

Recruiting students from China

Market evidence and priorities for universities



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Purpose and scope

This report examines mainland Chinese students considering overseas higher education, using official and original research available by May 2026. It compares selected destinations and distinguishes undergraduate, taught postgraduate and research routes. Its purpose is to help university leaders plan recruitment, admissions and student support without treating China as a single homogeneous market.

Research approach

This report synthesises official statistics, government guidance and original research available by its stated evidence date. Sources are numbered in the text and linked at the end. National datasets count different populations and stages; definitions appear beside each comparison. Calculations and Merta recommendations are distinguished from reported results.

This is a selective review of published evidence, not new institutional fieldwork, a systematic review or an evaluation of Merta's products.

Interpretation and use

Findings from one institution or population may not transfer to another. Policy summaries reflect the report date; current official guidance should govern individual cases. Recommendations should be tested against an institution's own applicants, service capacity and outcomes. A cited organisation does not endorse Merta.

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Executive findings

China remains one of the most important sources of international students, but its route mix is changing. The Chinese Ministry of Education reported **570,600 people went abroad to study in 2025** and **535,600 returned** that year. These are annual movements, not a count of students currently enrolled overseas. By comparison, its 2019 release recorded 703,500 going abroad, before the pandemic. Different cohorts and study types prevent a simple conclusion that demand for a particular country has fallen by the same proportion. [1,2]

The US hosted **265,919 Chinese international students in 2024/25**, down 4% on 2023/24 and well below the 2019/20 peak of 372,532. UK HESA data also show Chinese enrolments declining since 2022/23, while the UK granted **88,776 study visas to Chinese main applicants** in the year ending March 2026. Australia's 2025 annual count included **196,957 Chinese students** commencing or continuing on student visas across sectors. The measures are not directly comparable. [3,4,5,6,8]

Student choices are not a single subject story. UCAS reported that business fell from 43% of Chinese undergraduate acceptances in 2013 to 26% in 2023, while creative arts and design rose from 4% to 11%. Reputation, education quality and cultural experience were prominent reasons for choosing the UK. These are UK undergraduate findings, not a profile of every Chinese applicant worldwide. [11,12]

Recruitment priority: explain the course's academic and career value with evidence, serve student and family questions across the decision journey, diversify programme and geographic assumptions, and offer reliable support on English-language learning, belonging and next steps after graduation. Plan for competition from Hong Kong, Japan, Germany and strong domestic provision rather than assuming the US-UK-Australia trio captures all demand.

For planning, distinguish a large existing cohort from fresh demand. A campus can have many current Chinese students while receiving fewer new applications, and a national visa flow can move differently from a particular university's enrolment. The institution should track undergraduate, taught postgraduate and research routes separately, including the share moving from one degree to another. This also prevents a decline in one route from being mistaken for a collapse of the entire market.

What the data count

The most useful China dashboard separates annual outbound movement, host-country student stocks, new entrants and visa grants. China’s 570,600 outbound students in 2025 is a flow from the origin country. Open Doors’ 265,919 is a US stock that includes students on Optional Practical Training. HESA counts UK enrolments by permanent address. Australia’s PRISMS student count includes different education sectors. A decision to recruit in one university cannot be inferred from any one of those totals. [1,3,4,5,8]

Indicator	Latest reported figure	Interpretation
Chinese nationals going abroad to study	570,600 in 2025 [1]	China MOE annual outbound flow.
Chinese students in US higher education	265,919 in 2024/25 [3]	Open Doors stock including OPT.
UK study visas to Chinese main applicants	88,776, year ending Mar 2026 [6]	Visa grants, not enrolments.
Chinese students in Australia	196,957 in 2025 [8]	Annual count across student-visa sectors.

Table 1. Measures have different populations and periods; do not add them together.

Within the US series, the decline was not identical by level. The IIE country fact sheet records 78,583 Chinese undergraduates in 2024/25, down 10.2%, and 120,229 graduate students, down 2.1%; 61,981 were on OPT. Those figures suggest different planning questions for bachelor’s recruitment, graduate recruitment and graduates in work training. [4]

A university should build an offer-to-census view for its own students, recording location, course, level, prior institution, offer timing and destination alternatives. The measurable market is the applicants for whom its academic proposition and support are credible, not China’s population as a whole.

Open Doors’ academic-level cut shows why a single Chinese total is insufficient. A university considering undergraduate expansion should not use the resilience of its graduate or OPT stock as evidence of fresh bachelor’s demand. For each destination, record the same stage definitions and the release date. Where the public dataset does not separate the programme of interest, state the gap and use institutional data with a clear denominator. Avoid deriving a global Chinese outbound share by adding national administrative totals that include different populations.

The direction of travel

China's pre-pandemic annual outbound flow was large: the Ministry of Education reported 703,500 in 2019. Its 2025 flow of 570,600 remains substantial while below that benchmark. The same April 2026 release counted 535,600 returnees in 2025, up 40,600 on 2024. Annual returns are not the same people who went abroad in the same year, so subtracting them does not calculate a net student stock. [1,2]

The US series shows a sustained adjustment. Chinese students numbered 372,532 in 2019/20, 289,526 in 2022/23, 277,398 in 2023/24 and 265,919 in 2024/25. Open Doors' changing inclusion of online students around the pandemic and its inclusion of OPT require care in interpreting the long span. Nonetheless, the recent two-year decline is clear within the published series. [4]

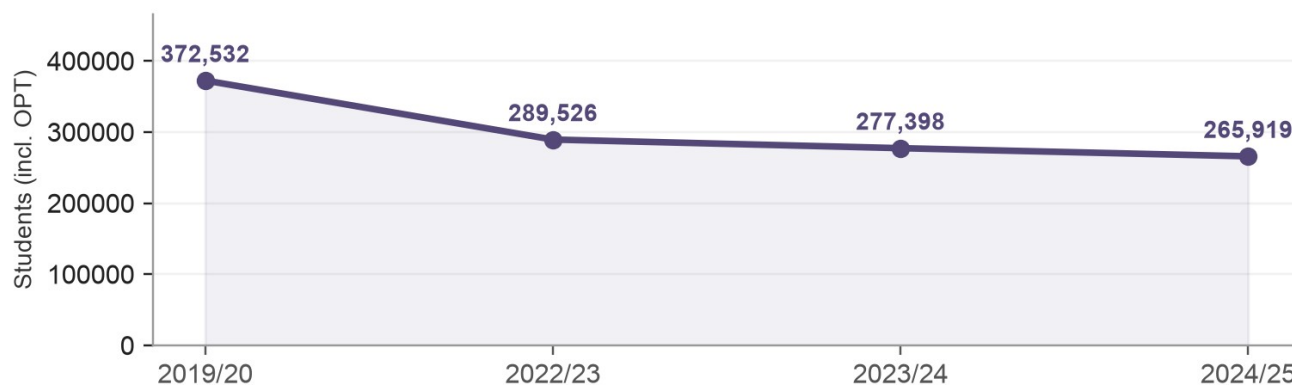


Figure 1. Selected Open Doors years for Chinese students in US higher education, including OPT. The line omits intervening years and is not an annual outbound count. [4]

UK and Australia remain large destinations. HESA's January 2026 release says Chinese enrolments declined from 2022/23, while UK visa grants for the year ending March 2026 were down 15% on the prior year for Chinese main applicants. Australia's 2024 higher education count recorded 158,664 Chinese students, 31.8% of the international higher education cohort; its 2025 all-sector annual student count was 196,957. The latter is broader and should not be treated as a year-on-year university change. [5,6,7,8]

Do not turn these facts into a single "China is disappearing" narrative. Demand can move between undergraduate and postgraduate study, onshore and transnational programmes, and destinations. A strong domestic university system and a returning graduate labour market can also alter the value proposition of an overseas degree. Recruitment forecasts should therefore be programme specific and include a downside scenario.

Competition extends beyond the traditional destinations

Germany counted around **38,600 Chinese international students** in winter 2024/25, second only to India among origins in DAAD's summary. DAAD said this was about 7% below winter 2019/20, while English-language programmes were expanding. Japan's student guide counted **123,485 students from China** in 2024 across universities, training and language institutions. Neither total is comparable with a US university-only census. [9,10]

Hong Kong is part of the choice set for many mainland students. The University Grants Committee increased the non-local ceiling for publicly funded taught programmes from the equivalent of 20% of local places to 40% starting in 2024/25. Its 2025 pamphlet describes over 26,600 non-local students in UGC-funded programmes. This is an expansion of capacity, not proof that every additional place will be filled by mainland applicants. [14,15]

Universities should study destination substitution at the applicant level. Ask which other countries and formats are under consideration, then examine what the student values: proximity to family, programme reputation, language, cost, degree length, work options and the possibility of returning to China. UCAS found that 63% of surveyed Chinese UK undergraduate applicants had applied or planned to apply to another country in addition to the UK and China. The data come from a particular UK application route, but show why an offer is rarely a final decision. [12]

Transnational education and joint programmes can be legitimate alternatives to physical mobility. They should be assessed on academic quality, recognition, student experience and the actual transfer pathway. A university should avoid marketing a "guaranteed" overseas progression that depends on later admission, funding or visa approval.

A student comparing Germany, Japan, Hong Kong and an English-speaking destination may be weighing very different degree lengths, language demands and proximity to family. Ask the applicant which alternative is credible for their intended subject, rather than assume the alternatives in a national ranking. A research candidate may compare laboratories; an undergraduate family may compare safety and whole-degree cost. Programme pages should show what the course offers on those dimensions and what remains uncertain until admission or visa approval.

Fields of study and academic value

The picture differs by level and destination. In the UK undergraduate pathway, UCAS reported business and management still leading Chinese acceptances in 2023, but with a reduced share compared with a decade earlier. Creative arts and design more than doubled their share. In the US, Open Doors provides separate field-by-origin tables for Chinese students. Institutions should use those alongside their own admissions data rather than apply the US all-nationality STEM average to China. [11,12,19]

An undergraduate proposition often combines reputation, quality of teaching, academic breadth, campus experience and a safe transition. UCAS found reputation (62%), education quality (60%) and cultural experience (46%) among reasons Chinese students chose the UK. The sample concerns Chinese students in a UK context; it is evidence of salient themes, not a universal ranking of every destination choice. [12]

Postgraduate questions differ. A taught-master's applicant may compare academic standing, course length, employer recognition, assessment style and return-on-investment. A research applicant may focus on supervisor expertise, lab access, funding, intellectual freedom and research collaboration. Present programme outcomes by level and discipline, not only an institution-wide ranking. Where a profession requires licensing, explain the relevant jurisdiction and limits of recognition.

The likely next step may be another degree. UCAS reported that 73% of surveyed Chinese UK undergraduates were considering postgraduate study in the UK; 43% considered a UK job and 34% a job in China. These were overlapping options, not mutually exclusive forecasts. Universities can support that exploration with honest postgraduate pathways and careers advice that covers both destination and home-country labour markets. [11]

A richer subject strategy starts with course-level data. Compare enquiries, qualified applications, offers and enrolments by subject and level over several intakes. Then ask students what they hoped to gain from the course and whether the teaching delivered it. A rise in creative arts acceptances in the UK may justify better presentation of studio facilities and industry links, but it does not prove that the same trend exists for a science-focused university or a different destination. [12]

Geography, families and information channels

China's regions and cities differ in household resources, school pathways and exposure to overseas education. Recruitment solely through a few major cities can miss suitable applicants, while national advertising may generate interest without the service capacity to assess qualifications. Segment using the institution's own data by province, school or university, level, subject and stage reached. Validate any new-city investment with conversion and continuation, not just enquiries.

Family influence matters, especially at undergraduate level. UCAS research on international choice found Chinese applicants rated parents highly as influencers; teachers and agents also contributed information. The student should remain the decision maker, while universities make it easy for a family to understand cost, safety, accommodation and support with the student's consent. A bilingual family information session can be helpful if the official conditions remain clear and consistent. [13]

Digital channels should carry authoritative information rather than a stream of slogans. Maintain current Chinese-language summaries where needed, linked to the controlling course and policy pages. Disclose who answers a chat and what they can decide. Current students can explain life on campus; they should not give immigration, financial or mental-health advice as if they were staff. A faculty member can give depth on curriculum and research fit.

Trust is weakened by an unexplained fee change, unclear scholarship terms or inconsistent messages between an agent and the university. Give every applicant direct access to their offer, documents, deadlines and a named escalation route. Test translations with students and staff familiar with the subject, because seemingly small differences in eligibility language can change a financial decision.

Parents and teachers can help students evaluate risk, but the university should not bypass the student. Let the applicant decide who may receive fee, offer or housing information. If a family asks about safety, show the actual reporting, accommodation and emergency services. If an agent asks for a decision update, ensure the student can see the same status. The result is a consistent record and a clearer consent boundary, which matters when several people are involved in the decision.

What students may be nervous about

Cost, personal safety, belonging, academic transition and employment are distinct concerns. Universities should ask which one matters in a live case. A student choosing an expensive overseas degree may need evidence that the curriculum differs meaningfully from a strong domestic option and that graduates can explain its value to employers in China. The Ministry of Education projected 12.22 million higher education graduates in 2025, underscoring the scale of the domestic graduate labour market; it does not reveal the individual return to any overseas programme. [16]

Country relations and immigration rhetoric can also affect confidence. A geopolitical headline may raise questions about welcome, visa processing, research collaboration or travel. The institution should publish dated official information and a route to a qualified adviser, avoiding speculation about a specific visa outcome. Keep a contingency plan for deferral and remote start where academically and legally feasible.

UCAS' Chinese student research found that 28% of respondents said they had received little careers advice and 4% none. That is an actionable service issue for universities: programme-specific advising should begin before enrolment and continue through study. Career support should cover international students' realistic eligibility for internships and work, alongside options after return. [11]

Belonging should be demonstrated, not asserted. Show how students obtain academic help, use English in seminars, meet peers beyond their own nationality group and report discrimination. Give prospective students access to current students with varied experiences. Publish housing and arrival details early enough to influence the decision, and set a clear standard for response time when an offer holder asks for help.

Employment anxiety cannot be resolved by highlighting a few exceptional alumni. Provide cohort-based outcomes with response rates and the range of destinations, then give students access to careers advisers who know the subject. Describe the limits of work eligibility clearly. A student planning to return to China may need help explaining a foreign degree to employers there, while another may seek research training or a second degree. The service should accommodate those legitimate routes without treating one as the default.

Recruitment channels and partnerships

Agents and school counsellors can help families navigate unfamiliar systems. The university still owns admissions standards, fee information, data access and the student experience. Written agreements should define accurate claims, subagent controls, complaint handling and data return. Check actual messages used in-market. A commission-linked partner may be useful, but channel performance should be judged by enrolled students who continue and succeed, not just applications submitted.

Academic partnerships offer a different route: joint curriculum development, research links, summer study, articulation and carefully governed dual-degree pathways. They require transparent recognition and quality assurance. An articulation agreement can attract strong students when prerequisites and transfer rules are clear; a vague guarantee can create disappointment and compliance risk.

Alumni can speak credibly about career trajectories in China and elsewhere if the story is contextualised. Report their degree, graduation year and employer sector, and avoid presenting a few exceptional outcomes as a cohort average. Current student ambassadors can answer daily-life questions and help a new student imagine the transition. Give them training and a handoff route for sensitive questions.

Direct applications should be serviceable. A Chinese-language summary does not help if the application portal rejects a common document format or sends automated replies at the wrong stage. Track time to an accurate answer, incomplete files, scholarship decisions and offer-holder withdrawals. Invest in qualification expertise and support capacity before expanding acquisition spending.

Partnership governance should specify who owns the relationship at each stage. A school counsellor may introduce an undergraduate; an agent may help prepare documents; a department may assess academic fit. The university should approve the final offer and maintain direct contact. Review translated claims, subagent use and complaints. A strong partner sends students who understand the programme and can succeed, not merely many forms. Measure that through enrolment and continuation, with attention to whether students received the support promised before arrival.

The current position and plausible futures

As of May 2026, the evidence supports three simultaneous facts: China continues to send hundreds of thousands abroad annually; the US Chinese student stock has declined in recent years; and other destinations and domestic provision are material alternatives. The direction for any one university depends on its courses, brand, price, city network and ability to support students. A single national forecast would conceal these differences. [1,4,9,10]

Scenario 1: selective recovery. Mobility remains substantial, but competition favours courses with strong academic evidence, graduate support and trusted partners. A university with differentiated programmes could improve conversion despite flat national flows.

Scenario 2: destination redistribution. More applicants choose regional options, Germany, Japan, Hong Kong or transnational provision. Lower travel burden, local recognition and price could matter. This scenario is plausible from capacity and existing stocks, but the cited data do not prove a one-for-one diversion from the US or UK. [9,10,14]

Scenario 3: tighter external constraints. Visa, research-security or economic shifts raise uncertainty. Universities should stress-test offers, deposits and arrivals, protect students' ability to defer, and avoid building budgets on best-case growth. None of these scenarios should be given a false probability from the available evidence.

The useful leading indicators are qualified applications, offer timing, scholarship take-up, visa progress and deposit-to-arrival conversion by programme and place of origin. Review them each intake and compare the result with a dated policy register.

The scenario exercise should be updated with observable triggers. For example, a sustained fall in complete applications for one course, later offer issuance or more visa-stage deferrals would change the enrolment forecast. A change in another destination's capacity is a hypothesis about possible redistribution until the institution sees applicants moving. Record the assumption and revisit it after census. This makes the forecast a management tool rather than a confident story about a complex national market.

Destination policy and student uncertainty

Canada's 2026 international student planning target of up to 408,000 study permits includes 155,000 new arrivals and 253,000 extensions. The cap and associated attestation process can affect an individual applicant's feasible timeline, but the target is not a forecast of Chinese university enrolments. IRCC counted 102,148 Chinese study-permit holders at the end of 2023 across levels of study; that historical stock cannot describe the 2026 intake. [17,18]

In the UK, the year ending March 2026 brought 88,776 visa grants to Chinese main applicants, a 15% decline on the prior year. The UK's large existing Chinese cohort and its new visa flow may move differently. A university should therefore examine course-level applications and visa-stage losses separately. Inform students when a policy is current, proposed or superseded and make a qualified adviser available for individual questions. [5,6]

Political tension can influence perception even where a rule has not changed for the student. Avoid treating news coverage as a legal conclusion. Maintain a dated policy register for recruitment staff and agents, with an owner who can update course pages, deposit terms and offer-holder messages quickly. Where a visa or travel condition changes, identify affected students rather than sending a generic warning to everyone.

The ethical operating standard is clear: do not promise permission to study, work or remain after graduation. Describe current official requirements, expected university processing times and the options if a decision arrives late. Provide a fair deferral and refund route. An applicant who cannot travel on time should not have to choose between losing a large deposit and starting a course without adequate academic preparation.

Experience after enrolment is part of recruitment

The credibility of a China recruitment claim depends on what enrolled students actually experience. UCAS and Pearson reported that nine in ten surveyed Chinese students would recommend the UK and that 92% said course quality met or exceeded expectations. These are UK survey findings and do not establish that every course or destination delivers the same experience. They do show the value of collecting student-level feedback and using it to test recruitment promises. [11]

Track whether Chinese students can access academic support, understand assessment conventions, build relationships across national groups, secure housing and reach careers advice. Compare with other student groups in ways that protect privacy and avoid stereotyping. If a programme's student feedback identifies a recurring issue, admissions copy should not continue to promise a strength the teaching team cannot deliver.

Career support must begin early. The same UCAS research found 28% reporting little careers advice and 4% none. That gap is particularly relevant when students consider postgraduate study, UK employment and employment in China simultaneously. Offer workshops on sector and home-market recruitment timelines, provide clear information about internship eligibility, and avoid relying on a single generic careers fair. [11]

Student ambassadors and alumni should be free to describe challenges as well as benefits. Current students can explain language adjustment, supervision and social life more credibly than a promotional page. Staff should answer formal matters, including complaints, disability support, immigration and fee disputes. Build an escalation route that records whether the question was resolved, not merely whether it was answered.

Recruitment and student-experience teams should share evidence. If enrolled students report weak careers support, a new brochure should not promise exceptional preparation while the underlying service is unchanged. Conversely, a demonstrably strong teaching or mentoring practice can be documented and shown to applicants. Use student feedback with consent and context; a testimonial is one person's experience, while a survey or continuation rate describes a broader group under a defined method.

A practical evidence and testing agenda

Before increasing recruitment spend, audit three cohorts by programme and level. Record province or city, prior institution, application source, offer date, scholarship, conditions, deposit, visa, arrival, census enrolment and first-year continuation. Compare new applicants with existing student stock. A falling US stock does not tell a university which course lost appeal; its own funnel might show a price problem, an academic-fit problem or a late-offer problem. [4]

Conduct a structured offer-holder study at three points: after offer, before deposit and after the decision. Ask what alternative was considered and what information remained unclear. Include students who declined and those who deferred, not only those who enrolled. Translate the survey carefully and give an anonymous route for sensitive experience. Pair stated reasons with behavioural milestones rather than assuming either alone is complete evidence.

Test interventions against the diagnosed concern. If applicants ask about course credibility, try a faculty session with a clear curriculum and research example. If they ask about living and belonging, offer a matched current-student conversation. If they ask about financing, make the full cost and award timeline transparent. Randomise an invitation when practical, preserve usual support for everyone, and measure census enrolment, early continuation and student-reported clarity. Vendor engagement metrics are not a substitute for these outcomes.

Review partnerships on student fit, academic performance, complaints and continuation as well as volume. An agent, school or alumni network that attracts many applications but leaves students confused about conditions may raise costs and harm trust. Conversely, a smaller partnership with strong preparation may deserve more investment. Publish the measurement definitions before making a strategic claim about success.

The testing agenda should include a negative finding. If a peer session increases engagement but does not change enrolment, examine whether the group had already chosen the university or whether the real barrier was price. If an award increases deposits but not arrivals, inspect cash timing and visa progression. Record implementation fidelity: did the invited student get the intended service, and did staff have capacity to answer? Without that check, a null result can be mistaken for proof that an idea never works.

Priorities for universities recruiting in China

Make the academic proposition specific. Present course-level teaching, research strengths, assessment, prerequisites and alumni pathways. Use transparent employment data with sample sizes and year. Show how a graduate can use the degree in China as well as abroad. Differentiate bachelor's, taught master's and research messages.

Serve the whole decision. Explain total cost and scholarship conditions, housing, support, English-language learning, safety procedures and progression options. Offer direct university contact even when an agent or school introduced the student. Provide student and family information in appropriate languages while keeping one authoritative policy record.

Diversify with evidence. Use programme-level data to test new provinces, feeder institutions and subject areas. Compare qualified enrolments, persistence and cost of service, not raw lead volume. Treat Hong Kong, Japan, Germany and strong domestic degrees as part of the student's real choice set, without assuming their statistics are interchangeable. [9,10,14]

Measure post-offer support. Trial a matched current-student conversation, faculty briefing or career clinic for an eligible group. Analyse all invited students, including those who do not participate. Track census enrolment, early continuation and student-reported clarity. If a student chooses another option for a sound reason, learn from it rather than reclassifying it as a marketing failure.

China remains a large, sophisticated market. The durable recruitment advantage lies in credible academic value and a dependable student relationship, with policy and family questions handled honestly throughout the journey.

Use a yearly review of programme-market fit. Compare the newest cohort with the prior two on academic preparation, offer timing, scholarship use, enrolment and first-year progression. Invite current students to challenge assumptions about welcome, teaching and careers. Then adjust one or two defined practices with a measurable hypothesis. The university can remain active in a changing Chinese market without making a single optimistic or pessimistic national forecast its strategy.

Sources

Sources were published by the evidence cut-off shown on page 2. Links point to the cited release or study; later updates to a live page may be visible after this edition.

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Make academic value visible

Make academic quality visible.
Answer family and career questions honestly.
Support the student beyond the application.

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