

International Education East Asia

# East Asia student mobility review

March 2022

## Introduction

This report examines the current state of student mobility from East Asia to the UK. Pulling together the latest available data on higher education enrolments, issuance of UK study visas and applications to undergraduate programmes, the report constructs a picture of the impact that Covid-19 has had on demand for UK education in the world's most important education region.

Student mobility from East Asia was more negatively impacted by the pandemic than almost any other region in the world. First-year enrolments in UK higher education programmes dropped nearly 12% in 2020/21, compared with a 1.6% rise from the rest of the world. This sharp decline occurred across all of East Asia: 14 of the 15 education markets considered in this report<sup>1</sup> saw first-year enrolments fall in 2020/21.

UK study visa data tells a similar story. Visa issuance to students in East Asia fell 34% in 2020, compared with a 5% decline in the rest of the world. While demand returned in East Asia in 2021 – rising 47% over the previous year – it lagged the recovery in the rest of the world, which saw issuance of UK study visas surge by 112% last year. Students in East Asia have appeared slower to return to the idea of studying in the UK than their peers in other regions of the world, while they also responded less enthusiastically to the return of the Graduate Route post-study work visa. In nine out of 15 education markets in East Asia, issuance of UK study visas remains below pre-pandemic levels.

Application data in 2022 for UK undergraduate programmes tells a more optimistic, if slightly divergent, story about demand for UK education in East Asia. UCAS applications from East Asia grew steadily even during the pandemic, suggesting that students in the region were not deterred from applying to study in the UK even if their plans to enrol were deferred. By 2022, all but one of the 15 markets in East Asia had at least returned to its pre-pandemic application level.

### Data sources and time periods covered

This report utilises the latest available data from the Higher Education Statistics Agency (HESA), the UK Home Office, and the Universities and Colleges Admissions Service (UCAS) to identify the major trends in inbound student mobility to the UK over the previous, current and next academic year. Each data source covers a different period and therefore shows a different part of the student mobility picture, both during the early throes of the pandemic and now as the world slowly returns to normal.

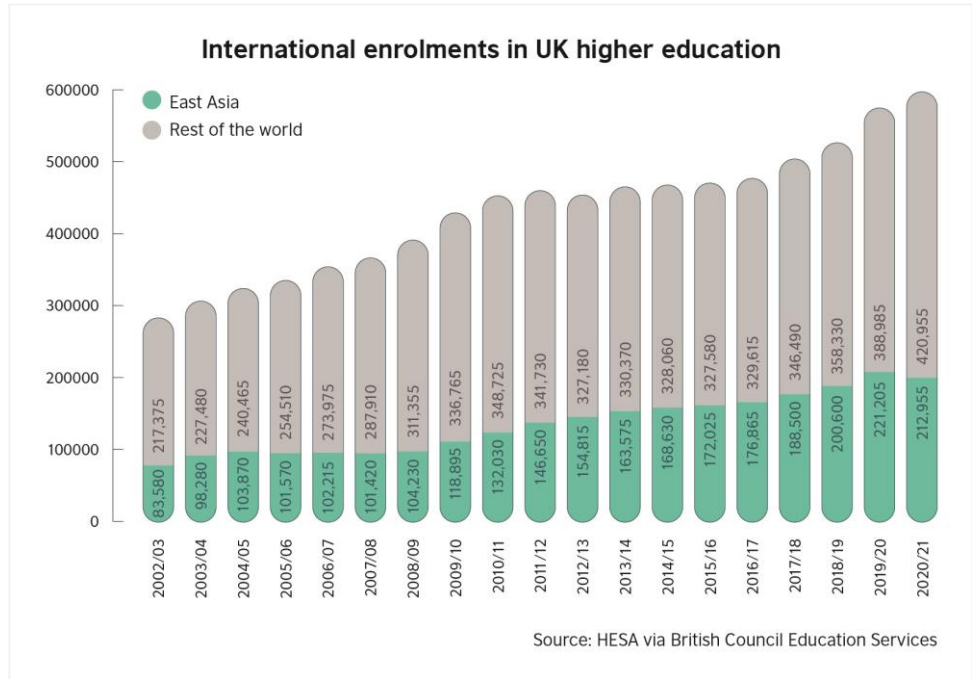
By examining these data sources in combination, it is possible to identify both short-term trends likely caused by the pandemic as well as potentially broader structural shifts in student attitudes and behaviours across East Asia. While no single source can give a complete picture, in combination they provide a relatively robust answer to the question of what impact the pandemic has had – and continues to have – on student mobility from East Asia to the UK.

Data source	Metric	Academic cycle	Shortcomings
HESA	Higher education enrolments	2020/21	Backward looking
UK Home Office	Issuance of UK study visas	2021 (2021/22)	Does not differentiate higher education from other levels of study
UCAS	Applications to UK undergraduate programmes	2022/23	Only counts direct undergraduate applications, generally does not cover TNE transferred students and/or articulation

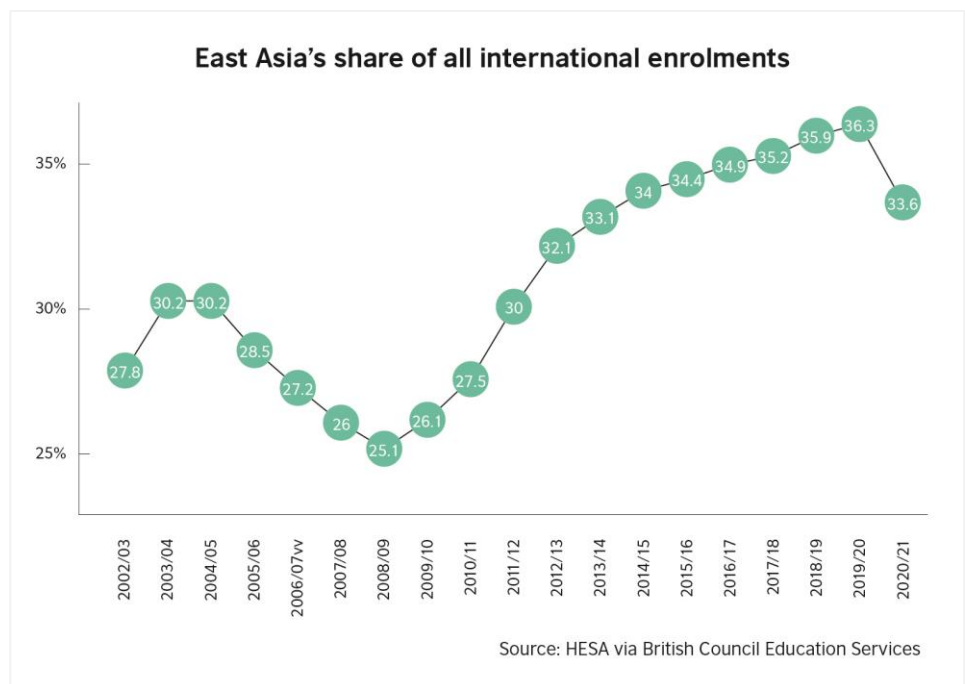
<sup>1</sup> Brunei, Cambodia, China, Hong Kong, Indonesia, Japan, Laos, Malaysia, Myanmar, Philippines, Singapore, South Korea, Taiwan, Thailand, Vietnam

# Enrolments in UK higher education fell across East Asia in 2020/21

In the first full academic year after the pandemic hit, students from East Asia appeared to take a far more cautious approach to enrolling in UK higher education than their peers in other regions of the world. Total international enrolments in UK higher education actually increased in 2020/21, rising by nearly 4% over the previous cycle. While enrolments of first year students declined modestly due to the pandemic, they managed to grow in many parts of the world, most notably South Asia, parts of Eastern Europe and the Middle East. This was no small feat, given the enormous logistical challenges posed by Covid-19; it is also a testament to the enduring attraction of UK higher education, even if some portion of these first-year students likely did not physically reside in the UK for at least part of the 2020/21 academic year. All in all, enrolments in UK higher education were less impacted than those at other study levels.



East Asia however was a notable exception to this trend. The UK higher education sector's most important student region, East Asia saw overall enrolments fall 3.7% from 2019/20, and first-year enrolments decline by 11.9%. This drop was large enough to offset gains in most other regions of the world, with East Asia almost singlehandedly responsible for the decline in first-year student enrolments in 2020/21. In fact, when excluding East Asia from the global tally, first-year enrolments from the rest of the world actually rose by a modest 1.6% in 2020/21.

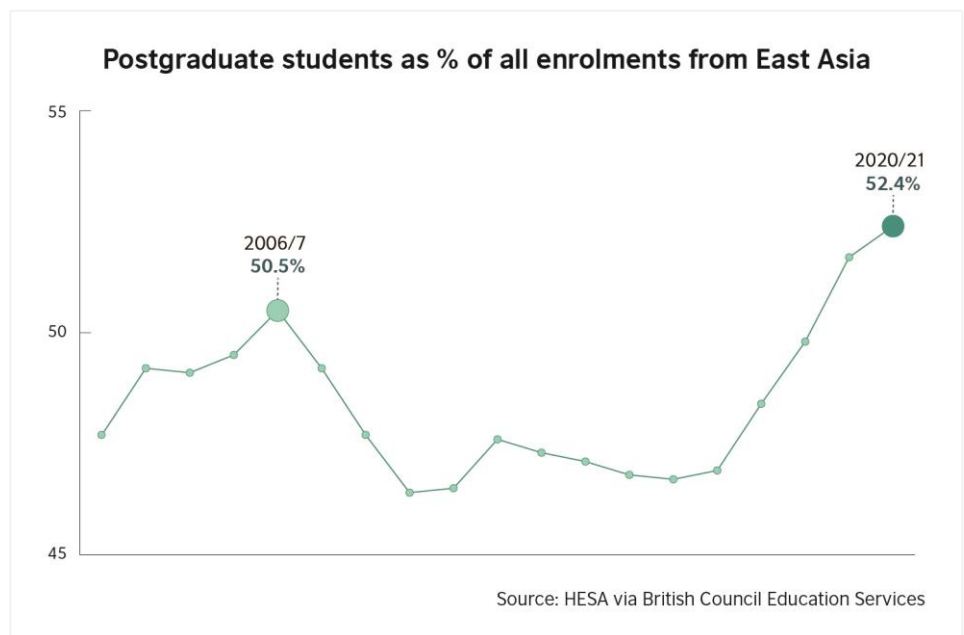
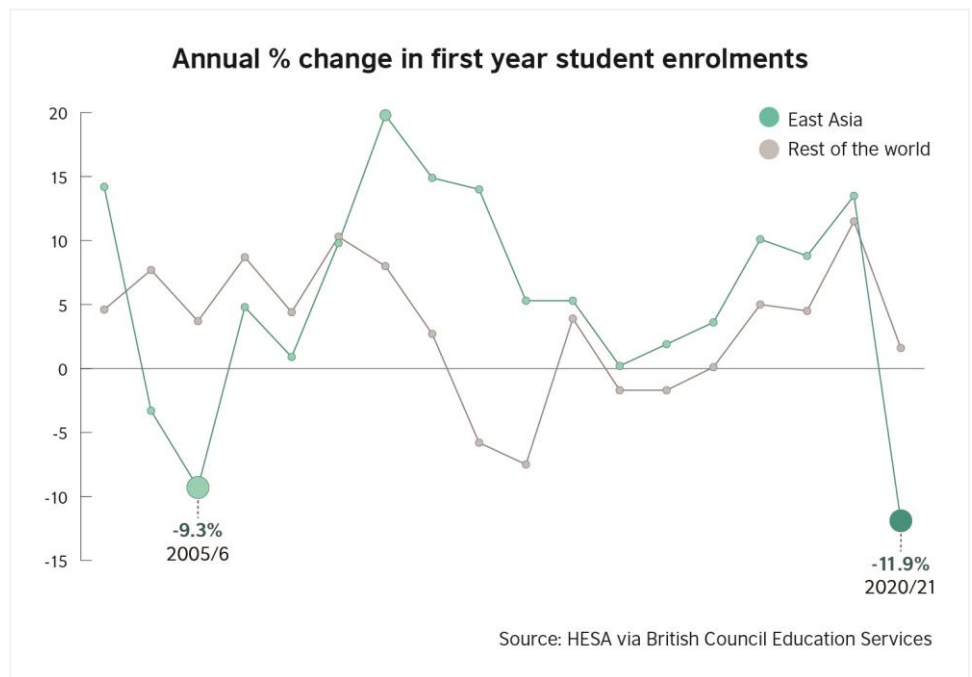


As a result of this divergence in behavior, East Asia's share of all international students enrolled in UK higher education fell nearly 3% in one academic year. This reversed an upward trend in the portion of international students in UK higher education hailing from East Asia that had been underway since 2008/09. Indeed, growth in first-year student enrolments from East Asia had previously outpaced those from the rest of the world every year from 2009-19.

The reasons for the sudden reversal in behavior by students from East Asia are not entirely clear. Fears of Covid-19 obviously played a large role, both in terms of the risk that the virus posed to the health of students as well as the disruption that it caused to traditional ways of delivering higher education in the UK.

International students from East Asia are largely fee-paying and perceptions of the value of a UK higher education experience under social distancing requirements appear to have been somehow tarnished. This suggests that demand for UK higher education from East Asia did not diminish so much as it was deferred for future academic cycles, which subsequent data on UK study visa issuance and UCAS applications from East Asia appear to validate. The return of the post-study work visa also had less of a galvanizing effect in East Asia than it did in other major sending regions, as graduates from East Asia more often intend to return to their home region to seek employment.

The decline in first-year enrolments from East Asia was particularly pronounced at the undergraduate level. Indeed, while first-year enrolments from East Asia in UK postgraduate programmes declined by 8.2% in 2020/21 over the previous year, this was far less than the 18% drop-off in first-year enrolments of undergraduate students. As a result, the overall share of postgraduate students among all higher education enrolments from East Asia rose to an all-time high in 2020/21, continuing a trend dating back to 2016/17.

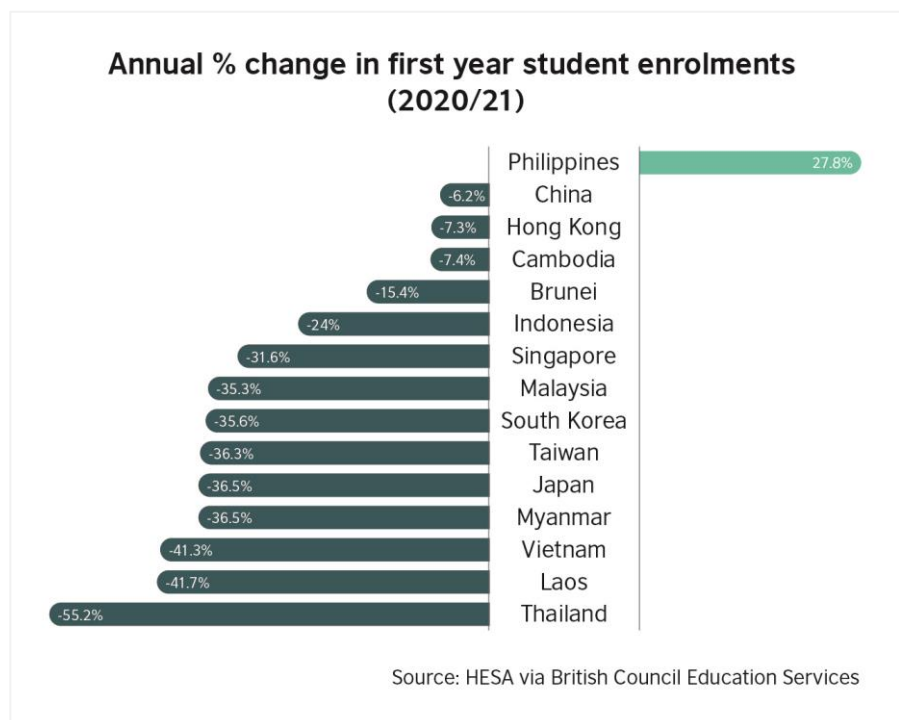
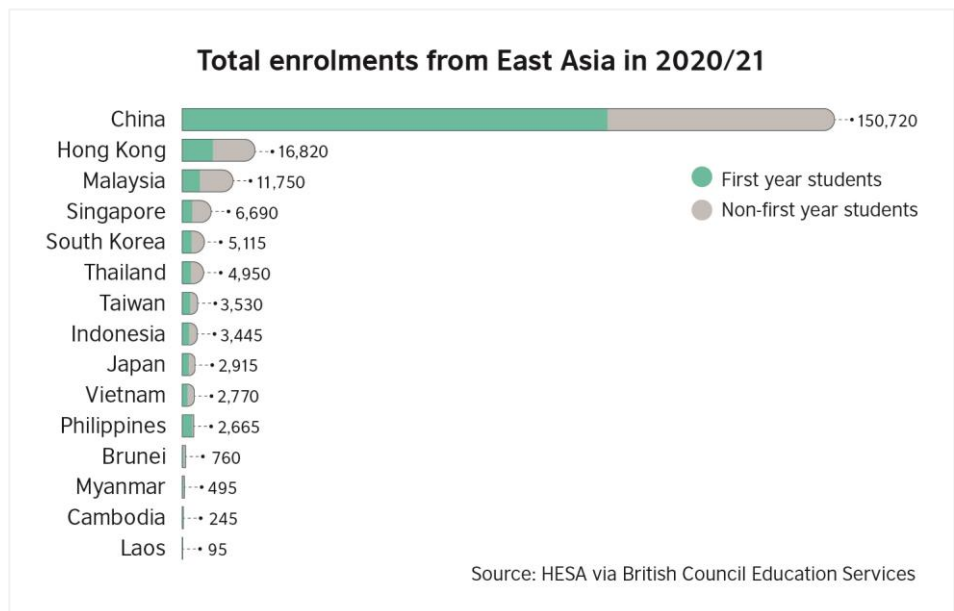


This yawning gap suggests that both the funding and study motivations of postgraduate students from East Asia differ from their compatriots at the undergraduate level. Less concerned about the impact of the pandemic on their education experience and their employment prospects – or more wary of losing their opportunity to study abroad – postgraduate students from East Asia were less likely to defer their enrolments in UK higher education.

China continued to account for the lion's share of mobility from East Asia in 2020/21, making up 70.8% of all enrolments in UK higher education from the region. Among first-year students, this proportion rose to 78.7%. Given China's outsized importance to the East Asia region, the UK higher education sector should consider itself fortunate then that enrolments from the Middle Kingdom were less impacted than those from many other major markets in the region. While first-year student enrolments from China fell by 6.2% in 2020/21, 13 of the 14 other education markets in the region declined by greater amounts.

In fact, the impact of the pandemic on enrolments in UK higher education varied widely across the East Asia region. At the high end, first year enrolments from the Philippines increased quite dramatically, rising 27.8% over the previous year despite the pandemic, as students from the country appear to have been attracted to specific programmes in nursing and the return of the opportunity to work in the UK after graduation.

Everywhere else in East Asia, however, first year enrolments declined in 2020/21. This included precipitous drops in developed markets such as Singapore, South Korea, Taiwan and Japan, all of which saw first year enrolments fall by more than 30% over the previous year. First-year enrolments from Vietnam fell even faster (41.3%), as the UK continued to lose ground in one of the most important education markets in the region. Meanwhile first-year student enrolments from Thailand collapsed by more than 55%.



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While the scale of the decline in enrolments from East Asia differed, nearly every country in the region saw a significant number of students defer – if not cancel – their plans to study in the UK in 2020/21. This fact speaks not only to similar attitudes across the region, but also the challenges that UK higher education institutions may face in turning the ship around.

Preliminary data for issuances of UK study visas in the region in 2021 and UCAS applications from East Asia in 2022 indicate that demand has rebounded in both the current (2021/22) and next academic year (2022/23), but the recovery still often lags behind pre-pandemic levels. This gap suggests that the focus on Covid-19 and its immediate repercussions on outbound mobility from East Asia may have disguised longer-term shifts in attitudes in the region toward studying in the UK.

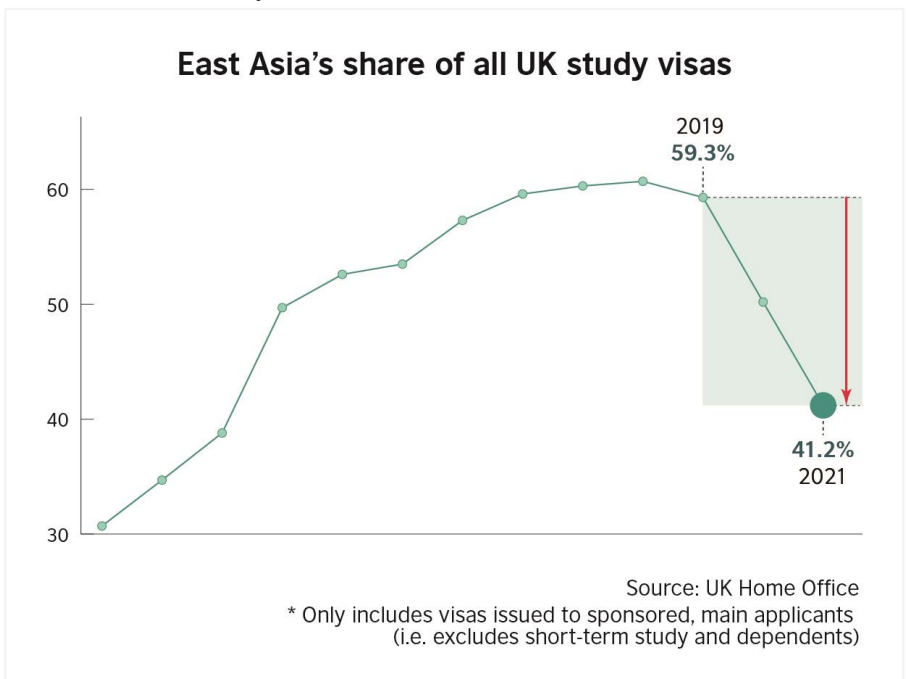
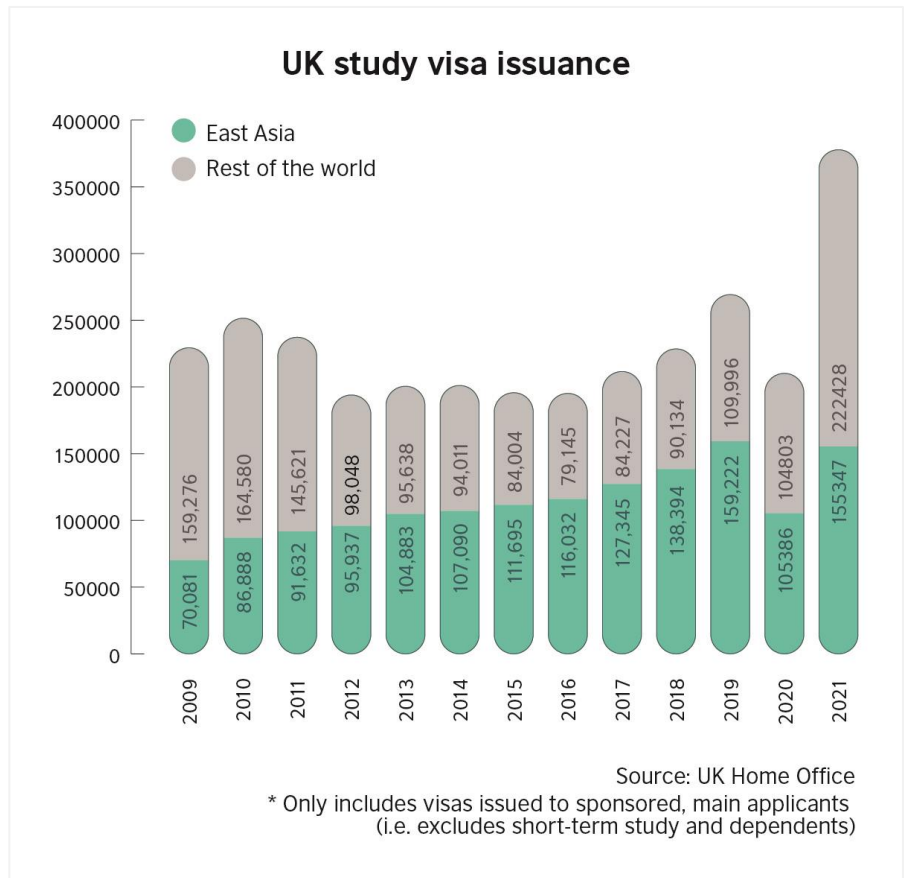
While HESA data gives a clear snapshot of how enrolment patterns changed during the first full year under Covid-19, it is backward looking; getting a clearer picture of where mobility from East Asia may have headed since then requires looking more deeply at signals from more current data sources.

# Demand for UK education remained subdued in East Asia in 2021

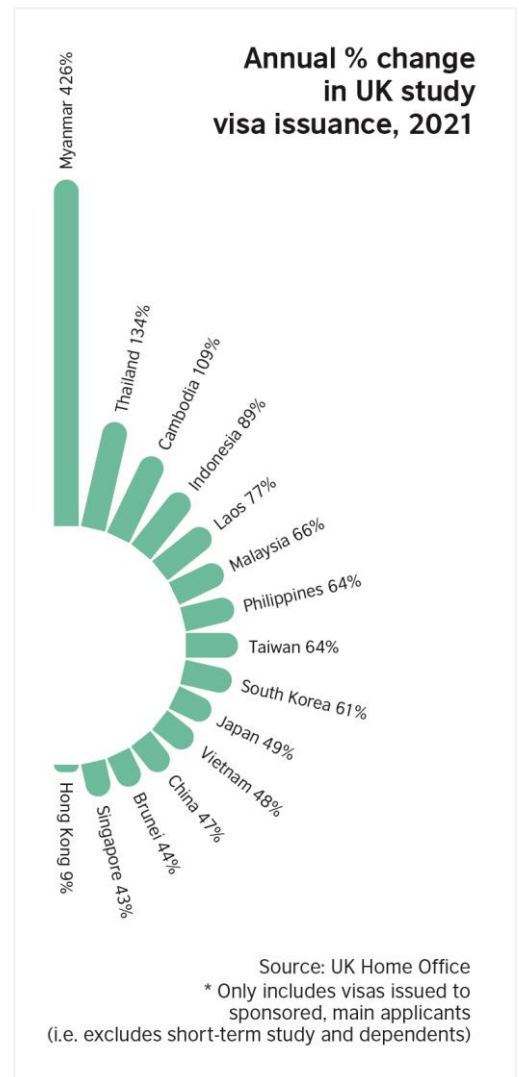
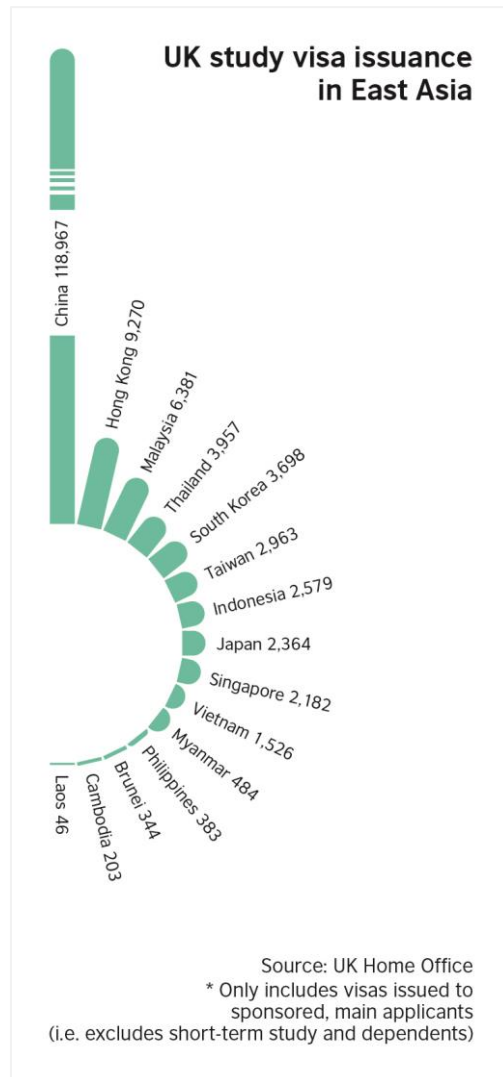
Fortunately, demand from East Asia for UK study visas rebounded sharply in 2021, as it did nearly everywhere. Visa issuance in the region rose 47.4% over 2020 levels. At the same time, the number of UK study visas issued in East Asia in 2021 remained slightly below pre-pandemic levels. Compared with the dramatic growth in demand for UK study visas recorded in other regions of the world in 2021, East Asia’s rebound appears disappointing.

It is also worth noting that issuance of UK study visas to students in East Asia fell off more dramatically in 2020 than to students in the rest of the world. This aligns with HESA data showing a steeper drop-off in first-year student enrolments in UK higher education from East Asia in that period. That overall visa issuance declined to students in East Asia by nearly 34% in 2020 yet first-year enrolments from the region in UK higher education only fell by 12% in 2020/21 also indicates that other study levels were far more impacted by the downturn in mobility in 2020.

Visa issuance in 2021 was a far more positive story overall, including in East Asia, indicating that first-year enrolments in UK higher education should be significantly higher in 2021/22, with other education levels likely also benefitting. However, the muted recovery from East Asia can be seen in the region’s falling share of overall visa issuance – a trend that dates back to 2018. That year, more than 60% of all UK study visas were issued to students in East Asia; by 2021, the figure had dropped to 41%.



The story of East Asia's rapidly declining share of UK study visas goes well beyond the surge in issuance to European students, who were required to apply for UK study visas for the first time in 2021. While issuance of UK study visas to students in East Asia in 2021 remained slightly below 2019 levels, issuance to students in South Asia grew 162% over this period, while issuance in Sub-Saharan Africa rose 144%. Both of these student markets appear to have responded enthusiastically to the return of the post-study work visa, while students in East Asia – and Southeast Asia in particular – have reacted far more coolly.



Despite this growth in other regions, China remains the UK's most important market for UK study visas by some degree, with students in China having received 38,000 more visas in 2021 than those in India. Yet the gap has shrunk considerably since the onset of the pandemic, as the UK issued 85,000 more study visas in China than India in 2019. China accounted for 76.6% of all UK study visas issued in East Asia, similar to its proportion of first-year enrolments in UK higher education in 2020/21. China's share has actually risen slightly since the pandemic struck, from 74.9% of all UK study visas in 2019, despite the strict Covid-19 containment measures still in place in China.

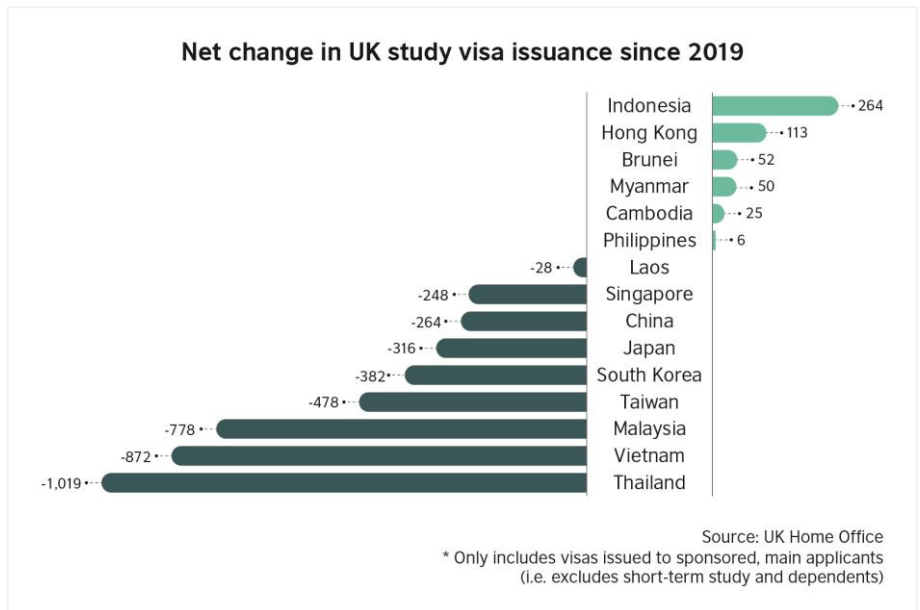
Not surprisingly, issuance of UK study visas grew in every corner of East Asia in 2021, sometimes quite dramatically. Visa issuance more than doubled in Thailand and Cambodia and grew fivefold in Myanmar despite a military coup in February 2021. Hong Kong, on the other hand, recorded only modest growth in 2021 over the previous year, but that is due mostly to a far smaller decline in demand for UK study visas during the previous year. Indeed, more UK study visas were issued in Hong Kong in 2021 than in 2019.

Most of East Asia, however, has yet to return to 2019 levels, let alone surpass them. Nine out of the 15 education markets in the region received net fewer UK study visas in 2021 than in 2019, with the downturn in Thailand, Vietnam and Malaysia most pronounced. Given that a significant number of students who would have sought UK study visas in 2020 presumably delayed their



applications – as HESA enrolment data also suggests – this relatively muted recovery so far in 2021 indicates that a sizeable number of students may be waiting for the pandemic to subside even further before applying for UK study visas. This would suggest that issuance of UK study visas in East Asia could witness much stronger growth in 2022.

For a clearer picture of what is appearing on the horizon, however, we must turn our attention to application data from UCAS for the 2022/23 academic year.



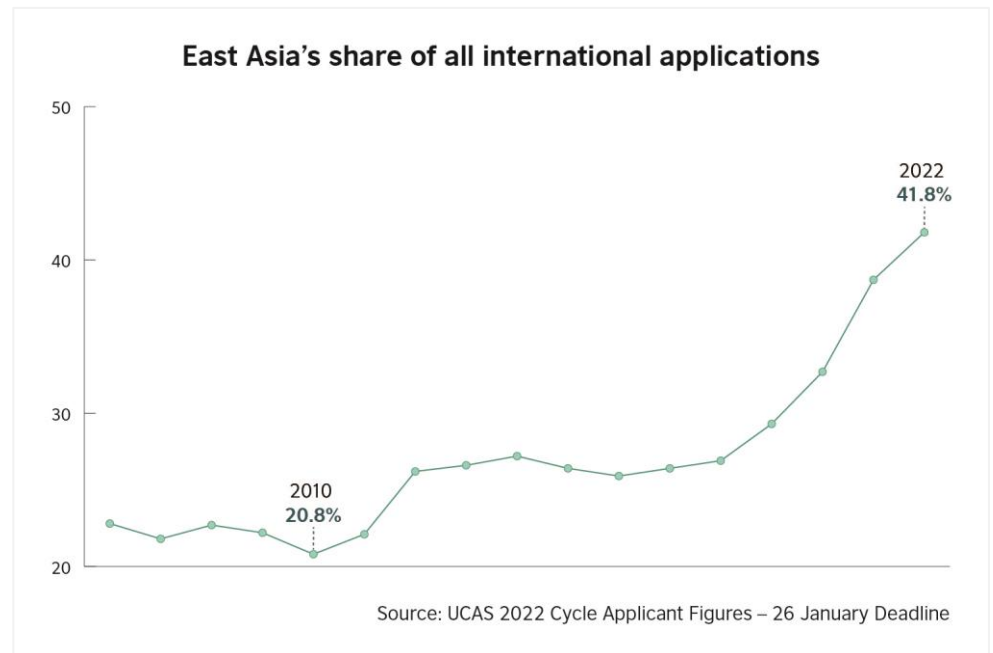
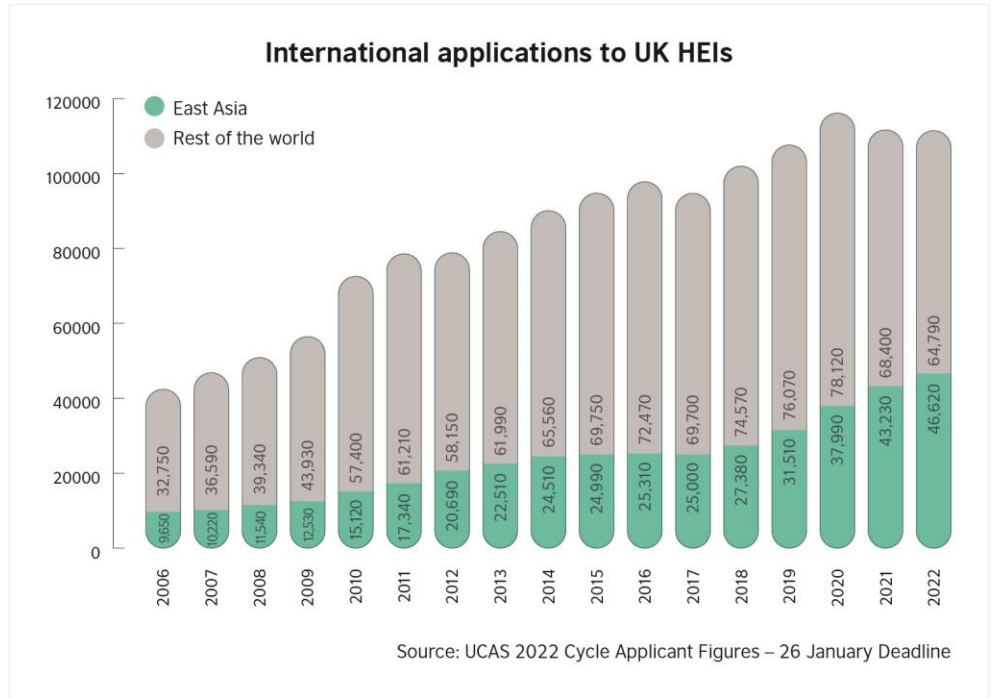
# Undergraduate applications for 2022/23 cycle point to a continued recovery in mobility from East Asia

The latest application data for the 2022/23 academic year indicates steady if unspectacular growth in demand from East Asia for UK undergraduate education. However, UCAS data needs to be taken with a grain of salt, as the number of applications to UK undergraduate programmes in recent years has not shown the downturn during the pandemic that has been recorded in HESA enrolments in 2020/21 or issuance of UK study visas in 2021. If anything, UCAS application data has told an often conflicting story over the last few years.

Applications from East Asia to UK undergraduate programmes have grown consistently every year since 2017, indicating almost no impact from Covid-19 whatsoever. This contrasts with applications from the rest of the world, which declined markedly through the

January 2021 deadline from the previous year (falling by 12.4%) and again through January 2022 (declining a further 5.3%). As a result, the share of all international UCAS applications coming from East Asia has risen from 26.4% in 2017 to 41.8% in 2022.

This growth in East Asia's share is partly explained by a sharp decline in applications from European students, who now must pay higher fees to study in the UK. However, given the downturn in outbound mobility from East Asia shown both in first-year student enrolments in UK higher education in 2020/21 and the region's muted recovery in UK study visa issuance in 2021, some other factors must also explain this data discrepancy.

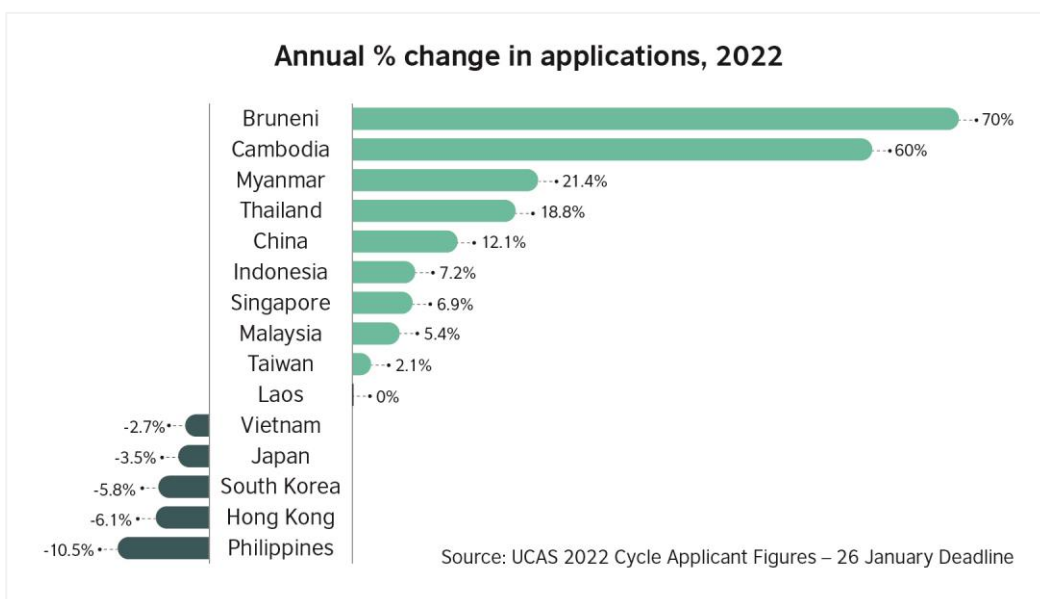
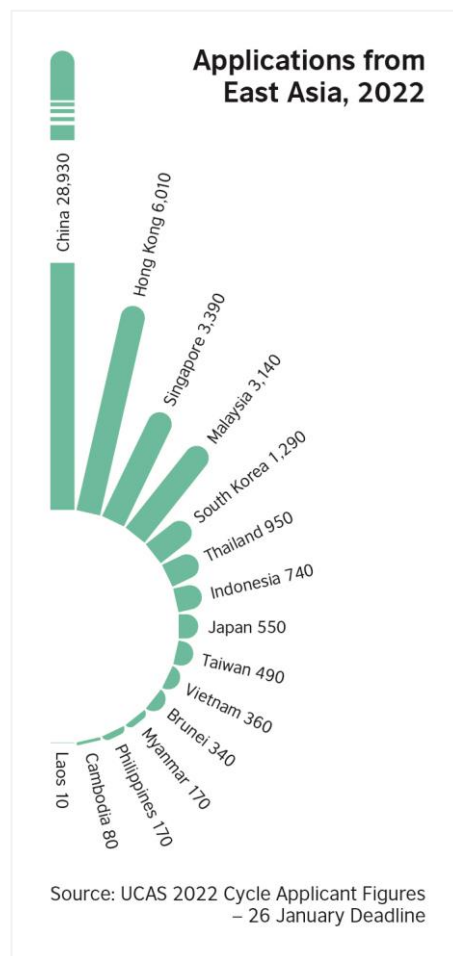


One possible explanation for the gap is that Covid-19 depressed demand from East Asia to travel and study in the UK, but it did not discourage students in the region from submitting applications to UK undergraduate programmes. Indeed, many of the students from the region who received places at UK institutions may have applied with the intention of deferring their enrolments until after the pandemic had subsided. Another possible explanation is that the pandemic has changed the behaviour of undergraduate applicants from East Asia, with students more likely to apply to multiple UK institutions – hence being counted multiple times in UCAS data – or even multiple countries. In the former case, one application from East Asia would be worth only a fraction of an actual inbound student; in the latter, an application could be worth even less.

It also appears that a sizeable number of international students from other regions are enrolling in UK higher education institutions or receiving UK study visas without appearing in UCAS application data at all. Issuance of UK study visas to students in India, for example, grew 83% in 2021 over the previous year, while applications to UK undergraduate programmes from India only rose 25.5%. Similarly, visa issuance to students in Nigeria rose 166% in 2021 but UCAS applications only increased 47%. Many of these Indian and Nigerian students appear to be applying through alternative channels to receive sponsorship for their UK study visas. In East Asia, however, the discrepancy between visa issuance and UCAS applications is not as pronounced, indicating that the share of undergraduate enrolments from the region is higher than in other parts of the world.

Once again, China leads the way in UCAS applications, accounting for a steadily rising share of demand from the region. Students from China made up 62% of all undergraduate applications from East Asia in 2022, up from less than 40% as recently as 2017. Nearly 89% of all growth in UCAS applications

from East Asia since 2020 came from China. While the country's regional share is rising, however, it remains notably lower than its portion of HESA enrolments from the region in 2020/21 or UK study visas issued in East Asia in 2021.


















Most of Southeast Asia also recorded meaningful growth in UCAS applications 2022, including Thailand, Indonesia, Singapore and Malaysia. UCAS applications from these countries have now surpassed pre-pandemic levels.

More concerning for UK universities is the falling number of undergraduate applications in 2022 from other significant education markets in the region such as Hong Kong, South Korea, Japan and Vietnam. UCAS applications from South Korea remain below 2020 levels while those from Vietnam have recovered but not surpassed pre-pandemic levels.

All told, UCAS application data points to a continued recovery in demand for UK education in East Asia in the 2022/23 cycle. However, given the steepness of the drop-off in mobility from the region in 2020/21, as well as the muted recovery in 2021/22, converting these applications into enrolments may be more challenging than in previous cycles.

**The long road back :  
Change in demand for UK education in East Asia since Covid-19**

Education market	First year UK HEI enrolments	UK study visas issued	Applications to UK undergraduate programmes
	2020/21 vs. 2019/20	2021 vs. 2019	2022 vs. 2020 applications applications
 Brunei	-15.4%	+17.8%	+61.9%
 Cambodia	-7.4%	+14%	+14.3%
 China	-6.2%	-0.2%	+36.1%
 Hong Kong	-7.3%	+1.2%	+2.4%
 Indonesia	-24%	+11.4%	+12.1%
 Japan	-36.5%	-11.8%	+1.9%
 Laos	-41.7%	-37.8%	0%
 Malaysia	-35.3%	-10.9%	+11.3%
 Myanmar	-36.5%	+11.5%	+70%
 Philippines	+27.8%	+1.6%	0%
 Singapore	-31.6%	-10.2%	+4.3%
 South Korea	-35.6%	-9.4%	-8.5%
 Taiwan	-36.3%	-13.9%	+2.1%
 Thailand	-55.2%	-20.5%	+20.3%
 Vietnam	-41.3%	-36.4%	0%



Source: HESA, UK Home Office, UCAS

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## Conclusion: Planning for the post-Covid-19 world

The long shadow of Covid-19 can still be seen across East Asia, and demand from the major East Asia markets will likely not fully recover to pre-pandemic levels until the risks of the virus approach zero. But we expect that a recovery will come once the risk has been suppressed.

Longer term, all signs point to continued demand from the major markets in East Asia – led by China – which remain the top region for student mobility to the UK in absolute numbers. The recovery will nevertheless follow a winding path, with challenges arising from the prolonged financial impact of the crisis, rising geopolitical tensions and logistical obstacles that will make travel more complicated and costly.

For UK institutions, it is important to understand that prospective students in East Asia face a maze of uncertainties in making overseas study decisions, churning up a tide of enquiries about everything from campus safety protocol to travel and visa logistics. With heightened competition for international students, universities will need to be even more responsive to these enquiries than they have been in the past. Successful institutions will measure response times in minutes rather than hours or days. Solutions may include setting up frontline response teams in key markets to provide high quality and reliable services to support both students and agents on the ground.

In addition, pressure to recover international enrolments coupled with tighter budgets and travel restrictions will mean that many international offices have to rely more on commercial partners and in-country representation, and this will often mean accepting higher acquisition costs per student. The gradual re-opening of most countries in East Asia will allow UK institutions to plan for face-to-face engagement again. But having on-the-ground representation will be more essential for institutions to manage local stakeholder relations, respond to opportunities and track changing market sentiments more efficiently.

Finally, whilst the return of the Graduate Route has not galvanized mobility from East Asia to the same extent, UK institutions will need to do more to promote high quality post-study work placements for graduates from the region – whether in the UK or overseas. Strong graduate outcomes remain extremely important to students from East Asia, who continue to seek a high return on their investment. Therefore, it will be essential for UK institutions to invest and demonstrate capability in linking international students to industry opportunities both in the UK and their home countries in East Asia.