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**Building Hong Kong into an International Higher Education Hub:
Attracting Students from ASEAN Countries**

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1. Introduction

The Hong Kong government has consistently prioritized the development of higher education in the city, striving to promote talent cultivation and youth development. In the 2023 and 2024 Policy Addresses, the Chief Executive outlined several policies aimed at establishing Hong Kong as an “**International Hub for Post-secondary Education**”. Despite achieving substantial growth in non-local student enrollment, current data indicates a significant trend of concentrated student sources. The majority of international student growth stems from Mainland China, while enrollment from other regions, particularly those from ASEAN countries, has experienced a decline.

¹ Established in June 2017 by a cross-disciplinary research team, the Research Centre for Sustainable Hong Kong (CSHK) is an Applied Strategic Development Centre of City University of Hong Kong (CityU). CSHK conducts impactful applied research with the mission to facilitate and enhance collaborations among the academic, industrial and professional service sectors, the community and the government for sustainable development in Hong Kong and the Region.

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This narrowing of student diversity poses challenges to Hong Kong's aspirations as a global education hub. A truly international education center requires a diverse student body that facilitates cross-cultural exchange, builds global networks, and strengthens international connections. The current concentration of international student sources may limit the breadth of perspectives and experiences that contribute to a vibrant academic environment.

Recruiting international students from beyond Mainland China is a critical strategy for building a diverse talent pool, strengthening global connections, and enhancing Hong Kong's strategic role in the Belt and Road Initiative. In July 2025, the research team of Centre for Sustainable Hong Kong visited Thailand and Laos, and in 2023 and 2024, conducted field studies in Indonesia and Cambodia, respectively. These visits revealed a growing demand for overseas education among school-age youth in ASEAN countries, presenting significant opportunities for Hong Kong to attract ASEAN students to pursue studies in Hong Kong. This article examines the potential for expanding Hong Kong's appeal to ASEAN students as a key strategy in diversifying its international student population and then proposes several targeted measures for enhancing Hong Kong's attractiveness as a higher education destination for ASEAN students.

2. Diversifying Student Sources

2.1 Recent Past Trends in the Distribution of International Students in Hong Kong

With the scale of a single city, Hong Kong boasts five universities ranked among the world's top 100 with academic strengths in fields such as finance, engineering, medicine, humanities, social sciences, and natural sciences, supported by robust research capabilities, placing its higher education and research quality at the global forefront. Geographically, Hong Kong is strategically located at the heart of Asia, close to ASEAN countries with convenient transportation links, serving as a vital gateway connecting Southeast Asia with China and the global community. As an international financial hub, Hong Kong offers abundant internship and employment opportunities, supported by flexible post-graduation work visa policies that encourage students to build their careers in the city.

In recent years, Hong Kong's universities have collectively admitted approximately 20,000 non-local students annually. Still, according to a report by the think tank Our Hong Kong Foundation, education services account for 1.4% of Hong Kong's GDP, which is significantly lower than major education-exporting countries such as the United Kingdom (6.3%), the United States (5.6%), and Australia (5.2%).

The number of non-local students in the University Grants Committee (UGC)-funded higher education system increased from 19,488 in the 2020/21 academic year to 23,099 in the 2022/23 academic year, with the growth primarily driven by increase in student intake from Mainland China, whose share rose from 69.8% to 77.3%. Meanwhile, the number of students from other

parts of Asia decreased from 5,057 to 4,411, accounting for 19.1% of the total non-local student population (including Mainland China) (see Table 1). While Hong Kong’s educational resources are highly competitive, and the large population of Mainland Chinese students naturally contributes to their high representation, the absolute decline in students from other Asian regions warrants attention.

Table 1: Distribution of Non-Local Students Admitted to UGC-Funded Higher Education Institutions by Place of Origin

Place of origin	2020/21	2021/22	2022/23	2023/24
The Mainland of China	13,605 (69.8%)	14,825 (72.7%)	16,229 (74.8%)	17,864 (77.3%)
Other Parts of Asia	5,057 (25.9%)	4,791 (23.5%)	4,685 (21.6%)	4,411 (19.1%)
The Rest of the World	826 (4.2%)	782 (3.8%)	794 (3.7%)	824 (3.6%)
Total	19,488 (100.0%)	20,398 (100.0%)	21,708 (100.0%)	23,099 (100%)

Source: University Grants Committee, Hong Kong

To attract international students, the Hong Kong government has implemented various measures. A recent study by The Chinese University of Hong Kong, titled *Education Soft Power: Non-Local University Students’ Connections with Hong Kong and Their Career Development Plans*, finds that Mainland Chinese students studying in Hong Kong rated Hong Kong’s education soft power significantly higher than foreign students. On the emotional soft power index, Mainland Chinese respondents gave a score of 7.42, while foreign students studying in Hong Kong scored only 5.93 (Zheng, 2020). The finding suggests that Hong Kong’s study environment is less appealing to foreign students than those from the Mainland. Without more targeted measures to attract students from beyond Mainland China, the trend toward a concentration of non-local student population may persist.

Other studies have corroborated such a trend. A United Nations survey conducted in 2019 reveals that Hong Kong has not been a top study destination for ASEAN students. Among the 10 ASEAN countries, six have prioritized Australia as their top destination, followed by Japan (two countries), while Brunei and Laos prefer neighboring Malaysia and Vietnam, respectively. Additionally, the United Kingdom, the United States, Canada, and South Korea ranked among the top three choices for some ASEAN countries. In contrast, Hong Kong did not appear in the top three study destinations for any ASEAN country (see Table 2).

Table 2: Top Study Destinations for ASEAN Countries (2019)

Country	Top Destination	Second Destination	Third Destination
Brunei	Malaysia	United Kingdom	Australia
Cambodia	Australia	Thailand	United States
Indonesia	Australia	Malaysia	United States
Laos	Vietnam	Thailand	Australia
Malaysia	Australia	United Kingdom	United States
Myanmar	Japan	Thailand	United States
Philippines	Australia	United States	Canada
Singapore	Australia	United Kingdom	United States
Thailand	Australia	United Kingdom	United States
Vietnam	Japan	United States	South Korea

Source: UNESCO Institute for Statistics (2024b).

2.2 ASEAN Students as Ideal Recruitment Targets for Hong Kong

At the same time there is a strong demand for overseas education among ASEAN students, providing a strategic opportunity for Hong Kong to tap into this pool for diversifying its international student sources. Comprising 10 emerging economies, ASEAN countries have young populations. As national wealth and family incomes rise with the steady growth in the economies, an increasing number of middle- and upper-middle-class families seek better educational opportunities for their children abroad.

According to UNESCO data, the total number of outbound international students from nine ASEAN countries (excluding Laos) reached 343,226 in 2022, a 14.7% increase from 299,224 in 2017 (see Table 3). Although the COVID-19 pandemic disrupted study abroad plans starting in 2020, the demand for international education among ASEAN students has been rebounding rapidly post-pandemic, with projections for further growth in the future.

Table 3: Number of Outbound International Students from ASEAN Countries

Country	2017	2022
<i>Brunei</i>	3,339	2,098
<i>Cambodia</i>	6,034	3,691
<i>Indonesia</i>	48,550	62,828
<i>Laos</i>	N/A	N/A
<i>Malaysia</i>	63,808	47,943
<i>Myanmar</i>	9,169	12,878
<i>Philippines</i>	17,378	30,351

<i>Singapore</i>	23,726	19,711
<i>Thailand</i>	32,577	29,585
<i>Vietnam</i>	94,643	134,141
<i>Total</i>	299,224	343,226

Source: UNESCO Institute for Statistics (2024a).

The strong demand for overseas education cuts across other national differences. Take the example of Cambodia and Indonesia. The population of approximately 17.42 million in Cambodia is of medium-sized in ASEAN. Indonesia is a population giant with 280 million people. Indonesia’s per capita GDP is US\$4,942, nearly double that of Cambodia’s US\$2,460. However, when calculating the ratio of outbound international students to total population, Indonesia’s rate is 0.024%, and Cambodia’s is 0.021%. The two countries shared a similar appetite for overseas education despite large socio-economic differences (see Table 4).

Table 4: Similarity amidst differences: Cambodia and Indonesia

	Cambodia	Indonesia
Population	17.424 million	280 million
Per Capita GDP	US\$2,460	US\$4,942
Average Age	25.8 years	29.9 years
Main Religion	Buddhism	Islam
Number of Higher Education Institutions	115	4,523
Number of Outbound International Students	3,691	62,828
Outbound Students/Population	0.021%	0.024%

Source: Compiled by authors based on data from Hong Kong Trade Development Council (2025a;2025b); UNESCO Institute for Statistics (2024a); BPS Statistics Indonesia (2024a;2024b); Ministry of Education, Youth and Sport, Cambodia (2022).

The Cambodian government prioritizes the development of public universities to establish them as national flagship institutions. Cambodia’s higher education sector comprises over 130 institutions, with private universities constituting the majority, numbering over 80. Public universities, such as the Royal University of Phnom Penh (RUPP), the Institute of Technology of Cambodia (ITC), and the National University of Management (NUM), benefit from substantial government support, receiving over 90% of their funding through state loans and investments. In contrast, private universities operate independently, relying on tuition fees and other self-generated revenue. This financial disparity influences institutional priorities, with public universities positioned as key players in the government’s vision for educational excellence.

Through field visits, the research team engaged deeply with local political and business communities and published several analytical articles and policy recommendations (Mo, Li & Li, 2024a; 2024b; 2025). These interactions revealed that middle-class families in these countries strongly desire overseas education for their children, with many affluent political and business elites having studied abroad. Notably, Australia recently announced plans to reduce student visa quotas by up to one-third (Nikkei Asia, 2025). If Hong Kong can tailor its admission policies to meet the needs of ASEAN students, it could seize this opportunity to attract more of them.

3. Pathways to Attracting More ASEAN Students

To develop an “International Hub for Post-secondary Education”, Hong Kong government has initiated and executed a range of new measures (Our Hong Kong Foundation, 2023), including increasing non-local student quotas, improving and expanding student dormitories, and increasing scholarships. The Legislative Council’s Subcommittee on Promoting the Development of Hong Kong into an International Education Hub also conducted a comprehensive review of the effectiveness of current education policies and support measures, providing feedback from higher education institutions to government departments (LegCo, 2025). However, these efforts have focused mostly on the supply side and lack targeted strategies geared to stimulate demand from outside the Mainland China.

In this section, we will propose a few suggestions to address this gap.

3.1 Factors Influencing Study Abroad Decisions

Among the theories explaining why students pursue overseas education, the *Push-Pull Theory* and the *International Flow Theory* are particularly significant. The *push-pull theory* posits that students are driven to study abroad by various unfavorable conditions in their home countries, such as outdated educational facilities, limited higher education opportunities, weak research foundations, and socio-political instability. These constitute the “push factors” that prompt students to seek education overseas.

The choice of destination depends on the “pull factors” offered by different locations, such as sufficient scholarship support, advanced educational and research environments, abundant higher education opportunities, stable political and social conditions, and better living standards (Zhan, 2015). The *International Flow Theory* integrates the push-pull framework to describe the decision-making process of international students. Mazzarol and Soutar (2002) outline this process in three stages:

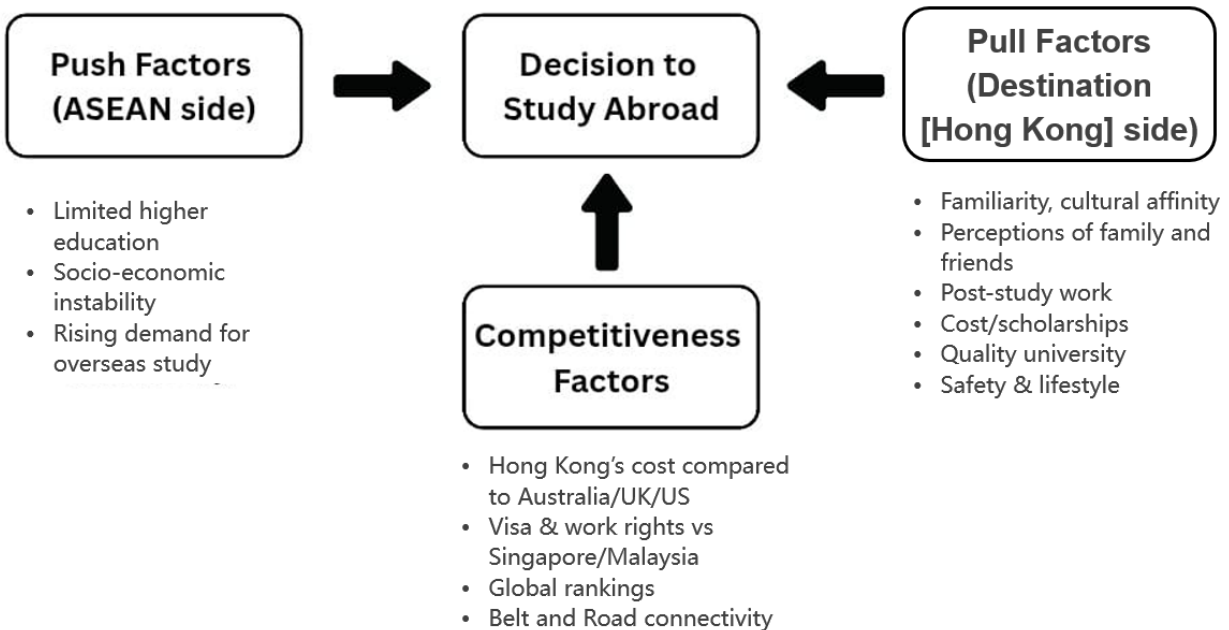
- **Stage 1:** Students decide to study abroad due to various “push factors,” such as limited educational opportunities in their home countries caused by economic constraints, low

levels of global economic participation, or lack of government emphasis on education. These factors drive students to seek better educational opportunities abroad.

- **Stage 2:** Students select a specific destination based on “pull factors,” such as educational and post-graduation employment opportunities, the economic development level of the destination relative to their home country, familiarity with the destination, and the perceptions of family and friends about the destination.
- **Stage 3:** After choosing a destination country, students select a specific institution based on additional “pull factors,” such as the institution’s reputation, available academic programs, and associated costs (e.g., tuition, transportation, and living expenses).

Figure 1 visualizes the analytical framework of the *Push-Pull Theory* on studying abroad decision. The rising number of outbound ASEAN students reflects the active role of “push factors” in their home countries. The question is whether Hong Kong will enhance its “pull factors” and implement targeted measures to attract ASEAN students. This requires not only policy development from the supply side (Hong Kong) but also a deeper understanding of the demand side (ASEAN students’ expectations and perceptions) to identify specific factors that can strengthen Hong Kong’s appeal.

Figure 1: The Push-Pull Analytical Framework on Studying Abroad Decision



Source: compiled by the authors.

Countries and regions such as Japan, South Korea, Taiwan, and Singapore have already conducted demand (push)-side research to understand ASEAN students’ expectations and refine their policies. For instance, Zhang (2017) conducted in-depth interviews with Southeast Asian students in Taiwan to explore their reasons for studying there, their experiences, and their suggestions,

providing actionable recommendations for Taiwan's *New Southbound Policy*. Similarly, Sundarrajh and Zulkfli (2019) analyzed the key factors influencing international students' choice of Malaysian higher education institutions and effective communication strategies. In 2023, Japan's *Conference on the Future of Education* set a goal to increase international student numbers to 400,000 annually by 2033. In August of the same year, South Korea launched the *Study Korea 300K* initiative, aiming to attract 300,000 international students by 2027. ASEAN students are key targets for both Japan and South Korea.

3.2 Recommendations for Attracting ASEAN Students to Hong Kong

3.2.1 Demand-side research to understand ASEAN students' preferences

Currently, there is a lack of systematic research on ASEAN students' expectations for Hong Kong. Research institutions and funding bodies should encourage research teams to engage directly with ASEAN students and local communities to understand their preferences for academic programs, need for financial aid and cultural support. Such studies will help Hong Kong design policies that align better with ASEAN students' expectations and achieve the goal of diversifying student sources. Some possible options include:

- **Surveys:** Fund research institutions to conduct surveys in ASEAN countries (e.g., Cambodia, Indonesia, Vietnam) to gather insights from potential students on their academic preferences, financial capabilities, and cultural needs.
- **In-Depth Interviews and Focus Groups:** Conduct in-depth interviews with ASEAN educational institutions, government officials, and student representatives to understand their perceptions and expectations of Hong Kong's education system.
- **Collaborative Research:** Partner with universities in ASEAN countries to conduct joint research projects analyzing barriers and motivations for students choosing Hong Kong.

3.2.2 Targeted promotion to enhance the "Study in Hong Kong" brand

As shown in Figure 1, the students' familiarity with education destinations and the perceptions of their family and friends are critical "pull factors" in destination selection. Hong Kong's appeal to ASEAN students will be strengthened through targeted promotional activities, emphasizing its world-class universities, geographic proximity to ASEAN, and career opportunities as a global financial hub. These efforts can leverage digital platforms, education fairs, and partnerships with ASEAN secondary schools and universities.

- **Digitalization:** Use social media platforms (e.g., Instagram, TikTok) and those popular among ASEAN students (e.g., GoJek in Indonesia) to promote Hong Kong's academic strengths and lifestyle experiences.
- **Education Fairs and Campus Outreach:** Host "Study in Hong Kong" education fairs in major ASEAN cities (e.g., Jakarta, Phnom Penh, Bangkok), inviting representatives from

Hong Kong universities to connect with local secondary schools and universities. Establish partnerships with prominent ASEAN institutions, such as Universitas Indonesia (QS Asia Ranking 46), to hold joint recruitment seminars.

- **Alumni Networks:** Build ASEAN alumni networks and invite ASEAN graduates who studied or work in Hong Kong to share their experiences. Many government officials in ASEAN countries have studied abroad, including in Hong Kong, and could serve as brand ambassadors to enhance Hong Kong's influence in the region.

3.2.3 Enhance internship and post-graduation employment opportunities

The *International Flow Theory* also highlights employment prospects as a key “pull factor” for international students. Hong Kong should strengthen collaborations between universities and industries to provide internship opportunities for ASEAN students.

- **Internship Alliances:** Hong Kong universities can partner with leading companies in finance, technology, and logistics (e.g., HSBC, Tencent, DHL) to create tailored internship programs aligned with students' academic interests.
- **Career Development Workshops:** Regularly host career planning workshops for ASEAN students, inviting industry experts to discuss Hong Kong's employment prospects and offer training in resume writing and interview skills.

3.2.4 Expand scholarship programs

Scholarship is another key “pull factor” in the selection of destination and institution. To enhance Hong Kong's attractiveness, the government should, within financial constraints, expand the *Belt and Road Scholarship* program, including:

- **ASEAN Future Leaders Scholarship:** Establish a dedicated scholarship for top-tier ASEAN students to attract talent with compelling incentives.
- **Support for Hong Kong Students to Study in ASEAN:** The current *Belt and Road Scholarship* primarily funds international students to study in Hong Kong. The government could consider reverse funding to support Hong Kong students studying in ASEAN countries, for example, for one or two semesters in exchange programmes. Overseas internship opportunities should be greatly increased to enable broadened exposure and immersed experience in overseas work and cultural settings for Hong Kong students and young graduates. The increased presence of Hong Kong students and young graduates in ASEAN universities and corporates will also effectively promote the visibility of Hong Kong as an attractive destination of education and career development for ASEAN students and parents.
- **Enhancing Foreign Student Welfare in Hong Kong.** Hong Kong should regularly review and improve its foreign student policies to remain competitive, particularly for attracting

ASEAN students, by drawing on best practices from Australia, Japan, EU nations, and the United States. For example, Australia specially establishes an independent external complaint handling body for overseas students to address their complaints about private registered school providers. Japan provides subsidies for housing and living costs and allows children to enroll in schools. EU countries and the U.S. similarly provide part-time work opportunities, generally without restrictions on campus or off-campus work.

4. Conclusion

Hong Kong is committed to becoming an international higher education hub but has faced a trend of concentrated student sources in recent years. Extending the diversity of student sources will benefit the resilience of the education hub, add weight to the education of the total student population including the local students, and contribute to broader development and policy goals, including the Belt and Road Initiative. The economically emerging ASEAN region, with its 10 member countries, has become a key recruitment target for many destinations. Whilst current policy improvements in Hong Kong have focused on the supply side factors, which is necessary and welcome, the recommendations in this article address the need for more targeted, demand-side efforts.

Systematic demand-side research will enable Hong Kong to better enhance its appeal to ASEAN students. Through more targeted measures, Hong Kong can further consolidate its position as a global education hub, achieving goals of student source diversification and educational internationalization while injecting new momentum into the *Belt and Road Initiative* and regional connectivity.

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