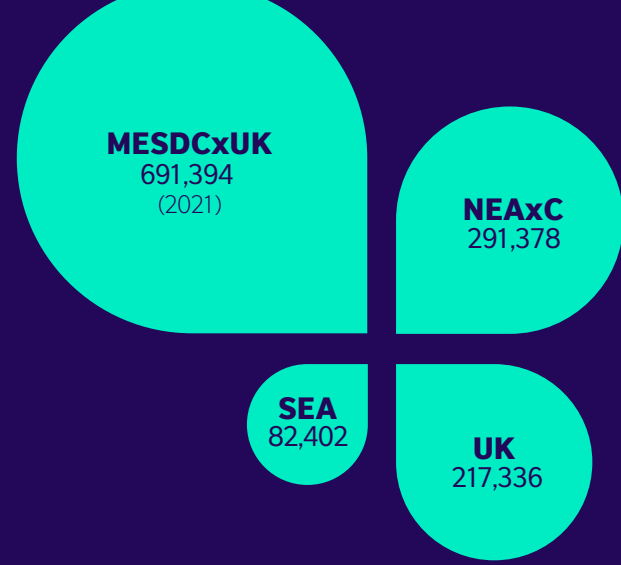


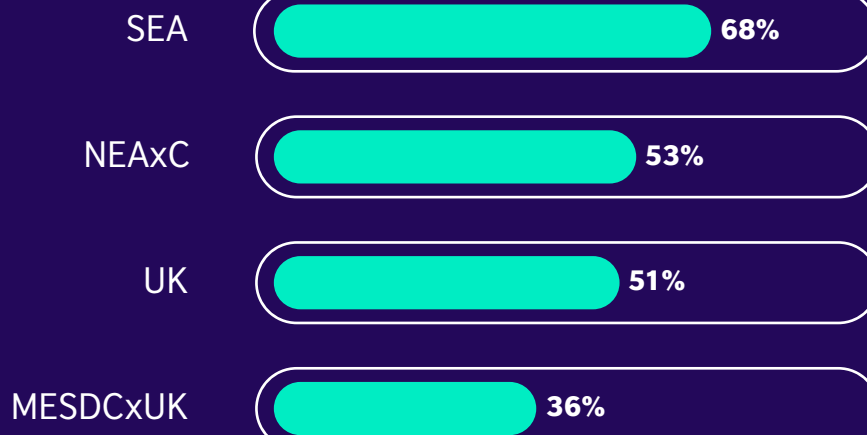
Intra-regional mobility in East Asia

Student mobility within East Asia is **rising...**

Mobility of students from East Asia into the four markets/regions in 2022



Growth of inbound students from East Asia into the four markets/regions (2013-2020)

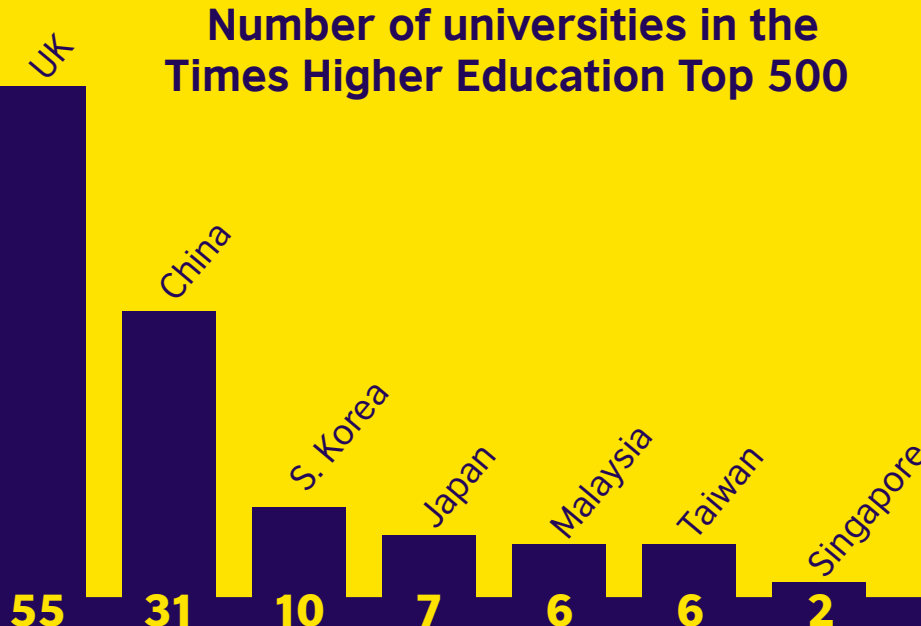


Source: UIS, China Ministry of Education, JASSO
 Note: NEAxC as a destination covers Hong Kong SAR, Japan and South Korea; SEA as a destination covers Malaysia, Thailand and Vietnam; there is no publicly available data for Singapore and Taiwan as destinations, or mainland China post 2018.

... driven by **4 main factors**

- IMPROVED RANKINGS
- ECONOMIC GROWTH
- SCHOLARSHIPS
- LOWER COSTS

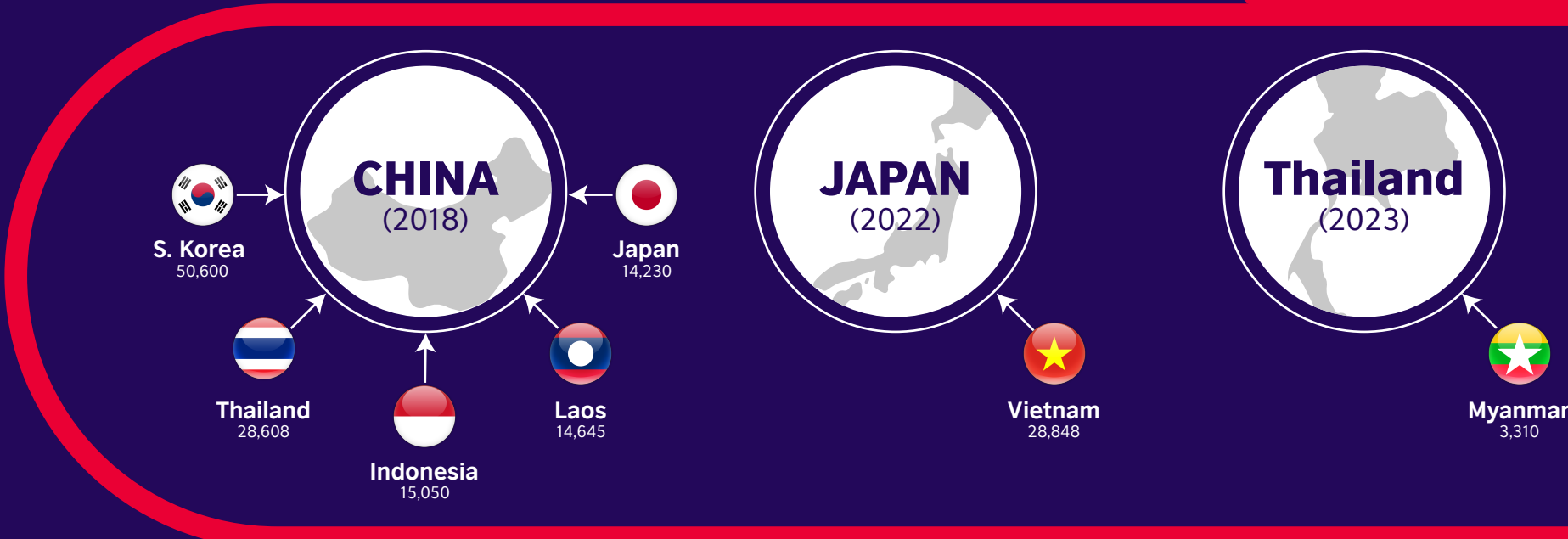
Number of universities in the Times Higher Education Top 500



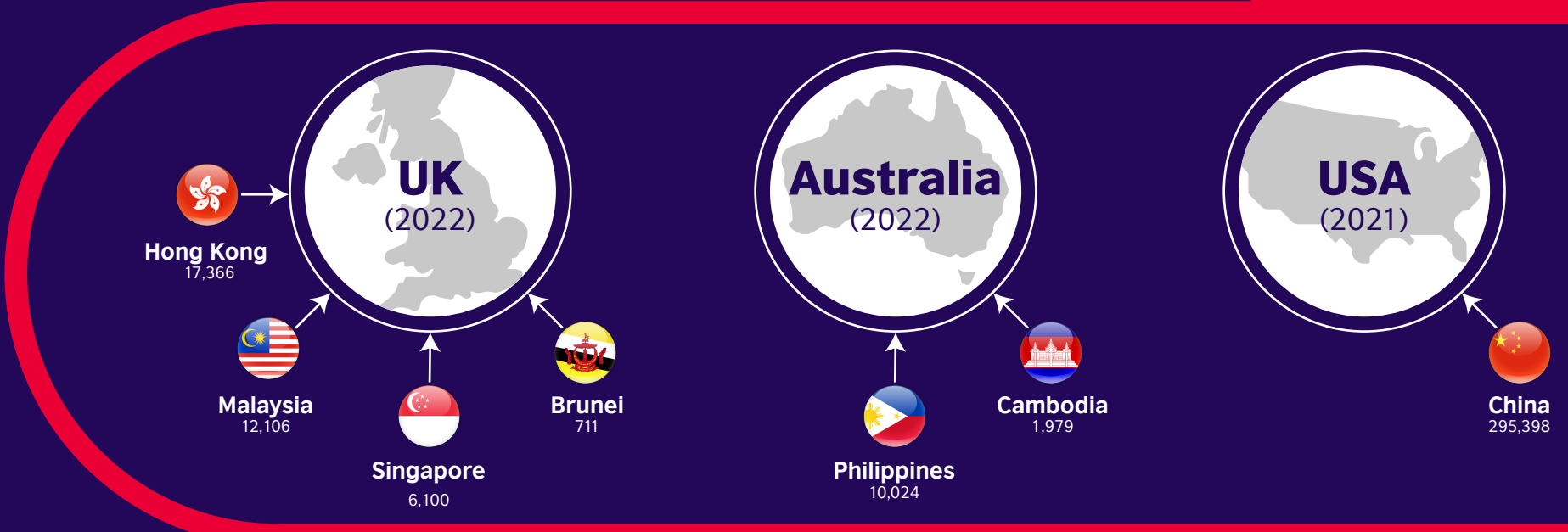
For half of the countries in East Asia, the top outbound market is another country/territory in **East Asia**

Top host country for EA source markets

East Asia



MESDC*

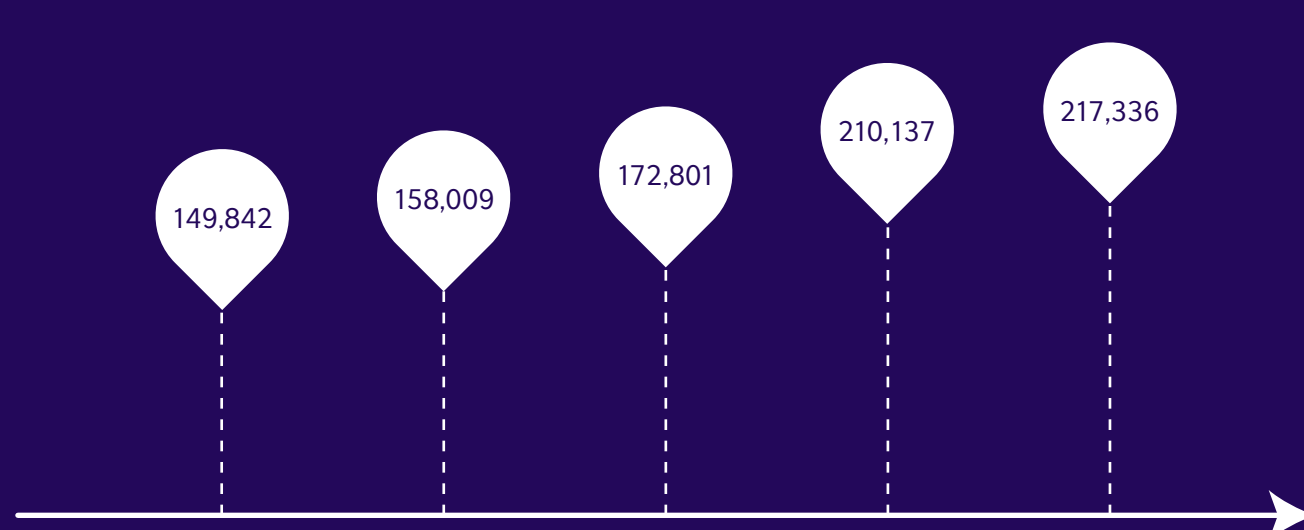


* Main English speaking destination countries
 Source: UIS, China Ministry of Education, JASSO

For the UK, rising competition in East Asia **means**

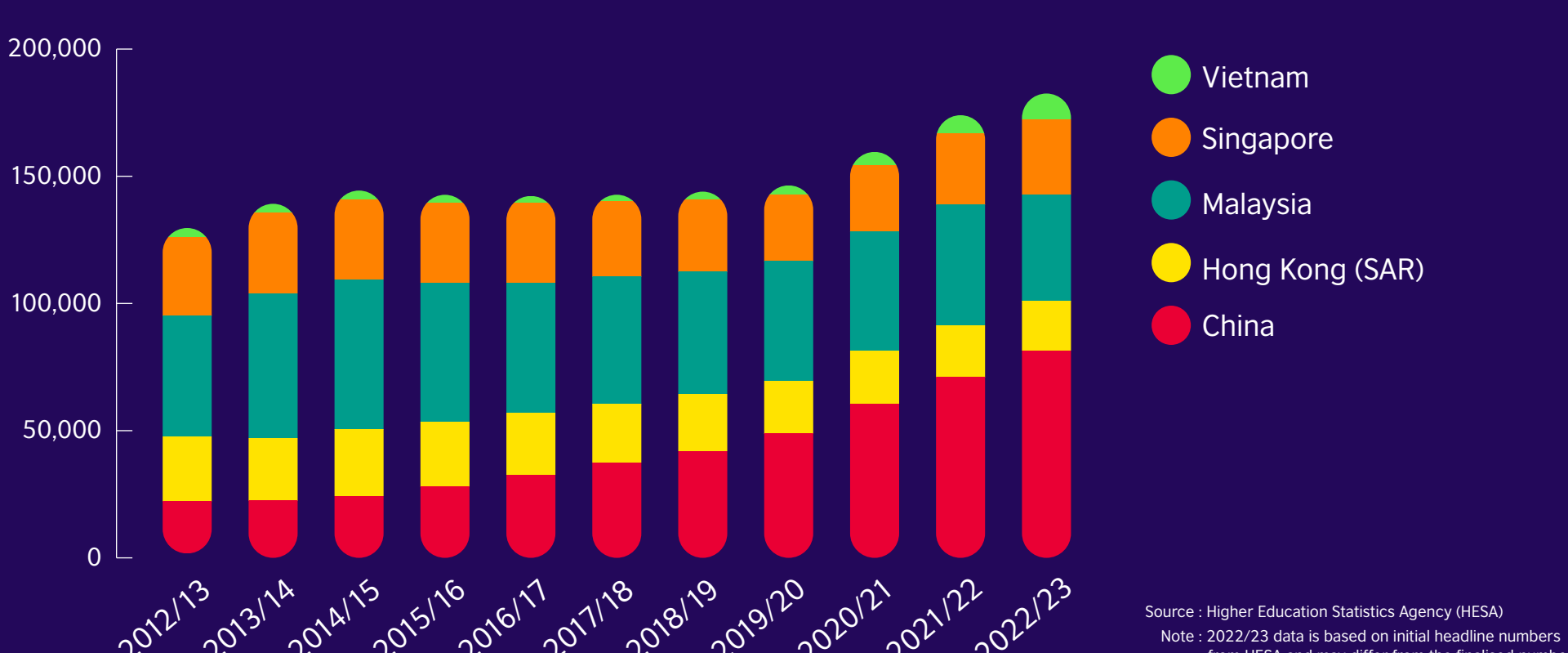
- Ensuring that the quality of the UK education offer remains world class
- Establishing a strong presence/regional hub to ensure timely response and relevance to local and regional audiences
- Proactively positioning UK TNE to capture demand from within EA and close neighbouring regions (e.g. South Asia/MENA)

Mobility from EA to the UK



Source: UIS

Enrolment in UK TNE in select EA countries/territories



Source: Higher Education Statistics Agency (HESA)
 Note: 2022/23 data is based on initial headline numbers from HESA and may differ from the finalised number