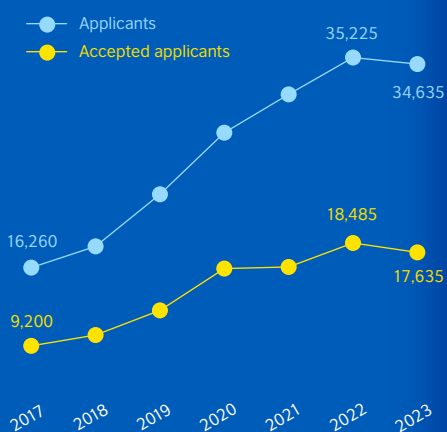


# Undergraduate Recruitment Channels from China and Future Prospects

1

## Demand for UK education in China may be plateauing amid rising competition

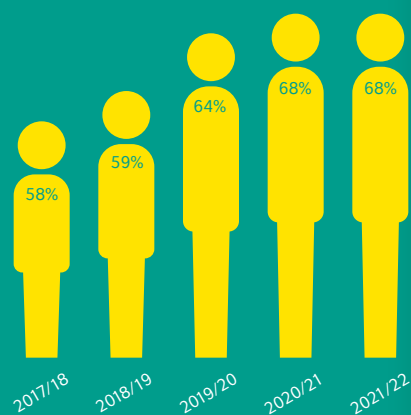


Recent trends in Chinese undergraduate applications

Source: UCAS

2

## A growing proportion of Chinese UG students study their whole course in the UK



First year, first degree entrants by year of entry

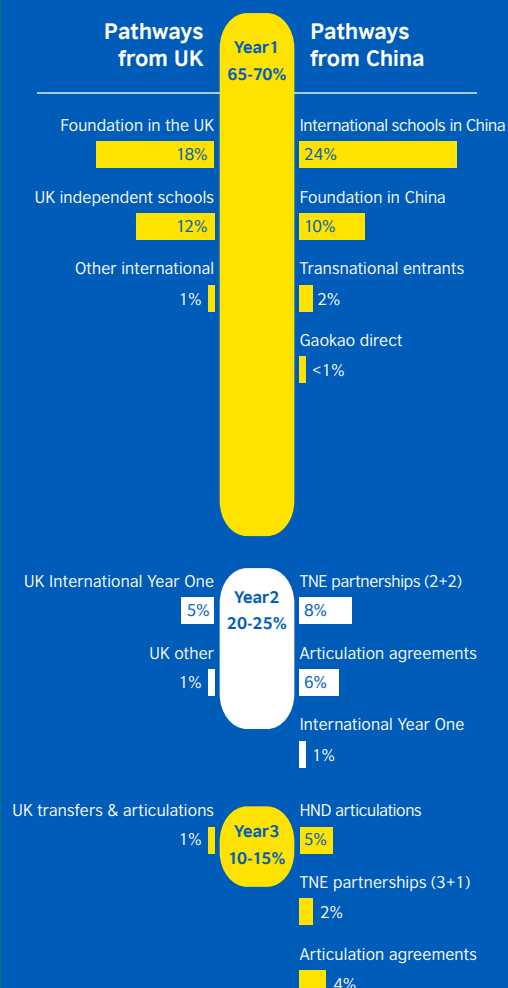
Source: HESA

\* Year 2+ entrants include students transferring through transnational education partnerships and credit recognition agreements

The number of China-domiciled students joining UK degree courses in Year 1 grew substantially between 2017/18 and 2021/22, while the number entering in later years has seen a slight decline.

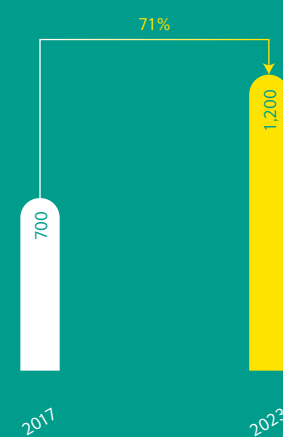
3

## Foundation programmes and international schools in China are the major pathways for students



4

## Growth in international schools in China is driving mobility to the UK



The number of international high schools in China over time

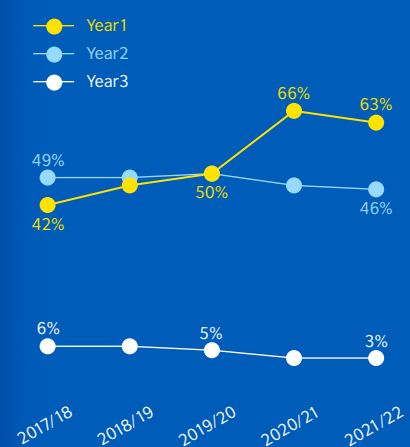
Source: Bonard

\* Includes international/bilingual schools, schools for non-Chinese citizens, and international departments of public schools

- More than 665,000 students were enrolled in international schools in China in 2022.
- Many of these schools are located in Beijing, Shanghai, and affluent provinces of Guangdong, Zhejiang, Jiangsu, and Shandong.

5

## Rankings matter more, but wildcards could upend mobility demand



Share of Chinese new undergraduate entrants enrolling in Russell Group by year of entry

Source: HESA

**Wild cards:** Geopolitical competition, economic slowdown in China, more restrictive UK migration policy.

The UK's appeal as a study destination has traditionally been strong among Chinese students, thanks to its cost-performance ratio, shorter programme durations, and academic prestige.