments from East Asia 2019/20	First year enrolments from East Asia 2021/22	Net Change	Russell Group?
1	Univ. of Glasgow	3,825	6,150	2,325	Y
2	UCL	7,195	9,140	1,945	Y
3	Univ. of Manchester	5,770	7,230	1,460	Y
4	King's College London	4,010	5,460	1,450	Y
5	Univ. of Southampton	3,810	4,835	1,025	Y
6	Univ. of Edinburgh	4,875	5,860	985	Y
7	Univ. of York	2,150	2,885	735	Y
8	Univ. of the Arts, London	3,010	3,690	680	N
9	Univ. of Bristol	2,970	3,615	645	Y
10	Imperial College London	2,945	3,590	645	Y
11	Univ. of Warwick	3,545	4,160	615	Y

First-year enrolments from East Asia by UK HEI



Source: HESA via British Council

HESA data

Outside of China, recruitment performance in East Asia has not varied as widely among UK HEIs

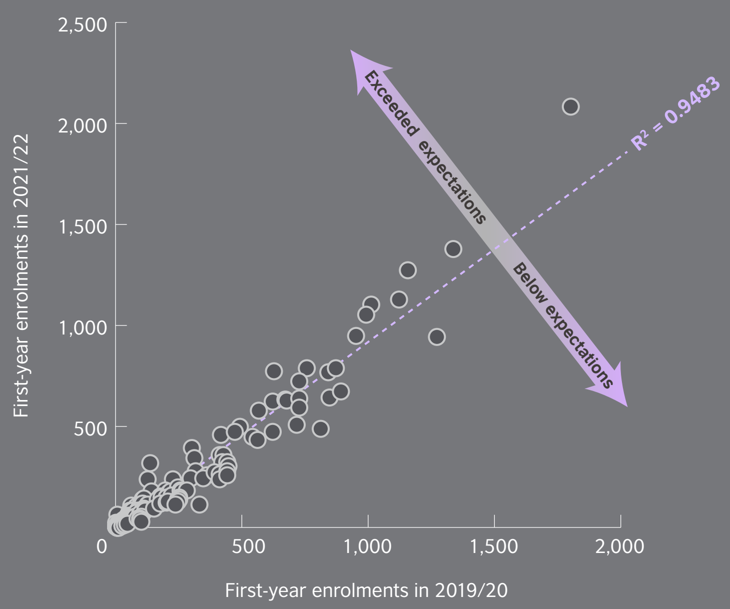
Outside of China, recruitment performance among UK HEIs in East Asia during the pandemic remained largely stable with less variation in outcomes. Compared with their enrolments in China, a greater number of UK HEIs saw first-year enrolments surpass pre-pandemic levels in the rest of the region in 2021/22; all told, 53 UK HEIs recorded net increases in first-year enrolments in 2021/22 compared with 2019/20. However, these gains were mostly modest, with only five universities seeing first-year enrolments rise by more than 100 students.

Rankings were also less predictive of recruitment success outside of China. Among the 10 HEIs that recorded the largest net increase in enrolments from the rest of the region in 2021/22, six were Russell Group members, compared with 10 out of the top 11 UK HEIs when including China.

On the flip side, first-year enrolments remained below pre-pandemic levels at 99 UK HEIs in 2021/22, including 23 universities that recorded declines of more than 100 students compared with 2019/20. Among the HEIs that saw the largest net decline in first-year enrolments over this period, four six are members of the Russell Group, indicating that rankings alone were no guarantee of recruitment success during Covid-19. Notably, among the top-10 UK HEIs that increased net first-year enrolments from the non-China portions of East Asia, only five also feature among the top-10 UK HEIs at boosting enrolments when including China: UCL, University of Glasgow, King's College London, University of Manchester and University of Edinburgh.

Rank	UK HEI	First year enrolments from East Asia (ex-China)		Net Change	Russell Group?
		2019/20	2021/22		
1	UCL	1,800	2,085	285	Y
2	Anglia Ruskin Univ.	135	320	185	N
3	Univ. of Glasgow	625	775	150	Y
4	King's College London	1,155	1,275	120	Y
5	Univ. of Law	125	240	115	N
6	Queen's Univ. Belfast	300	395	95	Y
7	Univ. of Manchester	1,010	1,105	95	Y
8	Univ. of Edinburgh	990	1,055	65	Y
9	Univ. of London[1]	5	65	60	N
10	Univ. of Hull	60	110	50	N

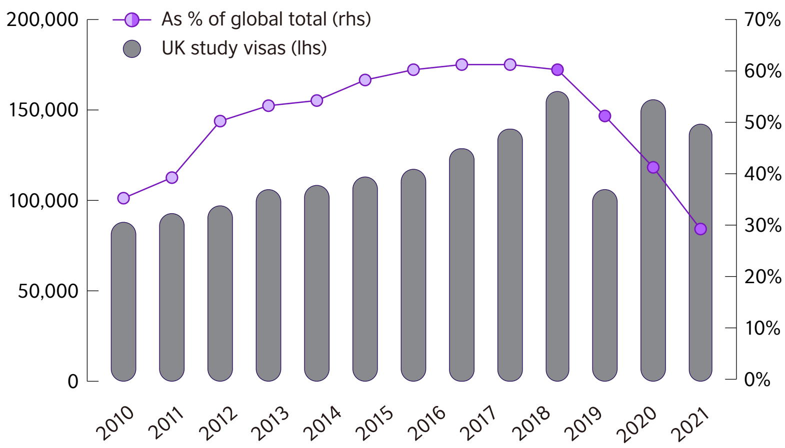
First-year enrolments from East Asia (ex-China) by UK HEI



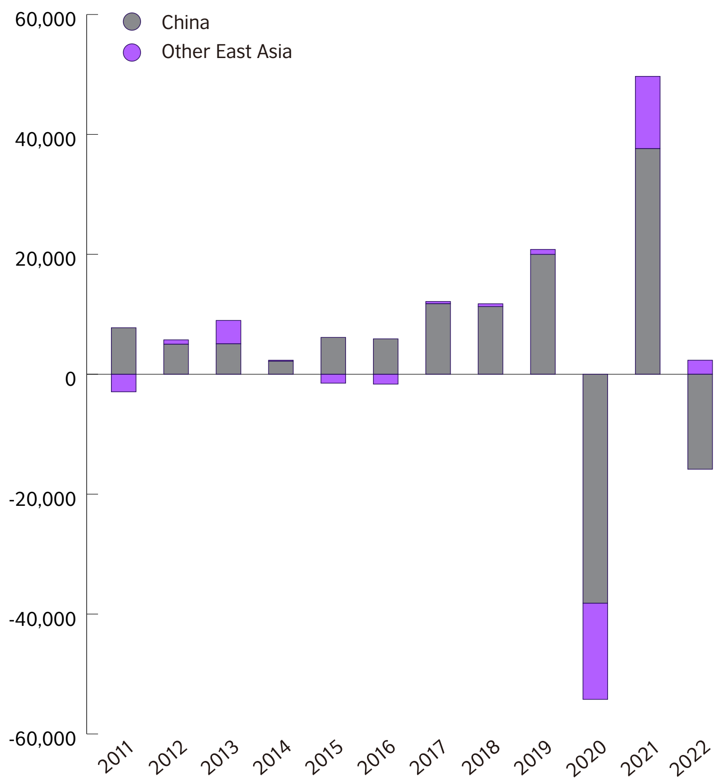
Source: HESA via British Council
1. Institutes and activities

Overall issuance of UK study visas in East Asia slipped in 2022, with region's share of global total falling to lowest point in over a decade

UK study visas[1] issued in East Asia



Net change in UK visa issuance in East Asia



Source: UKVI

1. Only study visas issued to sponsored, main applicants (i.e. the students themselves)

UK study visa data provides a more recent picture of demand for UK education in East Asia, as well as how the region's recovery from the pandemic has compared with other parts of the world. Here the data is more pessimistic, as the number of UK study visas issued in East Asia fell in 2022 – even as issuance of UK study visas surged by nearly 30% worldwide over the previous year. The net effect is a continuation in the sharp decrease in East Asia's share of all of UK study visas. Since 2019, East Asia's share has fallen by half – from 60% in 2019 to 29% in 2022.

The region's decline in the last year was driven by China, where the lingering effects of the country's zero-Covid policy and onerous restrictions on international travel severely depressed demand for overseas study. After more than a decade of acting as the growth engine for outbound student mobility from East Asia to the UK, China became a significant drag in 2022.

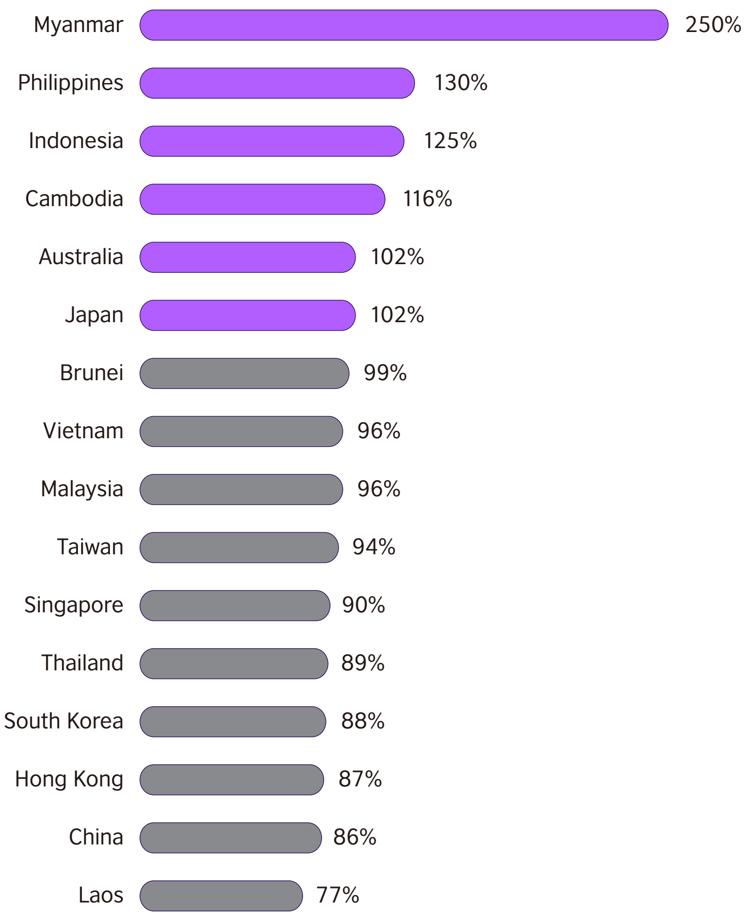
However, even when excluding China, the number of UK study visas issued in East Asia rose only marginally in 2022, increasing by 2,333 visas – a paltry 6.3% rise over the previous year. Meanwhile, issuance of UK study visas to the rest of East Asia remains below pre-pandemic levels.

On the optimistic side, the regional outlook looks brighter over the next year. With China abandoning its zero-Covid controls in late 2022, demand for UK study visas is likely to pick up in 2023. It remains to be seen, however, whether the region's share of global visa issuances will recover its once dominant position given higher demand for UK education in other regions of the world.

UK visa data

Even as Covid-related restrictions have lifted, demand for UK study visas remains depressed across most markets in region

UK study visa issuance in 2022 as % share of 2019 figure[1]



Source: UKVI

1. Only study visas issued to sponsored, main applicants (i.e. the students themselves)

Despite issuing 217,000 more study visas globally in 2022 than in 2019, the UK granted fewer visas in most markets of East Asia than it did before the pandemic. In fact, issuance of UK study visas remains below pre-pandemic levels in 10 out of the 16 education markets in the region, including the five largest markets for UK education: China, Hong Kong, Malaysia, Thailand and South Korea. These markets also made up five of the seven education markets globally that have recorded the largest net decline in issuance of UK study visas from 2019 to 2022 (along with Russia and Oman).

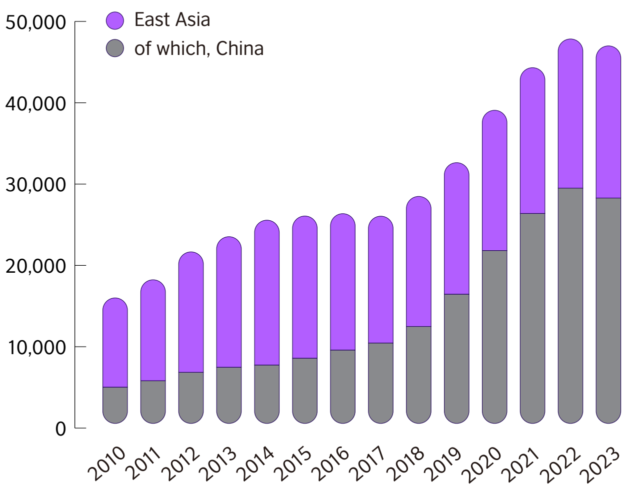
Flagging demand for UK study visas in East Asia appears to go well beyond China, extending both to developed locations such as Singapore and Hong Kong as well as key growth markets such as Vietnam. That most of these markets – with the notable exception of China – lifted Covid-related travel restrictions nearly a year ago indicates that the reasons for the downturn in demand for UK education may also extend beyond the pandemic.

The region's tepid rebound in demand for UK education in 2022 suggests that the majority of prospective students who opted not to study in the UK during the pandemic will likely never do so. Meanwhile, the long-term structural factors that will depress outbound mobility from the region – low fertility rates, slowing economic growth, rising domestic and regional higher education alternatives – have not gone away.

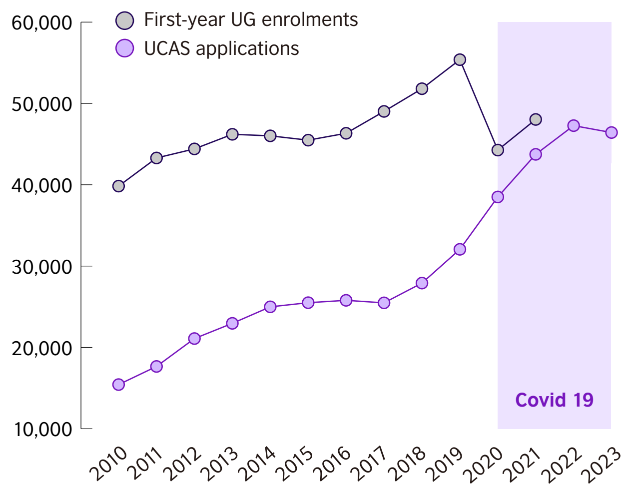
While it can be confidently predicted that the overall number of UK study visas issued in East Asia will return to growth in 2023, structural headwinds mean that a number of markets may never recover 2019 levels again.

Applications from East Asia are down so far in 2023, but there is reason for optimism later in 2023 application cycle

UCAS applications from East Asia
Through January application deadline



UCAS applications and enrolments[1], over time



Source: UCAS, HESA via British Council

1. Enrolment data corresponds to the preceding January's application cycle, e.g. January 2021 UCAS application figures correspond with 2021/22 enrolment data

For only the second time in the last 15 years, the number of UCAS applications from East Asia fell in January 2023. The drop was modest though, with only 850 fewer applications submitted to UK HEIs than in January 2022 (a -1.8% decline). The slump was also entirely explained by China, with applications from the rest of the region rising by 370 overall in 2023 compared with the previous year.

Further muddying the waters, UCAS application data has also become less predictive of future undergraduate enrolments since the onset of the pandemic. For reasons that are not entirely clear, the correlation between UCAS data – which only covers a portion of students applying to undergraduate programs – and subsequent first-year enrolments in UG programmes was largely severed once Covid-19 struck.

UCAS application numbers from the region continued to grow in 2021 and 2022, for example, even as first-year enrolments in undergraduate programmes fell by -20% in 2020/21. Facing uncertainty about international travel and visa issuance restrictions, students in the region appear to have applied to more programmes overall, driving down the conversion rate of each UCAS application.

There are also mitigating circumstances at play in the current cycle, with China's abrupt end to its zero-Covid policy in late 2022 likely contributing to the fall in UCAS applications from this market in January 2023. This dynamic would also point to a likely rebound in UCAS applications from China later in 2023, although there is **no guarantee** that more applications will necessarily translate into more enrolments.

Key takeaways

What can the recent past tell us about the future of mobility from East Asia?

#1 The story of the downturn in outbound student mobility from East Asia since the onset of the pandemic goes far beyond the UK. At the end of 2022, there were fewer students from the region enrolling in every major English-speaking host destination market, while outbound mobility from other regions surged.

#2 With China abandoning its zero-Covid policy, the chances for a broad recovery in mobility from East Asia appear strong in 2023. Yet East Asia is less likely to regain its previous status as the global growth engine for the UK. The region will continue to be eclipsed in terms of total student outflows by higher-growth markets in South Asia and Sub-Saharan Africa, although the quality of East Asia's outbound student population will remain world class.

#3 Outside of China, demand for UK education has also struggled to recover pre-pandemic levels. In Northeast Asia, only Hong Kong's enrolments in UK higher education in 2021/22 and UK visa issuance in Japan in 2022 were higher than before Covid-19 struck. Meanwhile, in Southeast Asia, new enrolments at UK HEIs and UK visa issuance have surpassed pre-pandemic figures in only four markets (Myanmar, Philippines, Indonesia and Cambodia).

#4 While the pandemic played an undeniably large role in depressing demand for overseas education in East Asia, the most recent data indicates that it may not be the only factor at play. Structural headwinds such as low fertility rates, slowing economic growth, and rising competition from domestic and regional HEIs also appear to be playing a role. In combination, these factors will limit the scale – if not the trajectory – of the recovery in outbound mobility from East Asia in 2023 (and beyond).

#5 Of equal importance, the effect of the broad-based slowdown in outbound mobility from East Asia has not been felt equally by all UK HEIs. Indeed, some UK institutions saw enrolments from East Asia grow even during the worst of the pandemic, and they will likely continue to enjoy success in recruiting students from the region in 2023. As students in East Asia become more discerning about both whether they study overseas as well as where they choose to enrol, competition for the region's outbound students will continue to rise.

#6 One potential outcome from rising competition in East Asia is that mobility from the region may become an increasingly winner-takes-all proposition. Some UK HEIs will continue to struggle to meet recruitment targets in the region even amid a broader recovery in 2023.

#7 Going forward, East Asia will be defined less by the quantity of its outbound students and more by their quality. UK HEIs that wish to remain relevant in the region will need to invest more time and resources but focus on recruiting higher quality students rather than higher numbers. This strategic **shift** will create a virtuous cycle for UK HEIs, improving their rankings and global reputation while increasing their competitiveness in future recruitment cycles.

Questions or Comments?

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