

UCAS



GLOBAL INSIGHTS: WHAT ARE THE EXPERIENCES OF CHINESE STUDENTS IN THE UK?

INTERNATIONAL

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FOREWORD

I'm delighted Pearson has partnered with UCAS on this fascinating report into the Chinese student journey through UK higher education (HE).

Pearson is the world's leading learning company, serving 160 million users a year – and both China and the UK are, and always have been, a crucial part of Pearson's global focus.

On my visit to China earlier this year, I met with government, businesses, and institutions, and saw first-hand how crucial education is seen in relation to the country's ongoing and future prosperity.

As we have witnessed since the pandemic, as borders re-open so global mobility increases. You need not look further than this report for evidence of this. It demonstrates clearly that Chinese students want to continue their higher education in the UK – for the cultural experience, for a love of learning, and to boost their future employment prospects. It's heartening to learn, through this research, that nine in ten Chinese students would recommend the UK as a study destination. In a country where education is king, the UK retains its crown.

What we are seeing at Pearson, including within the division I lead, English Language Learning, is that the reasons to learn, such as purely to pass exams, are changing. Learning is now a lifelong pursuit and language skills in particular are a key requirement to succeed in both HE and in your career. People now want, and businesses increasingly require, ongoing learning and skills development for personal growth and to accelerate up the career ladder.

Pearson has responded to this global shift by creating a learning and assessment ecosystem that connects people and products, meeting

consumer, institutional, corporate, and self-learning needs. Equally, we are delighted to be continuing our partnership with UCAS to expand the reach of our content and test preparation materials for Chinese students.

As you will see from the following pages, this research gives fresh insights into how, why, when, and where Chinese students choose to study in the UK.

Pearson will be reviewing the findings and digging into this rich data, so we can find even better ways to support Chinese students to gain the language skills they need to succeed both in their learning and beyond into life. We will also be looking at how we can work with organisations, such as UCAS, to make the UK the most attractive study destination possible, for all international students.

I hope you find this research as rewarding and illuminating as I did.

Gio Giovannelli
President, English Language Learning, Pearson



REFLECTION

It is with great pleasure and personal pride that I present this report as the Executive Member of the British Universities International Liaison Association (BUILA) and Chair of the China Regional Interest Group. As a former Chinese student in Wales, I can vouch for its vibrant culture and welcoming community and encourage international students to explore the diversity of experiences offered across different regions of the UK. The incredible experience of UK higher education has shaped my personal and professional life.

In my various international roles at UK universities, I have had the privilege of supporting many impactful UK-China HE partnerships that played a role in shaping the Chinese recruitment landscape. The long-standing commitment of UK universities to engage and invest in Chinese market is facing compounded challenges by recovery of domestic and global economies and job markets, geopolitics, and changing immigration policies. The good news for all higher education recruiters is that the Chinese market has shown its resilience to these challenges. However, the future of international student recruitment from China can only be delivered by a coordinated approach by universities and the wider sector bodies, re-building one of the strongest education links for UK and Chinese students for many years to come.

I am pleased that this report explores the full student lifecycle and the complex ecosystem of Chinese applicants, including the multi-layered push and pull factors, and diverse influences that shape Chinese students' decisions to study in the UK. Understanding these influences is vital for universities as we shape our China strategies and marketing tactics to connect with the needs and aspirations of this important market, and deliver our universities' own unique value services.

A key finding from this report is the growth potential in the Chinese market, for an increasingly diverse subject range. Amidst intensified competition for local university places in China, and an extremely competitive labour market that is seeking internationally educated, bilingual, and career-ready graduates, universities in the UK have valuable opportunities to pursue diversification and sustainability within China.

I would like you to join me in applauding UCAS and Pearson, and the Beijing Overseas Study Service Association (BOSSA), for this comprehensive report. It not only reinforces the importance of the Chinese student market but will serve as a catalyst for deep and authentic collaborations centred around students themselves, enabling cross-cultural understanding to flourish. I also extend my gratitude to the hundreds of thousands of Chinese students who have chosen the UK as their academic home, enriching our campuses, cities and industries with their diverse perspectives and contributions.

Finally, enjoy reading and delving into the rich data and insights presented in this report. I look forward to hearing how this insight has helped shape your engagement with China.

Ula Tang-Plowman,
Executive member, BUILA
Chair, China Regional Interest Group
Director of International Recruitment, University of Central Lancashire



EXECUTIVE SUMMARY



China is the biggest undergraduate (UG) international market for UK HE and the third biggest market overall – more applicants apply through UCAS from China than from either Wales or Northern Ireland. There were 33,195 Chinese applicants to UK UG studies in 2023.

The number of UG Chinese students placed through UCAS has more than doubled (+9,400) since 2016– the fastest growth rate of entry to the UK, worldwide. As such, one in four international acceptances through UCAS are currently from China. Their net economic benefit to the UK is significant – in 2021, the British Council **calculated** that Chinese students, as a whole, spent £5.4bn on costs such as tuition fees and living expenses in the UK.

UCAS projections, as discussed in our **Journey to a Million** essay collection, demonstrate that long-term demand from China will continue to grow – by 2030 Chinese UG applicants could exceed 50,000, overtaking Scotland and making it the second biggest national market behind England. However, some commentators are suggesting the UK may be close to '**peak China**'. Post-COVID effects on attainment of Chinese students, coupled with uncertainty regarding the global and domestic **economy**, and ongoing concerns for parents and students around **personal safety** and **affordability** are likely to have an impact on future demand.

For the first time since 2013, UCAS **end of cycle data** for 2023 has recorded a reduction in the number of UG applicants from China (-1% on 2022), and for the first time since 2015, a reduction in the number of acceptances (-6% on 2022). Whilst the return to growth in Chinese applicants is projected, it will depend on several factors. To what extent will the Chinese economy recover? For how many years will the impact of the pandemic endure on the mindset of parents and applicants?

With intensifying competition from mature and new study destinations in an increasingly competitive post-pandemic international student market, how will the UK fare? And to what extent may the wider public narrative regarding migration could influence student mobility?

Through this report, in partnership with Pearson, we seek to provide post-pandemic insight into Chinese students who choose the UK as their UG study destination. To do this, we combine data from the more than 33,000 Chinese UG applicants making 140,000 applications to UK universities and colleges, with survey insights from almost 1,600 UG Chinese applicants and around 200 existing UG Chinese higher education (HE) students¹. By collaborating with the Beijing Overseas Study Service Association (**BOSSA**), we are also able to share previously unpublished 2022 behavioural insights highlighting early indications as to trends in appetite for UK study across China.



1 Further information on these audiences can be found in the technical notes.

KEY FINDINGS INCLUDE:

Nine in ten Chinese students would recommend the UK as a study destination. 92% also share that their expectations of course quality have been exceeded or met.

Reputation is the number one factor that makes the UK stand out as a study destination. Consistent with previous **UCAS research**, 62% of Chinese students select UK HE for its reputation. Rankings are highly attractive for students seeking overseas studies to obtain a hukou¹, with Shanghai **issuing** it to Chinese graduates from top 100 universities in the world.

Chinese students consider several study destinations in parallel. 63% of applicants applied or planned to apply to another country alongside the UK and China. These applications were to top study destinations including the USA (40%), Canada (39%) and Australia (27%).

Seven in 10 Chinese students are more likely to stay in the UK because of the Graduate visa route, whilst one in five do not know about it. Chinese students hold 11.3% of issued Graduate route visas as opposed to Indian (41.4%) and Nigerian (10.1%) students.

Eight in ten Chinese acceptances are in high tariff providers. In 2023, 76% of Chinese acceptances were to high tariff providers. Whilst there has been an increase in acceptances across all types of providers between 2014 and 2023, the growth in acceptances to medium tariff (+92%) and lower tariff providers (+20%) has been more moderate compared to higher tariff providers (+228%).

More than 1/3 are heading to London: Three regions (London, the North West, and Yorkshire and the Humber) account for more than half of Chinese acceptances (57%). While Chinese students are more likely to opt for high tariff providers, the dominance of London is not being driven solely by provider type.

Subject choice is evolving. Business has consistently been the most popular HE subject choice for Chinese students in the past decade (43% of acceptances in 2013 to 26% of acceptances in 2023); however, creative arts and design subjects have more than doubled in popularity (4% of acceptances in 2013 to 11% in 2023).

Applicants come from wealthy, urban areas. Seven in 10 (68%) applicants come from the 10 most populous provinces and the four directly governed municipalities of China. 57% of applicants come from the top ten wealthiest regions as measured by GDP. In contrast, 35% of the population of China live in these areas.

Almost three in four Chinese students enrolled in a UK UG degree are also considering a postgraduate (PG) degree in the UK. Finding a job in the UK (43%) or in China (34%) are also popular options.

The UK is holding its own on the global stage. 2022 search data shows that the UK's popularity as a study destination has increased by 148% year-on-year, and remains consistently popular in Guangdong, Jiangsu, and Shandong.

UCAS is the single largest channel for international students entering UK undergraduate study. Approximately 95% of undergraduate entrants from the EU, and 60% of entrants from outside the EU, apply through UCAS. In the 2023 cycle, we engaged with over 400,000 individuals from over 200 countries and territories; supported around 150,000 applicants (and tens of thousands of their teachers, counsellors and agents) to make applications; and helped place over 70,000 international students into a UK university or college.

UCAS plays a key role in helping maintain the UK's competitive advantage through our independent, impartial, and trusted brand and shared admission service.

In line with UCAS' **commitment** to grow nation-level intelligence as to the different values, motivations and interests held within key markets, this research is the first in a series of planned country-specific deep dives. Upcoming reports will explore both mature and emerging markets for UK HE, including India.



NEXT STEPS





Shaping the next International Education Strategy

UCAS has supported the Government's **International Education Strategy** (IES) since its inception and has been a key delivery partner by deploying strategic and tactical initiatives to fulfil its goals. These initiatives include: developing the UCAS international strategy in line with the IES²; launching the **UCAS International App**, a mobile-first streamlined discovery tool; and content created in collaboration with UK Visas and Immigration (UKVI) operations teams to better guide and support applicants about what to expect through the admissions journey.

The strategy has already achieved one of its targets to increase the total number of international students choosing to study in the UK HE each year to 600,000. However, the UK HE sector itself, as well as the geopolitical context that it operates within, has evolved since 2019.

2 For further information, see section 'About International Education'

This report on experiences of Chinese students in the UK identifies opportunities for the UK HE to remain competitive in a dynamic landscape, and ways to promote further diversification in the UK's international student recruitment efforts. In recognition of the findings of this report, along with UCAS wider insight, it is our view that a future Government's next iteration of the International Education Strategy should be built around trusted, high quality, and sustainable growth:

- ▶ **Trusted growth:** the demonstration of exceptionally high levels of compliance with all visa and immigration requirements.
- ▶ **High-quality growth:** the admission of talented international students with the potential to succeed in UK HE and meet skills needs both within the UK economy and overseas.
- ▶ **Sustainable growth:** ensuring that the UK providers have sustainability in markets its recruiting from, spreading and mitigating the risks from reliance on a narrow set of recruiting nations, in a narrow set of subject areas. As well as the capacity to consistently welcome and support international students and provide them with a world-class experience.

For the next iteration of the IES, it is key that international students have a visible voice at a local and national level. This will ensure that the needs and motivations of international students are better understood and promote their positive experience of UK HE.

Furthermore, employability is a **key motivator** for Chinese students. Almost three in four Chinese students are considering finding employment in the UK after graduation. The International Student Employability Group (**ISEG**), chaired by UKCISA, was established in 2020 and has been supported by the IES. As such, the next iteration of IES can continue to acknowledge and support ISEG, UCAS, and other sector bodies to strengthen support and guidance for international students on employability in a way that benefits the UK economy. As was recognised by the previous **IES updates**, it is also becoming **increasingly important** to demonstrate the graduate outcomes international students can expect to achieve through international HE study and this should continue to be prioritised in the future as well.



Next Steps for the Migration Advisory Committee review of the Graduate Route Visa

During the course of producing this report, the Home Secretary, James Cleverly, announced a series of government measures in relation to broader migration levels. These measures included a review by the Migration Advisory Committee (MAC) of the graduate visa route to ensure that it works in the best interests of the UK and to safeguard the system from potential misuse, along with a review of the Shortage Occupation List.

This report, along with UCAS' broader understanding of student progression, provides a timely range of evidence regarding the motivations of international students along with the role of graduate route in the decision-making process both within the UK and global market. Using this evidence, UCAS would recommend that the following areas are considered as part of any review:

- ▶ The role of the graduate route in supporting UK's competitiveness in the global student recruitment market.
- ▶ The relationship between the graduate visa route, the Shortage Occupation List, Immigration Salary list, and broader economic needs across the UK.
- ▶ The role of the graduate route in promoting greater diversity in the range of nations accessing UK HE, and how this can be done in a sustainable manner across a wider range of UK regions, providers, and subjects.
- ▶ How greater assurance can be provided through streamlining the undergraduate and postgraduate visa route, potentially into a single progression route.

**UCAS SUPPORT FOR
UNDERGRADUATE
CHINESE STUDENTS**





UCAS recognises that it has a key role in any future International Education Strategy. In line with our international strategy, UCAS continues to develop its services to enhance the experience of international students, and those involved in their recruitment, through enabling a more efficient, personalised, and streamlined admissions process. This will allow universities and colleges to easily identify high quality UG Chinese applications – in line with the proposed recruitment pillars of the next iteration of the International Education Strategy.

This work includes collecting more accurate and relevant information about an international applicant's education history, qualifications, and location to deepen provider understanding of the diverse student segments within China, and to support more targeted recruitment approaches. UCAS will also be developing the capability of 'document upload', verification tools, and fraud support to create a more transparent and trusted admissions and visa process.

As the largest gateway to UK undergraduate study, we intend to continue transforming the journey of international students that are supported by UCAS. To support smoother transition to UK HE, UCAS plans to deepen its personalisation technology to develop tailored and accessible advice for Chinese applicants and deliver it through platforms they naturally use, such as WeChat, an accessible microsite, and in a mobile-first format. We will also work with advisers, agents, parents, carers, and sector bodies to encourage international students to declare disabilities, including mental health conditions, at application stage, with recognition that perception and language around this can differ across countries and cultures.

In order to support transition of learning and interacting in a new language, we will also work with Pearson to make English learning and test preparation materials available for UG Chinese students, through a content arrangement in the UCAS International mobile app.

BACKGROUND

When the pandemic hit in 2020 and restrictions ensued, commentators feared the impact on internationally mobile students. However, despite the pandemic, demand for international education remained strong, and interest in global international education **increased** by over 20% between 2021 and January 2023. Demand for international HE is expected to continue to **grow** further in the coming years. Globally, 6.4 million students undertook their tertiary studies abroad in 2020, **almost double** the amount in 2007. Demand for UK HE remained strong as well – in total, 155,000 international students were **accepted through UCAS** during the pandemic, and 88% of international applicants considered the UK as a **positive or very positive** place to study.

Throughout 2021, despite strict pandemic-control measures, China remained the largest source market for international students worldwide with 1,061,511 Chinese students studying abroad². Flexibility in mode of delivery, timetable adaptations and **temporary migration concessions** ensured that the Chinese market remained vibrant. In 2023, outbound mobility from China has been given two notable boosts. Firstly, in January, the Chinese government **downgraded** COVID-19 from a category A to a category B risk, lifting travel restrictions. Secondly, the Chinese government **announced** that it would cease to recognise overseas degrees obtained via online learning, encouraging students back to campus. Together, these factors are likely to bolster the supply of students from China travelling physically to the UK to study.

However, the UK's continued success in attracting Chinese students is not a foregone conclusion. During the 2023 application cycle, UCAS **reported** a decline in applicants from China (-1% on 2022 equivalent data). With Chinese universities climbing up the world rankings and slowing economic growth within China, some commentators are suggesting the UK may be close to **'peak China'**.

This report reflects on the full student lifecycle of Chinese students, from who they are, and why they choose to study in the UK, to their experiences of UK HE, and plans post-graduation. As such, these findings will support the UK HE sector in identifying areas of opportunities and challenges, to support a sustainable and high quality growth in an increasingly competitive environment.



**SECTION 1:
WHO ARE
THE CHINESE
STUDENTS
COMING TO
THE UK?**



Highlights

China is the biggest international market: In 2023, one in five international applicants and one in four international acceptances were from China.

Chinese applicants have a higher acceptance rate than non-Chinese international applicants: Growth in applicants has been higher than the growth in acceptances, reducing the acceptance rate over time.

Population trends do not define the trends in age and gender: Chinese applicants are more likely to be 18 and female – these trends do not mirror the demographics of the Chinese population.

More applicants apply from China than from Wales and Northern Ireland

Overall, and within the international market, the representation of applicants from China has been increasing over the past ten years. Currently over a fifth of all international applicants come from China. 33,195 applicants applied from China through UCAS during 2023, relative to 23,225 from Wales and 18,015 from Northern Ireland.

Moreover, UK higher education (HE) has reported growth in numbers of Chinese applicants over the last ten years, rising 55% (+11.7k) in the last five cycles (2019-2023), and 175% (+21.1k) over the last ten cycles (since 2014). In comparison, in the last five years, UK applicants have increased by 7%, whereas, volumes of non-China international applicants have been static.

Proportion of all applications

10 years ago (2014)

1.7%

5 years ago (2019)

3.1%

2023

4.4%

Proportion of International applications

10 years ago (2014)

10.0%

5 years ago (2019)

15.3%

2023

21.8%

Figure 1: Proportion of all and international UG applications made by Chinese students, 2014, 2019 and 2023

17,405 UG applicants from China were accepted into UK HE through UCAS during 2023. Although there has been growth in acceptance numbers from Chinese UG applicants – +40% over the last 5 years, and +149% over 10 years – this growth has been lower in proportion to growth in applicants, reducing the acceptance rates as a result. However, the acceptance rate for Chinese applicants (52% in 2023) is higher than non-Chinese international applicants (46%). This means that in 2023, one in four accepted international applicants were from China. For the 9% of Chinese applicants who apply from UK schools³, acceptance rates are higher at 71%.

Of all Chinese accepted applicants, 77% declare a UK or other international (non-Chinese) qualification on their application.⁴ Therefore, a lot of the demand for UK undergraduate study comes from Chinese students who studied in international-curriculum secondary schools. This reflects findings of UCAS' **previous research** which found that 85% of Chinese applicants considered how their choice of qualification in school might affect their ability to study abroad, commonly choosing a non-domestic curriculum to maximise their opportunities to study overseas.

	China	UK	Non-China International	All
2023	52.4%	80.5%	45.6%	73.7%
2019	57.9%	82.6%	54.3%	77.0%
2014	57.8%	77.9%	53.4%	73.7%

Figure 2: Acceptance rates, by domicile groupings. 2014, 2019 and 2023

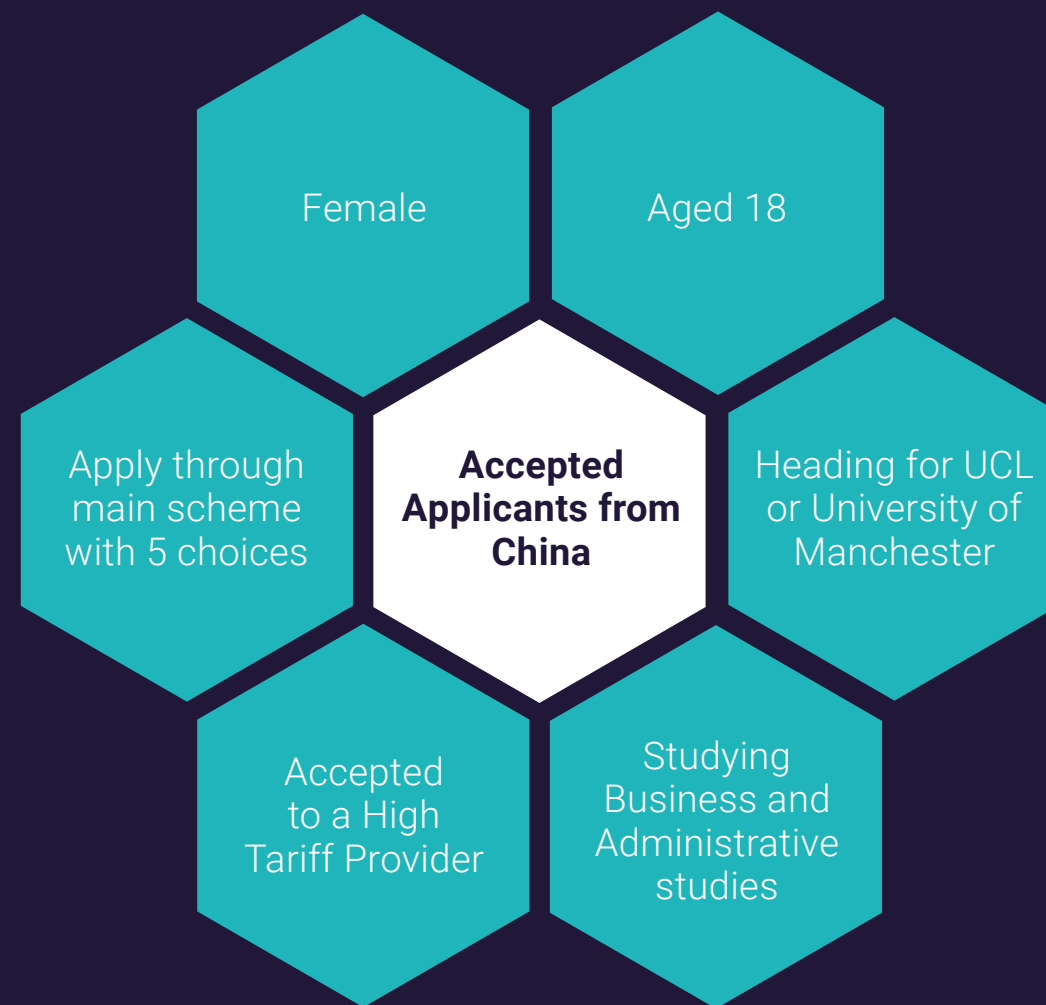


Figure 3: Most frequent characteristics and application features of accepted applicants from China⁵

Chinese students are more likely to be female, aged 18 and from Shanghai

Historically, the age profile of applicants has been more spread between the 18, 19, 20 and 21-24 age-bands; but, in recent years, the growth in applicants has been more pronounced in the 18-year-old band. In 2023, 46% of applicants from China were aged 18, with representation reducing as age-bands get older - only 1% of applicants were aged over 25 years. This shift towards a younger Chinese student cohort is not driven by national population trends, where we see fewer 18-year-olds in the Chinese population than ten years ago (20.0m in 2013, 14.8m in 2022)⁶. It could therefore be linked to a cultural shift, and a switch away from traditional pathway programmes towards direct entry⁷.

The female to male applicant ratio is not equal, it stands at 51:49 – this is relative to a gender gap of 53:47 for non-China international applicants and 57:43 for UK domiciled applicants. This gender gap has narrowed over time – it was at its highest in 2015/16 (58:42). Current acceptance rates by gender indicate that 53% of female Chinese applicants accept a place in UK HE compared to 52% of male applicants. Looking at China's national population data, in the younger age bands (representing current applicants (ages 17-24)) the distribution is 46% female and 54% male⁸. This suggests that the trend we see is not the result of demographics but other factors.

The majority of Chinese applicants come from urban and wealthy areas of China

When we analyse where Chinese applicants are applying from, we note that **seven in ten (68%)** applicants come from the top ten most populous provinces, plus the four municipalities of Beijing, Shanghai, Tianjin, and Chongqing. The top five 'sending' cities are: **Shanghai (13% of applicants); Beijing (10%); Shenzhen (5%); Guangzhou (4%); and Nanjing (3%)** – the first four of which are generally seen as China's most developed and wealthy, 'Tier 1,' cities.⁹

In terms of GDP, the top GDP per capita regions of China are: Beijing, Shanghai, Jiangsu, Fujian, Tianjin, Zhejiang, Guangdong, Inner Mongolia, Hubei and Chongqing.¹⁰ Looking at these ten wealthiest regions, 57% of applicants come from these regions. In contrast, 35% of the people of China live in these areas.

The cities of Shanghai and Beijing in particular are centres for applicants into UK HE, with the highest application rates (applicants per 10,000 of the population) of the 14 areas examined. These cities also have the highest GDP across China.¹¹ Population is generally lower but denser in these big cities, and although wealth is undoubtedly a factor, other elements such as accessibility to information and exposure to western influences and media could also be inspiring people to overseas HE.

This trend correlates with data from Pearson related to those sitting Test of English Academic (PTE) in China, which is dominated by individuals residing in Shanghai (26%) and Beijing (20%)¹².

**57% OF UG
CHINESE
APPLICANTS
COME FROM
THE TOP
TEN GDP
PER CAPITA
REGIONS OF
CHINA**

Applications by originating province (2023)

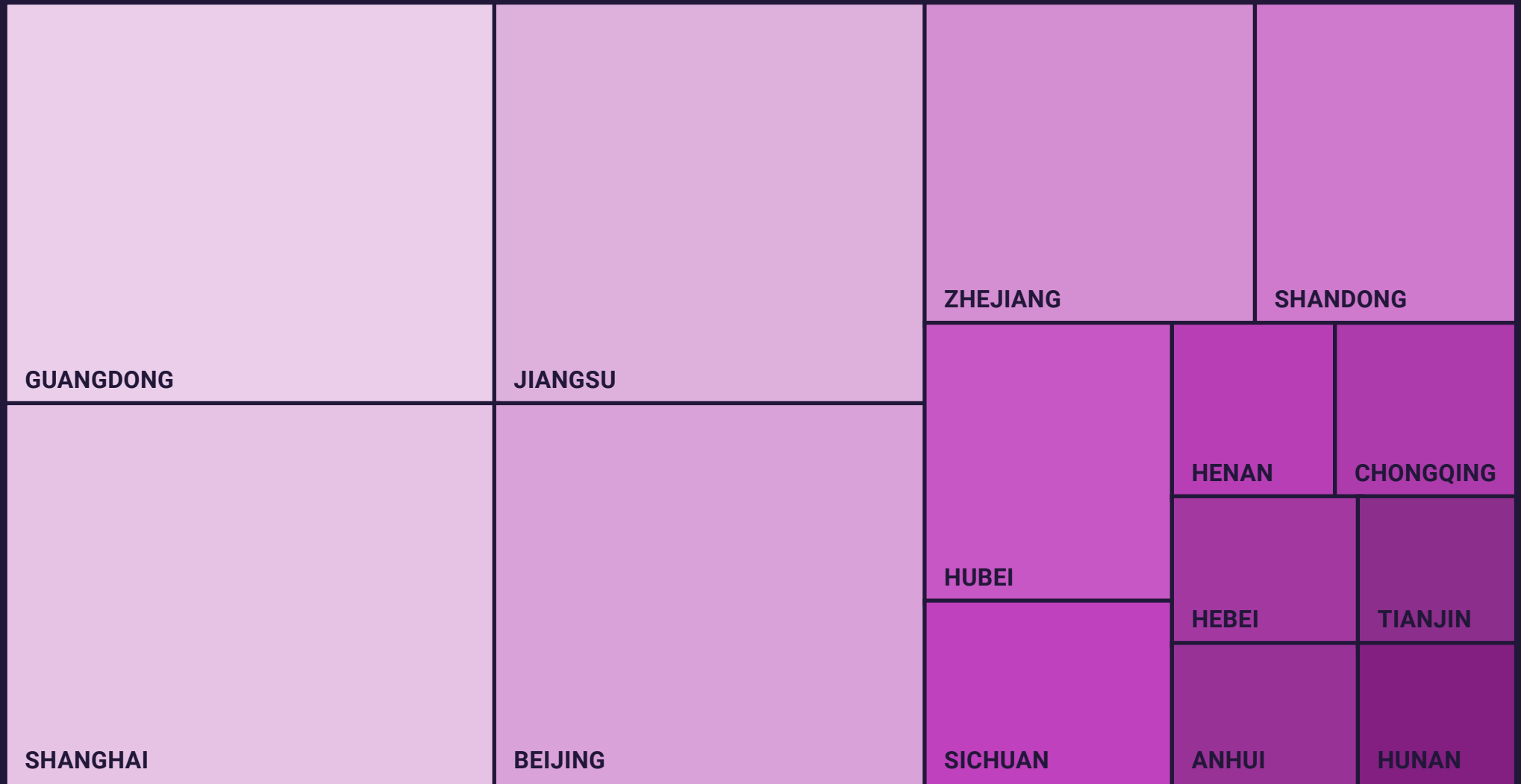


Figure 4: Applications by the originating province or municipality (home address) of Chinese applicants, 2023. Top ten provinces and four municipalities only (68% of all Chinese applicants)

Case Study 1 – Motivations and expectations for study in the UK from a Chinese applicant³

Student Name: Lining LI

Age: 18

Subject of interest: Accounting and Finance

“The UK is a safe country and has a strong academic reputation. Therefore, studying in the UK is my first choice. The schools I have chosen are among the top 100 universities in the world and their business schools are triple accredited by AACSB, EQUIS, and AMBA, which gives me confidence in the teaching quality. I hope that my study abroad life in the UK will be fulfilling and that I can develop my independence, self-confidence, and comprehension skills. I love travelling and cultural experiences, so I am very much looking forward to my adventure in the UK!”



**SECTION 2:
WHAT ATTRACTS
CHINESE
STUDENTS TO
STUDY IN
THE UK?**



Highlights

Reputation and quality matters: Reputation of UK HE and the quality of UK HE are the top factors for choosing the UK as a study destination.

Influences and influencers on choice of destination country and provider are similar: Independent research, parents, teachers and advisers, and friends are the top influencers on the student decision-making process when choosing both the country and provider of study.

Global competition is high: The USA, Canada, and Australia are other top international destinations considered by Chinese students.

Reputation and the quality of UK education are the main factors

When asked to choose from a list of factors that made the UK stand out as an international destination, the primary factor for Chinese students studying within the UK is the reputation of UK HE. This reflects the findings of **UCAS' previous research**, which found that 77% of international applicants to the UK applied because of the UK's strong academic reputation. The next three factors include quality of education, the culture and experience that the UK has to offer, and that UK universities or colleges offer the courses they want. Having family who have studied in the UK is chosen as the least influential factor in making the UK stand out as a destination for study. The chance to study in English is another pull factor – more than 70% of Chinese students studying abroad choose a major English-speaking destination¹³.

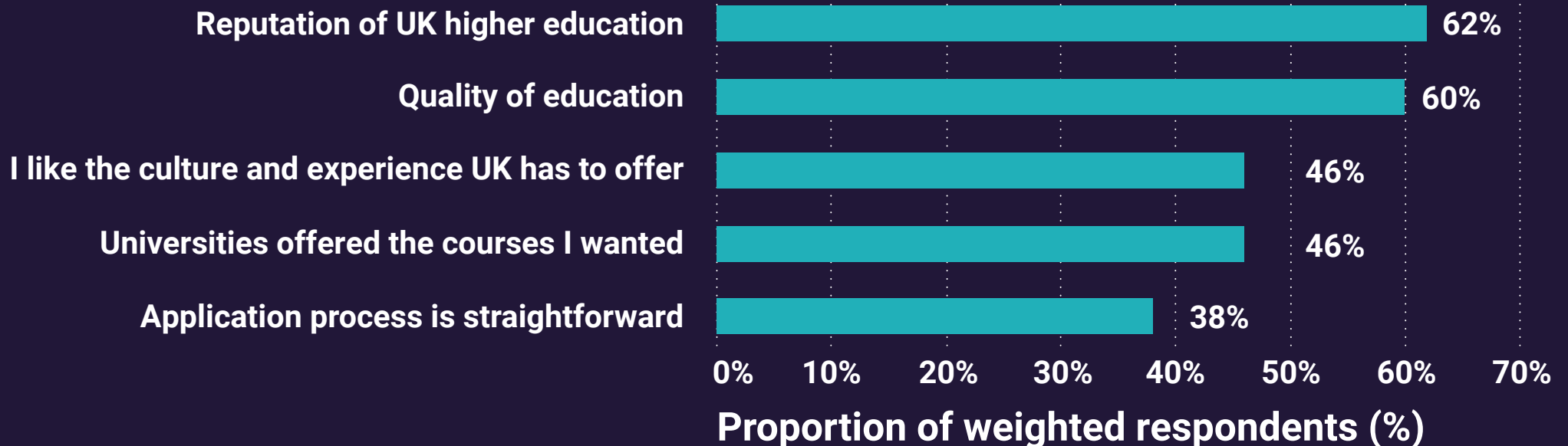


Figure 5: What made the UK stand out as an international study destination? Please select a maximum of five factors (top 5 factors shown)¹⁴.

Chinese students are independent researchers, but parents continue to have an influence

61% of respondents choose their own research as their top influencer when deciding to study in the UK, and on their choice of university or college (64%). This reinforces findings from [previous UCAS research](#), which highlighted the independence of international applicants in researching their study options.

Nonetheless, parents continue to play an important role in supporting Chinese students in choosing the UK as their study destination (55% of respondents), as well as their choice of university or college (42% of respondents). This aligns with the same [previous UCAS research](#), which found that parents and guardians are universally influential in applicant decision-making, with this trend more acute amongst Chinese applicants in particular.

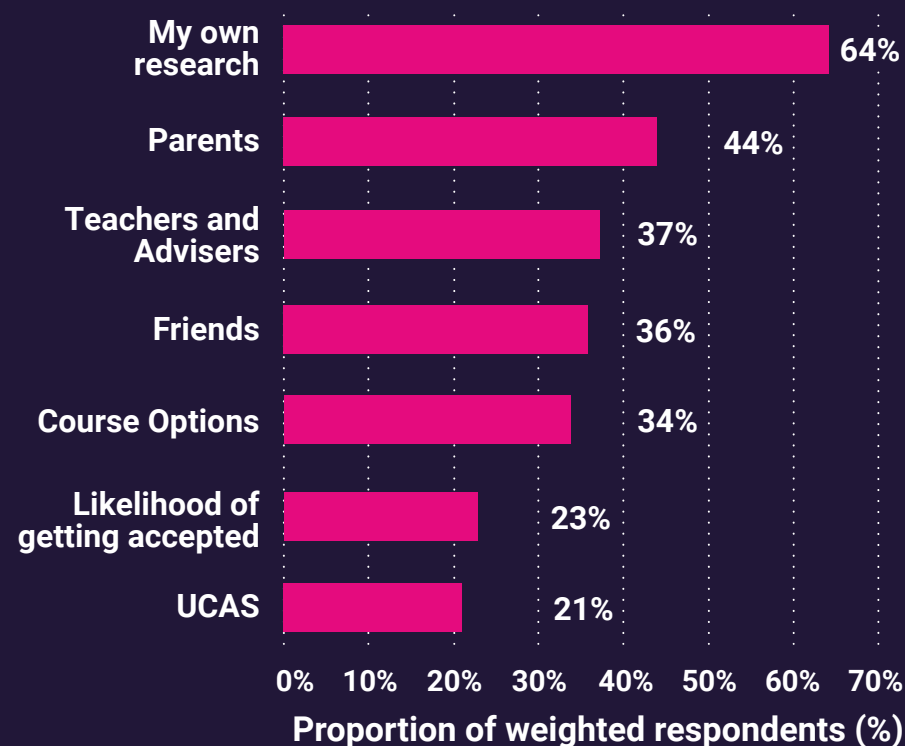
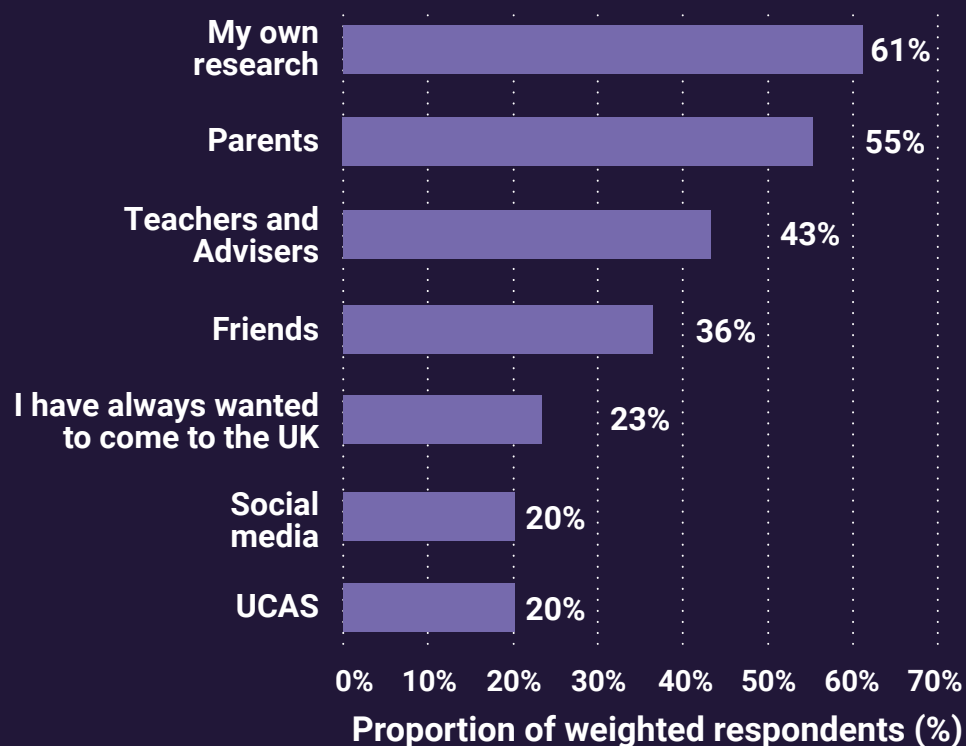


Figure 6: Which of the following, if any, influenced your decision to choose the UK as a study destination? (Top 7 factors shown).¹⁵

Figure 7: Which of the following, if any, influenced your decision to choose the university you are studying at? (Top 7 factors shown).¹⁶



Funding options available to international students are **different** compared to UK domiciled students. A **study** by HSBC suggests that parents in China are financially prepared to fund their children's education plan through savings (investments or insurance), or through a specific education savings plan. Our survey finds that 91% of respondents are receiving funding from their parents or carers. One in ten students have also taken out a private loan to finance their education in the UK. Patterns of HE finance for Chinese students reflect the commitment to and importance of overseas education felt by parents in China.

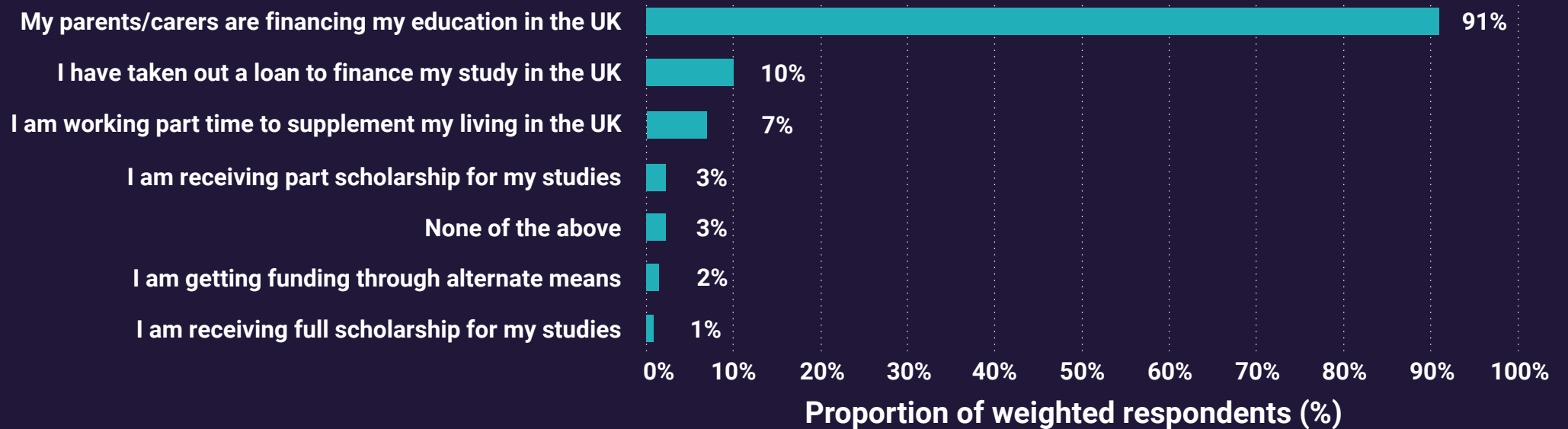


Figure 8: Do any of the following statements apply to you? Please tick all that apply.¹⁷

The student voice matters in determining choice of university or college

When asked about how they narrow down their choice of university or college, the top five factors cited by Chinese applicants are: course suitability (77%), achievable entry requirements (57%), location of university (45%), their likelihood of receiving an offer from that university (43%), and the university or college's focus on equality and diversity (39%). League tables, which can be seen as one proxy for reputation, carried less weight with applicants at this point in the decision-making process (30%)¹⁸.

Student reviews can also influence the decision-making process of Chinese students and rank as the most important resource for applicants when deciding which universities and colleges to apply to, 83% of respondents rate this as 'extremely important' or 'important', followed closely by university prospectuses (82%), and emails from universities and colleges (79%)¹⁹. 57% of respondents share that poor student reviews put them off when deciding on their university or college choices²⁰.

Similarly, when Chinese applicants were asked to rate how important different university-related factors were when choosing their university or college options, good student reviews ranked sixth (86% rated student reviews as 'extremely important' or 'important'). The top three factors in terms of importance were the quality of staff/teaching (96%), the quality of the teaching facilities at the university (93%), and the academic entry requirements for the course (92%)²¹.

Looking at the lifestyle factors that influence university or college choice, Chinese applicants deem the following as 'extremely important' or 'important' respectively: quality of university accommodation (87%), feeling like they "fit in" with other students at the university (86%), and the availability of university accommodation (85%)²².

Representation counts for international students. The relaunch of 'WeAreInternational' **campaign** led by key sector bodies aims to celebrate and communicate the range of contributions made by international students, and highlights stories to welcome prospective and current international students to the UK. **#WeAreInternational student charter** by UKCISA also aims to amplify the voices of lived experiences of international students in the UK. For the next iteration of IES, it is key that international students have a visible voice at a local and national level. This will ensure the needs and motivations of international students are better understood and also promote their positive experiences of UK HE – a powerful marketing tool for the sector. The British Council's **Alumni UK** programme can support that representation, recognising that international graduates, including those from China, can be a strong advocate for UK HE.

**STUDENT
REVIEWS RANK
AS THE MOST
IMPORTANT
RESOURCE FOR
CHINESE UG
APPLICANTS
WHEN DECIDING
WHICH
UNIVERSITIES
OR COLLEGES TO
APPLY TO**

Chinese students consider HE earlier than other international students

Chinese students are more likely to embark on their research journey earlier than international students as a whole – 14% of Chinese applicants think about HE options outside their own country in primary education (aged 11 or below) **versus** 12% for international students overall. As highlighted earlier, 77% of UG Chinese accepted applicants declare a UK or other international qualification, reflecting their propensity to consider overseas education earlier than other international students.

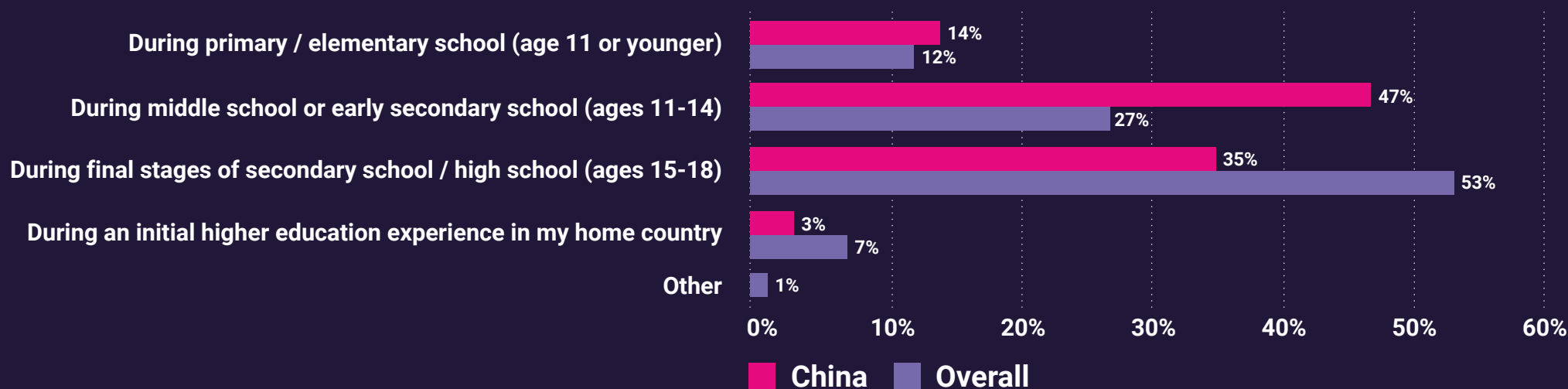


Figure 9: When did you first start to seriously consider applying to higher education outside of your home country?²³

We find that two in five Chinese students (39%) first think about choosing the UK as their study destination as early as secondary school, with a further two in five (41%) having this reflection in late secondary school.

And yet, Chinese applicants are 26% less likely than domestic UK students to register with the **UCAS Hub**, where students can explore options, favorite their interests and get tailored advice prior to applying. UCAS can work with advisers, agents, parents, and students to promote earlier registration with the **UCAS Hub** to allow Chinese applicants to more timely access to relevant information, advice, and guidance about studying in the UK, and the diversity of geography and subject choices in the full range of the UK' world-class universities and colleges.

Chinese students consider several study destinations in parallel, with close competition with USA and Canada

41% of Chinese students make their final decision about choosing the UK as a study destination during their late secondary education. 26% of respondents make their final decision during the application process, and 18% of respondents decide once they have received an offer. This suggests that Chinese students typically consider several destination countries in parallel – a hypothesis backed up by our survey as 58% of current students told us they considered the USA, and 25% considered China as one of their top study destinations.

Sinorbis' **'Chinese students, uncoded'** report suggests that the UK is outperforming the other major Western destinations in terms of online engagements. Research by **BONARD** reported that Chinese students in the UK increased in 2021, compared to a fall in the US, Australia, and Canada. As of early 2022, the US had the highest market share of overseas Chinese students. The UK replaced Australia as the country with the second highest market share of Chinese HE students, with numbers rising above 150,000 for the former and below 150,000 for the latter.

This is largely consistent with UCAS' applicant survey data that shows that, of the 63% of applicants who applied or planned to apply to another country alongside the UK and China²⁴, traditional destinations including the USA (40%), Canada (39%) and Australia (27%) are some of the immediate competition²⁵. However, international student recruitment continues to be a **competitive landscape** with **more countries** offering an attractive study environment and as such, UK must remain alert and responsive to both mature and emerging global competition.

Chinese students break the mould and choose their subject before the university or college

Previous **UCAS research** has found that for international students, university or college choice comes ahead of subject. However, our polling of Chinese applicants suggests that nearly half of Chinese students determine their subject choice (stage three) before starting to research universities (stage four)²⁶. This is more aligned to the decision-making process of **domestic UK students** and is reflected in the findings, which also shows that Chinese students are concentrated in a small number of subjects.

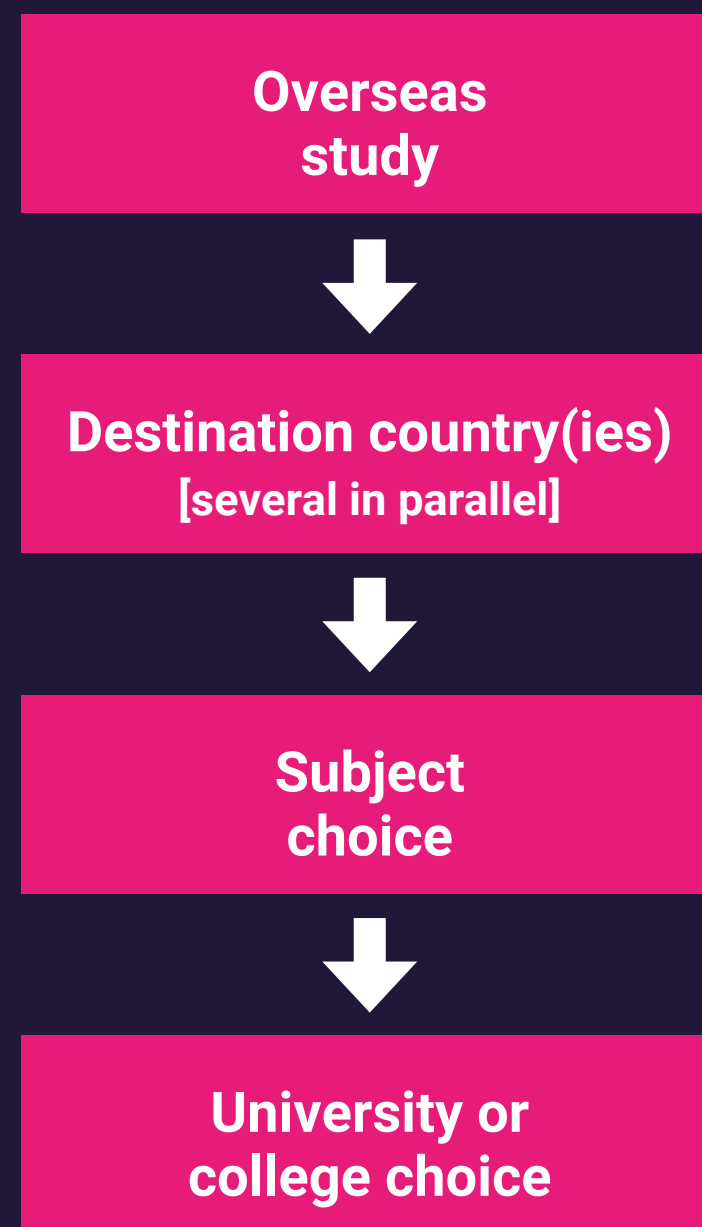


Figure 10: The typical Chinese student decision-making process

**SECTION 3:
WHAT AND
WHERE DO
CHINESE
STUDENTS
STUDY?**



Highlights

Concentration in provider type, nation, and region: 76% of Chinese acceptances are to higher tariff providers, and 67% are placed across London, Yorkshire and Humber, the North West and Scotland.

Subject trends are shifting: Business has reduced in popularity, but remains the top subject choice for both male (27%) and female applicants (24%). Following that is creative subjects for females (15%), and engineering for males (17%).

Clearing is less popular amongst Chinese students: In 2023, only 5.0% of Chinese acceptances secured places via Clearing compared to 7.9% of other international students and 14.5% of UK students



Case Study 2 – A Chinese student studying outside of London at a medium tariff provider ⁴

Name: Yuntao Wang

Age: 21

Course and university: BA Photography, Arts University Bournemouth

“I really love my university and it’s great to study photography as an undergraduate in Poole. This is an independent art university, so I have a lot of individualised learning courses and activities organised by the school. I think the tutors are all particularly enthusiastic and patient, and I can often talk one-on-one with my tutor. I think my university gives students respect for different ideas and attaches great importance to the cultivation of critical thinking.”



⁴ This case study has been provided by Arts University Bournemouth

Most Chinese acceptances are to higher tariff providers, with London a major beneficiary

Overall, in the 2023 application cycle, 3.1% of applicants accepted into UK higher education were from China. For 34 providers, Chinese students represented more than 3.1% of their accepted applicants, and for six providers it exceeded 15%.

In 2023, 76% of Chinese acceptances were to higher tariff providers²⁷. We note that nearly all the increased demand from Chinese students over the past decade has been absorbed by this segment of the sector. Whilst there has been an increase in acceptances across all types of providers between 2014 and 2023, the growth in acceptances to medium tariff (+92%) and lower tariff providers (+20%) has been moderate compared to higher tariff providers (+228%). Conversely, 66 UK HE providers recruited less than 1% of their UCAS intake from China, 91% of which are medium or lower tariff providers. In addition, 206 providers (99% lower or medium tariff) accepted no students from China.

Over a third (35%) of students from China accepted into UK HE are heading to providers in the London region, 12% to Yorkshire and Humber, 10% to the North West, and 9% to Scotland. At the other end of the scale, Northern Ireland (<1%), Wales (1%) and the East of England (2%) are the least frequent destinations.

London's dominance is evident regardless of provider tariff group: 31% of Chinese acceptances into higher tariff providers, 52% of Chinese acceptances into medium tariff providers and 39% of Chinese acceptances into lower tariff providers, are to providers located in London²⁸. This suggests that the dominance of London is not being driven solely by the availability of higher tariff providers. London is a popular destination for Chinese students heading to medium and lower tariff providers.

Compared to the other nations and regions, the concentration and range of available providers in London is notable. This, in unison with the global reputation and draw of the capital, are possibly major influences as to the popularity and dominance of London as a destination for Chinese students.

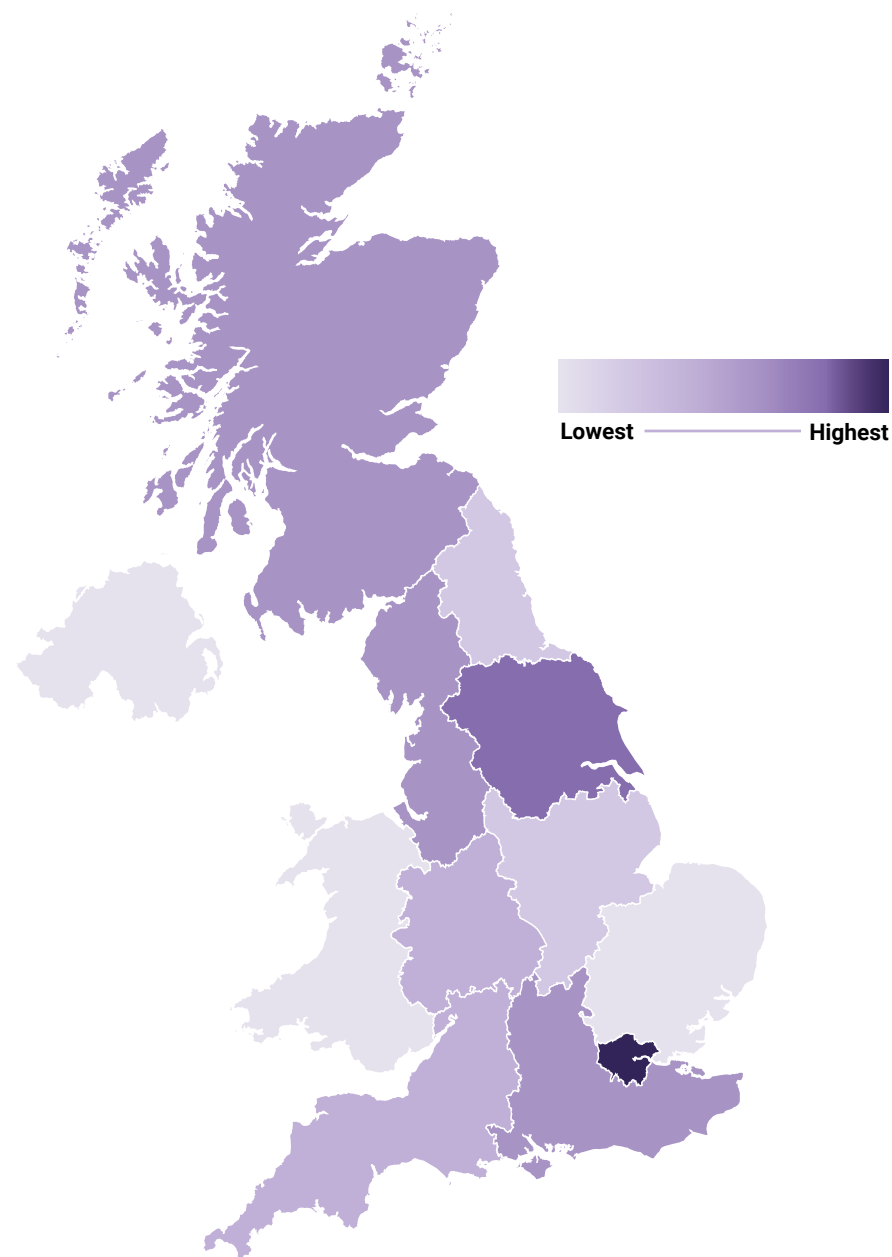


Figure 11: UK regional destinations (of providers) of applicants accepted from China, 2023



Chinese students are more likely to utilise all five UCAS choices and less likely to be placed through Clearing

UCAS applicants can make up to five course application choices in the **main scheme**. Around four in five Chinese applicants utilise all five choices and, of these, 74% make five higher tariff choices. This is consistent with **previous** UCAS research that indicated that international students are more likely (32%) than domestic students (10%) to use all five choices.

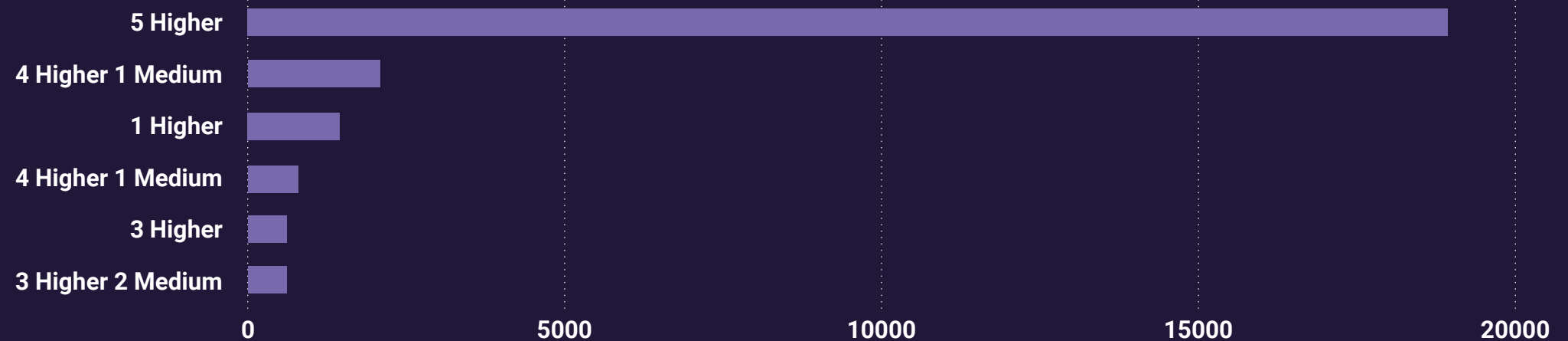


Figure 12: Top five choice combinations (by provider tariff) in applications submitted by Chinese applicants, 2023

Overall, international students are less likely to be placed through **Clearing** than UK students. During 2023, 5.0% of Chinese acceptances secured places via Clearing compared to 7.9% of other international students and 14.5% of UK students. It is also worth noting that nearly all usage of Clearing by Chinese students is by those who had already applied in the main scheme, before the 30 June deadline – they are very unlikely to apply after 30th June, known as ‘Direct to Clearing.’ Of the those accepted through main scheme Clearing, 44% (broadly aligned to the UK figure of 46%) were accepted to a provider that was one of their original choices.

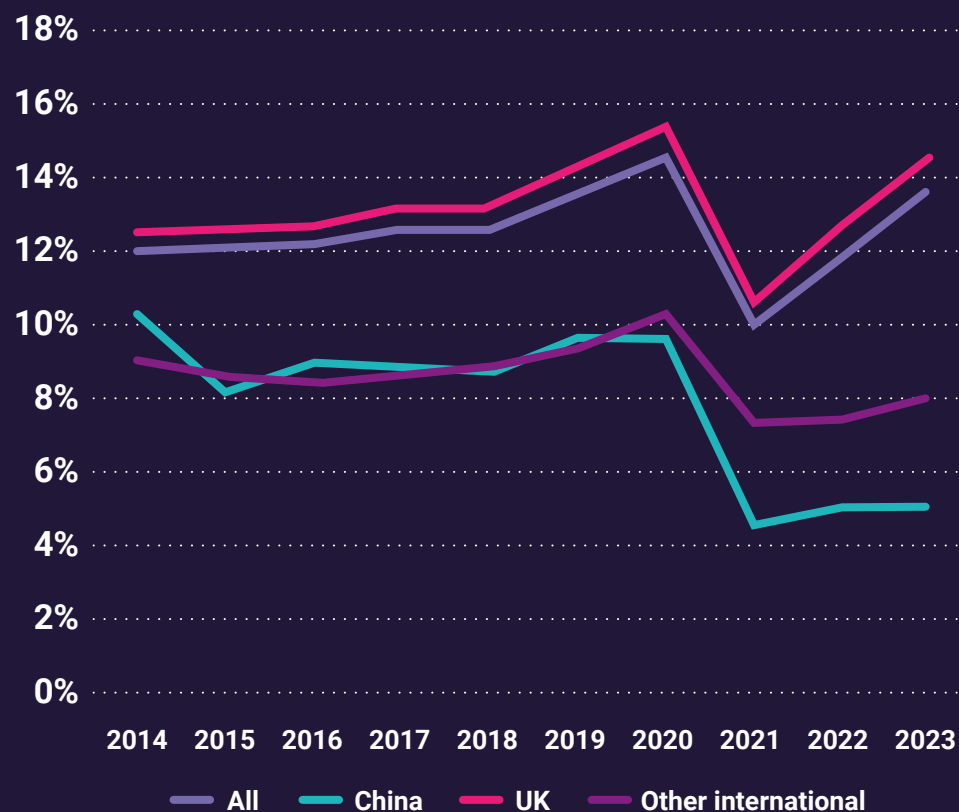


Figure 13: Percentage of applications resulting in an acceptance via the Clearing pathway, 2014-2023

Subject trends have evolved over time, particularly for female applicants

Business has consistently been the most popular HE subject choice²⁹ for Chinese students in the past decade. That said, Chinese students only account for 4.8% of all acceptances to business, with the majority (81.4%) made-up of UK students.

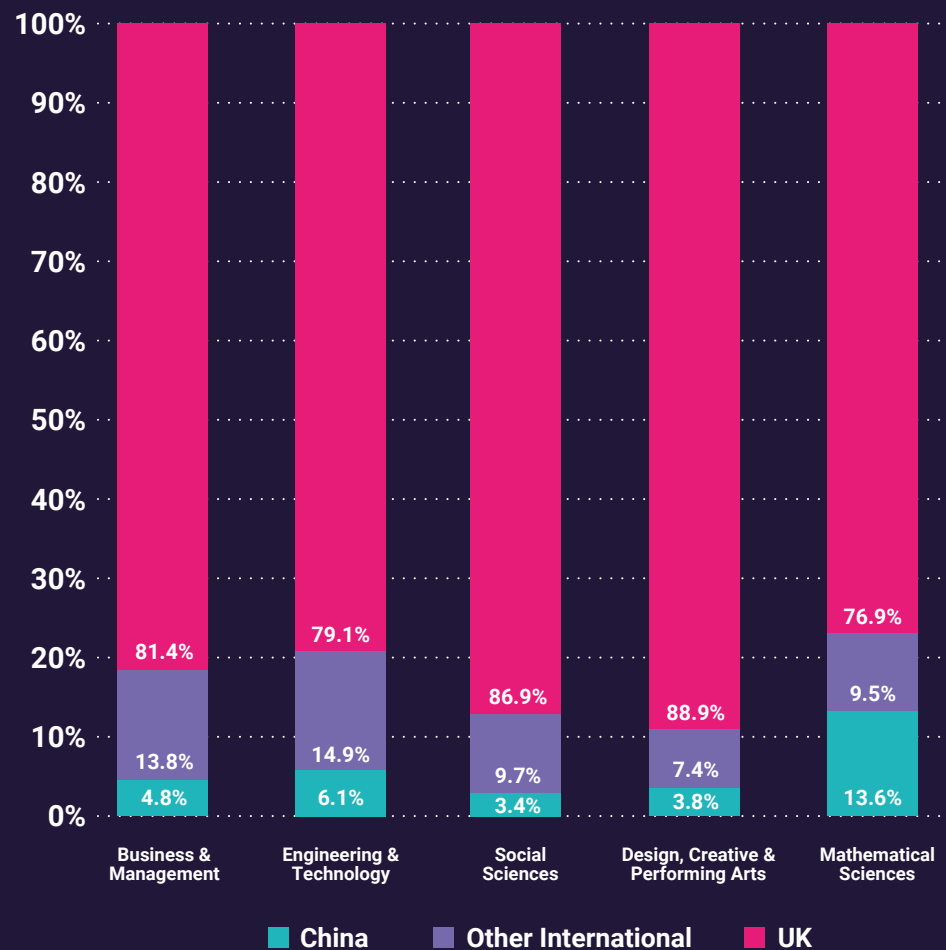


Figure 14: 2023 acceptances by domicile group, top five most popular subject groups for Chinese students

The dominance of business has lessened over the last few years – 42.8% of Chinese students were accepted onto business-related courses in 2013 relative to 26% in 2023³⁰. Meanwhile, creative arts subjects³¹ have more than doubled in popularity over the years (4% of acceptances in 2013 to 11% in 2023). This surge in interest in the arts has been **noted** in China where enrolments in its domestic Art College Entrance Exam exceed one million, and students are turning to overseas education as the competition rises for coveted domestic HE spots in this field, with the UK a notable beneficiary.

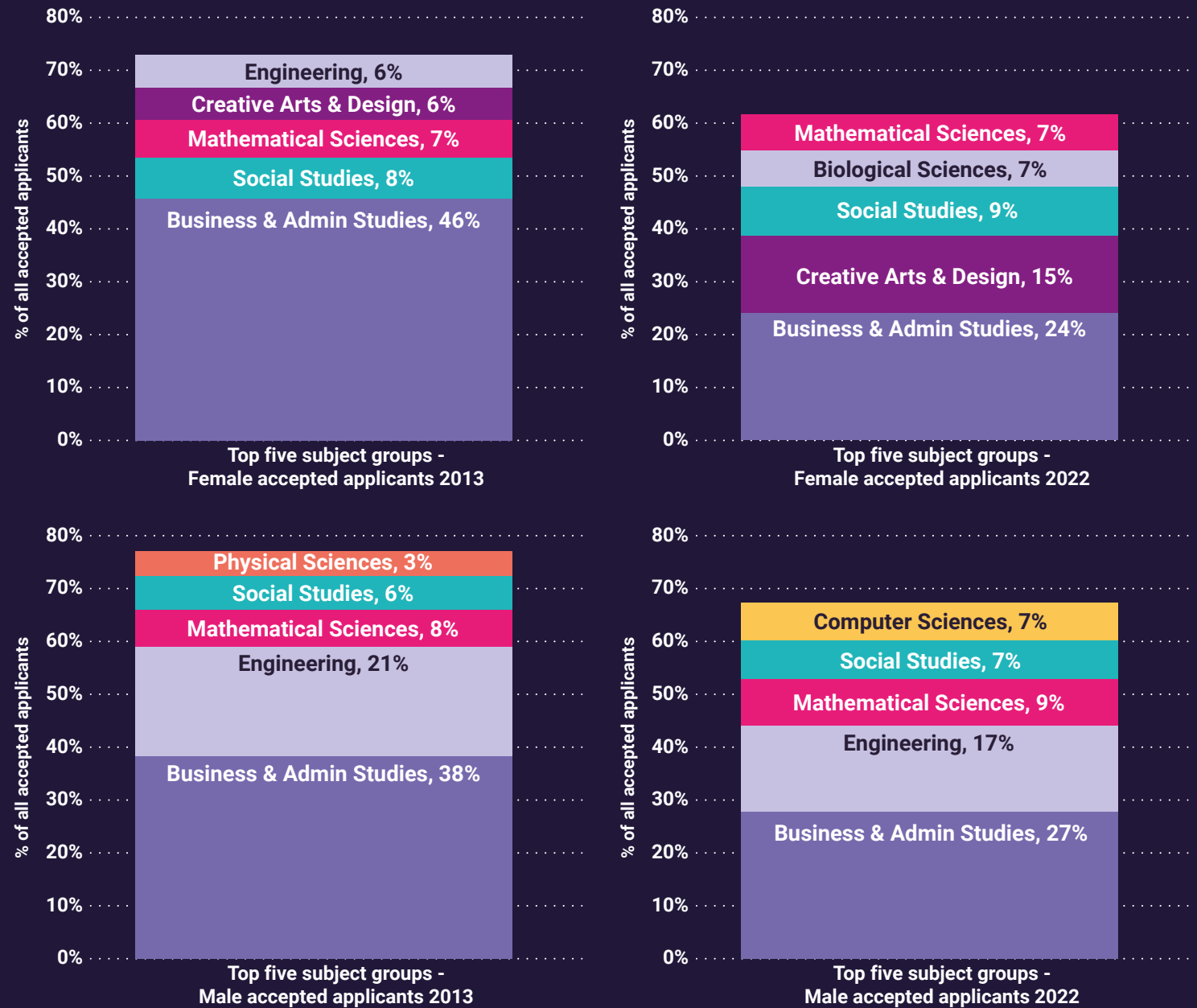


Figure 15: Most popular subject groups³² for accepted Chinese applicants by gender, 2013 and 2022

There is some variation amongst top provider choice by subject, highlighting the benefits of building a reputation for a discipline(s) within the Chinese market. Based on 2022 acceptance data³³ UCL is the top provider choice³⁴ for engineering and technology, social sciences, and mathematical sciences. University of Manchester is the top choice for business but is also popular for mathematical sciences (2nd highest number of acceptances), and engineering and technology, and social sciences (3rd highest number of acceptances). Across the top three most populous subject areas, there is minimal overlap among the top five provider choices, with only the University of Manchester and University of Edinburgh appearing twice. These two providers are also the two UK providers most frequently 'assigned' a test score by individuals sitting PTE in China³⁵.

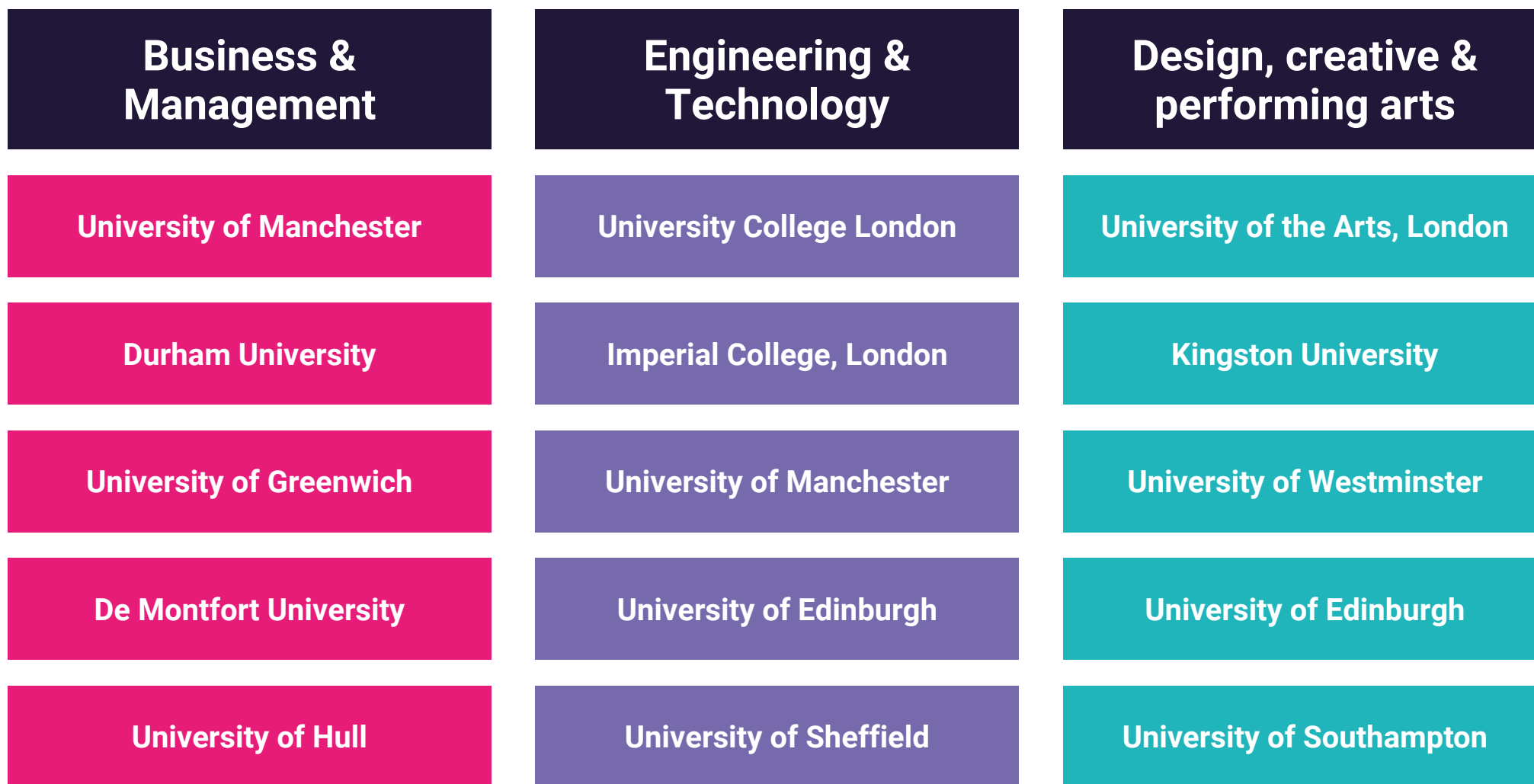


Figure 16: Top destinations (highest numbers of China acceptances through UCAS) for the most popular subject choices, 2022

There are subjects with no or very low Chinese acceptances. These include subjects that could have little uptake due to portability of qualifications, such as medicine & dentistry, and veterinary studies. However, there is scope for increased recruitment in subjects such as physical sciences; media, journalism and communications; geography, earth and environmental studies; and physical sciences; and architecture etc.

Diversification should be a core consideration in ensuring that the UK remains competitive in the global market and can be seen through multiple lenses. It is also key to sustainable international recruitment. To deliver this, UCAS, as the largest portal of entry for international students to UK UG studies, will continue to work with providers and sector bodies to promote the full diversity of UK HE.

This diversification can be achieved through recruitment:

- ▶ from a diversity of countries to mitigate the risk of market shifts in a single nation having a disproportionate impact
- ▶ into new subjects or subjects with low intake: physical sciences; geography earth and environmental studies
- ▶ from geographies they are recruited from in China and recruited to in the UK: e.g. smaller cities in China, Wales, and the East of England
- ▶ into a wider range of universities and colleges: e.g., medium and lower tariff providers

Study UK, **Scotland is Now**, and **Study in Wales** should also work together to collectively emphasise the breadth of UK HE in China, including its championing outside of the main Tier 1 cities in China.



Case Study 3 – A Chinese applicant applying to the UK for an a typical subject⁵

Name: Qihan XU

Age: 20

Subjects of interest: Sociology, Education

“I chose sociology to learn a different way of thinking and analysis to better solve problems. The UCAS system makes my application for UK universities quick and convenient. I can apply to multiple universities within one system and track the status by logging onto my UCAS hub and all the latest info is there for me to browse. I am looking forward to meeting new friends from different backgrounds in the UK. I hope that my experience will strengthen my confidence and improve my problem-solving skills in the future.”



**SECTION 4: WHAT ARE
THE EXPERIENCES OF
CHINESE STUDENTS
STUDYING IN THE UK,
AND HOW DOES THIS
DIFFER FROM THEIR
EXPECTATIONS?**





Highlights

Experiences of teaching, learning, and living in the UK are positive: 90% would recommend the UK as a study destination. 84% enjoy life in their city/region and 92% believe that their expectations of course quality have been met or exceeded

Rising living costs are impacting the student experience: 72% find their living expenses to be higher than expected

Most Chinese students are comfortable using English language in studying and living: 69% of students also continue to formally learn English while studying in the UK

Case Study 4 – A Chinese student reflecting on life studying in the UK⁶

Name: Annie Chan

Age: 21

Course and university: Economics and Statistics, University of Edinburgh

“I’m Annie, now in the final year of my degree. I really enjoyed the flexibility I had in my first two years to study optional modules – it made my course feel more personal. Learning-wise, it’s a more independent style of study, but I had expected that. I didn’t realise how many social opportunities I’d have access to – and volunteering too. It took me a few months to get used to the Scottish accent, but I don’t think I’ll ever get used to the temperature and the rain!”





Figure 17: Wordcloud of responses to the question prompt: Please describe your experience of studying in the UK in three words.

Nine in ten UG Chinese students would recommend UK as a study destination

“It opened up a whole new world for me. I didn’t know I could think and act this way, nor did I know I can contribute to my studying field.”

The vast majority of Chinese students connecting to UK HE have a positive experience. 92% of respondents believe that their expectations of course quality have been met (65%) or exceeded (27%). Despite the expense and challenge of UK study, 91% of Chinese students are extremely likely or likely to recommend UK as a study destination, with some using words such as ‘fun’, ‘enjoyable’, and ‘happy’ to describe their experience.

The survey also explored the sentiments about experiences of learning in the UK for Chinese UG students. 86% find their course to be intellectually stimulating and feel that their contribution in class is valued by their teachers (76%). Additionally, 68% of respondents feel that their contribution is valued in class by their peers, and 66% find that they get ample contact time with the teaching staff.

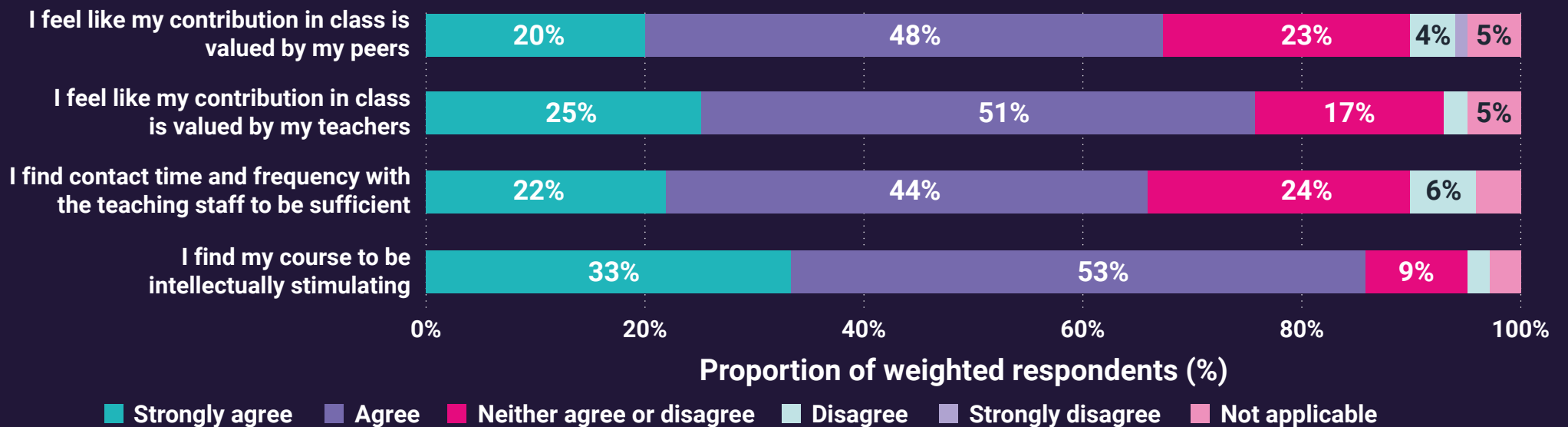


Figure 18: How far do you agree or disagree with the following statements about your experience of learning at a UK university or college?³⁶

Previous research by UCAS finds that experiencing life in a different country is a common motivation for international students. This research finds that 84% of Chinese students enjoy life in their city/region and four in five enjoy their campus life. International students are also **more interested** in meeting new people than UK domiciled students; 78% of Chinese students feel that they have been able to build a community of friends here.

However, transitioning to a new country comes with a **set of challenges**, such as language barriers, different education systems, and adapting to a new culture. Our survey found that during transition, Chinese students place more emphasis on the importance of support with accommodation (88% ranked this factor as extremely important or important), support with visa processes (79%), support with language skills (73%), and support with mental health needs (72%) from their provider. Pre-departure briefings (70%), opportunities to socialise with other international students (70%), on campus orientation programmes (67%), introduction to student groups/societies with similar interests (62%), and mentorship and buddy programmes (60%) are all classed as important as well.

“THOUGH INTERNATIONAL SUPPORT AND FUNDING ARE AVAILABLE, THESE ALL REQUIRE THE STUDENT TO BE SELF-MOTIVATED TO LEAN IN. IT IS DIFFICULT FOR INTERNATIONAL STUDENTS AT FIRST SINCE THE PROCESS COULD BE COMPLEX AND TEDIOUS, AND THE CULTURE DIFFERENCE MAKES ME AFRAID OF STEPPING OUT AT FIRST.”

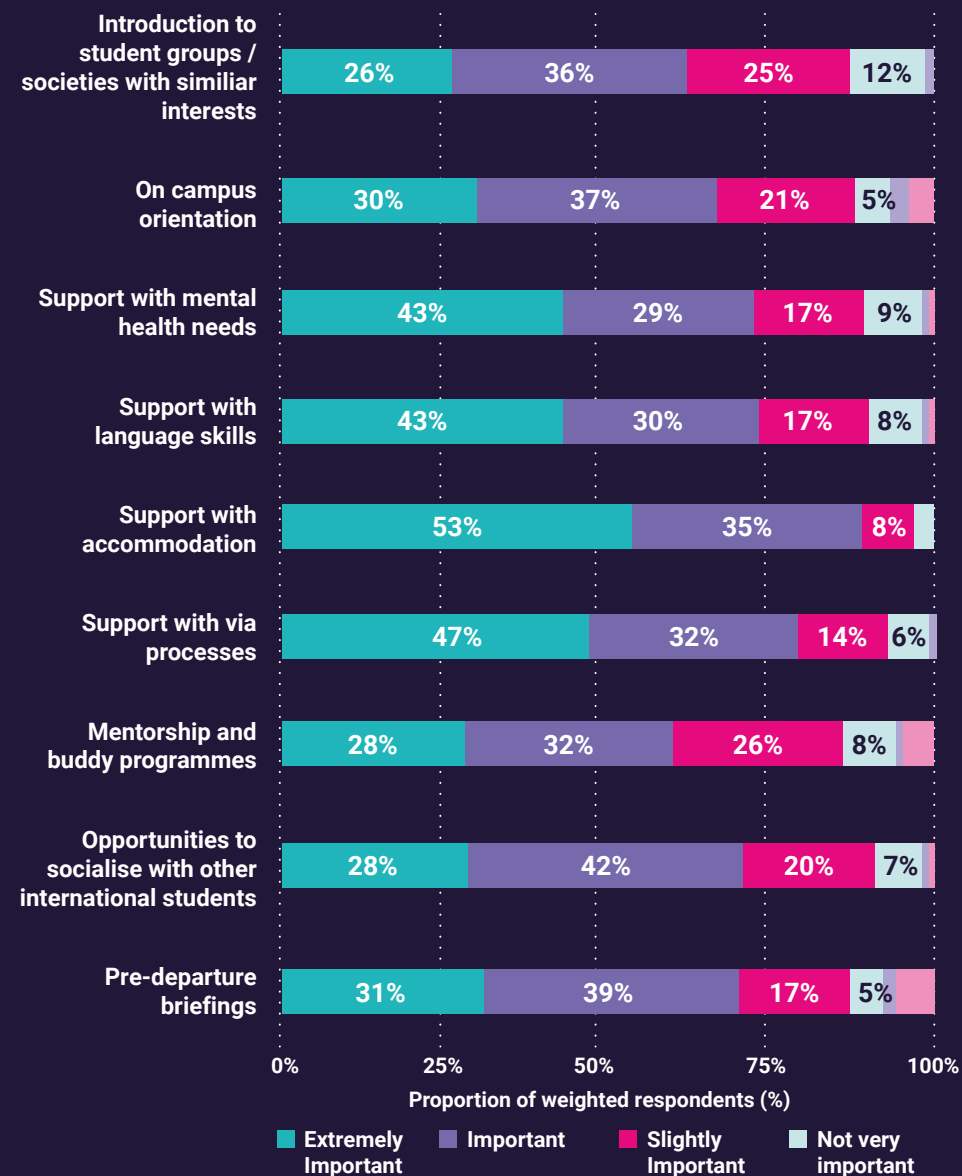
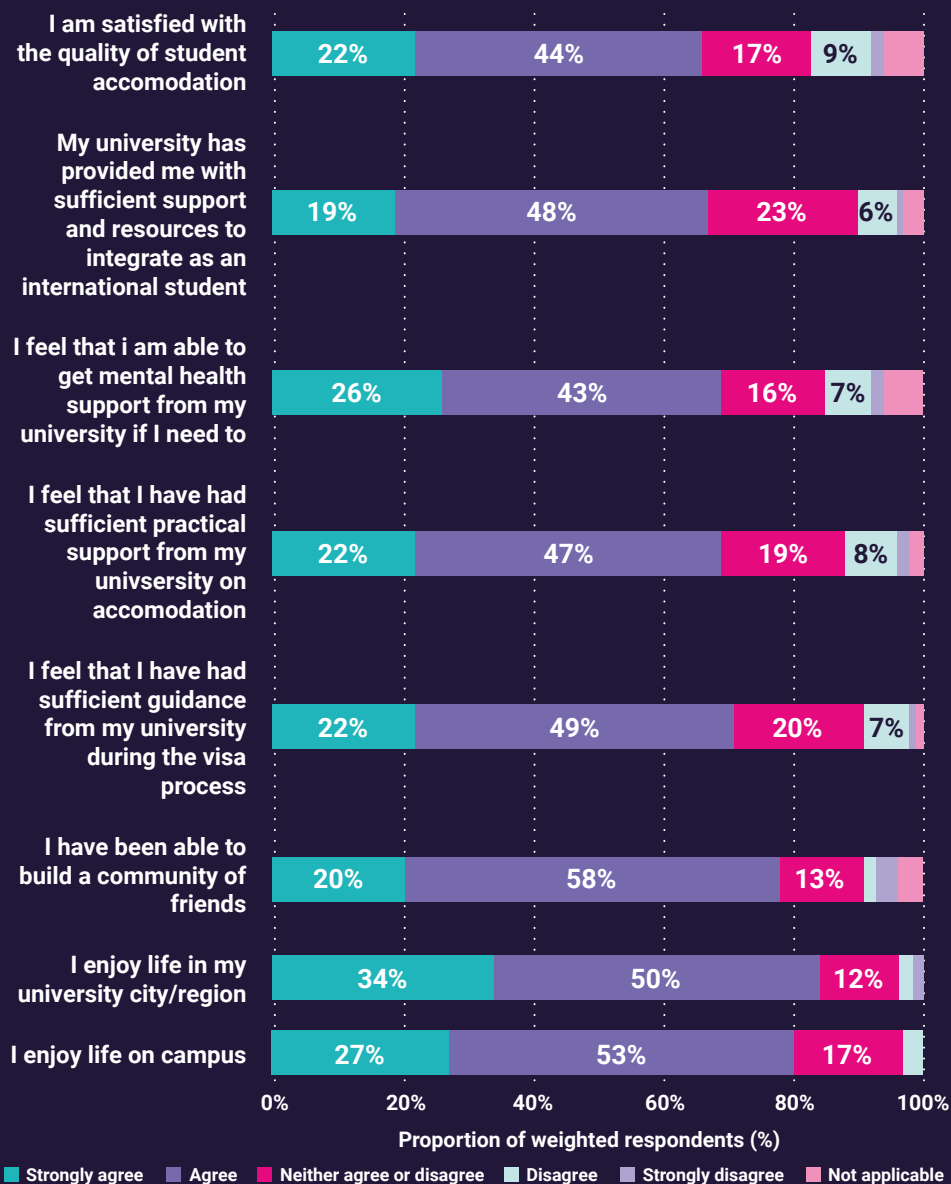


Figure 19: How far do you agree or disagree with the following statements about your experience of being an international student at a UK university?³⁷

Figure 20: Here are different ways that universities may support international students in their transition to higher education in the UK. Please rate these aspects according to how important you consider them to be for you.³⁸

“EVERYBODY ON CAMPUS IS SO FRIENDLY AND NICE, WHEN I CAME ACROSS DIFFICULTIES AND TROUBLES...MY TEACHER AND TUTOR ALWAYS HELPED ME OUT...I WOULD SAY I ENJOYED EVERYDAY I SPENT IN THE UK FOR THE LAST 5 YEARS.”

Around seven in ten Chinese students feel they received sufficient support from their university or college for visa processes, accommodation, mental health, and integrating as an international student. While most students find their accommodation to be of sufficient quality, 11% are not satisfied with it. Experiences of Chinese students studying in the UK can vary. Respondents highlight the adjustments made in early days to the new way of living and learning. Some also highlight their experience of being impacted by the strikes, and the cost-of-living in the UK.

Ensuring a positive experience for international students has to be joint effort by the sector. UCAS has been working closely with colleagues across the sector to improve the experiences of international students connecting to UK HE. From 2023 onwards, UCAS will be **hosting content** supplied by UKVI to inform international applicants and advisers at earlier stages of their admissions journey. To further support Chinese applicants, UCAS will:

- ▶ further build on our network of trusted and supported school teachers, counsellors and agents (UCAS registered centres) in China, deepening the UK's reach and support for potential applicants
- ▶ provide more localised advice, guidance and training for advisers and applicants on the UCAS application form, personal statement, and reference processes
- ▶ deepen its personalisation technology to develop tailored and accessible advice for Chinese applicants and deliver it through platforms they naturally use, such as WeChat, an accessible microsite, and in a mobile-first format.

More can be done to support Chinese students with their mental health and the rising cost of living

International students can be **vulnerable** to mental health challenges – they move to a new place far from home, away from their known support structure, and have to navigate a new system in a foreign language.

A recent UCAS **report** found that there has been a rise in the number of international applicants declaring mental/ or physical health conditions over the last decade, although this remains notably lower as compared to the UK applicants (3.9% vs 13.4%). This could be linked to the stigma associated with mental health in some countries. The Council of International Schools (CIS) is setting out a **transitions care model** for schools and universities. Their research reflected on the lack of recognition of international students mental health needs and the affects it could have if not supported when transitioning to HE.

The results from this study demonstrate that Chinese students recognise the importance of mental health support in transitioning to UK HE (72%), and most can get mental health support from their provider when needed (69%). However, more can be done, especially for the 9% who feel that they are not able to access mental health support when in need.

Students who declare mental health conditions are **more likely** to be aware of and access support. UCAS will continue to work with advisers, agents, providers, and sector bodies in encouraging international students to declare disabilities, including mental health conditions, at application stage. This includes:

- ▶ as **endorsed** by Student Minds, being mindful about use of language, recognising that the notion of mental health can differ across countries and cultures;
- ▶ providing clarity of how and where that information will be used, ensuring translated content is available for parents and other family members to enable conversations; and
- ▶ tailoring support to the relevant stage in the research and application journey.

The rising cost-of-living within the UK has **exacerbated** the challenges faced by international students, and is affecting the **decision making** of both UK and international applicants. This study finds that for half of Chinese students, expenses have been a little over expectation and, for just over one in five (22%), they have been far more than expected. Research by **New Oriental** notes similarly that 38% had concerns over expenses in 2023.

A previous UCAS survey found that only 18% of international applicants³⁹ recall seeing information about the cost of living from universities and colleges. They are also 23% more likely than home students to look for financial support when choosing universities⁴⁰. Given that international students have been hit **particularly hard** by the rising living costs, UCAS, universities and colleges and other information providers can provide a constant drumbeat of tailored and accessible **information and advice** to build understanding and confidence about how to manage costs as a student.

**A PREVIOUS UCAS RESEARCH
FOUND THAT ONLY 3.9% OF
INTERNATIONAL APPLICANTS
DECLARE MENTAL OR PHYSICAL
HEALTH CONDITIONS AS COMPARED
TO 13.4% OF UK APPLICANTS.**

Nine in ten Chinese students declare an English qualification when applying to study in the UK

91% of Chinese students surveyed declared an English qualification when applying to UK HE. The majority enjoyed taking an English test (44%) or felt indifferent about it (34%). Awareness regarding English language requirements for overseas education exists early on for students coming from China, with just over three in ten students considering it in early secondary school (ages 12 to 16), and three in ten in late secondary school (17 to 18).

Overall, most Chinese students in the UK are very comfortable or somewhat comfortable in speaking English in lectures/ academic setting (85%), university social life (83%), and everyday life in the UK (78%). They are relatively more likely to feel very comfortable speaking English in academic settings and everyday life, than in university social life. However, some comment on difficulty in understanding accents and miscommunication due to the language barrier.

Around seven in ten students continue to formally learn English language while studying in the UK. For those who do not continue, free provision (35%), and the availability of in person instruction (32%) could have encouraged them to carry on.

“ENGAGING IN THE LANGUAGE ENVIRONMENT IS PERHAPS IN ITSELF THE MOST EFFICIENT WAY TO LEARN ENGLISH”

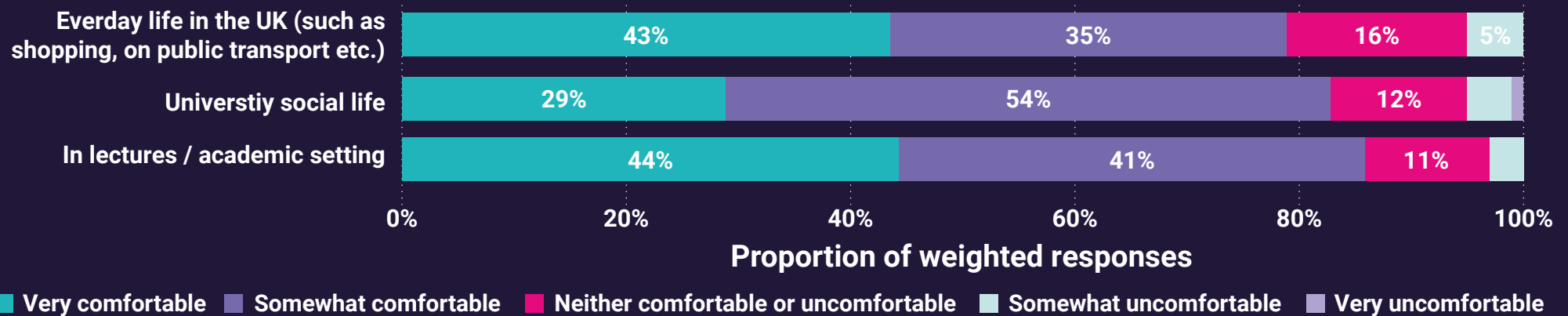


Figure 21: Please rate how comfortable you are speaking English in the following situations.⁴¹

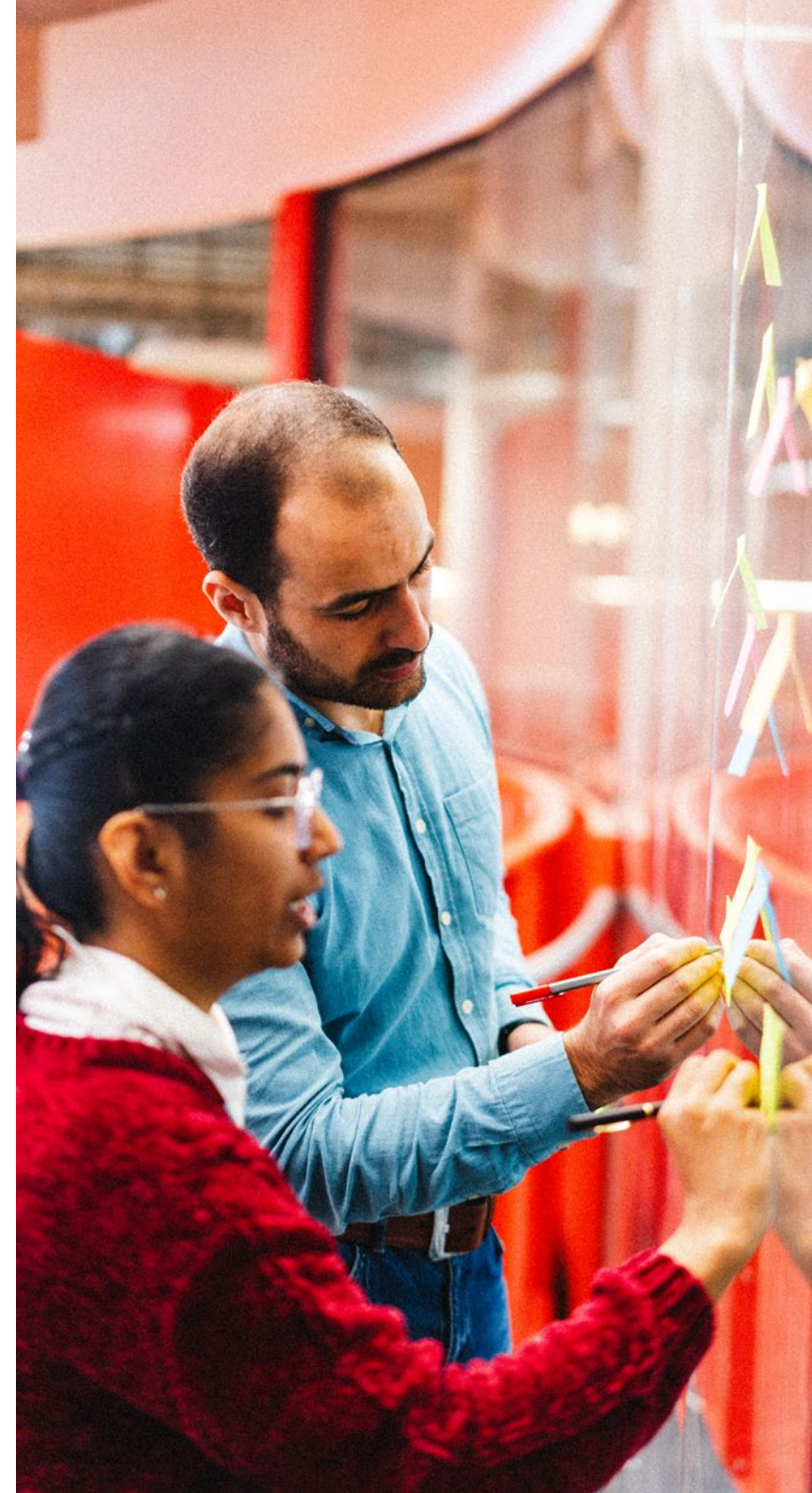
English language preparation and practice can be integrated into the application journey and beyond. UCAS, universities and colleges and other information providers can provide a constant flow of **information and advice** about how to prepare for an English language test and clearly signpost services and opportunities available for students. Universities, colleges, and sector information providers can also strengthen support for transition to new standards and pedagogy on topics such as referencing, plagiarism etc.

In order to support transition of learning and interacting in a new language, we will also work with Pearson to make English learning and test preparation materials available for UG Chinese students, through a content arrangement in the UCAS International mobile app, mirroring an **existing arrangement**. This would give non-native English-speaking students the opportunity to learn about and schedule their English language skills assessment in the same place as they are conducting their research into degree courses.

The security of all English language testing is of paramount importance – it ensures that each English assessment accurately reflects the skills and abilities of the test taker. In summer 2023, Pearson identified some testing violations with its PTE Academic Online version and took immediate action to withhold or cancel test scores. There was no issue with the test centre version of PTE Academic and Pearson offered all impacted test takers a free voucher to take PTE Academic in person, liaising with affected individuals and higher education providers.

This highlights the importance of verification and fraud tools that maintain the integrity of international HE admissions. That's why UCAS is developing its post-submission services to streamline the review and verification of key data and documents for admissions and visas decision making.

This report is published in the wake of broader, global concerns around security risks linked to international students. In 2022, **over 1000** scientists and postgraduate students were barred from studying in the UK amid rising concerns over security. More recently, the Dutch Ministry of Education has **confirmed** that mandatory screening is planned for students and researchers looking to study 'sensitive subject areas'. It is imperative for those involved in international student recruitment and admissions to recognise that the practice does not exist in a vacuum.



**SECTION 5:
WHAT ARE
CHINESE
STUDENTS'
PLANS POST-
GRADUATION?**



Highlights

Plans after graduation: 73% are considering a PG degree in the UK after graduation, and 66% of this group have applied to or intend to apply to postgraduate courses at different universities than their undergraduate course.

Employability is a key motivator: The majority of UG Chinese students planning to find employment in the UK are looking to apply for graduate jobs (86%) or entry-level positions (56%).

Careers education can be strengthened: 28% of students say that they have not received much careers advice and 4% have received no advice at all.

Almost three in four Chinese students enrolled in a UK UG degree are also considering a PG degree in the UK

Students were asked to select from a list of thirteen choices regarding the options they are considering post-graduation. Most Chinese UG students (73%) are considering a PG degree in the UK. Students are also considering finding a job in the UK (43%) or in China (34%). They are more likely to opt for a degree or job in the UK than in China or another country. When asked to pick what they are most likely to do, over half (52%) of respondents select a PG degree in the UK as their number one option, with 11% planning to find employment in the UK. The results demonstrate the attractiveness of the UK, and the importance placed on PG study by Chinese students. Similar trends were also found by British Council that highlighted that Chinese students made up 23% of UK PGT students in 2021-22 who had previously studied in the UK.

The **IES for London** by London Higher highlighted the value of a single visa pathway from UG to PG to support seamless progression and avoid additional burden for prospective students. Given the strong inclination of Chinese students to progress to PG studies, the MAC review could be an opportunity to assess the feasibility of streamlining the process of moving from an undergraduate visa to postgraduate visa to support the in-country progression pipeline.

In comparison, only 39% of UK domiciled final year UG students without a finalised plan for after graduation tell us that they would consider PG study in the UK after they graduate – the overwhelming majority of these UK domiciled students (84%) are considering finding a job in the UK after graduation⁴². When asked about their preferred intended activity after graduation, 57% of UK domiciled final year students who have a plan for after graduation tell us that they plan on getting a job in the UK, and only 26% select PG study⁴³.



52% Postgraduate qualification in the UK

11% Get a job in the UK

8% Postgraduate qualification in a different country

8% Get a job in China

6% Another UG qualification in the UK

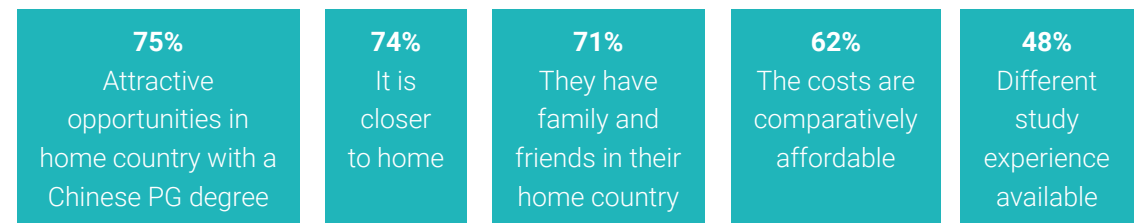
Figure 22: Which of the following options are you most likely to do after graduating? (Top five factors shown)⁴⁴

There are differences in motivations behind plans to pursue a PG degree in the UK, at home in China, or in another country, as outlined in the table below.

Top five factors for considering postgraduate study in the UK⁴⁵:



Top five factors for considering postgraduate study in China⁴⁶:



Top five factors for considering postgraduate study in a different country⁴⁷:

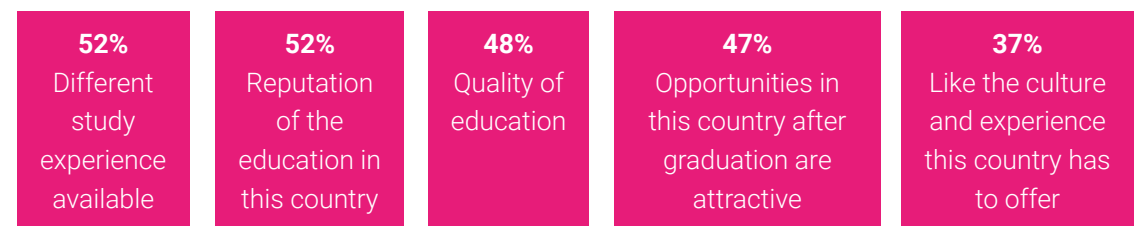


Figure 23: Top five factors for considering PG study in UK, China, or a different country

Most Chinese students considering a PG degree in the UK are likely to have applied to or intend to apply to a different university or college than their undergraduate choice (66%). 27% are yet to decide whether they would apply to different universities or colleges. Given the strong inclination of UG Chinese students to progress to PG studies in the UK, there is a significant opportunity for universities and colleges to provide information, advice, and support to UG Chinese students considering remaining in the UK to continue their education journey onto PG programmes.

Seven in ten Chinese students are more likely to stay in the UK as a result of the Graduate visa route.

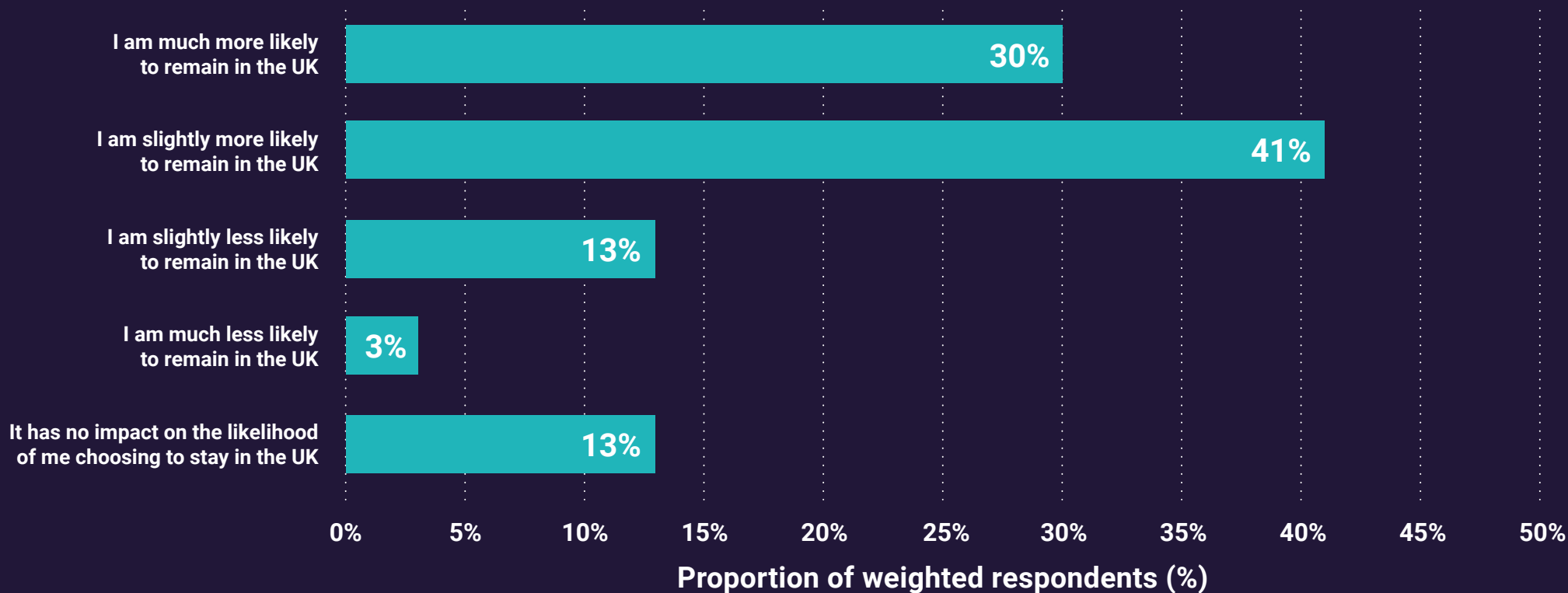


Figure 24: How, if at all, has the offer of the Graduate visa route or post-study work visa impacted your decision of whether to stay in the UK after you graduate?⁴⁸

It is clear that the post-study work offer has been a key tool used in the global recruitment market. The re-introduction of post-study work rights in the UK, through the Graduate visa route has helped to drive UK's competitiveness. In this study, 71% of Chinese students inform us that they are slightly (41%) or much more likely (30%) to stay in the UK because of the Graduate visa route.

Visa statistics show that Chinese students are less likely to apply for the Graduate visa route relative to other international student groups. Chinese students hold 11.3% of issued Graduate route visas compared to the 41.4% and 10.1% held by Indian and Nigerian students respectively.



Chinese students are pragmatic in their choice of employment

The majority of Chinese students planning to find employment in the UK are looking to apply for graduate jobs (86%) or entry-level positions (56%). One in four students will be considering middle management positions and a small proportion (7%) are aiming high for senior management positions. Almost seven in ten students (68%) believe that they have received a lot of careers advice or a fair amount of careers advice from their university or college. 28% of students say that they have not received much careers advice and 4% have received no advice at all.

Employability is a **key motivator** for Chinese students and is becoming increasingly important in the decision making process for overseas study. Due to the challenges in their domestic employment landscape, Chinese students are prioritising **job prospects** upon their return to China. Universities and colleges can also continue to ensure that local and international employment skill needs are promoted within course content and wider careers services offered by universities and colleges, recognising the key role employability skills play in attracting Chinese and other international students to the UK.

The **International Student Employability Group** (ISEG), chaired by UKCISA was established in 2020 and has been supported by the IES. The next iteration of IES can continue to acknowledge and support ISEG, UCAS, and other sector bodies to strengthen support and guidance for international students on employability.

It is also becoming **increasingly important** to demonstrate the outcomes in knowledge and skills international students can expect to achieve through international HE study. International students provide a key opportunity for addressing some of the UK's shortage skills needs. However, HESA made the decision to **cease** calling the international non-EU students from December 2021 for graduate outcomes, **reducing** the evidence base for international graduate outcomes. As such, UCAS strongly supports the expansion of international graduate outcomes data collection by HESA– both for those who remain in the UK and return overseas - as this continues to be a significant gap to build confidence amongst the thousands of international students, including Chinese students, who choose UK as their choice of study destination.



Better employment opportunities are the biggest motivation for those seeking to move to a region different from their home region in China

“Better life experience” - Female respondent from Langfang, Hebei province⁴⁹

“I want to live in Beijing” - Male respondent from Wuhan, Hubei province⁵⁰

Chinese students are **less likely** to stay in the UK after graduation than other international students, and some seek overseas study to obtain a **hukou** to move across to provinces such as Shanghai and Beijing for access to better socioeconomic opportunities. **80%** of Chinese students who studied abroad between 2016 and 2019 returned home after completing their studies.

Our survey found that just over a third (34%) of Chinese students are considering finding a job in China and 8% consider it to be their most likely choice. **Relaxation** of hukou rules in provinces around China has the potential to make moving back to China an attractive opportunity. Earning a degree from a highly ranked institution has also gained further value after last year when Shanghai authorities started **offering hukou** to Chinese graduates from the top 100 universities in the world. This reiterates the importance of designing programmes to equip graduates with the skills to gain access to and succeed in UK and Chinese job markets.



Case Study 5 – A Chinese student discussing life after graduation in the UK⁷

Name: Siqi Jia

Age: 22

Course and university: Economics and Politics, University of Glasgow

“My name is Siqi Jia, I am a graduate from the University of Glasgow and now an employee at Deloitte in London. I came to the UK in 2018 to pursue my undergraduate degree in Economics and Politics. My initial plan was to move back home to find employment in China. Throughout my time at university, I found myself very interested in the financial services industry. After comparing the job markets in the UK and China, I decided to start my career in the UK as I enjoy the diversity it offers as well as the various opportunities for students.”

⁷ This case study has been provided by UKCISA



**SECTION 6:
WHERE NEXT
FOR CHINESE
RECRUITMENT?**



Highlights

Demand is set to increase: UCAS projections show applicant numbers could exceed 50,000 by 2030.

Insights from digital search data: There has been an increase in online searches linked to studying in the UK from Guangdong, whereas searches from Beijing have decreased.

Growth is not guaranteed: The predicted growth in applicants could be affected by global competition, geopolitics, and government policy.

China to overtake Scotland by 2030 and become the second biggest market for UK HE

As per UCAS projections, there could be a up to a **million applicants** to UK HE by 2030. A 60% increase is projected for international students, signalling the ongoing attraction of UK HE. We project that China will continue to be the largest non-UK market for UK HE – 2030 could see applicant numbers exceed 50,000, more than the number of Scottish domiciled applicants for UK HE, making China the second biggest market, behind only England. Therefore, the next iteration of **International Education Strategy** should focus on a nation specific approach, with explicit actions set out for the Chinese outbound market given its current and continuing importance to UK HE.

In light of the increase in applicants projected from China, UCAS is also working on enabling a more efficient admissions process so universities and colleges can easily identify high quality Chinese applicants through:

- ▶ collecting more accurate and relevant information about international applicants' education history, qualifications and location to deepen providers' understanding of the diverse student segments within China and to support more targeted recruitment approaches.
- ▶ developing the capability for 'document upload' and verification and fraud support, creating a more trusted, transparent, streamlined and efficient admissions and visa processes.
- ▶ delivering additional predictive insights commenting on the future for Chinese recruitment to support advisers and providers.

Alternative models of HE delivery such as transnational education (TNE) can be supported as a **resource effective way** of expanding sustainable provision for global learners, whilst mitigating against geopolitics, perceived 'brain drain' and environmental impact. UCAS as the gateway to UK HE is supporting this by expanding relevant and personalised information, advice, and guidance (IAG) to support all choices and routes to UK HE, including pathways provision, advanced entry, and TNE.



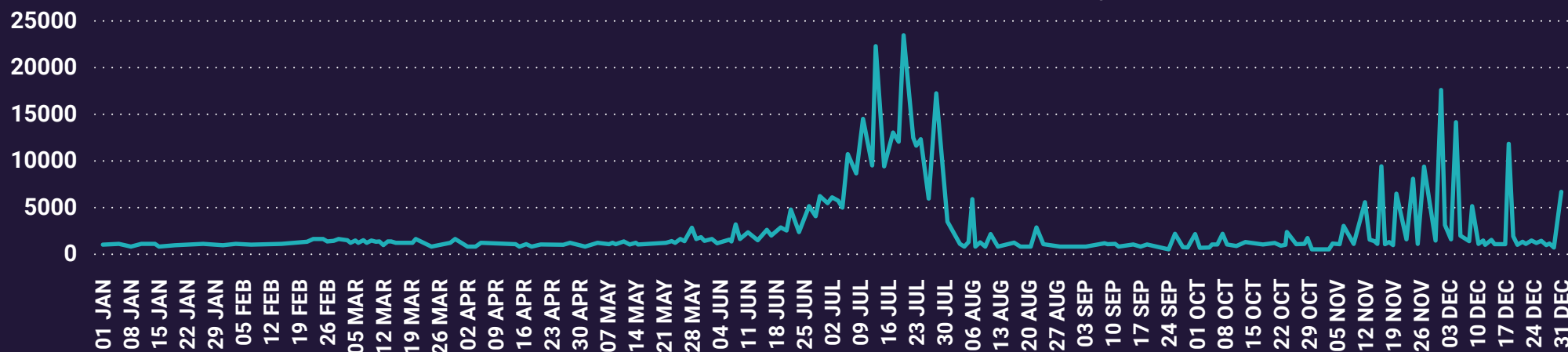
Digital data shows a surge in searches for UK study

Access to digital footprint data from within China can give us further, more immediate indicators, as to the potential pattern of demand over the next few years. Search data from **BOSSA**, China's business association of study abroad service agencies, offers an on-the-ground barometer of appetite to study in the UK.

In 2022, 887,814 individuals in China engaged with online content about studying in the UK e.g., searched for specific universities and/or courses and/or accessed more general information about studying in the UK. This is more than double (+148%) the number who searched for such content in 2021, likely due to the **unblocking** of Chinese access to study abroad aka the 'return to normal,' and the UK's opening-up **ahead of global competitors**, such as Australia.

We note clear surges in July, linked to research ahead of the final year of schooling or a quest for pre-departure information, and late November/ early December, when visa information is typically released and prior to UCAS' January equal consideration deadline. The peaks also align closely to China's **domestic university cycle**, probably due to the quarter of students who consider domestic options in China, alongside their quest to study abroad.

Individuals in China engaging with online content about studying in the UK, 2022



SOURCE: BOSSA

Figure 25: Individuals in China engaging with online content about studying in the UK, 2022. Source: BOSSA

Of these searches, around 8% are made by those 19 and under, who are likely interested in UG study; whereas searches are more frequently made by those in the 30-39 (30%) and 40-49 (26%) age groups, likely to comprise of both aspiring PG students and agents and parents advising students.

Some provinces and municipalities hold greater potential than others for growth

Analysis of the searches at regional level (dividing the search count by population), highlights those provinces and municipalities where interest in study abroad in the UK is highest. Most notably, we see the fall-off in appetite from those based in Beijing – this may be due to the **improving reputation** of Beijing’s domestic universities; or, alternatively, an increase in the availability of in-person resources, such as national education exhibitions, agents’ recruitment events and presentations at international schools within Beijing post-pandemic. Conversely, the UK remains consistently popular with individuals making online searches based in Guangdong, Jiangsu, and Shandong.

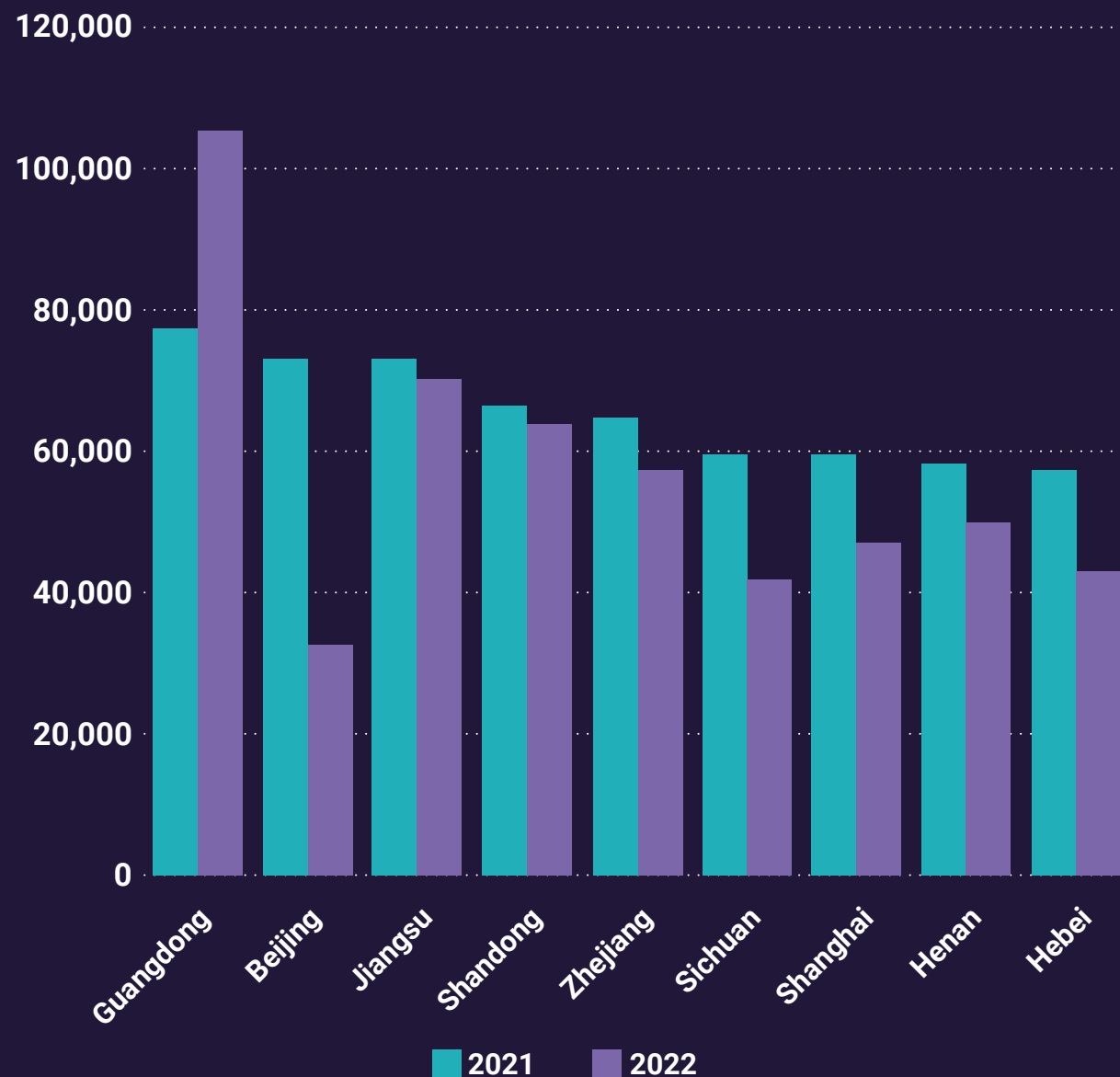


Figure 26: Online searches for content on studying in the UK by region, 2021 and 2022.
Source: BOSSA

There may be a shift in subject demand

In 2022, public expenditure allocated to education in China amounted to **3.95 trillion yuan** – it is transforming into a regional ‘super hub’ for education⁵¹. Plans have been **announced** recently in China to reform the portfolio of courses offered within the Chinese HE system, with an aim of growing programmes that specialise in basic sciences and medicine to strengthen China’s goal to become a global science and technology superpower. Courses with lower employment outcomes may be discontinued. Depending on the impact of the changes proposed on the supply and availability of HE courses in China, there may be a shift in the subject mix that Chinese students are interested in studying in the UK.

Chinese universities have also recently **raised tuition fees** for domestic students, with plans to do the same for international students coming to China. While fees for domestic students in China are much lower compared to fees charged in the UK and other popular destinations, it could lead to increased outward mobility of Chinese students.

The future looks (cautiously) positive for Chinese recruitment

Overall, the UK’s high interest engagement statistics from BOSSA indicate a positive sign that China’s study abroad industry is recovering from the last three years with overseas education presenting an **attractive alternative** to the highly competitive HE system in China. Equally, projections indicate that the Chinese middle class, with a propensity to pursue HE overseas, will continue to grow and could make up **40% of the population** by 2030.

In addition, as China’s job market is tightening, local intelligence from BOSSA suggest that employers are expressing a preference for candidates who have spent a longer duration overseas, which, in many cases, involves also studying a postgraduate qualification outside of China and/or benefiting from the **Graduate route**. Furthermore, agencies based within China are generally **optimistic** about market development – they have observed a recovery of the market and noted

increased demand for all major education sectors⁵². This suggests that we may be yet to reach what some commentators have termed ‘**peak China**’.

However, despite these positive circumstances, UCAS **end of cycle data** reported a decline in UG Chinese applicants (-1%) and acceptances (-6%) this year. A challenging domestic **economic climate** in China means that recovery and growth may not be linear, with return-on-investment increasingly critical for families facing increased financial pressures. Furthermore, global competition, geopolitics and government policy loom large as **potential limiting factors**.

2022 data from **Project Atlas** shows how competition is changing market share of international students, with the US holding the highest market share (15%), followed by the UK (10%), Canada (9%), Australia (6%), France (6%), and Russia (6%). Globally, policies for student and post study work visas continue to change too. After an **extension** earlier in 2023, Australia **recently announced** changes to its post study work visa, reducing its duration, maximum age of eligibility, and conditions for extension. However, it continues to remain competitive with its offering of two years of validity for a bachelors and masters degree, and three years for research masters, and PhD. Canadian government also announced temporary measures to provide an additional 18 months’ work permit to post graduates during COVID19, however, it will **not be extending** this policy beyond 2023. In addition, non-traditional overseas study destinations like Japan have set out ambitious pathways, setting-up a **Japan Alumni Global network** to provide the latest information for life after studying in Japan.

Therefore, whilst growth is projected, this will be against a dynamic global market that is truly open for business. In addition, tensions across the globe could have a rapid (and unforeseen) impact on the progression of students from specific nations. There is also potential for domestic UK Government policy to continue to shift, that could affect the desire and/or ability of international students to choose the UK as their study destination.

ABOUT UCAS INTERNATIONAL



UCAS connects the world to UK HE by delivering a world-class, shared admissions service that increases the quality and diversity of international UG and postgraduate taught (PGT) applications for the sector. UCAS drives forward initiatives and cross-organisational collaboration to better support international applicants, their advisers and the UK as a destination of study. Over the last 30 years, UCAS has helped over a million international students to secure their study place in the UK. Providing an impartial and independent process for fair and transparent discovery, applications, and placement, UCAS plays a key role in the international student journey.

In the 2023 cycle, UCAS engaged with over 400,000 individuals from over 200 countries and territories; supporting around 150,000 applicants, and tens of thousands of their advisers to make an application. As the largest single channel to entry, UCAS helped to place over 70,000 international students into a UK university or college. UCAS plays a key role in maintaining the UK's competitive advantage through its independent, impartial, and trusted brand and services.

The **UCAS International App** is a mobile-first discovery tool for international applicants, launched in 2022. It is now used in over 200 countries and territories and has been downloaded by more than 200,000 prospective international applicants. The App features comprehensive course listings for almost all courses (both UG and PGT) at UK universities and colleges; a scholarship matching tool; and accommodation search functionality. Undergraduate course provision listing and integration with the **UCAS Hub** is one of the newest additions to the App following its recent rebrand, expanding on its former PGT programme focus to allow accessibility to trusted and impartial data across study levels.

As **UCAS forecasts**, annual demand from international undergraduate applicants could reach to 200,000 by 2030, the focus on ensuring a positive experience of international applicants looking to enter UK higher education is fundamental in maintaining the UK's competitive position. To support this increase in demand, UCAS is completing an

International Admissions Review to consult the sector on how UCAS can better personalise and streamline for all parties.

This Admissions Review is focusing on four key areas:

- ▶ **Growing the UCAS adviser channel** to deliver a more diverse, engaged and supported international community of quality school counsellors and agents;
- ▶ **Unlocking all routes to UK HE** with more relevant and personalised information, advice and guidance to support all choices and pathways into UK study;
- ▶ **More efficient admissions** to improve the application experience, delivering more accurate and relevant international data and documentation to providers;
- ▶ **Building greater trust and transparency within the system** with post-submission services that streamline the review and verification of key data and documents for provider admissions and visas decision making. This will increase speed and confidence and reduce risk from increasing speculation and fraud.



TECHNICAL NOTES



The data used throughout this report is taken from UCAS undergraduate application data, and UG survey insights from various UCAS surveys at different points in the cycle. To supplement this data, a bespoke survey was also conducted in early 2023 (UCAS international students survey), with responses from almost 200 existing UG Chinese higher education (HE) students.

Domicile data is collected in the undergraduate application by way of a drop-down list consisting of reference data held by UCAS, which is updated annually. For this report an applicant is included in the data as a Chinese applicant where they have specifically selected the domicile, China. Reference to 'other international' will include all non-UK domiciles other than China.

Unless otherwise specified, the analysis in this report is performed on the end of cycle snapshot from the 2023 application cycle. Numbers have been rounded to the nearest five.

The UCAS data in this report aligns with information and datasets that have been released publicly, in line with this any statistics that name specific UK HE providers represents end of cycle 2022 data.

Some of the analysis relating to course subjects is based on Joint Academic Coding System (JACS) classifications to enable comparison across longer time periods. Due to availability of data under this classification system trends will reference data up to and including the 2022 cycle. It should be noted that equivalent data analysis for 2023 referencing Higher Education Classification of Subjects (HECoS) classifications indicated comparable trends and breakdowns, across respective categories with similar coverage. Data referencing the region (city/province) of origin for applicants from China has been developed from conducting free-text searches on the applicants declared home address for the 2023 application cycle. Searches were made for mention of the most populous municipalities and provinces in China, and then checked and validated to ensure the reference was to the city/province and not part of a street name.

The new survey evidence referenced in this report comes from the UCAS International Students Experience survey. This survey was open from March to April 2023. The survey was sent to a sample of current university or college students and recent university or college graduates domiciled in China, Nigeria and India. For this report, the data has been filtered to the responses of the students and graduates domiciled in China.





The responses were weighted to be representative of the population of China-domiciled students and graduates in UK HE between 2018 to 2022. The weighting process accounts for differences in response rates observed in different characteristic groups, such as gender and age. The survey received around 195 responses from Chinese students and graduates, representing around 74,000 Chinese graduates and students.

Additional existing survey insight has been referenced from the UCAS New Applicant Surveys and the UCAS New Applicant Decisions Surveys. These surveys are sent out to applicants just after they have submitted their UCAS application and gather insight on their decision-making process and what was important to them when deciding where to apply. These applicant surveys run from September to June during each UCAS cycle. The survey results are weighted to be representative of the entire applicant population for that cycle, accounting for differences in response rates from different characteristic groups such as age and gender.

For the analysis for this report, the results of the New Applicant Surveys from 2019 to 2023 were combined and filtered down to include only the responses from applicants domiciled in China. There were 765 responses to the UCAS New Applicant Surveys from Chinese applicants between 2019 and 2023, representing a weighted total of 73,545 applicants. In addition, the results of the New Applicant Decisions Surveys from 2019 to 2023 were also combined before being filtered to only include the responses from applicants domiciled in China. There were 805 responses to the UCAS New Applicant Decisions Surveys from Chinese applicants between 2019 and 2023, representing a weighted total of 46,755 applicants.

Finally, statistics from the 2023 UCAS Finalist Survey were used to compare UK final year students' plans following graduation with the plans of students from China. The Finalist Survey was open from June to July 2023 and was sent to students in their final year of study at a UK university or college. Results were weighted to be representative of the population of final year students who were eligible to receive the survey. There were 3,150 responses from UK-domiciled final year students to the survey, representing around 203,505 UK final year students. The Finalist Survey results referenced within this report were filtered to include only UK-domiciled final year students.

When referencing the results of the UCAS surveys within this report, the weighted proportion of respondents who selected that response has been referenced and rounded to the nearest whole number. All references to the number of respondents and weighted total of respondents have been rounded to the nearest 5.

ENDNOTES

- 1 A **hukou** (household registration) is an official document issued by the Chinese government to Chinese citizens that entitles the registrant to certain benefits in a particular region; for example, hospitals, schools, or land-purchasing rights.
- 2 **BONARD webinar**, March 2023
- 3 Based on the categorisation of the UCAS apply centre as Grammar, Comprehensive, Independent, Sixth Form Art School, Language School, Tech College, and Tertiary College
- 4 Qualification information is entered on the application by the applicant and is not subject to any validation. This statistic identifies applicants that have listed at least one qualification which falls into the UK, or international qualification groupings (including A Levels, EU and Non EU country specific qualifications, IB etc). Exclusions include Chinese (domestic) qualifications, language proficiency, music qualifications or any Level 4 qualifications.
- 5 Based on 2023 cycle, apart from named provider information (as at 2022 cycle)
- 6 **<https://www.census.gov/>**
- 7 **BONARD Webinar**, June 2023
- 8 **<https://worldpopulationreview.com/>**
- 9 **<https://data.stats.gov.cn/english/easyquery.htm?cn=E0103>**
- 10 **<https://data.stats.gov.cn/english/easyquery.htm?cn=E0103>**
- 11 **<https://data.stats.gov.cn/english/easyquery.htm?cn=E0103>**
- 12 All PTE takers in China, regardless of intended destination country. Pearson data aggregated for 2018-2022.
- 13 **BONARD webinar**, March 2023
- 14 No of respondents: 195, Weighted no. respondents: 74,140
- 15 No of respondents: 195, Weighted no. respondents: 74,140
- 16 No of respondents: 185, Weighted no. respondents: 71,030
- 17 No of respondents: 195, Weighted no. respondents: 74,140
- 18 UCAS New Applicant Decisions Survey, How did you narrow these choices down to the universities or colleges you applied to? Please select all that apply. 2019-2023 cycle Chinese applicants. 390 respondents in total, representing a weighted total of 23,300 Chinese applicants.
- 19 UCAS New Applicant Survey, When deciding which universities and colleges to apply to, how important were the following resources? 2019-2023 cycle Chinese applicants. 680 respondents in total, representing a weighted total of 57,870 Chinese applicants.
- 20 UCAS New Applicant Decisions Survey, Would any of the following things put you off applying to a university? Please select all that apply. 2019-2023 cycle Chinese applicants. 770 respondents in total, representing a weighted total of 44,605 Chinese applicants.
- 21 UCAS New Applicant Survey, When deciding which universities and colleges to apply to, how important were the following factors? 2019-2023 cycle Chinese applicants. 755 respondents in total, representing a weighted total of 72,315 Chinese applicants.

- 22 UCAS New Applicant Survey, When deciding which universities and colleges to apply to, how important were the following lifestyle factors? 2019-2023 cycle Chinese applicants. 745 respondents in total, representing a weighted total of 71,340 Chinese applicants.
- 23 Results taken from UCAS' **Where next: what influences the choices international students make** report
- 24 UCAS New Applicant Survey, This year, have you applied, or do you intend to apply, to study in countries other than the UK or the country where you currently live? 2019-2023 cycle Chinese applicants who had applied to study in the UK. 670 respondents in total, representing a weighted total of 62,280 Chinese applicants.
- 25 UCAS New Applicant Survey, Which other countries have you applied to, or do you plan to apply to? (Please tick all that apply.) 2019-2023 cycle Chinese applicants who had indicated that they had applied or were planning to apply to study in countries other than the UK. 400 respondents in total, representing a weighted total of 38,020 Chinese applicants.
- 26 UCAS New Applicant Survey, When did you decide on your choice of subject(s)? 2020-2021 cycle Chinese applicants. 285 respondents in total, representing a weighted total of 18,980 Chinese applicants.
- 27 **UCAS Tariff points** translate student qualifications and grades into a numerical value. This grouping of high, medium and lower tariff providers is based on the average levels of attainment of their UK 18-year-old accepted applicants (summarised through UCAS tariff points) in recent cycles.
- 28 Based on acceptance data for 2023 application cycle.
- 29 This analysis has considered JACS3 groupings for 2014-2022 and HECoS groupings for 2019-2023. Although these systems are not directly comparable, findings have been consistent.
- 30 2013 relates to Business and Administration (JACS3 category) and 2023 Business and management (HECoS category).
- 31 JACS3 category Creative arts and design in 2013. HECoS category design, creative and performing arts.
- 32 Based on JACS3 classifications to enable a 10 year comparison. JACS data not available for 2023 but analysis on 2023 HECoS subject classification data indicates themes and patterns comparable to the 2022 data presented.
- 33 Provider level end of cycle 2023 data not available currently.
- 34 When analysing Chinese applicants accepted to UK HE
- 35 This relates to score assignment. This is where a test taker 'assigns' their score to a university or college, so the university or college can verify it. This means that the test taker may have applied to that university or college. Pearson data, filtered to UK, aggregated for 2018-2022.
- 36 No of respondents: 195, Weighted no. respondents: 74,140
- 37 No of respondents: 195, Weighted no. respondents: 74,140
- 38 No of respondents: 195, weighted no. respondents: 74,140
- 39 Data from UCAS cost-of-living research survey from November 2022: 'Can you recall receiving any cost of living information, directly from universities?'
- 40 Data from UCAS cost-of-living research survey from November 2022: 'Which of the following are most important to you when researching/shortlisting universities?'
- 41 No of respondents: 195, weighted no. respondents: 74,140
- 42 UCAS Finalist Survey 2023. Which of the following options, if any, would you consider? Please select all that apply. Asked to undergraduate students in their final year of study at a UK university or college in 2023 who did not have a finalised plan for after graduation. Data filtered to UK-domiciled students. 730 respondents in total, representing a weighted total of 46,540 UK final year students.

- 43 UCAS Finalist Survey 2023. What do you intend to do after graduating? If you are intending to do more than one activity, please select the option which will take up more of your time. Asked to undergraduate students in their final year of study at a UK university or college in 2023. Data filtered to UK-domiciled students. 1,990 respondents in total, representing a weighted total of 126,750 UK final year students.
- 44 No of respondents: 195, weighted no. respondents: 74,140
- 45 No of respondents: 130, weighted no. respondents: 53,980
- 46 No of respondents: 25, weighted no. respondents: 9,500
- 47 No of respondents: 65, weighted no. respondents: 21,120
- 48 No of respondents: 195, weighted no. respondents: 74,140
- 49 Survey response to 'Why are you planning to live in another region / city in your home country'
- 50 Survey response to 'Why are you planning to live in another region / city in your home country'
- 51 **BONARD Webinar**, June 2023
- 52 **BONARD Webinar**, June 2023



UCAS

