

Trends in Chinese International Education 2026

The Latest Student Recruitment Market Intel

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Agenda

1. The Year in Review: Two Simultaneous Truths
2. Study Destinations & Visa Resilience
3. Economic Backdrop
4. The New ROI of Overseas Study?
5. International Schools in China
6. Agent Landscape

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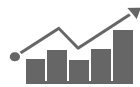
Chinese Recruitment and Marketing Experts



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Achievements



517
Member Schools



200+
Events Annually



120,000+
Community Members

#1 The Year in Review: Two Simultaneous Truths



Two Simultaneous Truths

2025 was the most disruptive year for US-China student recruitment since COVID. US saber-rattling singled out Chinese students several times.

Chinese enrollments to the US have been more resilient than many other sending countries.

Two Simultaneous Truths

- 1) **New enrollments were down in fall 2025.**
- 2) **China was more resilient than other markets.**
- 3) **Meanwhile, upstream demand indicators held:** Common App applications from China essentially flat, Harvard Chinese cohort up 4.5%, study-abroad agency firms up 252% since 2021.
- 4) **The question this talk tries to answer:** which number is the signal, and which is the noise?

The Policy Year: What Actually Happened

- 1) **The whiplash pattern.**
- 2) **What remains live going into 2026:** DHS proposed rule capping F-1 duration at 4 years; White House “Compact” proposing a 15% intl. UG enrollment cap and 5% per-country limit; Harvard SEVP legal battle still in courts.
- 3) **Context elsewhere:** Canada, Australia, Japan, UK.
- 4) **Bottom line:** NAFSA projects a 30–40% drop in new international enrollments nationally — but Chinese students showed comparative resilience throughout.

Will The Next Year Be Better?

- 1) **Summit calendar:** A Trump–Beijing visit is reported for May/June 2026; a reciprocal Xi visit is also being discussed. Summits reliably reduce rhetorical heat — already visible in approval of Nvidia H200 chip sales to China and softer official tone.
- 2) **Stronger RMB:** The Chinese Yuan strengthened below 7:1 USD near end of 2025 — best level since 2023. This directly improves the affordability of overseas tuition for Chinese families.
- 3) **Solid macro fundamentals:** China GDP grew 5% in 2024; 4.8% forecast for 2026. Record trade surplus of \$1.2 trillion in 2025 signals export resilience despite tariff pressure.
- 4) **The rebound question:** Universities that maintained China presence through 2025 have a first-mover advantage heading into 2026–27.

#2: Study Destinations

How Many Students China is Sending, and Where They're Choosing to Go

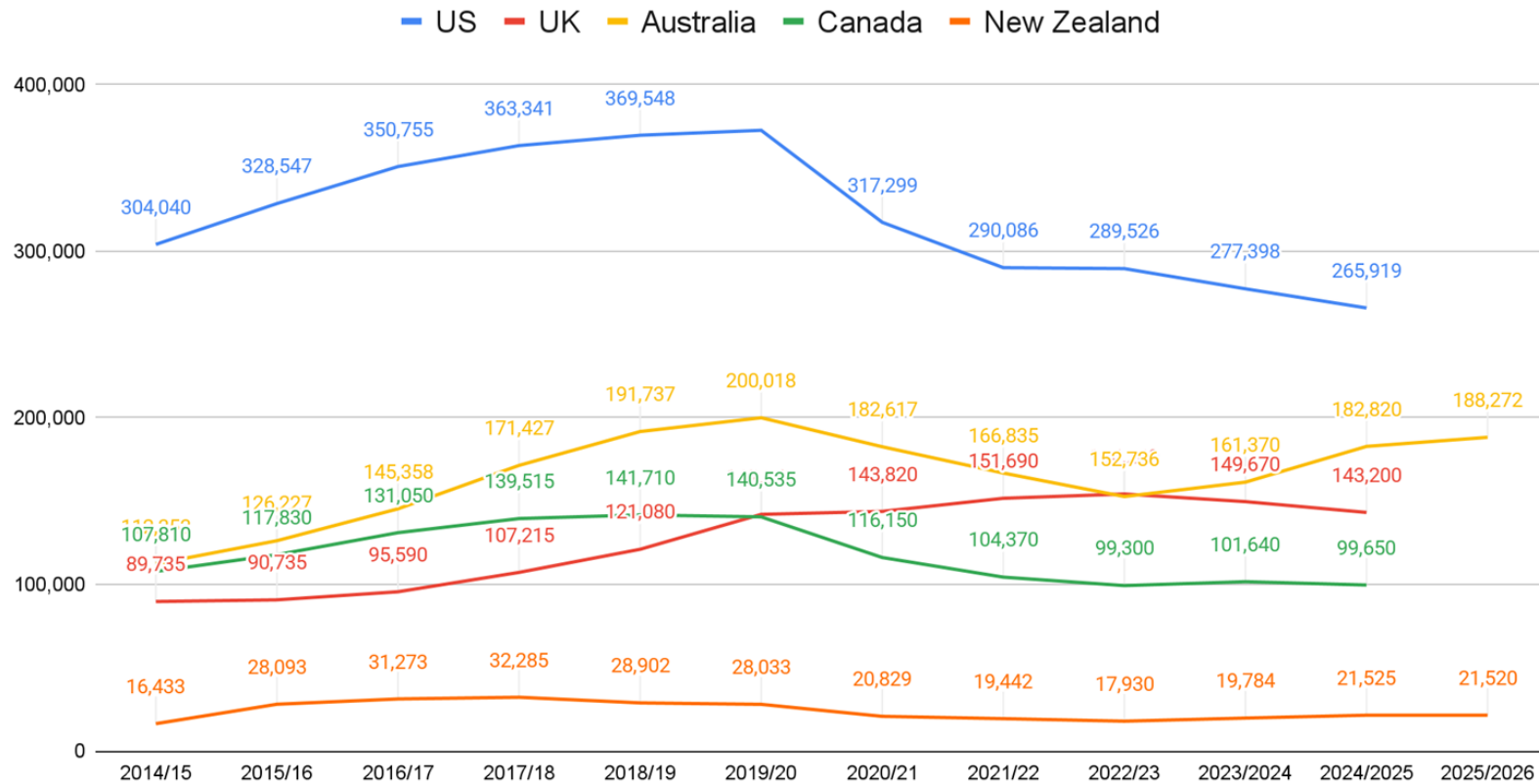


#2 Destinations: Push Factors Driving Outbound Mobility

- 1) **Limited Access to Top-Tier Local Universities:** Gaokao system favors students in Tier 1 cities, limiting access for others.
- 2) **Quality Concerns with Domestic Universities:** Significant gaps exist between elite and "Tier 2" universities.
- 3) **China's Competitive Job Market:** High youth unemployment makes foreign degrees, and especially overseas job experiences, attractive.
- 4) **Valued International Experience:** Access to higher wages and international job exposure is highly prioritized amongst Chinese families.

Study Destination Overview: Enrollment Trends

Total Chinese Enrollment

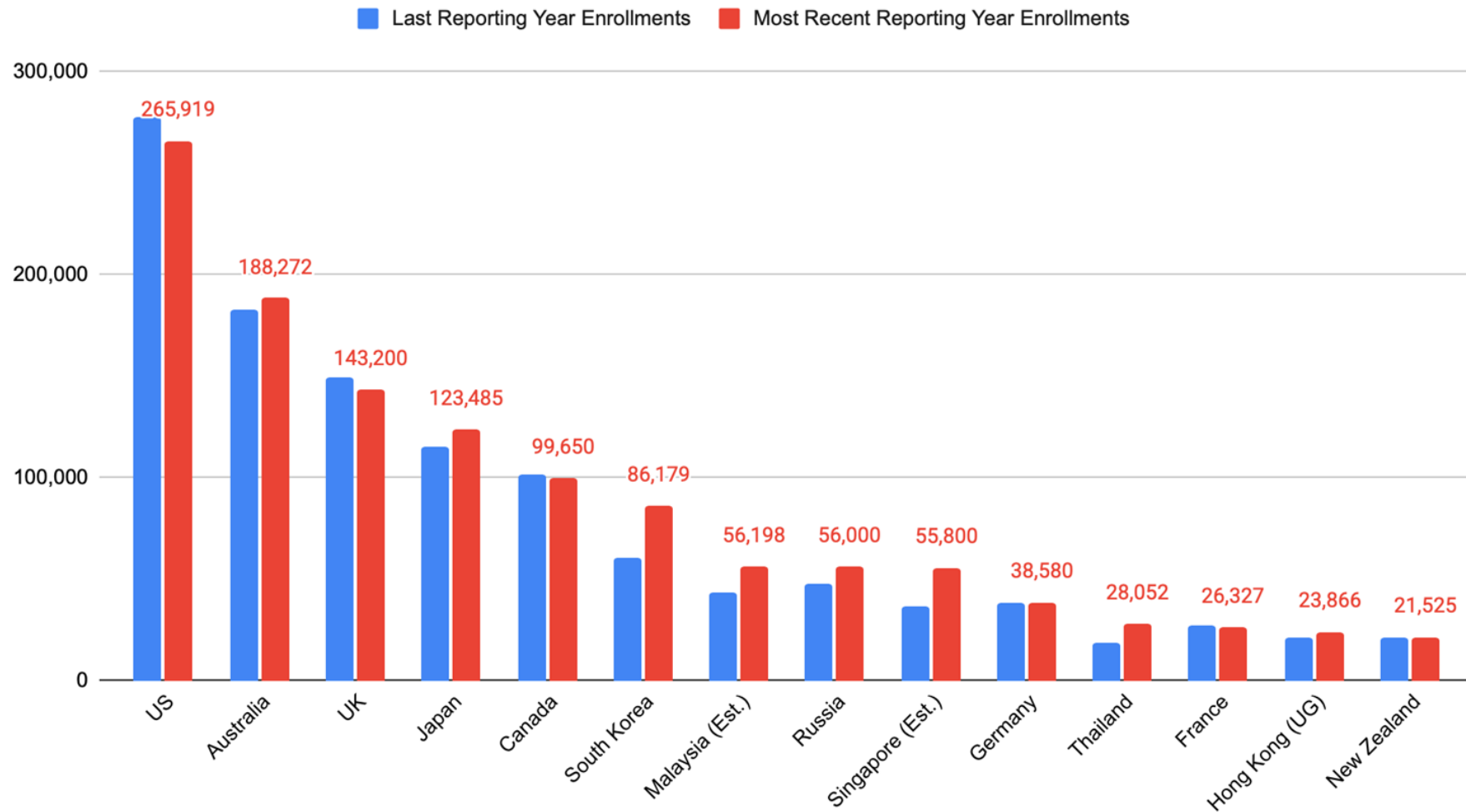


Source: IIE (US), HESA (UK), IRCC (Canada), Department of Education (Australia). Canada and Australia figures are for calendar years, such that 2014/15 = calendar year 2014.

697,041 Chinese students were enrolled in universities in the Big Four Anglophone Study destinations.

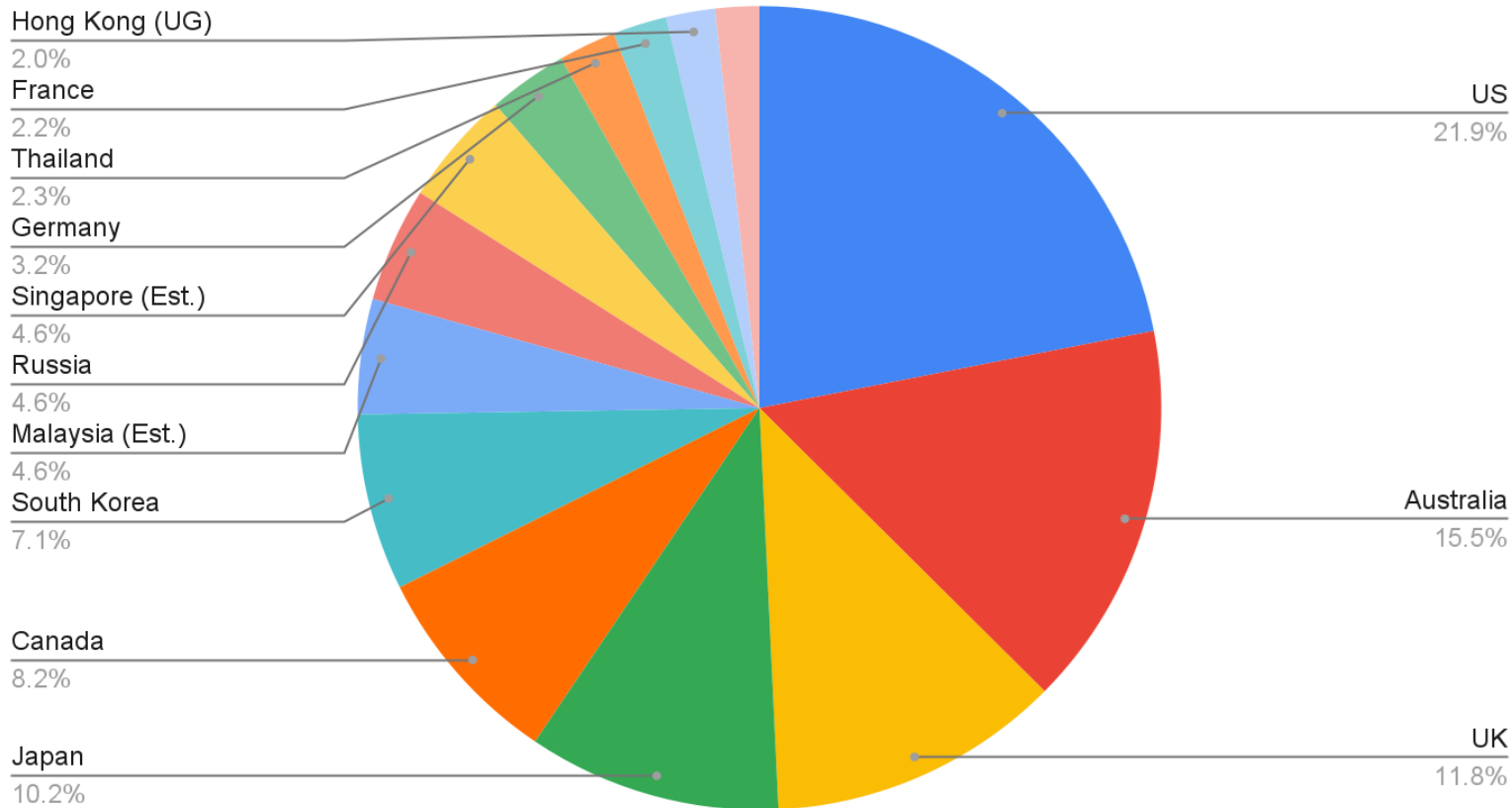
Study Destination Overview: Enrollment Trends

Most Recent Reporting Year Enrollments and Last Reporting Year Enrollments



Study Destination Overview: Enrollment Trends

The Big 4 Plus 10



Chinese outbound enrollment for the most recent reporting year:

1,213,053:

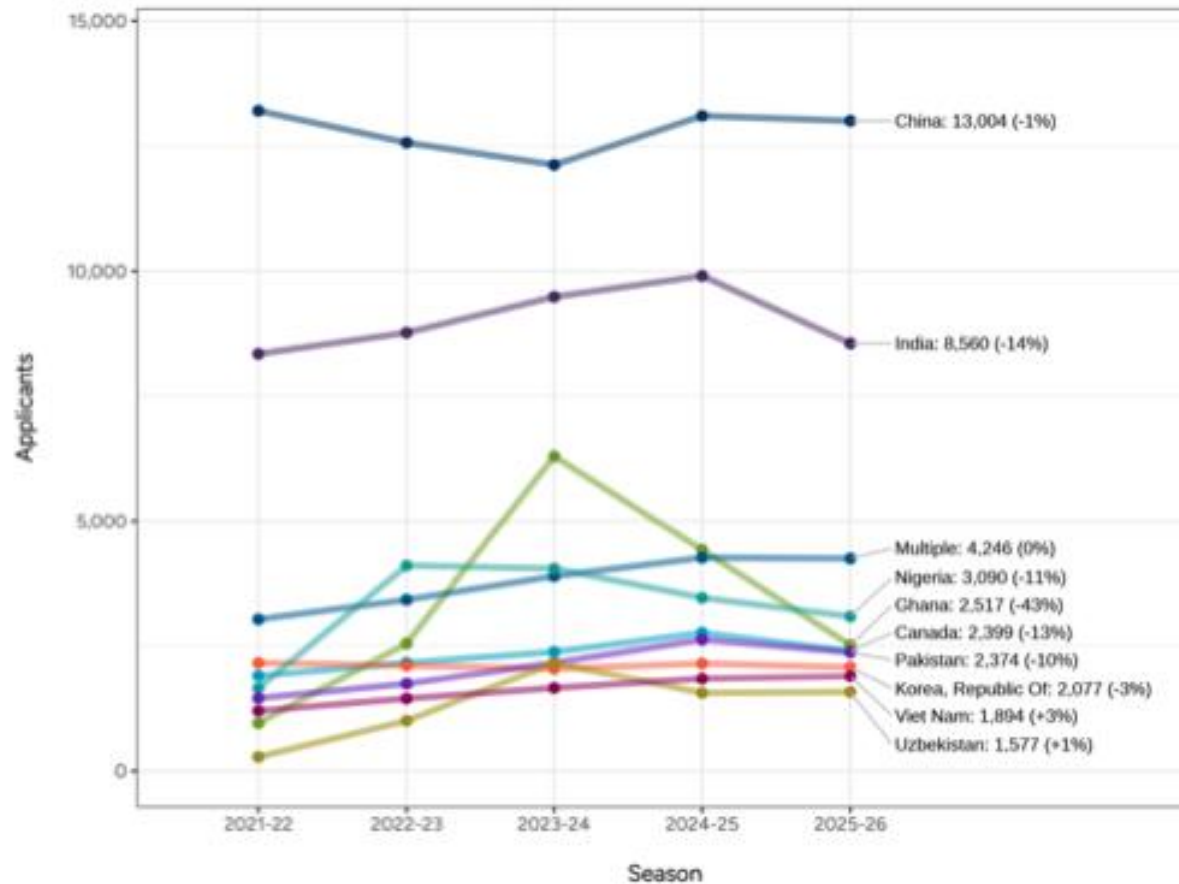
- Big-Four destinations accounted for 57.4%.
- Asian study destinations combined made up 30.7%.

Study Overseas: Consumption vs. Investment

- 1) **Two distinct market segments:** Asian destinations like Malaysia, Thailand, and Philippines are drawing families making a consumption decision: enriching experience, regional proximity, lower cost, peer networks close to home.
- 2) **Big Four destinations attract investment decisions:** A US, UK, or Australian degree changes career trajectories, opens PhD pathways, and commands a salary premium.
- 3) **Growth from these countries:** is it displacement?
- 4) **Note on Japan:** Japan–China tensions in 2026 will soften those numbers. Asian enrollment growth is not displacement of US recruitment.

USA Enrollment Trends

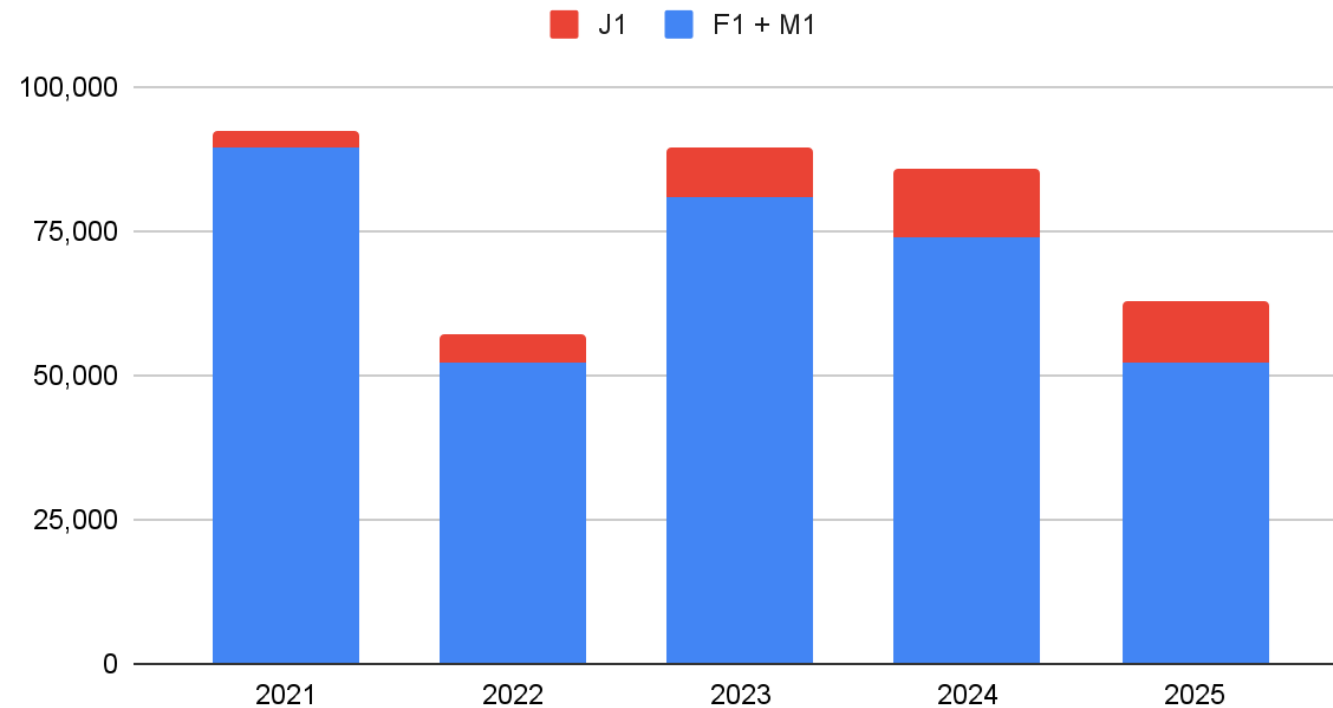
Figure 19. Growth in international first-year applicants among the ten highest-volume countries of citizenship as of 2025–26



- As of January 1, 2026: Applications from China are flat (-1%) from 2024 and up 5% from 2023.

USA Enrollment Trends: Visa Issuance

Visa Issuance to Chinese Students in US (Q1-Q3 Each Year)

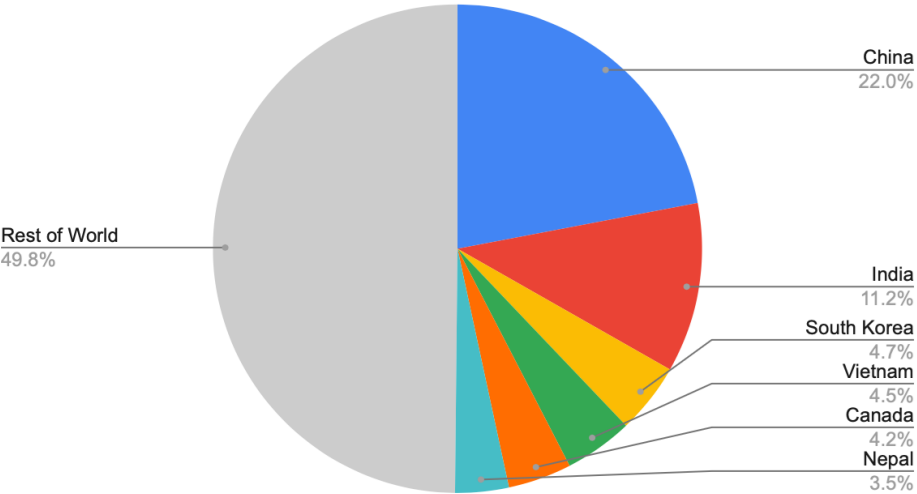


- Facing fall semester 2025, year on year F1 visa issuance (Q1-Q3 each year) was down 29% compared to 2024. Flat since 2022.
- J1 visas down 10% but double 2022 levels.

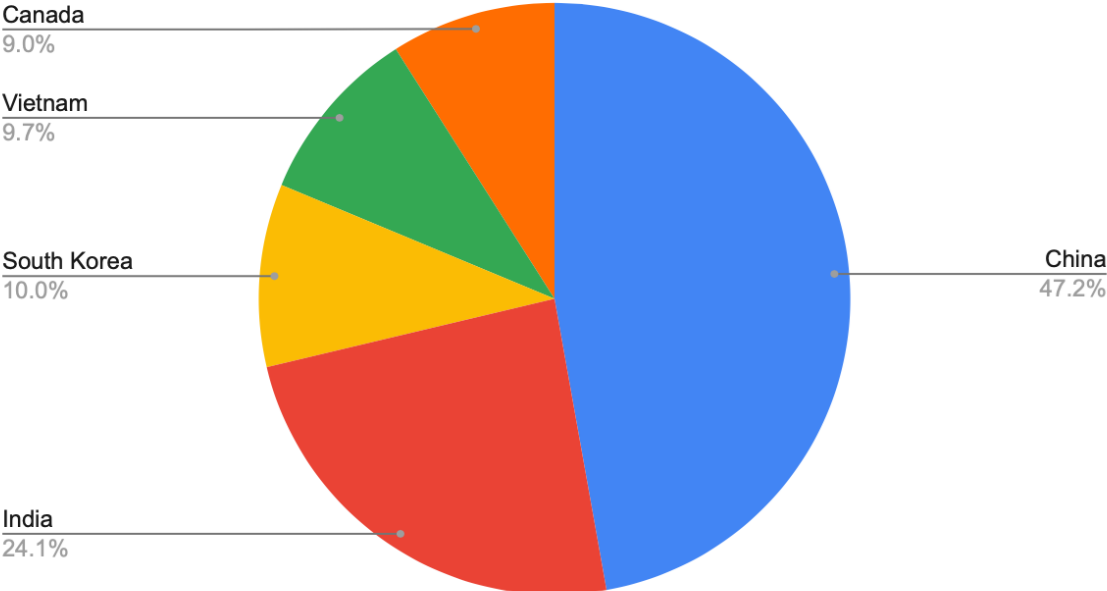
China Remains Irreplaceable

“Most students coming from India are at the graduate level. This has always been the case and likely will be for the foreseeable future,” she said. “Therefore, just from a recruitment and revenue perspective, they are never going to have the same impact on an institution’s bottom line as the Chinese undergraduate students.” -Rajika Bhandari, South Asia International Education Network

International Undergraduates 2024-2025



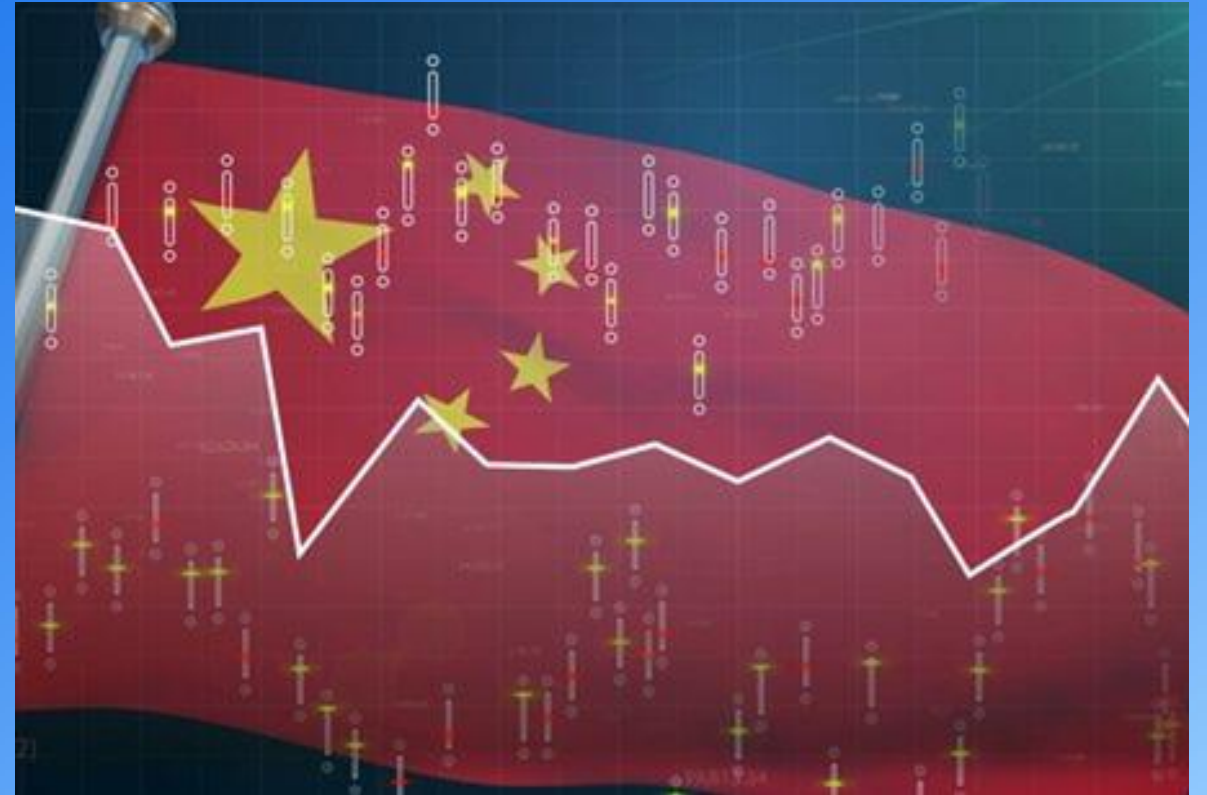
Top 5 Sending Countries: Undergraduate



Source: IIE Open Doors Report, 2024 (Intl. Students in the US)

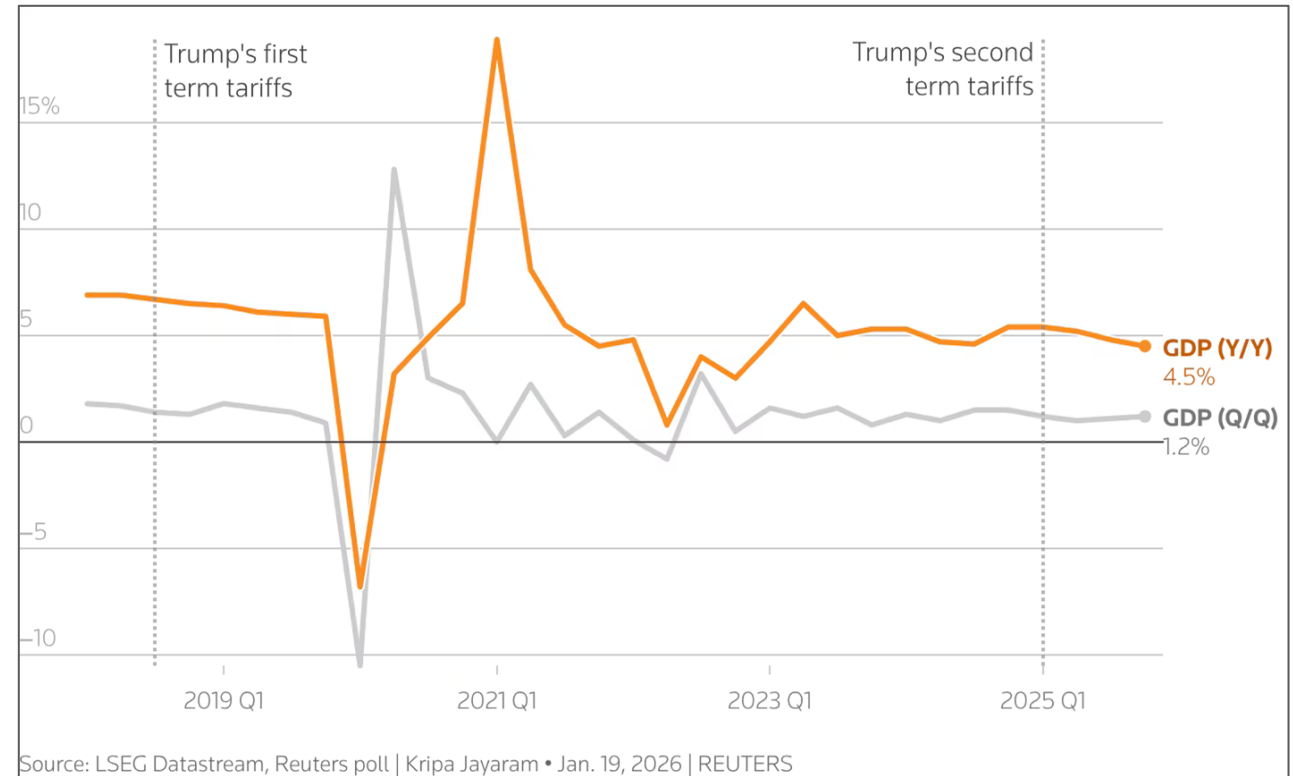
#3: China's Economy & Recruitment Implications

GDP Growth, Currency Exchange, Property Markets



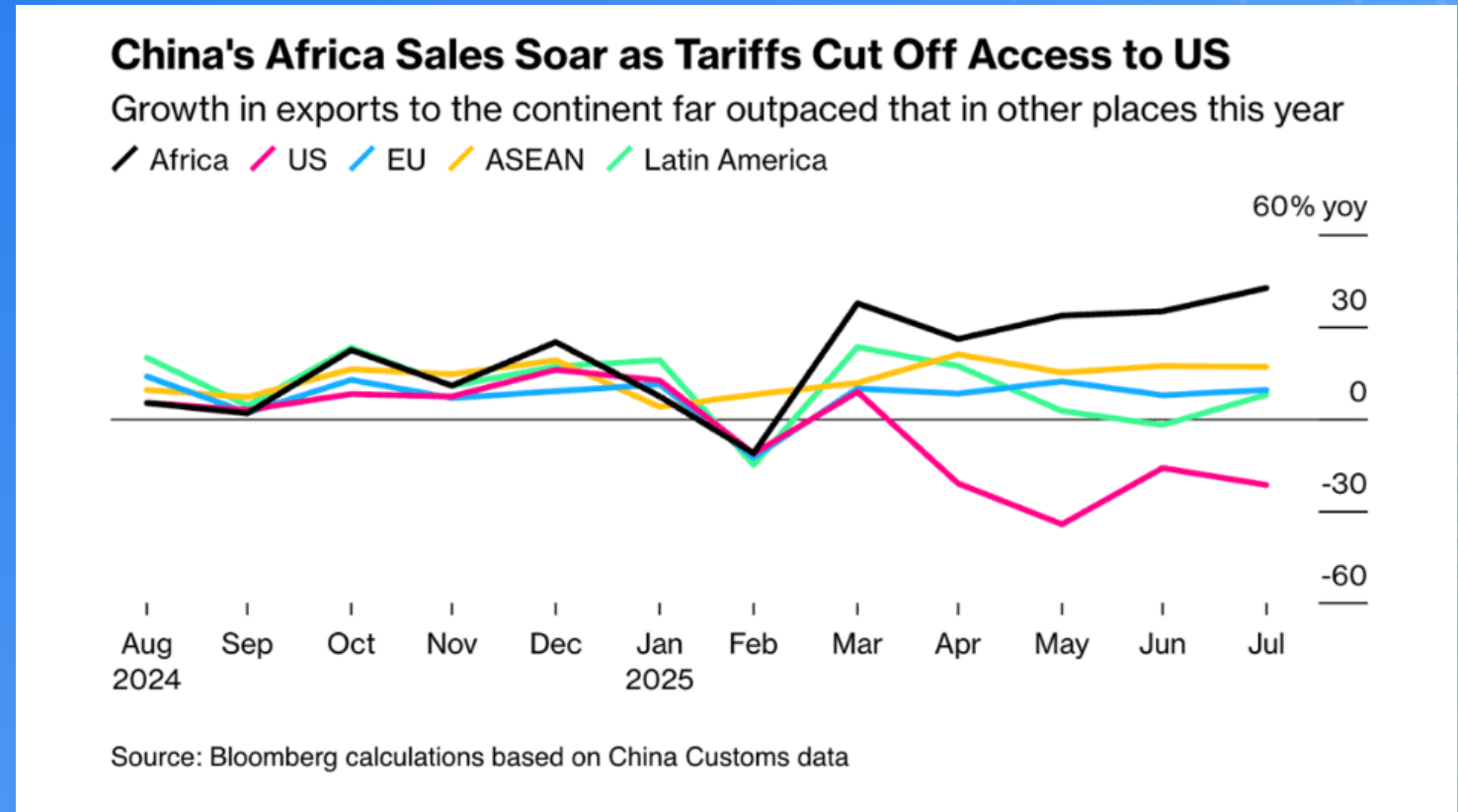
#3 The Economy: Growth, Trade, Property

- China's economy has recovered substantially from the 2022 lockdown shocks. The macro picture in 2026 is meaningfully better than 2025 on several fronts.
- GDP: 5.0% growth in 2025 (NBS official; IMF: 4.8%). Total exceeded RMB 140 trillion for the first time. 2026 consensus forecast: ~4.5–5.0%.
- Stimulus arrested property free fall; RMB below 7:1 USD (best since 2023); record trade surplus ~\$1T+ in 2025.



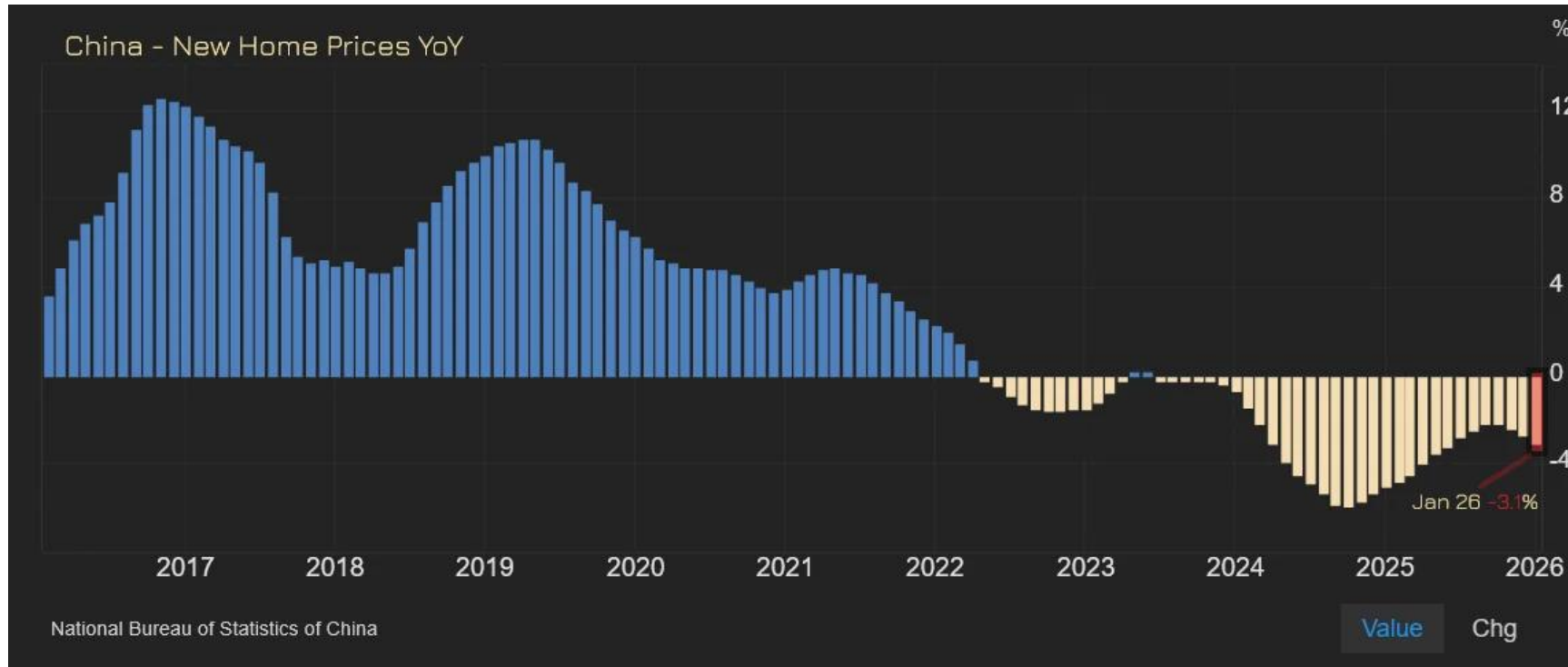
#3 The Economy: The Net Effect of Tariffs

- April 2025: reciprocal tariffs peaked at ~145%. May 12 truce: cut to 10%. Nov 2025 deal: extended through Nov 10, 2026. Feb 2026: Supreme Court struck IEEPA tariffs down; replaced with 10% Section 122 (expires ~Jul 24, 2026).
- China is much less reliant on exports to the US than 2017.
- Net rate ~13.7% (Feb 2026), down from ~27% peak. Yale: GDP hit to China ~0.2%.



#3 The Economy: Growth, Trade, Property

- Property makes up about 30% of GDP
- Property sales often used to fund study overseas



China Housing Index

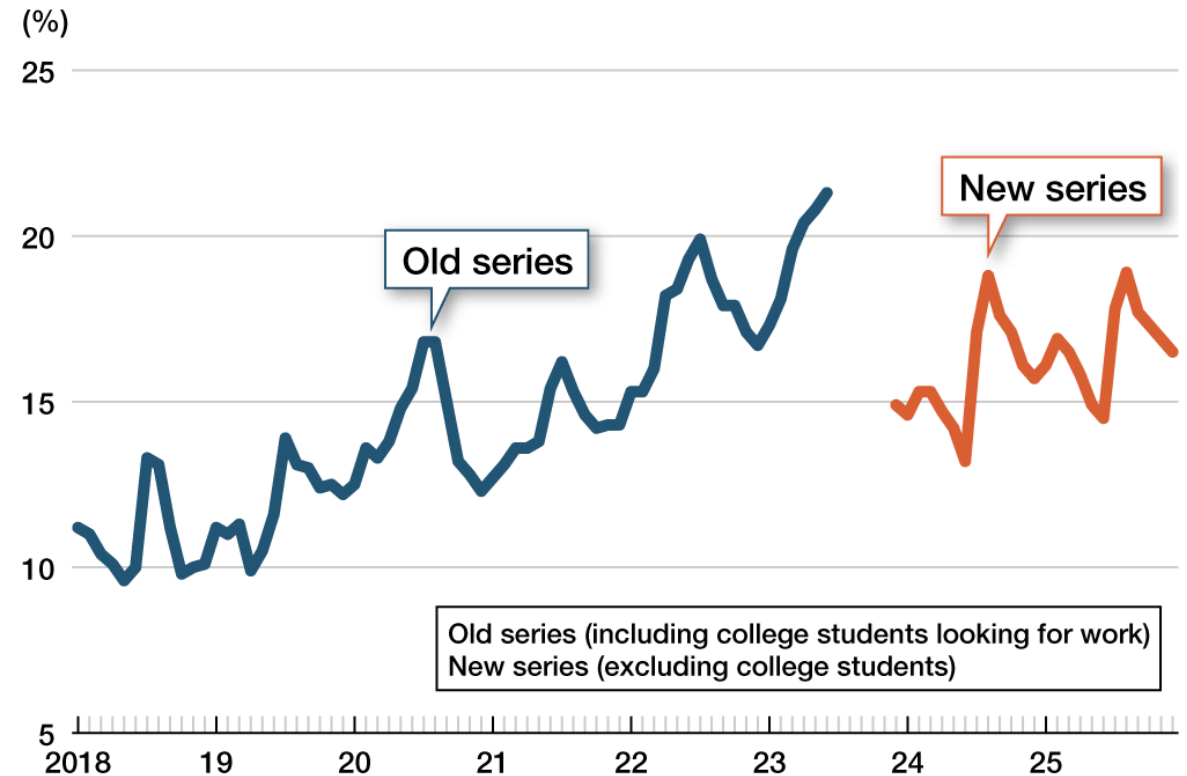
#3 The Economy: What to Look For

- Economic growth increases the size of the study overseas market.
 - China grew 5.0% in 2025 (official), exceeding RMB 140 trillion total for the first time. 2026 forecast: ~4.5–5.0% depending on tariff trajectory.
- Stability in CNY/USD exchange rate and property prices.
 - Reversed de-leveraging campaign
 - Government stimulus measures
- Property Prices
 - Prices stabilize.
 - Slowdown in construction will boost prices, but may impact growth.

#4 The New ROI of Overseas Study?

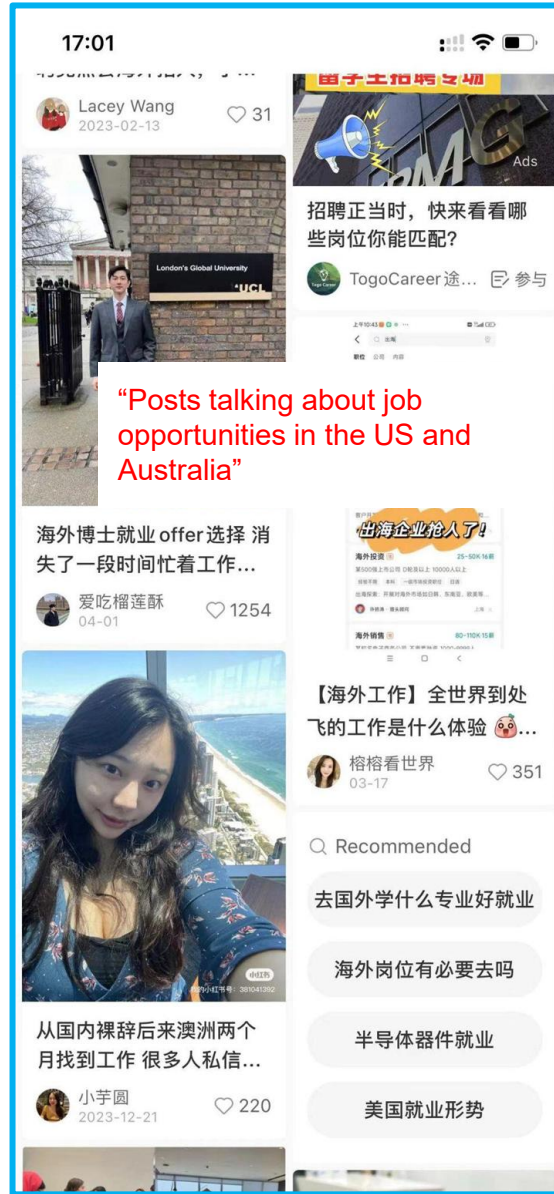
- Youth unemployment stands at 16.1% (Feb 2026, NBS).
- Structural mismatch persists: over 20% of major food-delivery platform drivers now hold college degrees.
- The weak domestic job market in China has heightened interest in graduate studies

Youth Unemployment in China, 2018–2025



Source: National Bureau of Statistics of China

nippon.com



People share their experiences on how they secured a job after studying abroad.

出海 Chuhai: Chinese companies go global

- 1) **Intense domestic competition is pushing Chinese companies overseas:** BYD, ByteDance, DJI, SHEIN, Pop Mart, MiHoYo — all expanding international operations to escape saturated home markets. Chuhai is now a mainstream corporate strategy, not an exception.
- 2) **This reshapes what overseas education means for graduates:** It's no longer only about impressing a multinational recruiter. Chinese companies' global arms actively need staff with international experience, language fluency, and cross-cultural range.
- 3) **The old “all Chinese students return home” narrative is less true:** Some graduates will stay abroad working for Chinese companies' international operations — not because they rejected China, but because their Chinese employer sent them there.
- 4) **Implication for US recruiters:** US work experience is now a selling point toward Chinese company global roles, not only US ones.

#4 ROI: Competitive Edge of Overseas Education



- 80.85% of corporate HR professionals view international study experience as an advantage for candidates.
- An analysis of job ads posted by 36 Chinese universities found that 64% emphasized requirements relating to an “overseas background.”



Trend #5: International Schools

The Barometer of Interest in Undergraduate Study Overseas

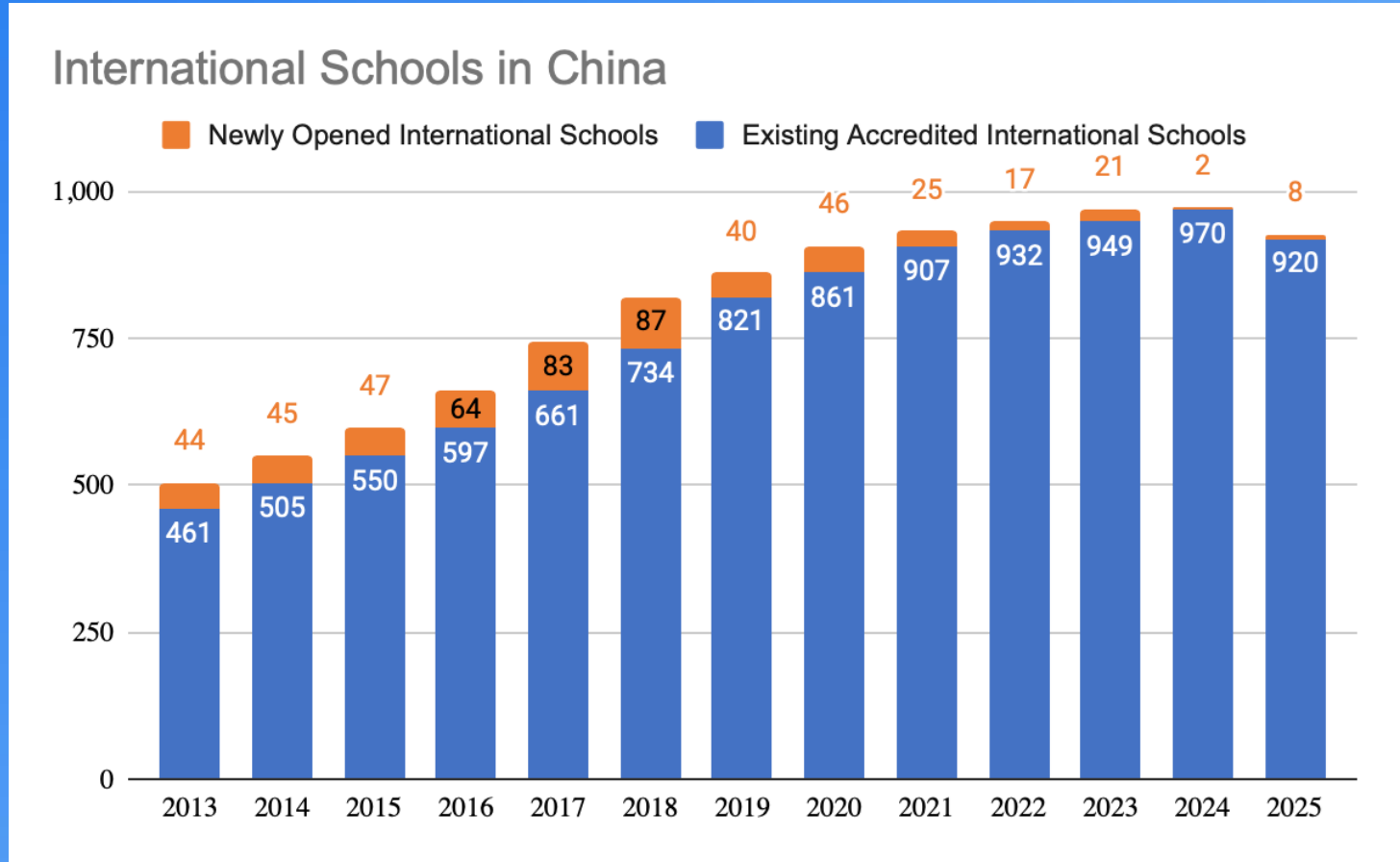
#5 International Schools in China

- 468,000 students enrolled in international schools in China.

- Tuition averages 129,000 RMB, flat from 2023.

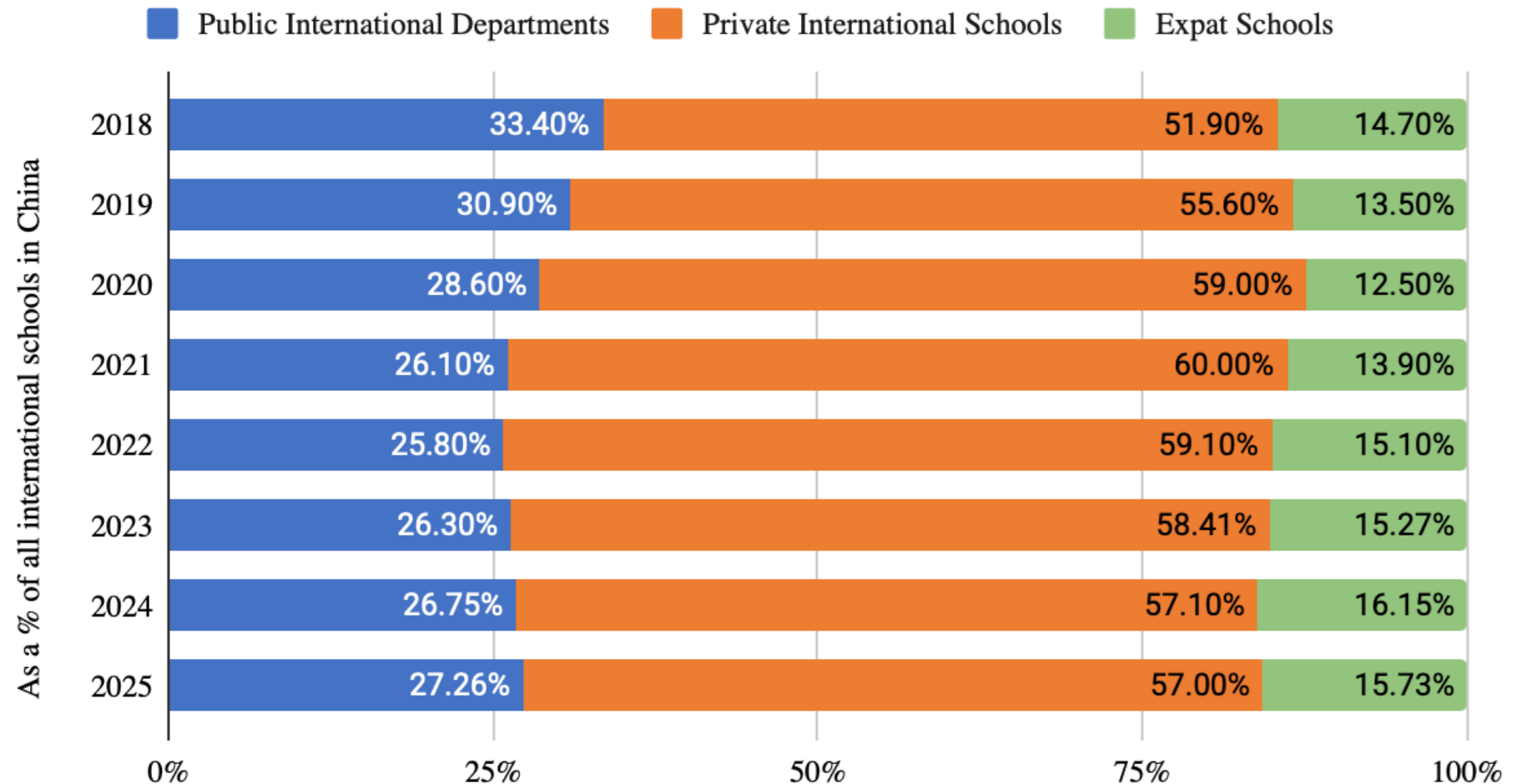
- 70% of schools < 500 students.

- Three kinds of international schools: public international departments, private schools & expat schools.



International Schools in China: Market Share

Market Share of International Schools by Type



Growth Areas

- **Tier 2 and 3 cities** are more insulated from demographic crunch.
- In the last five years, the number of international schools has almost tripled in **Thailand** and is up 11% in **Malaysia**.

2026 Fall

Week 1:
Southeast Asia Tour
10/5-10/9

Singapore - Kuala Lumpur - Bangkok

Week 2:
China Tour Part 1
10/12-10/16

Hangzhou - Nanchang - Wuhan

Week 3:
China Tour Part 2
10/19-10/23

Kunming - Guangzhou - Shenzhen

2027 Spring

Week 1:
China Tour Part 1
3/15-3/19

Lanzhou - Xi'an - Zhengzhou

Week 2:
China Tour Part 2
3/22-3/26

Ji'nan - Qingdao - Kunshan

Week 3:
Southeast Asia Tour
3/29-4/2

Hanoi - Bangkok - Chiang Mai

Trend #6: Chinese Agents in 2025

A Key Predictor of the Resilience of Study Overseas

环球教育 GEDU.org

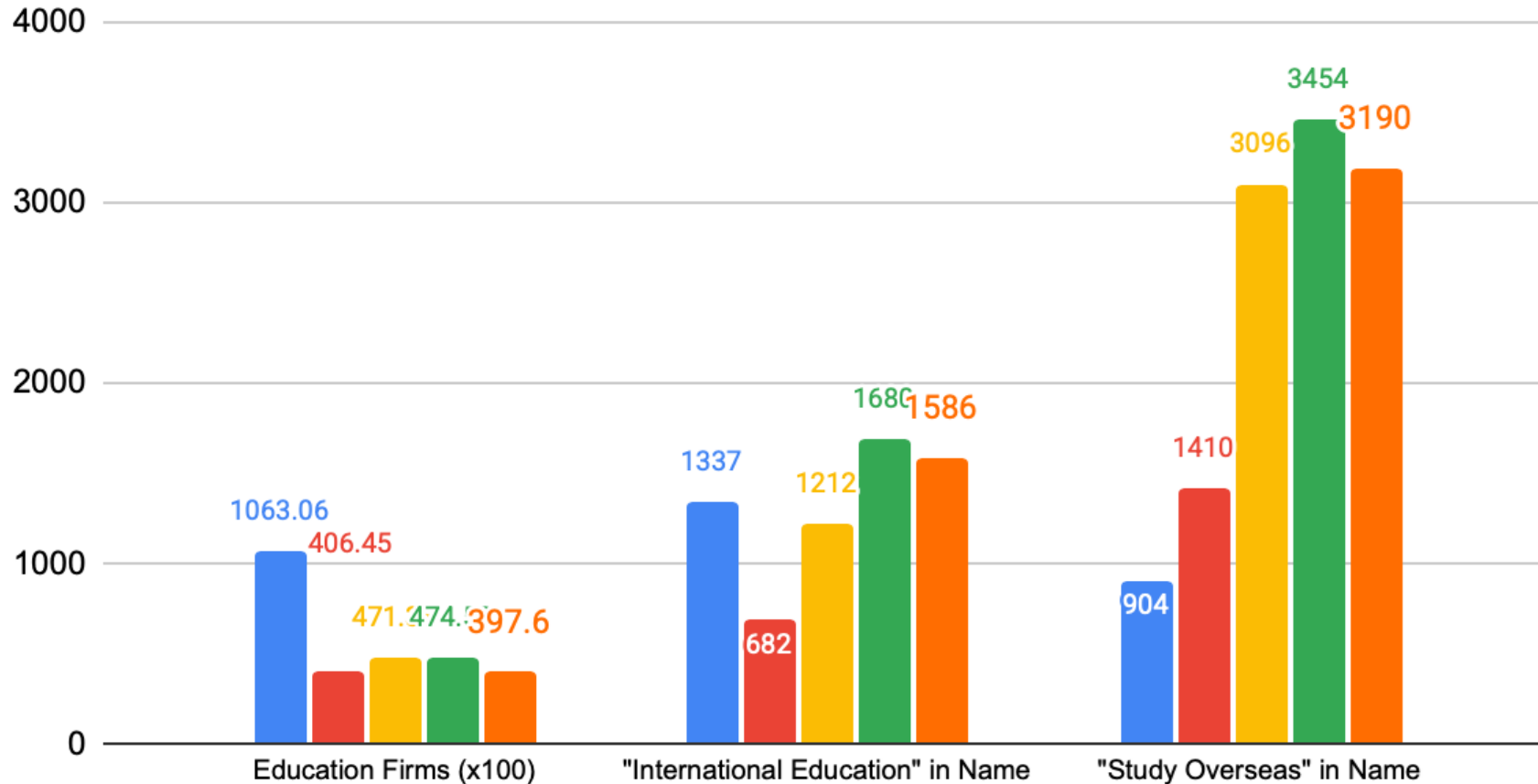
环球雅思 托福 留学 外教口语



#6 Agencies: Growth in Agencies

Newly Established Chinese Education Firms

2021 2022 2023 2024 2025

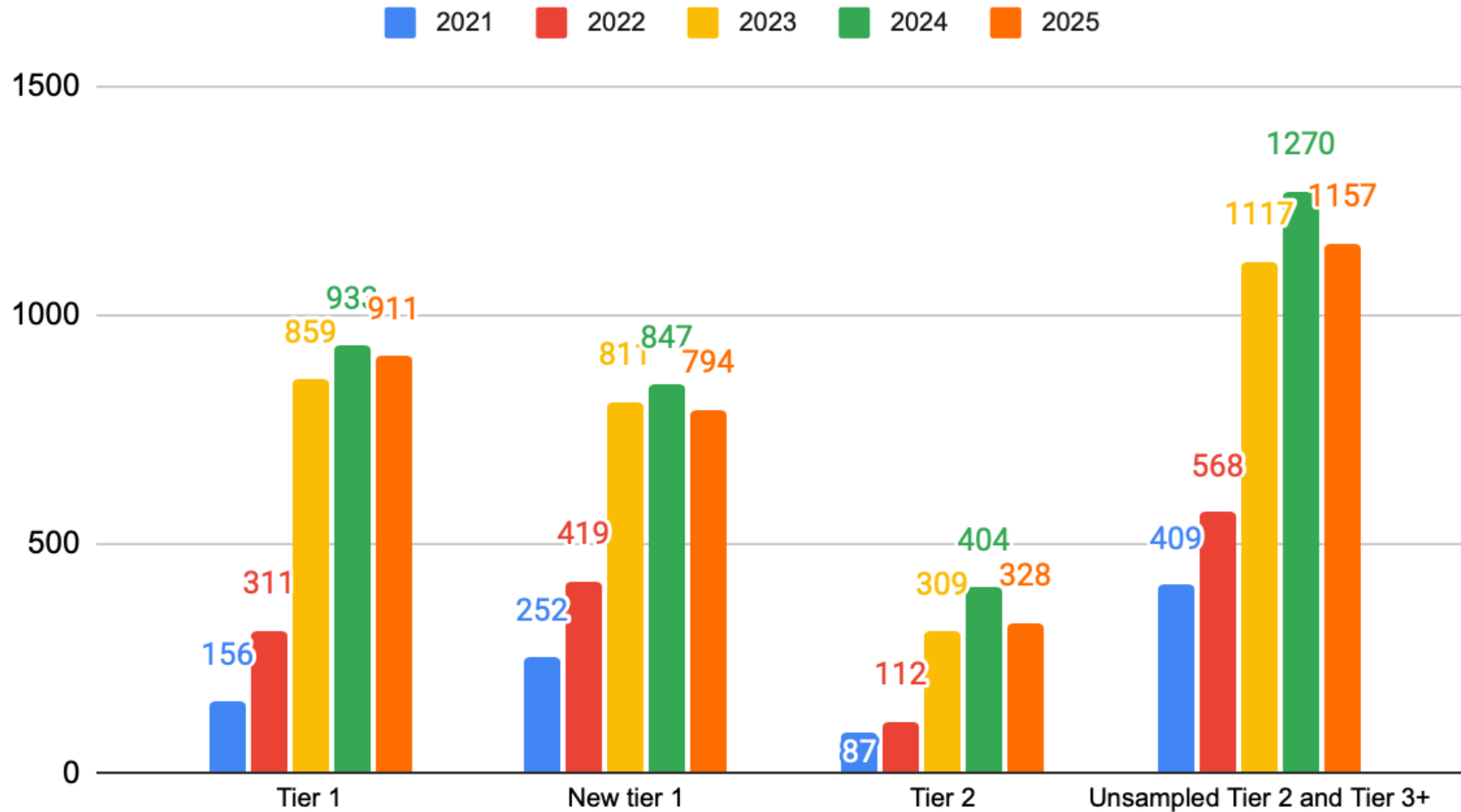


2025 saw 3,190 new companies with “study overseas” in their name.

This growth represents a **252%** increase since 2021.

#6 Agencies: Geographical Distribution

New Companies Whose Name Includes "Study Overseas"



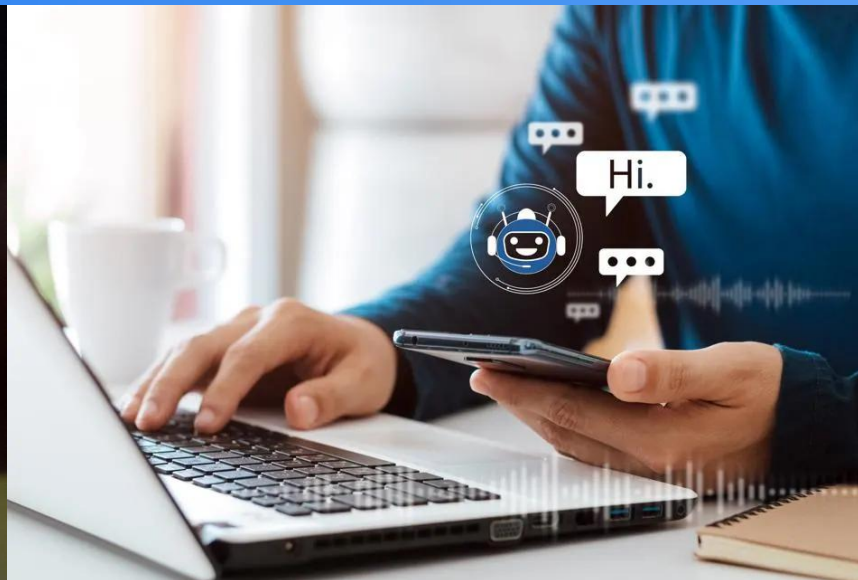
#6 Agencies: Fragmentation of the Agency Market

- Growing demand for study abroad services: New Oriental's study abroad division reported a **4.1%** increase in net revenues, exceeding **\$439 million**.
- **Fragmentation Pros:** Opportunities for diversification, better delivery in competitive markets
- **Fragmentation Cons:** Shrinking market share, lack of familiarity with commission-based models



#6 Agencies: Impact of Technology

- Technology is reshaping China's agency market
- Direct admissions trend is increasingly gaining traction, with various platforms facilitating it
- Shifting business models amid regulation and technological shifts like AI, direct enrollment, and the blurred line between agents and application platforms
- For now, traditional agents remain a trusted resource for Chinese students



common app

Create your account

Account information

Email Address *

Re-type Email Address *

Password *

- × 10-32 characters
- × At least one upper case
- × At least one lower case
- × At least one number
- × At least one special character
- × No space characters

Re-type Password *

× Passwords must match

How We Can Help

- Contact us at contact@sieconnection.com
- Check out our tour recap videos and previous webinars on our [Youtube channel](#) (@SunriseInternational2011)
- Have a look at our recent white papers and reports at sieconnection.com/insight.
- The best online interactions start with an offline conversation: travel to China and consider a recruitment tour, particularly in Tier 2-3 cities in China

How We Can Help

- [Book a time](#) to chat with us.
- Request a free China digital presence report
- Advice and assistance with Chinese websites and SEO; Wechat / Weibo / Bilibili account management; digital ads in China



Thanks

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