

June 2023

East Asia Education Insights

UK TNE in East Asia

Post-Pandemic

The pandemic accelerated uptake of UK TNE in East Asia, but often in unpredictable ways

Enrolment patterns in UK transnational education (TNE) in East Asia¹ during the pandemic were remarkable both for what changed and what did not. Overall demand for UK TNE, for example, continued to surge in 2021/22 even as **mobility** to the UK rebounded. TNE enrolments in the region grew more in the two years since 2019/20 than during the seven years that preceded Covid-19. This growth was also experienced by a majority of UK HEIs, with 67 institutions enrolling more students in TNE programmes in the region in 2021/22 than before the pandemic's arrival, compared with only 31 HEIs that saw net TNE enrolments decline over this period.

Yet many of the long-term trends in UK TNE enrolments in East Asia remained fundamentally unchanged during Covid-19. For example, the region's share of global TNE enrolments continued to fall as countries in the Middle East, Sub-Saharan Africa and South Asia grew faster. China's share of UK TNE enrolments in the region continued to rise, with China also remaining the world's largest TNE market by some measure. Yet enrolments in the three other major TNE markets in East Asia – Malaysia, Singapore and Hong Kong – continued to stagnate, due to the improving quality of local higher education provision.

Despite the pandemic, demand for in-person TNE instruction grew faster than fully remote options in the region. Yet enrolment at UK branch campuses in East Asia was also relatively unchanged over this period, with the vast majority of new students registering at UK providers without branch campuses or else directly at their in-country partners. Meanwhile, fewer than half of UK HEIs have reported increases in TNE enrolments alongside decreases in student mobility since 2019/20, calling into question the assumption that growth in TNE enrolments came at the expense of student mobility.

This report examines key trends in TNE enrolment in East Asia, identifying both how the pandemic changed UK TNE in East Asia, and just as importantly, how it did not.

A quick note is also required on definitions and data reliability. This begins with a general caveat that TNE reporting during the pandemic may have been inconsistent.

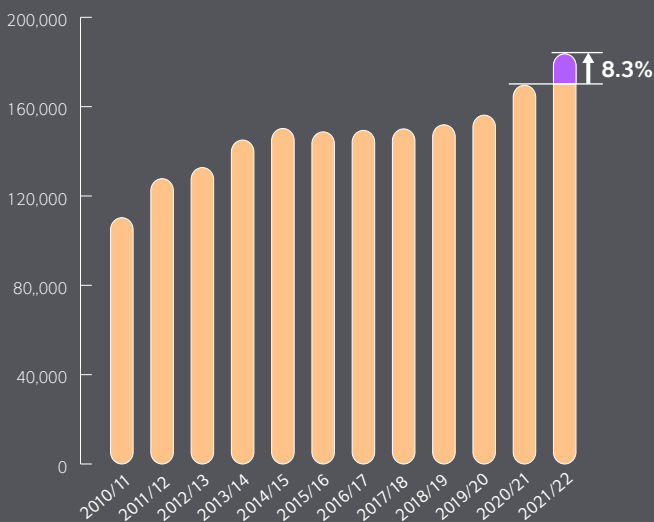
For UK HEIs, Covid-19 upended many of the normally bright distinctions between reporting a student who is enrolled, for example, at a programme in the UK and one who is studying for a UK degree overseas. Or, for that matter, a student who is enrolled in a TNE programme delivered fully remotely and one who is enrolled in an in-person programme that is temporarily conducted online.

Officially, students studying online from their home country due to Covid-19 did not count as distance learning or TNE students if they were enrolled on a course that was originally intended to be delivered in-person in the UK.

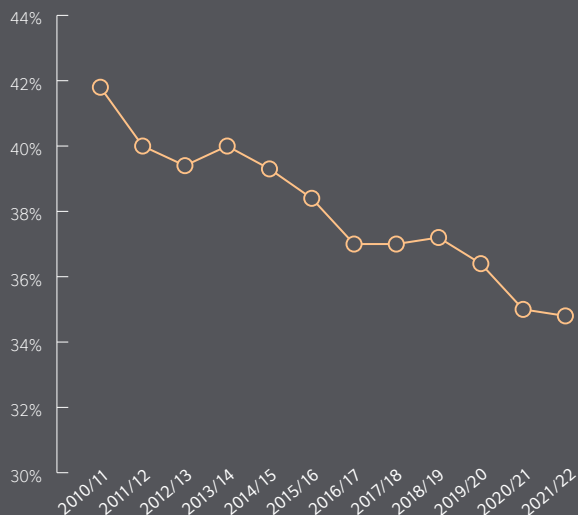
1. This report defines East Asia to include: Australia, Brunei, Cambodia, China, Hong Kong, Indonesia, Japan, Laos, Malaysia, Myanmar, Philippines, Singapore, South Korea, Taiwan, Thailand and Vietnam.

TNE enrolments in East Asia surged during the pandemic, even as the region's share of global enrolments continued to fall

East Asia enrolments in UK TNE, over time



East Asia's % share of UK TNE delivered globally



After largely plateauing from 2014/15 to 2019/20, enrolments in UK TNE in East Asia surged for the second straight year in 2021/22, rising by 8.3%. This growth followed an 8.6% increase in TNE enrolments in East Asia in 2020/21. Overall, enrolments in the region are up nearly 18% from before the pandemic struck, after having risen only 4% over the five years before the arrival of Covid-19 (2014-19).

However, this trend was not unique to East Asia. UK TNE enrolments increased 12.7% globally in 2020/21 over the previous year, and by another 9% in 2021/22. Surging demand for UK TNE across the world suggests that a significant number of students opted to enrol in TNE in lieu of traveling overseas, given both restrictions on international travel and the potential lack of in-person instruction even in the UK. And indeed, first-year enrolments from East Asia at HEIs in the UK were -6.3% lower in 2021/22 than before the pandemic struck.

East Asia remains the top global market for UK TNE – accounting for more than a third of all enrolments internationally in 2021/22 – but the region's share of UK TNE enrolments continued to drop during the pandemic. This is a continuation of a trend that pre-dates Covid-19: East Asia's share of global TNE enrolments has steadily declined over the last decade.

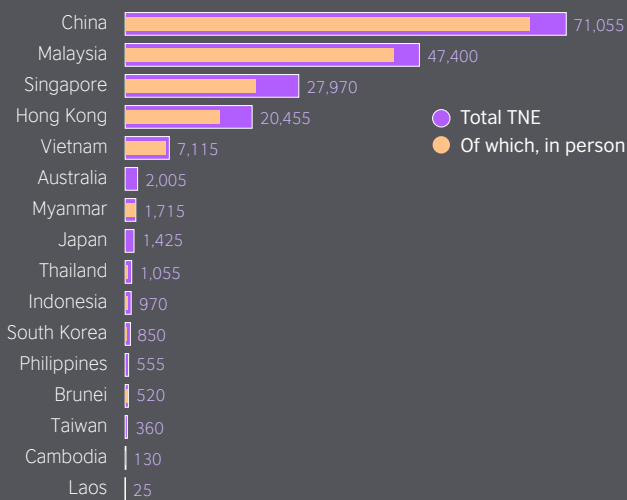
That East Asia's share of global UK TNE fell even as enrolments in the region rose by more than 8 per cent per year is a testament to how rapidly demand is growing in other regions of the world, notably the Middle East, Sub-Saharan Africa and South Asia.

Source: HESA via British Council

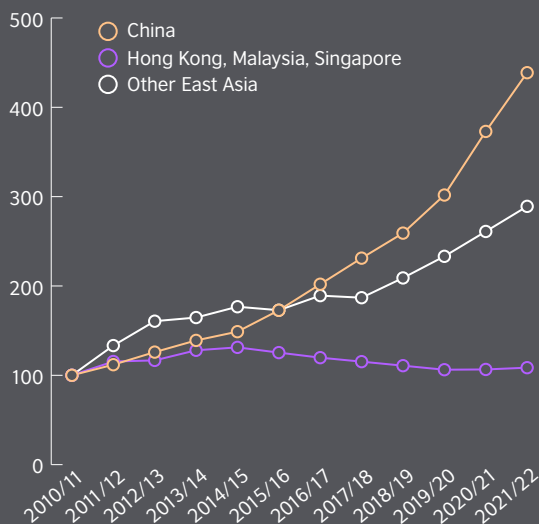
Note: Data from Oxford Brookes University excluded before 2019/20

Demand for UK TNE has continued to grow in China while enrolments in other major markets have stagnated

Enrolments in UK TNE in 2021/22, by East Asia market



Change in UK TNE enrolments by key market
Normalised change, 2010 = 100



UK TNE in East Asia remains highly concentrated in four key markets: China, Malaysia, Singapore and Hong Kong. These four locations together accounted for 90 per cent of all UK TNE enrolments in the region in 2021/22, largely unchanged from 94 per cent a decade ago.

All four of these markets also ranked among the seven largest destinations for UK TNE in the world in 2021/22: China (#1), Malaysia (#2), Singapore (#4) and Hong Kong (#7). Nearly 32 per cent of all students enrolled in UK TNE programmes around the world in 2021/22 were based in one of these markets in East Asia.

At the same time, growth in enrolments among these four TNE hubs has been driven entirely by China in recent years. Enrolments in China have surged by 45% since 2019/20, largely due to a policy permitting joint institutes to recruit extra students beyond their quota, if those students had been accepted to an overseas HEI but were unwilling or unable to travel during the pandemic.

On the flip side, UK TNE enrolments have fallen slightly in the three other major markets in the region over the last decade, with the number of students enrolled in UK TNE across Malaysia, Singapore and Hong Kong lower in 2021/22 (95,825) than in 2011/12 (101,925)¹. However, the stagnation in these three markets is also a sign of their success, as decades of UK TNE provision have helped strengthen and expand local higher education provision in these locations.

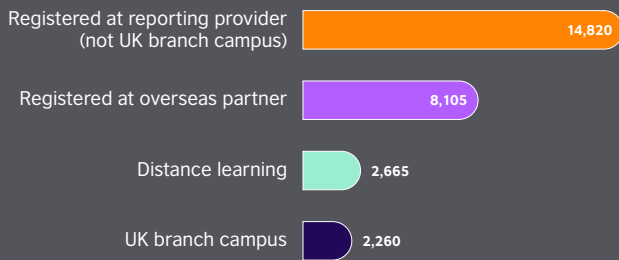
Across the rest of the region, demand for UK TNE has also continued to grow, albeit from a much lower base. Overall, TNE enrolments outside of the big four markets have more than doubled over the last decade, led by Vietnam (up 92% since 2019/20), Taiwan (60%), Cambodia (53%) and the Philippines (52%).

Source: HESA via British Council

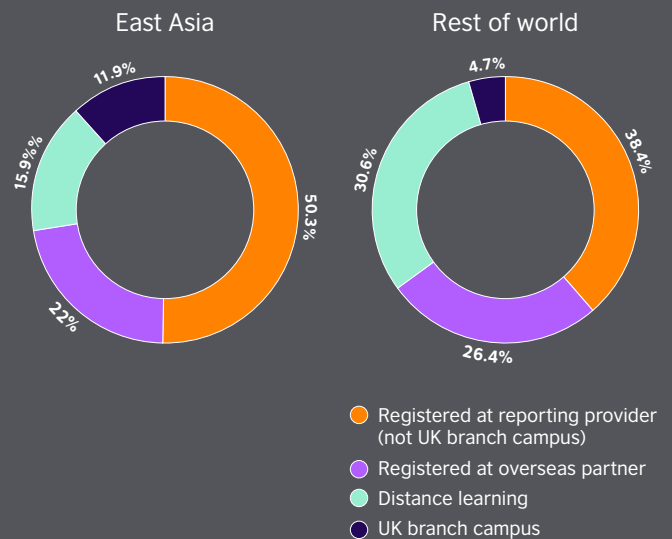
1. UK TNE enrolment data from 2018/19 and before excludes Oxford Brookes University.

Even during the pandemic, most students in East Asia preferred in-person instruction

Net change in UK TNE enrolments in East Asia since 2019/20 by type of delivery



TNE enrolments in 2021/22, by type of TNE programme



Overall, enrolments in UK TNE in East Asia grew by 27,420 students from 2019/20 to 2021/22. Most of this growth occurred in TNE programmes delivered in-person rather than through distance learning methods.

Only 2,260 more students enrolled in fully remote UK TNE programmes in the region in 2021/22 than before the pandemic, accounting for less than 10 per cent of the total growth in enrolments in the region over this period. Meanwhile, demand for UK TNE grew much more quickly in East Asia for programmes delivered in-person, despite Covid-19 having largely shut down international travel and made face-to-face instruction much more difficult.

Higher demand for in-person instruction in East Asia is partly explained by longstanding cultural preferences in the region for face-to-face learning. In 2021/22, for

example, students in East Asia enrolled in distance-learning TNE programmes at half the rate of the rest of the world, with only 15.9% of UK TNE delivered remotely in the region, compared with 30.6% in all other locations. In other words, far from changing the enrolment behavior of TNE students in East Asia, the pandemic accentuated it.

At the same time, enrolments at UK branch campuses in the region grew by relatively modest amounts during the pandemic. Overall, enrolments at UK branch campuses in East Asia increased by 2,260 students in 2021/22 compared with 2019/20 levels, representing only 8 per cent of the total increase in enrolments in UK TNE over this period.

Source: HESA via British Council

Access to in-person TNE instruction remains limited in many parts of the region

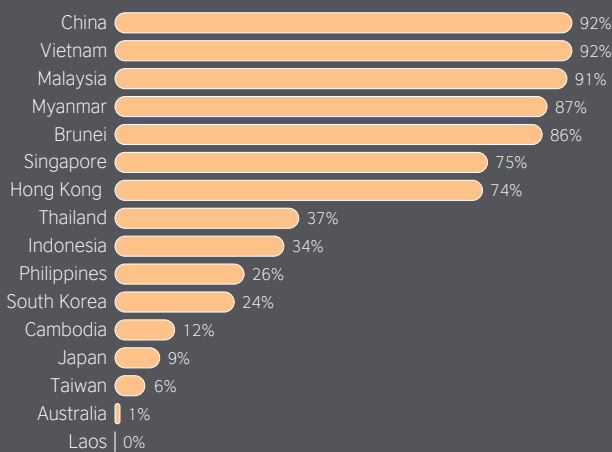
Access to UK TNE continues to vary widely across East Asia, with the pandemic bringing little change in this fundamental divide. In seven markets in the region, at least three-quarters of all enrolments in UK TNE continue to be delivered in person (including during the pandemic). Yet in the remaining nine markets, at least two-thirds or more of all UK TNE is delivered via distance learning methods.

Furthermore, in-person TNE remains a prerequisite for UK HEIs to achieve scale in the region. The four markets in East Asia that together account for 90 per cent of all UK TNE enrolments in the region all deliver a majority of their TNE programmes in person. In the fastest growing market for UK TNE in East Asia – Vietnam – more than 90 per cent of programmes were delivered in-person in 2021/22. While permission to deliver TNE in-person is generally not at the discretion of UK HEIs, varying degrees of policy support for TNE in the region can and should influence the strategic decisions of institutions.

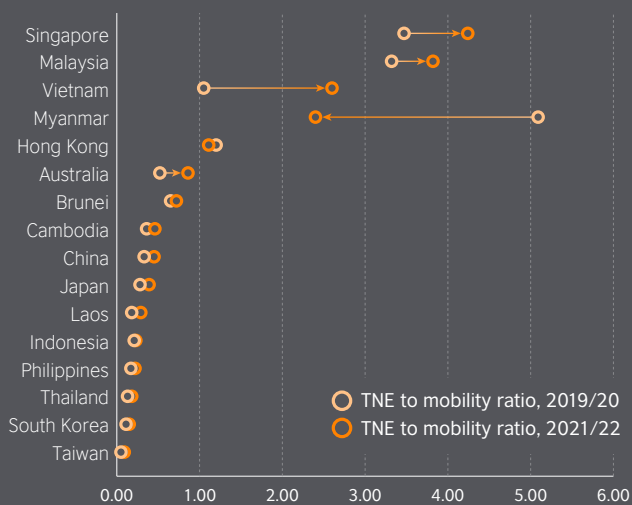
The attractiveness of TNE compared with mobility also varies widely across the region. In five of the 16 education markets in East Asia, for example, more students continue to enrol in UK TNE programmes than at HEIs the UK. In other markets, however, the ratio of TNE enrolments to student mobility to the UK is as low as 1:10.

In almost every market in East Asia, however, the pandemic increased the relative attraction of UK TNE. In 14 of the 16 markets, the ratio of enrolments in UK TNE to HEIs in the UK increased during the first two years of the pandemic; only Hong Kong and Myanmar were exceptions, likely due to internal political dynamics.

% share of all UK TNE delivered in person
2021/22

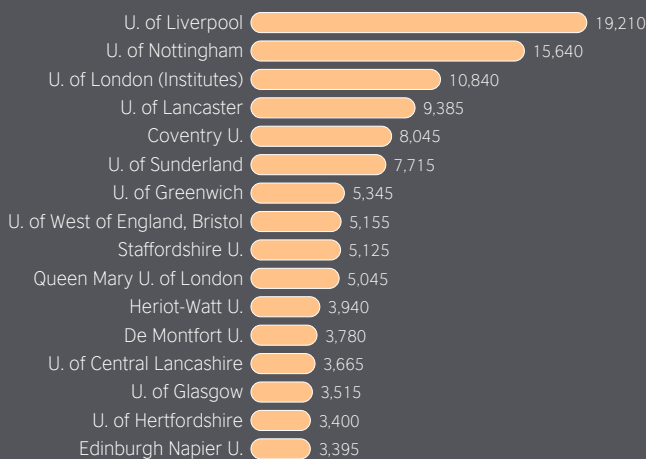


Ratio of enrolments in UK TNE to mobility to UK

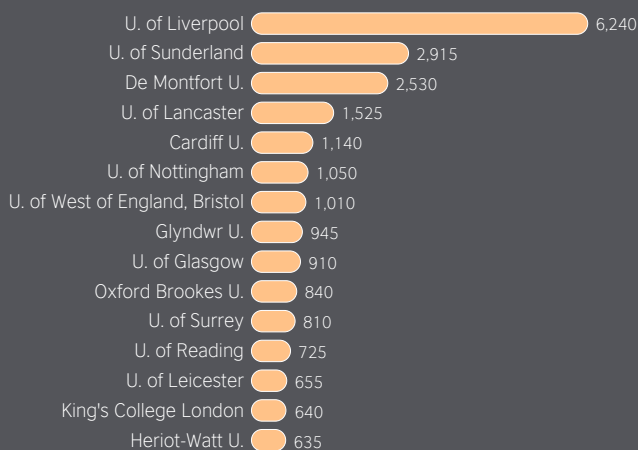


Most UK HEIs benefitted from growing demand for UK TNE in East Asia during the pandemic – but not all

UK HEIs with largest TNE enrolments in East Asia
2021/22



Largest net change in TNE enrolments in East Asia
2019/20 to 2021/22



At the institutional level, the lion's share of TNE enrolments in East Asia continue to be recorded by only a few UK HEIs. In 2021/22, for example, 10 UK HEIs accounted for half of all TNE enrolments in the region.

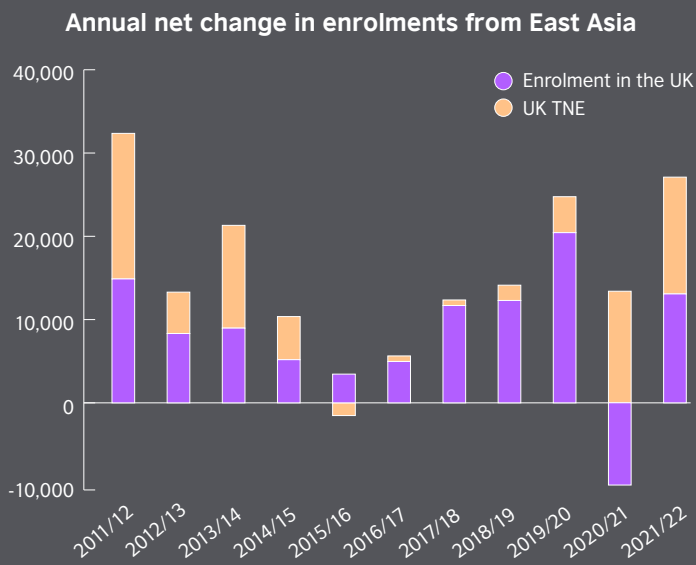
Even among the three institutions that enrol the greatest number of students in the region, however, the makeup of their student bodies varies widely.

- The **University of Liverpool**, for example, accounted for 10.5% of all UK TNE enrolments in the region in 2021/22, but 99 percent of these enrolments were based at its campus in China.
- The **University of Nottingham** comprised 8.5% of all TNE enrolments in the region in 2021/22, with 63% of these students located at its campus in China and another 34% enrolled at its campus in Malaysia.
- Meanwhile, the **University of London**¹ – which delivers its TNE programmes remotely – accounted for 5.9% of all UK TNE enrolments in East Asia in 2021/22, but only 6.1% of these students were based in China, while 41% were located in Singapore, 23% in Malaysia, and nearly 15% in Hong Kong.

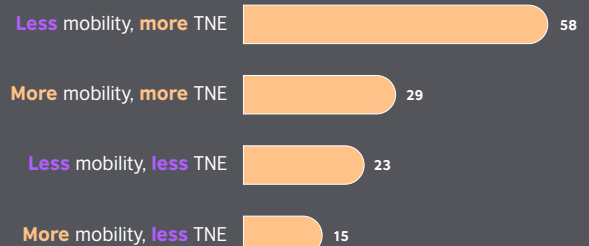
However, a majority of UK HEIs benefitted from surging demand for UK TNE due to the pandemic. All told, 67 UK HEIs enrolled more TNE students in the region in 2021/22 than in 2019/20. This figure was more than twice the number (31) of UK HEIs that saw net enrolments from the region decline over the same period.

While a rising tide did not lift all boats, differences in the strategic approaches that UK HEIs took to the region both during and before the pandemic likely explain a large part of the variation in their TNE enrolment performance.

Greater TNE enrolments in East Asia have not come at the expense of mobility to the UK



Change in enrolments from East Asia since 2019/20, by number of UK HEI¹



On the face of it, increasing TNE enrolments in East Asia – particularly during a global pandemic – would logically come at the expense of student mobility to the UK. A cursory look at the data would seem to support this hypothesis. In 2021/22, 66% of UK HEIs reported greater enrolment in their TNE programmes in East Asia than before the pandemic¹, while 64% of UK HEIs have reported declines in student mobility from the region since 2019/20.

However, a closer look at the data reveals that growth in TNE enrolments is more often associated with increased mobility to the UK. Over the last decade, for example, TNE enrolments have increased only once when enrolments in the UK did not: 2020/21. Rather than being substitutes for one another, TNE and mobility have been complementary.

At the institutional level, enrolment patterns during the pandemic were even more unpredictable. Of the 125 UK HEIs that reported changes in both TNE and mobility

enrolments in East Asia from 2019/20 to 2021/22, fewer than half (46%) reported *declining* mobility alongside *increasing* TNE enrolments over this period.

On the other hand, 23% of UK HEIs reported increases in both mobility and TNE, 18% reported declines in both, while 12% of institutions reported increases in mobility alongside decreases in TNE enrolments.

In other words, more than half of UK HEIs did not see TNE enrolments increase at the expense of mobility, while almost one quarter of these institutions were able to boost enrolments of both category of student over this period. There was no ‘common’ enrolment experience for UK HEIs over this period, and greater numbers of TNE enrolments did not come at the expense of mobility to the UK.

Source: HESA via British Council

1. Data only includes UK HEIs that recorded net changes in enrolments in both mobility and TNE from 2019/20 to 2021/22, n = 125.

Conclusion

Far from remaking TNE in East Asia, the pandemic turbocharged many of the pre-existing trends in the region

Key takeaways for UK HEIs

- 1 Even though East Asia remains the top region for UK TNE— accounting for more than a third of all global enrolments in 2021/22 – its share of UK TNE enrolments continued to fall during the pandemic.
- 2 UK TNE in East Asia remains highly concentrated in four key markets but we are seeing growth in markets such as Vietnam and Phillipines albeit from a very small base.
- 3 Demand grew significantly faster for UK TNE delivered in-person in East Asia, despite Covid-19 having largely shut down international travel and made face-to-face instruction more difficult.
- 4 Offering in-person TNE remains a requirement for most UK HEIs to achieve scale in the region. Fortunately, demand remains high for UK TNE, with enrolments in TNE outnumbering mobility to the UK in five of the region's education markets.
- 5 TNE enrolments have increased at more than twice as many UK HEIs as have decreased since the onset of the pandemic, even as a handful of UK HEIs continue to account for the lion's share of all enrolments in the region.
- 6 There was no 'common' enrolment experience for UK HEIs over this period, and greater numbers of TNE enrolments did not come at the expense of mobility to the UK.

The future of UK TNE in East Asia

Despite East Asia's declining share of global TNE enrolments, the region holds great promise for UK HEIs.

- As the quantity of students enrolling in UK TNE in the region slows, the quality of instruction in East Asia is accelerating.
- The region is ripe for new partnership opportunities for UK HEIs that are willing to make continued investments in the region, especially institutions looking at deeper partnerships beyond merely teaching transactions.

Despite a slowdown in mature TNE hubs, East Asia remains home to four of the seven largest TNE locations in the world.

- No other region can rival East Asia's combination of size and high-quality local higher education provision.
- Improving local HEIs mean there are stronger partners to deliver UK TNE and maintain world-class standards.

Despite two years' worth of enrolment data, there is much that we still do not know about the future of TNE in the region.

- Demand for UK TNE continued to grow in 2021/22 despite a significant rebound in outbound mobility to the UK.
- The pandemic may have permanently altered attitudes toward UK TNE, particularly in smaller markets with high-growth potential.

QUESTIONS OR COMMENTS?

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