

**THE LEARNING DRAGON:
HOW TO MARKET SUCCESSFULLY
TO CHINESE INTERNATIONAL STUDENTS**



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HELPING UNIVERSITIES AROUND THE WORLD REACH CHINESE STUDENTS ONLINE



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FOREWORD

China remains the world's largest source country for international students – with the US, Australia, the UK and Canada still among the most popular study destination countries.

While the number of Chinese students looking to further their education overseas is expected to continue to grow as more Chinese families are lifted into the middle and affluent classes, there are many dynamics at work that shape and change their choice of destination country.

For education marketers and student recruiters, these global trends mean that they need to work harder to ensure that their learning institution is part of the consideration set when Chinese students are researching their study destination and preparing for the application process.

In this report, we take a closer look at the different factors influencing the decision-making process of Chinese students and their expectations of overseas education.

Drawing on the most recent data, we analyse the reasons behind their choices and identify changes education institutions can make in their communication material to appeal to this market and drive awareness for their course offering.

As Chinese students are looking beyond highly ranked institutions in the English-speaking world for their overseas education, now is the time for universities and schools to take a more proactive approach toward marketing to this important international student segment.

This whitepaper is designed to guide you on your journey to create a compelling online and offline brand presence that appeals to the changing needs of Chinese international students and their parents.



Nicolas Chu
CEO & Founder
Sinorbis





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INTRODUCTION

China remains the top source of international students globally, with over 600,000 students leaving the country in 2017 to pursue an education overseas (representing an 11.74% increase on 2016), and 1,454,100 students currently enrolled in overseas higher education institutions.¹ In all major English-speaking markets – the USA, the UK, Canada, Australia and New Zealand – China is by far the largest source of international students, making up between 20–50% of the entire international student population. Chinese international students remain, therefore, a huge boon to the international market, contributing billions to a country's economy.

Number of Chinese international students in major English-speaking markets²

Host country	International students	Chinese international students	% Chinese international students
USA	1,078,822	350,743	32.5%
UK	501,045	97,850	19.5%
Canada	312,100	132,345	42.4%
Australia	327,606	114,006	34.8%
New Zealand	62,570	31,075	49.7%

But while the number of Chinese outbound students remains on a growth trajectory, there are several signs this growth may soon start to slow down. Changes in political climates are impacting not only students' decision to study in certain countries, but also to remain in that country after their studies. Graduates are returning to China in droves – in fact, the number of Chinese graduates returning from overseas studies each year has more than doubled since 2011.

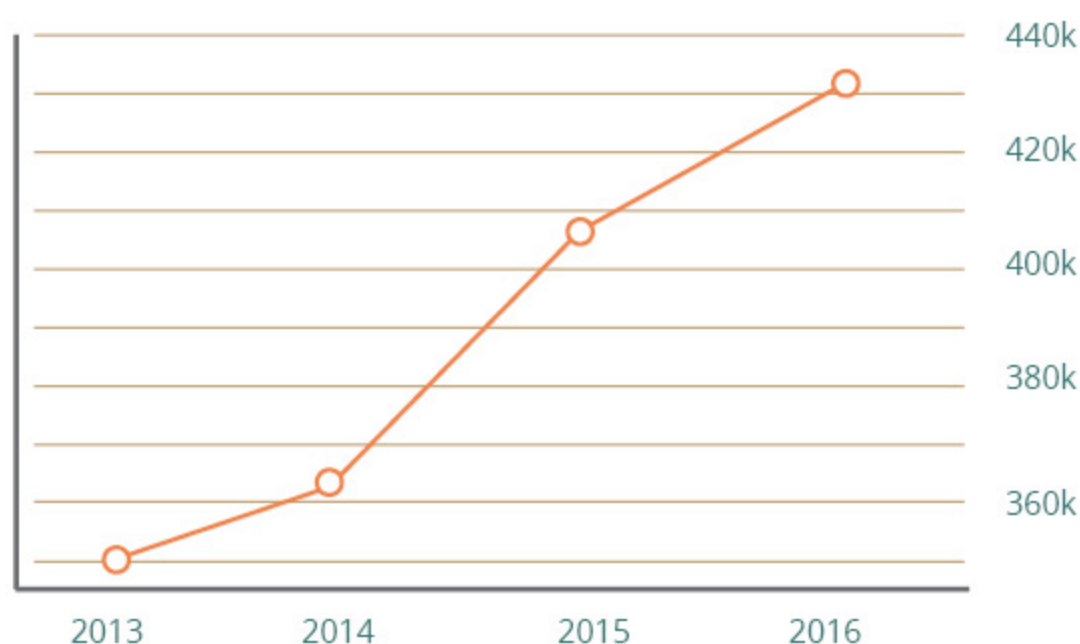
This is having a knock-on effect for job-seeking graduates, as foreign degrees are now less coveted by Chinese employers than they once were, with nearly 70% of newly employed graduates reporting their salary was below expectations.³

1 "2017 sees increase in number of Chinese students studying abroad and returning after overseas studies", Ministry of Education of the People's Republic of China, 2018. [http://en.moe.gov.cn/News/Top_News/201804/t20180404_332354.html]

2 "A Quick Look at Global Mobility Trends", Project Atlas, 2017. [<https://www.iie.org/en/Research-and-Insights/Project-Atlas/Explore-Data/2017-Project-Atlas-Infographics>]

3 "Increasing numbers of Chinese graduates returning home from overseas", ICEF Monitor, 6 Feb 2018. [<http://monitor.icef.com/2018/02/increasing-numbers-chinese-graduates-returning-home-overseas/>]

Number of Chinese graduates of foreign universities returning to China each year, 2013-2016⁴



Meanwhile, the international reputations of Chinese universities continue to go from strength to strength, giving students more options on home soil. In fact, in 2017, China received nearly 450,000 inbound international students, a growth of 11.4% from the previous year, becoming the fourth-ranked international study destination, by international student population, behind the US, the UK and Australia.⁵ This, combined with the increasing competition from other internationally trained graduates, means Chinese students may think twice before even applying to foreign institutions.

As competition for the Chinese student dollar intensifies, international education institutions can no longer rely on reputation alone to reach this all-important demographic. Rather, they need to have a deep understanding of the value they provide to Chinese international students, as well as the negative perceptions students might have about their destinations and institutions, and ensure both aspects are addressed in their marketing strategy.

This whitepaper aims to help marketers deepen their understanding about Chinese international students in order to more effectively engage them.

⁴ Source: Ministry of Human Resources and Social Security, Bloomberg

⁵ "A Quick Look at Global Mobility Trends", Project Atlas, 2017.

NUMBER OF INTERNATIONAL STUDENTS IN MAJOR MARKETS ⁶

CANADA

CHINA	132,345
INDIA	76,530
S. KOREA	21,345
FRANCE	20,790
US	12,915

USA

CHINA	350,734
INDIA	186,264
S. KOREA	58,660
SAUDI ARABIA	61,287
CANDA	26,973

UK

CHINA	97,850
US	28,125
MALAYSIA	18,400
GERMANY	18,205
INDIA	18,015

⁶ Ibid.



CHINA

S. KOREA	70,540
US	23,838
THAILAND	23,838
PAKISTAN	18,626
INDIA	18,626

AUSTRALIA

CHINA	114,006
INDIA	44,775
NEPAL	15,211
MALAYSIA	14,721
VIETNAM	13,949

NEW ZEALAND

CHINA	31,075
INDIA	19,585
S. KOREA	4,445
FRANCE	2,725
US	2,160

KEY TRENDS AMONG CHINESE INTERNATIONAL STUDENTS

Global numbers will continue to grow

According to China's Ministry of Education, in 2017, the number of students leaving to study abroad exceeded 600,000 for the first time, at an increase of 11.74% on the previous year.

This rise is largely due to the growth of the number of Chinese upper-middle-class (with annual disposable incomes between US\$24,001 and US\$46,000) and affluent (with annual disposable incomes over US\$46,000) households, which today account for

17% of all urban households. One study estimated that the number of upper-middle-class households and affluent households will nearly double to 100 million by 2020, accounting for 30% of all urban households.⁷

This increased income means overseas education is now more affordable to more families in China than ever before. As China's upper-middle and affluent classes look to embrace the education and cosmopolitan values of Western countries, more and more Chinese students will be seeking education abroad, even if the parents themselves have had no direct experience with overseas education.

Students are heading overseas earlier

Students are heading overseas at a younger age, with more and more students targeting high-school and undergraduate programs rather than postgraduate programs.

Graduates are highly likely to return to China

The majority of Chinese students who study abroad are likely to return to China following the completion of their overseas education. According to statistics released by China's Ministry of Education, 480,900 students returned from overseas study in 2017, up 11% from 2016.

⁷ "The New China Playbook", Boston Consulting Group/Aliresearch, Dec 2015.

Looking at figures between 1978 and 2017, of the more than 5 million Chinese students who have opted to study abroad, over 3 million of these, or about 84%, have returned to China.⁸

This is largely due to students simply missing home and wanting to be closer to family and friends, with around 50% of returning students citing “emotional and cultural factors” as a reason for coming home. The improving economy and continuing relative political stability in China also play a key role, with 43% stating this was a factor.

The difficulty of renewing visas and obtaining permanent residency also affects around 20% of returnees, while the difficulty of obtaining postgraduate employment in the foreign destination affects around 16%.⁹

8 “2017 sees increase in number of Chinese students studying abroad and returning after overseas studies”, Ministry of Education of the People's Republic of China.

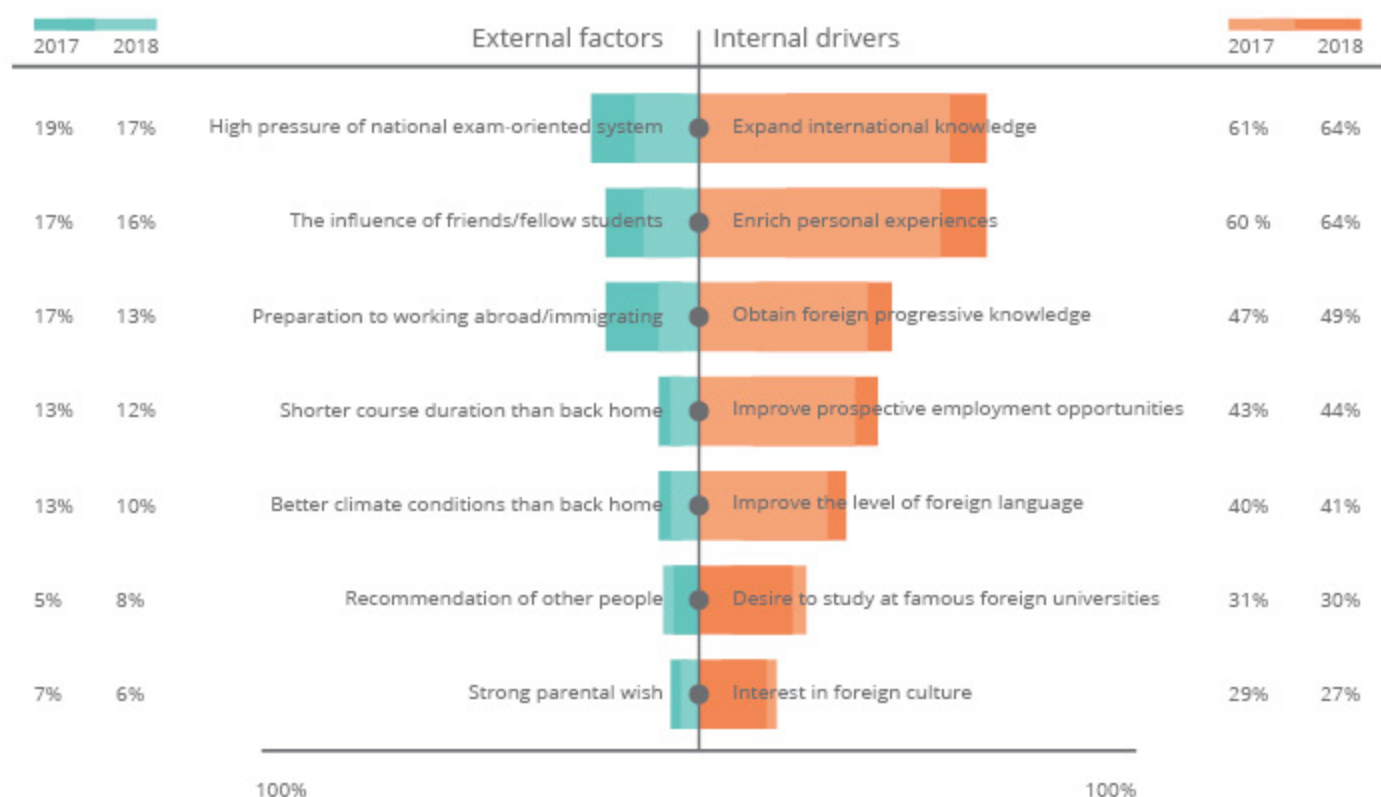
9 “Report on Chinese Students' Overseas Study”, New Oriental Vision Overseas, 2018.

REASONS FOR STUDYING ABROAD

While some might think parental pressures play a large part in Chinese students' decision to study overseas, it is indeed one of the least determining factors. In fact, students' biggest drivers are internal ones — expanding their international knowledge and having an enriched experience were the top reasons (64%) for studying abroad, followed by accruing advanced knowledge (49%), improving future employment prospects (44%) and learning a new language (41%).

On the other hand, external factors, such as avoiding the entrance exam for higher education (known as the National University Entrance Exam, or "Gao Kao", it is highly competitive and therefore extremely stressful for students), peer influence, and preparation for immigration, were far less important to students.¹⁰

Educational institutions, therefore, should focus messaging on students' internal drivers – in particular their desire to expand their horizons and be intellectually stimulated.

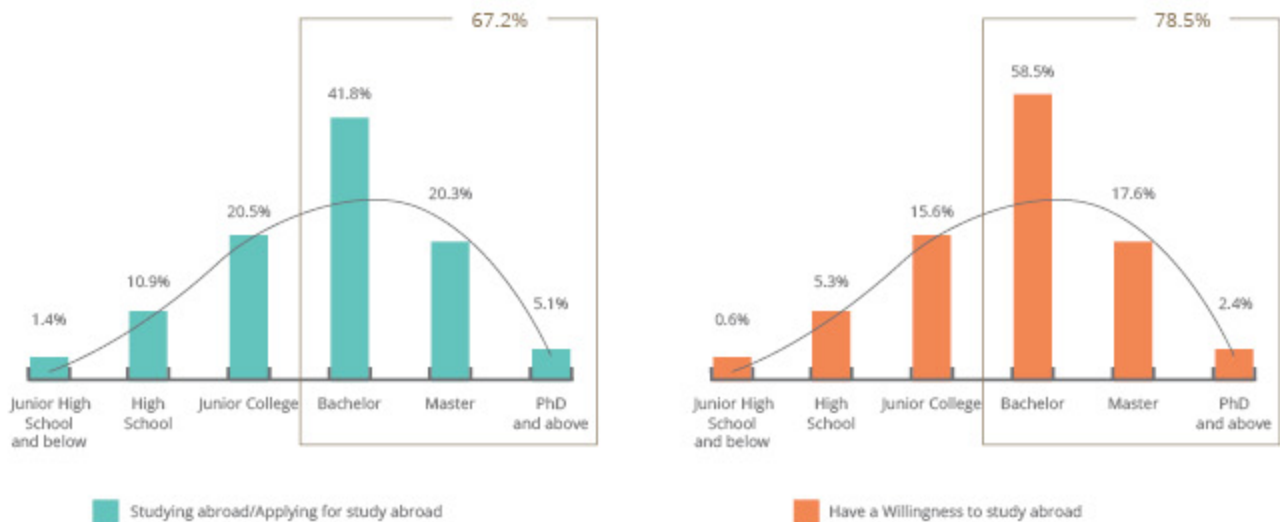


¹⁰ "Report on Chinese Students' Overseas Study", New Oriental Vision Overseas, 2018.

Influence of parents' education level and overseas experience

The education levels of students' parents is a good predictor of whether or not a given student will study abroad. Of the students who were already studying abroad or applying to study abroad, 67.5% had parents who had earned a bachelor's degree or higher, while for the students who had intentions to study abroad, this number was 78.5%.

Educational level of the parents



Note: 67.2%, 78.5% are those whose parents are above the Bachelor Degree level

Parents' overseas study experience, on the other hand, does not seem to have a significant influence on whether or not students opt to study abroad. Of the students who were already studying abroad or applying to study abroad, 15.7% had at least one parent who studied overseas themselves. Of the students who intended to study overseas, this figure was 26%. The vast majority, however, have parents with no overseas study experience, reflecting the widely held perspective that international education is aspirational and highly desirable.¹¹

Parents with overseas study experience



PREPARING TO STUDY ABROAD

Moving abroad to study is a huge and costly undertaking. As such, it requires a great deal of careful research beforehand. For marketers, understanding when and how Chinese students and their families prepare for this significant change is crucial in helping to develop highly impactful campaigns.

In this section, we take a closer look at the planning process and how marketers can influence students' choices.

Popular topics during the preparation process

When students are preparing to study abroad, one of the most important considerations, unsurprisingly, is the application procedure for their preferred institutions. Interestingly, however, in 2018 the most important factor¹² was future employment possibilities in their prospective destination.

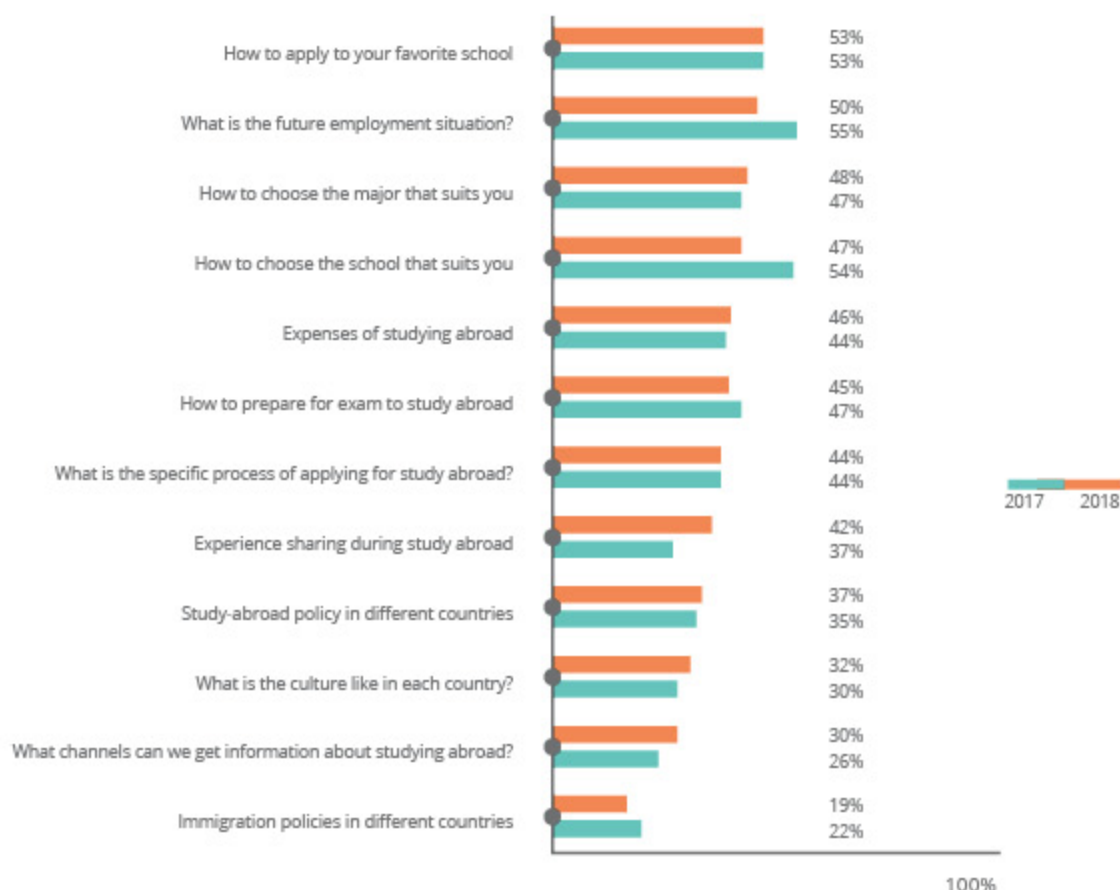
This signals that postgraduate work is a key factor for students. As the employment market in China gets more competitive, with more students than ever venturing overseas for their studies, graduates no doubt want to be able to differentiate themselves further from their peers with international work experience.

Other important considerations are how to select the best institution, how to select the best major, and how to prepare for entrance exams.¹³ Education marketers should therefore consider including these topics in their content marketing strategies.



12 Ibid.
13 Ibid.

Interesting topics in the preparation process for studying abroad



Who makes the decision to study abroad?

When it comes to the big decision of whether or not to study overseas, students wield a huge amount of control. In 76% of cases, the student was directly involved in the decision, whether they made it alone¹⁴ or jointly with their parents, while in 23% of cases, the decision was made by the parents alone. This is reflective of the increasing independence of China's millennial generation.

Education marketers, particularly those from colleges or universities, therefore, need to be mindful about ensuring any messaging appeals predominantly to students.

	2015	2016	2017	2018
Father	5%	4%	5%	4%
Mother	10%	4%	4%	4%
Both parents	18%	22%	16%	15%
The Student	32%	34%	29%	31%
Whole Family	34%	35%	46%	45%

76%

When preparation begins

The planning period typically begins well ahead of students' departure, with around 60% starting to make plans 1–2 years in advance.¹⁵ This is therefore the key period for marketers wishing to target Chinese students in enrolment campaigns.

Preparation period for the relevant admission exams

	2016	2017	2018
Half a year in advance	17%	20%	21%
One year in advance	47%	42%	38%
Two years in advance	24%	22%	21%
Over 2 years in advance	12%	16%	20%

41%

Preparation period for launching the application

	2016	2017	2018
Half a year in advance	19%	23%	25%
One year in advance	40%	48%	44%
Two years in advance	24%	16%	17%
Over 2 years in advance	11%	12%	14%

31%

When students tend to look for information

Once students have got over the hurdle that is the intensive Gao Kao in June, they then start to set their sights on higher education. This is reflected in the search volume for all key destinations, which increases up to June, and then peaks between July and September.

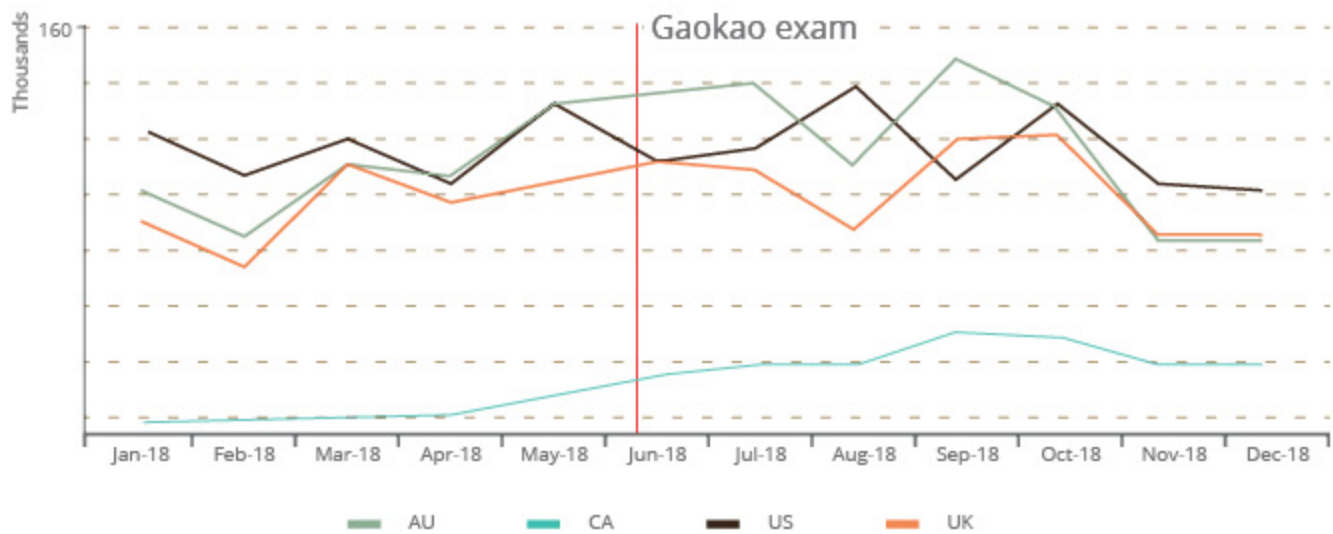
For the US, the search volume peaks in August, because the majority of students (local and international) prefer to start their US studies in the fall semester (which begins in late August), as there are more courses on offer as well as more opportunities for obtaining financial assistance.

There is also another peak of search volume in October.¹⁶

¹⁵ Ibid

¹⁶ Sogou Analytics, 2017 and 2018.

Monthly search volume for key destinations (desktop & mobile), 2018¹⁷



Sogou, China's 2nd largest search engine, is a strategic investment of Tencent, one of the largest Internet companies in the world. Unlike other search engines, Sogou integrates content from WeChat and QQ – social media networks owned by Tencent – into its search engine results.

This content is not available to other search engines and allows Sogou to provide a wider net of search results and attract a social media savvy user base. In addition to its search engine, Sogou provides users with an innovative smart input tool for which it holds more than 91% market share. It offers a unique opportunity for digital marketers to display specific content based on users' input, regardless of where the characters are typed.

Sogou also provides diversified options for users to decorate and personalise their input boxes with Sogou "skins" – a huge attraction for the millennial generation.

Where students look for information

Chinese students typically use a wide variety of channels to source information about their destination and their course of study. Marketers need to understand that the institution's official website is usually not the main port of call at this early stage in the decision-making process, with only about a quarter of students citing it as a key research channel (though this may be because few international institutions have Mandarin-language websites localised for this target market).

The main port of call for information for students is education consultants and agencies, with more than half of students citing these as a key source.¹⁸

Indeed, students are more willing to pay for professional advice, which is viewed as more reliable, than to ask for guidance from friends and relatives who have had experience studying abroad. (See "Tips for cracking the Chinese education market" on page 38 for tips on working with education agencies in China.)

Other important sources of information are social media (predominantly WeChat) and education exhibitions or workshops. Of these, education exhibitions or workshops were rated as the most effective, meaning they had the greatest influence on students' decisions regarding what and where to study, followed by WeChat and then the institution's website. This underlines

the importance of having a strong web and social media presence in China.¹⁹

Marketers will need to test for the optimal channel mix in order to reach their target audience. They may find that a well-rounded marketing strategy, including event marketing, content marketing and social media marketing tactics, will produce the best results.

¹⁸ "Report on Chinese Students' Overseas Study", New Oriental Vision Overseas, 2018.
¹⁹ "Chinese Students' Overseas Study Status Report", eeLearns/eduplan, 2015.



Key research channels to source information, 2015 (before official website)

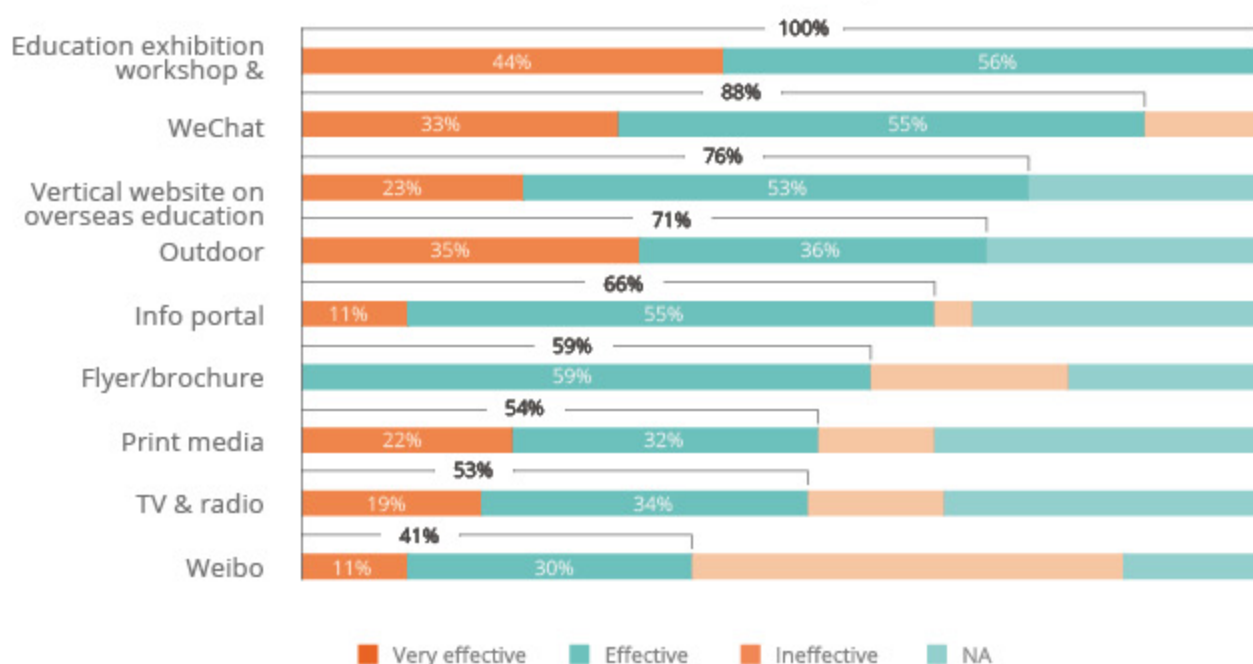


Where students come from

More than 60% of Chinese overseas students come from north and east China, with the biggest sources being Beijing, Shanghai, Shandong, Guangdong and Jiangsu provinces.²⁰

We're also seeing increases in provinces like Zhejiang, Hebei, Henan, Shaanxi and Hubei. Moving away from the coastal areas further inland, the number of families with children studying overseas steadily decreases.²¹

Effectiveness of overseas education ads by channel, 2015



20 Sogou Analytics, 2018

21 "Report on Chinese Students' Overseas Study", New Oriental Vision Overseas, 2018.

CHOOSING WHAT TO STUDY

When targeting Chinese international students, it's of course vital to know what programs are of most interest to them. While some findings – like the popularity of Business degrees – are perhaps not so surprising, others – like the surging popularity of Liberal Arts programs, or the low level of influence peers have over students' decisions – may defy expectations.

Level of education sought

Master's degrees are by far the most sought-after qualification, with around half of Chinese international students undertaking Master's programs. Bachelor degrees are also commonly sought, with around a quarter of students applying for these. They are slightly less popular in the UK, however, likely due to the high cost of their undergraduate programs.²²

Level of education sought by chinese students when studying overseas, 2018



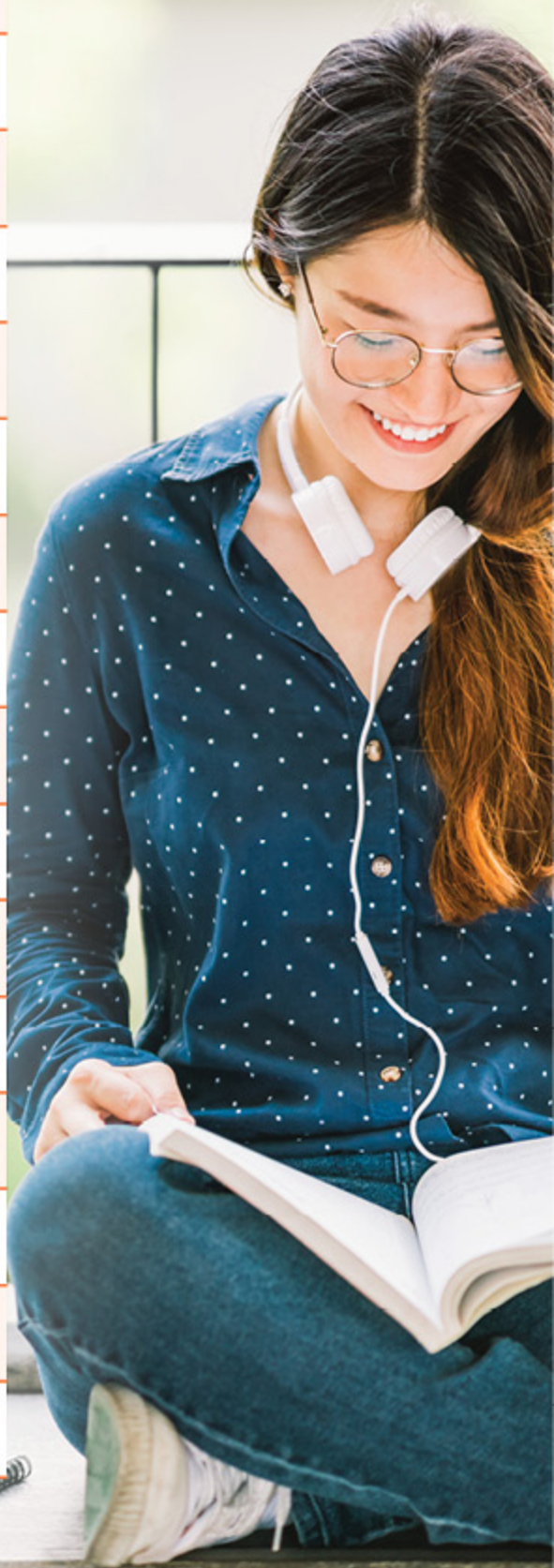
That being said, we're seeing a significant increase in searches for Bachelor's degrees, with search volumes up in the most popular destinations. In UK, search volumes are up 77%; in US, they are up 69%; in Canada, they are up 64%; and in Australia, they are up 33%. We're also seeing an increasing interest in secondary schools in all major destinations. In Canada, search volumes are up 55%; in the UK and Australia, they are up 29%; and in the US, they are up 27%.

²² "Chinese Students' Overseas Study Report", New Oriental Group, 2016.



Search volume trend by degree type

Destination	Degree	YoY Growth
AU	Bachelor's degree	33%
	Graduate degree	-13%
	Pathway to university	-14%
	Junior and high schools	29%
CA	Bachelor's degree	64%
	Graduate degree	-24%
	Pathway to university	-41%
	Junior and high schools	55%
US	Bachelor's degree	69%
	Graduate degree	35%
	Pathway to university	119%
	Junior and high schools	27%
UK	Bachelor's degree	77%
	Graduate degree	-45%
	Pathway to university	-13%
	Junior and high schools	29%

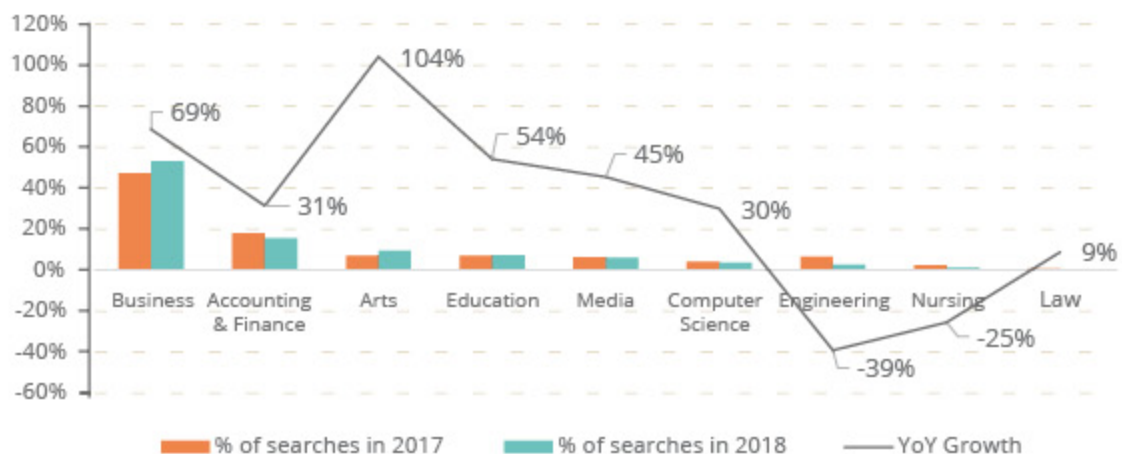


Popular fields of study

It will likely come as no surprise that Business remains the most popular field of study sought by Chinese international students, with 53% of students looking for information about qualifications in this field in 2018, up from 47% the year before. The overall number of searches for queries related to this field grew by 69% year on year, an increase in demand that is mainly driven by searches for Business qualification in the US and the UK, while search demand for the same subject in Canada and Australia remains relatively flat.

Accounting and Finance also continue to be popular (16% of search traffic), followed by the Arts (10%).²³

Popular fields of study searched for by Chinese looking for information on studying overseas, 2017 & 2018



Interestingly, though, the Arts are showing the highest year-on-year growth rate (104%) for search terms related to this subject. Having said that this increase in demand is predominantly driven by searches for Arts education in the US and there has been very little change for the same search terms for the other destinations. This heightened interest is perhaps indicative of a changing attitude towards an Arts education, which was once viewed in China as less valuable than “hard” subjects like Science and Engineering. Now, the soft skills that such an education cultivates – like creativity, the ability to innovate, adaptability, collaboration and communication—are starting to be seen as crucial ingredients for success in a fast-changing, globalised world.

While universities in China are beginning to implement Arts programs, these are still very much in experimental phases.²⁴ Students interested in undertaking Arts programs will therefore still be looking very much towards programs in

²³ Ibid.

²⁴ Yojana Sharma, “Why China wants ‘Western-style’ liberal arts education”, University World News, 8 Dec 2017. [<https://www.universityworldnews.com/post.php?story=20171202052059445>]

international institutions in the next few years. Even though still popular, the field of Engineering has experienced the sharpest drop in demand with overall search volume dropping 39% from 2017 to 2018.

While the overall trend for this subject is declining for the US and Canada, demand for Engineering studies in Australia has dropped by a whopping 83% while interest for Engineering degrees in the UK has increased by 153%, albeit starting from a very low base.

For a more detailed breakdown on online search volume by subject and study destination, please refer to the detailed country analysis later in this report.

Comparison of top 5 study majors being searched online for key destinations by search volume, 2018



Main considerations when selecting a field of study

Chinese students are quite practical when it comes to selecting a field of study, with 53% of them citing future employment prospects as a deciding factor. Passion, however, is also a crucial factor, with 59% of students citing personal interest as a driving force in their selection (though this figure has fallen slightly since 2017).²⁵ These two factors are certainly something marketers should consider when designing campaigns or crafting messaging.

25 "Report on Chinese Students' Overseas Study", New Oriental Vision Overseas, 2018.



Factors that are considered during the selection of the major

	2017	2018
Student's interest in the major	63%	59%
Good employment perspectives	55%	53%
Related to the previous education path	47%	46%
Major's ranking	39%	39%
University ranking	32%	34%
Education fees	29%	30%
Post graduation internship opportunity	28%	28%
Scholarship	23%	25%
High graduation rate	22%	22%
High admission rate	18%	22%
Difficulty of chosen course	17%	20%
Popularity of the major among international students	19%	15%
Recommendation of other people	6%	7%

CHOOSING WHERE TO STUDY

While one of the biggest reasons students choose to study abroad is to enrich their personal experience, students are highly pragmatic about which destination they choose, valuing above all else a quality education.

But changing political climates can and have had a dramatic effect, causing growth in popular destinations like the US and UK to stagnate over the past few years, while other destinations like Canada and Australia have seen healthy growth rates over the same period.

Marketers need to understand what is important to Chinese students and how they can alter their messaging to overcome negative perceptions.

Factors influencing choice of destination

When it comes to choosing where to study, Chinese students are predominantly concerned with getting a quality education, with factors like strength in a particular field of study and reputation of the institution also considered important.

However, there have been some telling changes in the data over the past few years. For example, while security was only considered by 28% of students in 2017, this figure leapt to 42% in just one year.²⁶ This is perhaps reflective of students' responses to anti-immigrant sentiment in some destinations, and some isolated but highly publicised incidents of violence against Chinese students, which has made them wary about going abroad to study. Indeed, figures from China's Ministry of Foreign Affairs show that between 2014 and 2016, the number of Chinese students overseas making requests for consular assistance went from 932 to more than 6,100.²⁷

Students are also more concerned about regulations towards international students, which is perhaps a response to the tightening of immigration policies in destinations like the US and UK that have made it more difficult for students to obtain visas. On the other hand, ease of immigration and obtaining permanent residency continues to be less of a factor, perhaps due to the increasing likelihood that students will return to China after they graduate.

²⁶ Ibid.

²⁷ Chris Parr, "A two-way street: why China is not just a student departure lounge anymore", The PIE News, 20 Apr 2018. [<https://thepienews.com/analysis/international-students-in-china-increasingly-diverse/>]



Students also appear to be becoming more money-conscious, with almost double the number of students citing low expense as a key factor than the previous year, and more students looking for scholarship opportunities. This may be a response to rises in tuition fees in certain destinations.

	2015	2016	2017	2018
Quality of education	64%	60%	63%	56%
Safety concerns	25%	23%	28%	42%
Culture	48%	54%	48%	41%
Overall strength of the country	48%	48%	50%	40%
Host country strength in particular field of study	38%	34%	37%	38%
Language environment	29%	35%	37%	37%
Reputation of the institution	35%	41%	37%	34%
Regulations towards international students	25%	21%	22%	33%
Local environment & standard of living	27%	31%	34%	26%
Low expenses	16%	15%	11%	20%
Scholarship opportunities	12%	9%	10%	18%
Simplicity of immigration	20%	15%	13%	11%
Recommendations from others	11%	13%	9%	8%
Family ties/relatives in the hosting country	10%	10%	11%	6%

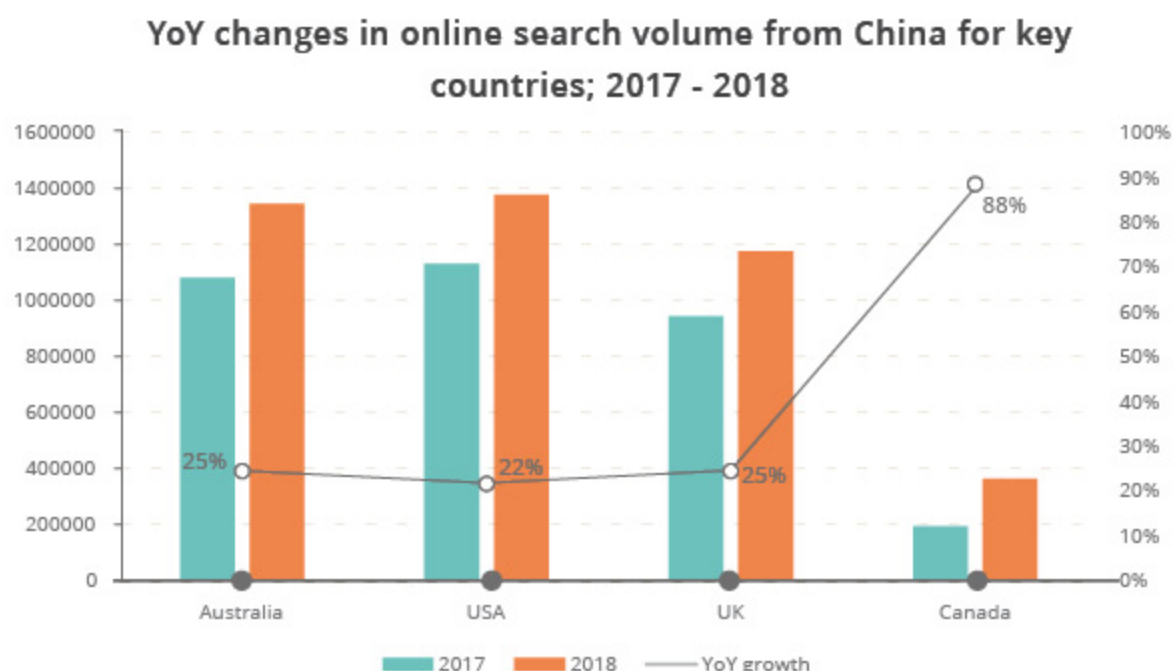
Most popular destinations

When it comes to choosing where to study, English-speaking countries are still the most popular options, with the USA, Canada, Australia and the UK being the top choices (in 2017, Australia and Canada overtook the UK in terms of number of Chinese international students enrolled in the country).²⁸ This is perhaps not surprising, seeing as English is considered by most to be the world's lingua franca, and therefore a highly useful skill for Chinese graduates to possess.

28 "A Quick Look at Global Mobility Trends", Project Atlas, 2017.

When comparing search volumes in 2017 to 2018, major destinations the US, the UK, Australia and Canada have all experienced year-on-year growth. However, while the US, the UK and Australia all experienced YoY growth of between 22–25%, in the Canada, it was a whopping 88%, showing its fast-growing popularity.

Data from 2018 also showed that Australia is closing the gap with US in terms of



search volume. Could Australia soon overtake the US at the number-one spot?²⁹

But, as we saw in the previous section, factors such as financial viability, safety and regulations pertaining to international students are having an impact, causing students to consider other options. This is reflected in the data, where we can see markets like Hong Kong, Japan, Singapore, Germany and France growing in popularity. Ultimately, countries like the US and UK can no longer afford to rest on their laurels.

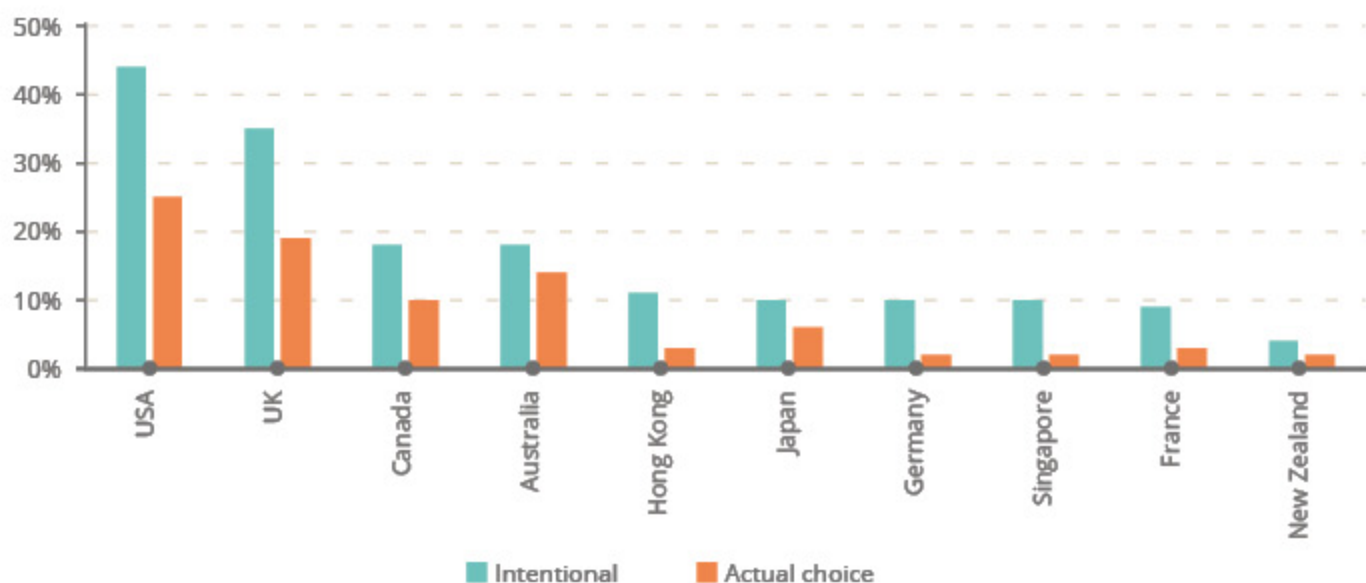
When we look at where students think about studying, versus where they actually study, there are also some interesting patterns. For example, in 2018, while 44% of students looked at the US as a possibility, only 25% of students chose to study there. Similarly, 35% of students considered the UK, while only 19% selected it as their chosen destination. There's a big opportunity here for marketers to close this gap, and focus their resources on those 15–20% of students who are already considering a destination, in order to get them over the line.³⁰

²⁹ Sogou Analytics 2017 and 2018

³⁰ "Report on Chinese Students' Overseas Study", New Oriental Vision Overseas, 2018.



Top 10 countries for overseas studies intentional versus actual



Choice of institution

When it came to factors influencing students' choice of institution, students were highly rational, with over half of them citing the availability and relevance of their desired major as the top deciding factor. University rankings and staff qualifications were also very influential, reflecting the importance students place on the quality of their education, as noted earlier.

Safety has also become a bigger concern over the years, with 52% of students factoring it into their decision. Employment opportunities have also become a larger concern, which perhaps comes on the back of limitations to post-study work opportunities imposed by some destinations. ³¹

³¹ Ibid.

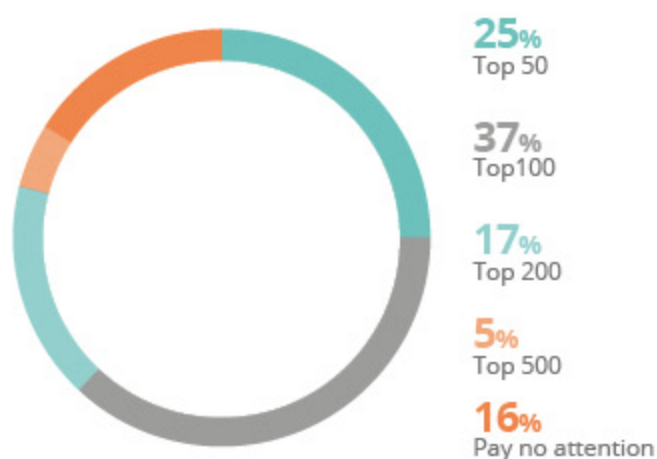
	2015	2016	2017	2018
Relevance of the major	58%	58%	59%	56%
University ranking	63%	50%	58%	52%
Safety concerns	43%	45%	47%	52%
Staff qualification	44%	44%	44%	49%
Enrolment conditions	52%	50%	47%	47%
Education fees	44%	50%	44%	46%
Campus atmosphere	48%	52%	46%	45%
Upgrading/employment opportunities	34%	32%	35%	38%
Quality of the facilities	40%	41%	40%	38%
Region	42%	44%	44%	37%
Scholarship	33%	34%	31%	31%
Course structure	20%	21%	23%	27%
Proportion of international students	19%	17%	24%	21%
Gender diversity among students	6%	7%	6%	7%

University rankings

As noted above, school ranking was a relatively important factor for students when deciding where to enrol. But how high did they aim?

According to 2016 data, 62% of students preferred universities that were ranked at least in the top 100 worldwide, with 25% of students aiming for universities ranked in the top 50. Universities with a good world ranking should therefore ensure this information is featured heavily in messaging.³²

Preference on the ranking of universities, 2016



³² "Chinese Students' Overseas Study Report", New Oriental Group, 2016.

HOW TO MAKE THE MOST OF EDUCATION OPPORTUNITIES IN CHINA



While most tertiary education providers are aware of the importance of Chinese international students to their market, the opportunities aren't limited to this sector. Indeed, there are many educational opportunities that Australia – and indeed other countries – can take advantage of, from K-12 all the way through to postgraduate and vocational education.

To learn more about the exciting opportunities for the education sector in Australia and around the world, we spoke to Rhett Miller, Consul and Trade Commissioner (Education North Asia) of the Australian Trade and Investment Commission (Austrade). Here are some of the key insights from our discussion.

Understanding the appeal of your institutions

Australia, says Miller, is one of the leading destinations for international students worldwide, punching well above its weight. Understanding the factors that attract international students, including those from China, to our shores, is key to creating compelling messaging. This is particularly important for regional institutions wishing to tap into this market – indeed, Austrade is actively looking at ways to promote study destinations outside of the major metropolitan areas to Chinese students.

Here are some of the reasons Australia is such a draw to international students.

Quality of the education

There are currently 7 Australian universities in the top 100 universities in the world, according to the QS World Rankings – an impressive feat, when you consider Australia's size. The high quality of the education provided there is certainly a key factor when it comes to Chinese students, with around 60% of them expressing a preference for universities in the top 100.

Another key factor is the fact that many Australian institutions recognise the Gaokao, China's higher education entrance exam, making the Australian system seem more merit-based than other systems.

Internationalised classrooms

Australian classrooms are some of the most internationalised in the world – and this fact extends beyond universities to the school and VET sectors as well.

“In universities, for example, over a quarter of the cohort in many institutions is international, meaning that Chinese students are getting a global experience when they study at Australian providers. This gives them an international skillset, which I think is really valuable in the era of global markets, and particularly as China itself internationalises and increases its influence globally,” - *says Miller.*

High liveability

Australia has a reputation for being one of the world’s safest countries, with a highly desirable lifestyle – indeed, Australian cities regularly rank among the world’s most liveable cities, with Melbourne taking the top spot several years running in the past. Add to that Australia’s relative proximity to China, the overlapping time zones, and the existing large Chinese communities, particularly in Sydney and Melbourne, which all make Australia more inviting to Chinese students.

Excellent post-study work rights

Australia has some of the most generous post-study work rights in the world, with international students allowed to work two years after they graduate. Students also have the ability to work during their studies too – their visas allow them to work 40 hours per fortnight during term time, and unlimited hours during breaks. This means that, in addition to a high-quality education, students can also gain valuable international work experience in the way of internships and graduate employment that makes them all the more employable when they return to China (which the majority do).



K-12 opportunities

In 2016, the Australian government changed student visa rules so that students age 6 and above could apply for them, regardless of their country of citizenship. Their guardians could also apply for guardian visas. This has made Australian education more accessible to younger students, leading to more enrollments at primary and secondary school level.

“Certainly we’ve seen good growth, particularly in the primary school area,” says Miller. “In terms of the secondary system, over half of international students in the secondary school system are Chinese in terms of nationality. And it remains obviously a market of great interest for our schools.” - *says Miller.*

However, what some people might be less aware of is the provision of secondary education by Australian providers in the Chinese market, which has become quite substantial over the years. The VCE (Victorian Certificate of Education), for example, is now being offered in 28 schools in China, making it the most popular Australian curriculum in the country. This helps

create greater demand for Australian institutions, with over 94% of VCE offshore graduates choosing to study at Australian universities. This has two-way benefits for students and staff too, with exchanges frequently occurring between partner schools in Australia and China. Austrade is also looking into ways to get more Australian schools to set up campuses in China.

The growing edtech sector

China has the world’s largest K-12 online education market, as well as one of the largest adult online education markets, and Australia is well-situated to take advantage of that due to their expertise in the edtech sector. In fact, Austrade recently hosted a program at a startup hub in Shanghai known as The Landing Pad for Australian edtech providers, to educate them on the market and help to connect them with investors and collaborators.

There’s certainly plenty of opportunity here, therefore, for Australians to bring their unique brand of innovative and world-class education solutions to this burgeoning market, from preschoolers all the way to adult learners.

"It's a two-way street"

It's important to bear in mind the long-term benefits of opportunities such as these, as they also serve to further strengthen our already "deep and constructive" relationship with China, say Miller. The hundreds of thousands of Chinese students who return to China, after having studied in Australia, continue to have close ties with the country. The flow is also going the other way, with China the number-two destination for Australian students studying abroad in 2015.

"International education really serves as the fundamental people-to-people link, which underpins a lot of the Australia-China relationship," -
says Miller.



TIPS FOR CRACKING THE CHINESE EDUCATION MARKET



As you can see, there are many factors to consider when it comes to cracking the Chinese education market. In order to sort out the dos from the don'ts, we enlisted the help of expert George Hernandez, who worked in international education in Australia for 7 years before founding Sofiri, an online platform that aims to connect prospective students looking to study abroad with education counselling service providers, giving a digital alternative to the traditional bricks-and-mortar agency model.

Here are Hernandez's top tips for education providers looking to appeal to the Chinese market.

Your strategy must be multi-faceted

When formulating your strategy for this market, it's important to realise that there is not going to be one "silver bullet" that will deliver the results you're looking for. Agencies, for example, are an important channel in China for the recruitment of students – but a single agency may represent hundreds, if not thousands of other institutions, so investing all your resources into this channel is risky.

Education providers, therefore, have to also **consider how they make their information available and control their brand and image**, at the same time as they're building relationships with agencies.

It's all about relationships

In China, there is a concept known as "guanxi", which is essentially about building a network of mutually beneficial interpersonal relationships that can be used for personal or business purposes. Guanxi is considered essential to social cohesion in Chinese culture, so education marketers can't underestimate its importance. Strong guanxi is particularly important in the Chinese education market, where students are heavily reliant on education agencies to recommend the best institutions and guide them through the process. As a result, agencies tend to wield more power than education providers.

As Hernandez says, "It's a market of relationships."

In order to foster relationship-building, **Hernandez says hiring at least one person to represent your institution in China** is a "no-brainer", as this will help you create connections with local agencies and universities faster and more effectively.

A tip for smaller institutions is also to not focus too heavily on trying to build relationships with the biggest agencies, who will be working with hundreds if not thousands of other institutions.

Rather, you may be better off forming deeper relationships with smaller agencies, who will be able to dedicate more time to your institution.

Get the basics right

In order for international institutions to establish a strong foundation in China, they must get the basics right. This means **having a high-functioning website and a comprehensive social media presence**.

Here, says Hernandez, it's important to **understand China's unique digital landscape**. Videos, for example, are a highly effective format for the Chinese market. It may be more beneficial, therefore, to create a strong presence on QQ, because both QQ and WeChat are owned by Tencent and are therefore more compatible with each other, whereas videos from other platforms (like Youku) cannot easily be embedded in WeChat.

Spend your budget wisely

The complexity of the Chinese market means that there is no one-size-fits-all approach. Once you have a strong foundation established and a bigger budget to play with, therefore, Hernandez recommends **performing tests to work out what are going to be the most effective strategies**. If, for example, you have a \$20,000 budget, you may want to spend half on advertising and half on KOLs to see what resonates with your audience.

Don't be afraid to **think outside the box** too – for example, are there forums that students in China might visit in order to seek information about the destination and study options, where a prominently placed ad might get a lot of click-through? Is there an alumni society with connections in China that could be sponsored? Could Chinese alumni produce content or be featured in marketing materials?

However, Hernandez advises thinking carefully about how to invest your offline marketing budget – print advertising, for example, is expensive, and doesn't necessarily generate big results. Instead, consider investing that money in the people who are on the

ground, whether that's training your agents and counsellors, or giving them additional resources for education fairs. Remember, it's all about relationships, so **investing in people will give you the most offline marketing traction.**

Get the right expertise (and not just people who can speak Chinese)

We see this all the time: the Chinese-speaking employee becomes the default expert on the Chinese market, purely based on the fact that they speak the language.

But you wouldn't hire a native English speaker to do your marketing without asking if they have any actual marketing experience, would you?



To give you the best chance of success, you need to hire recruiters and marketers (it's crucial to have both, says Hernandez) that are not just native speakers, but also **have a deep understanding of the Chinese online and offline landscape**. Recruitment and marketing staff also need to work closely together, as both will benefit greatly from the insights of the other.

Be patient!

The nature of the education industry is that things take a while to happen. Students need to thoroughly research their destinations and institutions, put in applications, sort out visas, find accommodation and in many instances take a 12-month English language course. That means the students you're marketing to may not actually begin their degree until 2 years after your campaign has run.

It's important, therefore, to **be patient** and bear this in mind when evaluating your marketing efforts.

In the meantime, **learn as much as you can** – Hernandez recommends travelling to China as often as your time and budget allows in order to cultivate a deeper understanding of cultural nuances.



A CLOSER LOOK AT THE BIGGEST MARKETS FOR CHINESE INTERNATIONAL STUDENTS

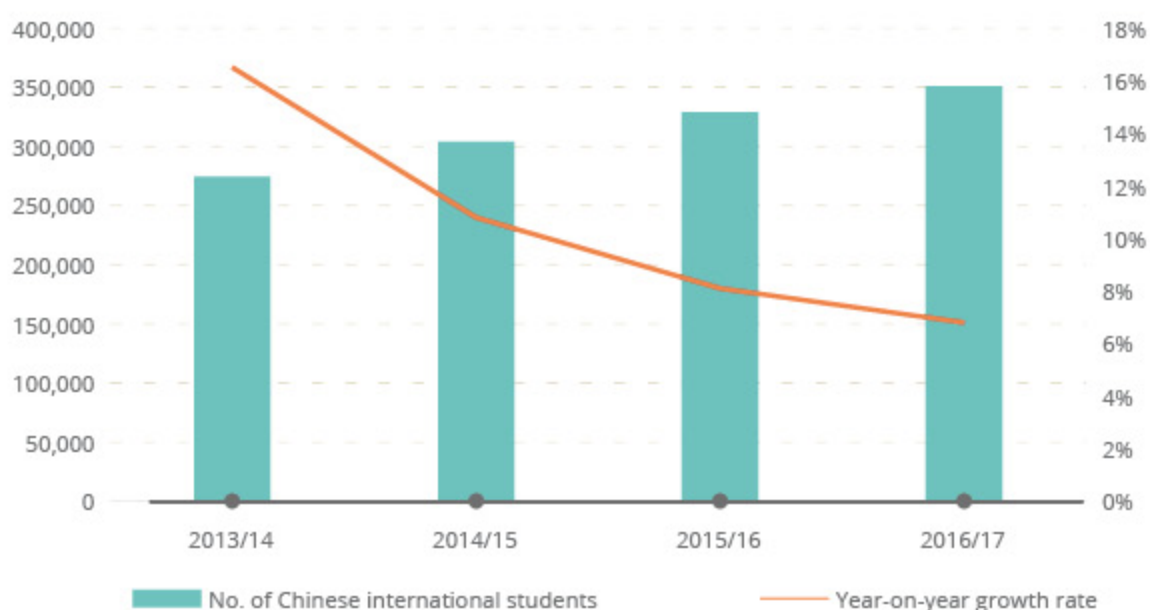
USA

Chinese students have been a huge boon to the American economy for nearly a decade. As of 2016, there were 350,000 Chinese students enrolled in American universities, making up nearly one-third of foreign students. According to the US Department of Commerce, these students contribute more than US\$12 billion to the US economy annually.

Chinese students also make up a highly significant proportion of international secondary school students – according to the Institute of International Education (IIE), a total of 81,981 Chinese students went to the US to attend secondary schools, making up 42% of international high school students.³³

The US has been the most popular destination for Chinese international students for many years, largely due to the strong reputation of its institutions, but while the numbers of Chinese students enrolled in the US continues to rise year on year, the growth rate has been steadily declining.

Chinese international students enrolled in the US³⁴



³³ "Report on Chinese Students' Overseas Study", New Oriental Vision Overseas, 2018.

³⁴ "Number of college and university students from China in the United States from academic year 2007/08 to 2017/18", Statista [<https://www.statista.com/statistics/372900/number-of-chinese-students-that-study-in-the-us/>]

This could be due to several reasons, including rising tuition fees, making it less affordable, and rising admission standards, making it more difficult for Chinese students to get in. The high incidence of gun violence means safety is also a key concern.³⁵

But there's no denying the Trump Effect. Trump's travel ban, while not impacting Chinese nationals directly, has no doubt created a perception that the US is far less welcoming to foreigners than it once was. There are also reports that more Chinese students are being denied visas,³⁶ and in May 2018, the administration introduced limits to visas issued to Chinese students and researchers in specific industries, including robotics, aviation and high-tech manufacturing, affecting how long they are able to stay in the country.³⁷

The dwindling appeal of the USA as a study destination for Chinese students is already having a marked effect on American institutions – in a recent survey conducted by the American Association of Collegiate Registrars and Admissions Officers (AACRAO), of the 250 US institutions that participated, 25% saw declines in applications from Chinese undergraduate students and 32% saw declines from graduate students.³⁸ If American institutions

wish to reverse this worrying trend, they may perhaps want to make their institution appear more safe, welcoming and accommodating to Chinese students (for example, by having a Chinese-language website or developing Chinese-language resources), and underline any orientation or integration programs that help Chinese students in particular get situated in their new environment.

As might be expected, the 2018 top 20 list is heavily populated by Ivy League colleges, such as Harvard, Columbia and Yale, no doubt due to their stellar international reputations. Two institutions have also made their way to the top 20 list for the first time in 2018: Rice University, in Houston, Texas, and the California Institute of Technology (or 'Caltech') in Pasadena, California.

35 "How are Chinese students at US universities faring in 2018?", SI News, 29 Jan 2018. [<https://www.studyinternational.com/news/china-student-us-2018/>]

36 Marisa Lee, "Chinese students increasingly find US a hostile place to study", Asia Sentinel, 18 Apr 2018. [<https://www.asiasentinel.com/society/chinese-students-find-usa-hostile-place-study/>]

37 "Report: US introduces restrictions for some Chinese visas", ICEF Monitor, 30 May 2018. [<http://monitor.icef.com/2018/05/report-us-introduces-restrictions-for-some-chinese-visas/>]

38 Marisa Lee, "Chinese students increasingly find US a hostile place to study", 2018.

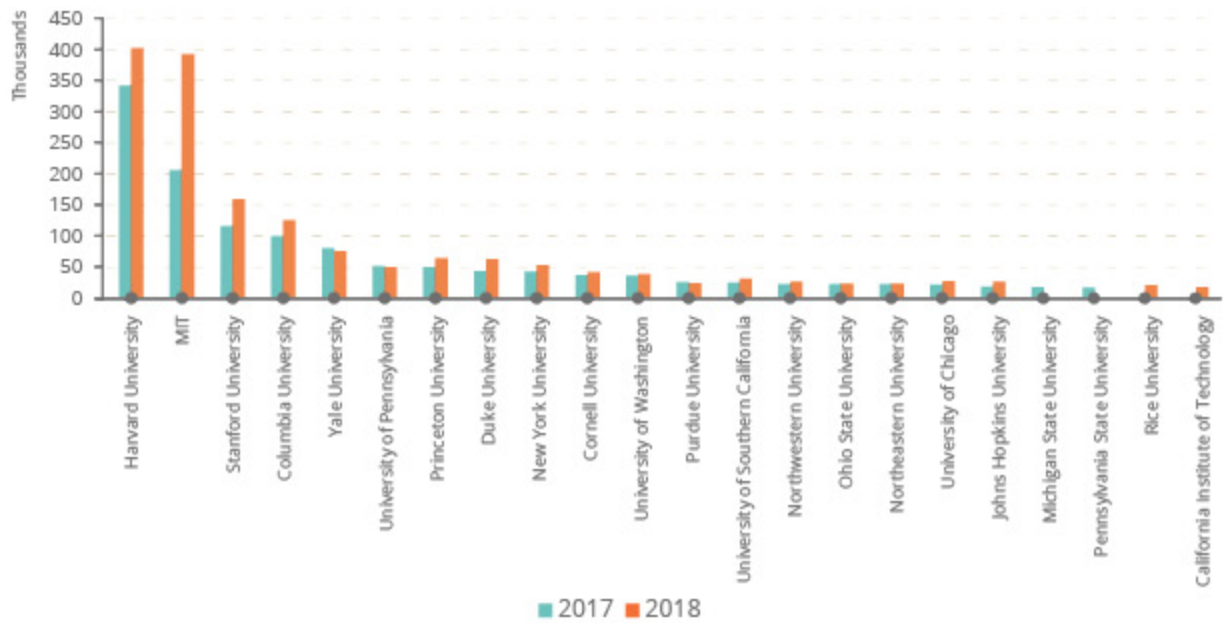


Top 20 searched for universities in the US, 2017 versus 2018

2018 ranking by search volume	Change in search popularity position compared to 2017
1. Northeastern University	-
2. Northwestern University	-
3. Harvard University	-
4. Massachusetts Institute of Technology	-
5. Stanford University	-
6. Columbia University	-
7. Yale University	-
8. Princeton University	+1
9. Duke University	+1
10. New York University	+1
11. University of Pennsylvania	-3
12. Cornell University	-
13. University of Washington	-
14. University of Southern California	+1
15. University of Chicago	+2
16. Johns Hopkins University	+2
17. Purdue University	-3
18. Ohio State University	-2
19. Rice University	Not previously in top 20
20. California Institute of Technology	Not previously in top 20



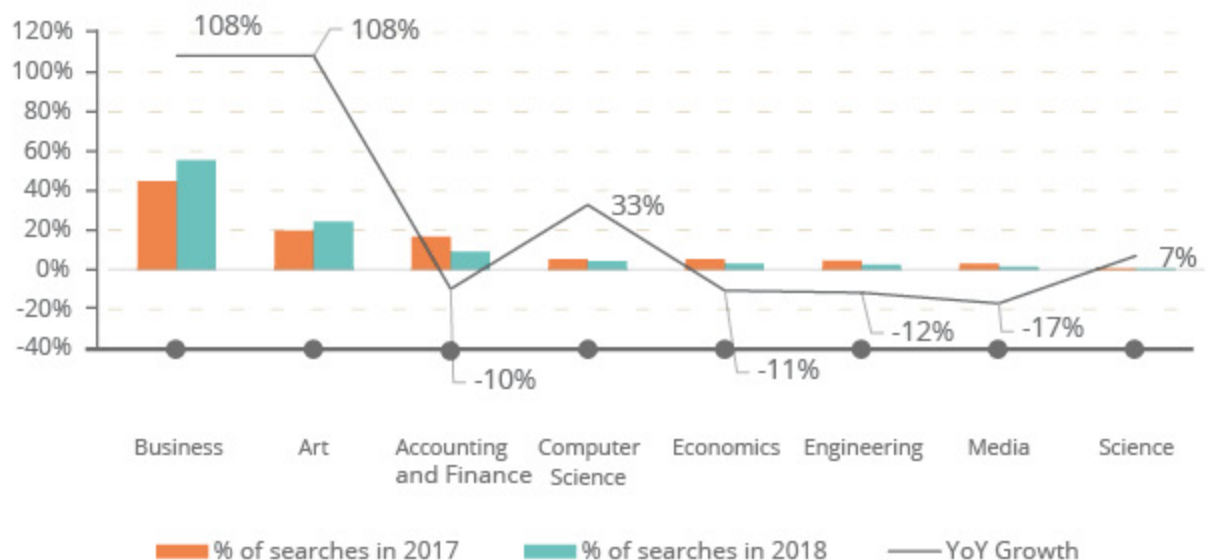
Search volume for top 20 universities in the US



Top searched for fields of study in the US

Business (55%) and Arts (24%) were by far the most popular fields of study for Chinese students looking to pursue an education in the US. Both subjects also experienced the biggest surge in overall search volume in 2018, up by 108% each when compared to 2017. Even though the Computer Sciences are marginally less popular than other subjects, the field still gained 33% in relevant search requests, indicating a growing demand.

Popular fields of study in the US by % of search requests, 2017 & 2018



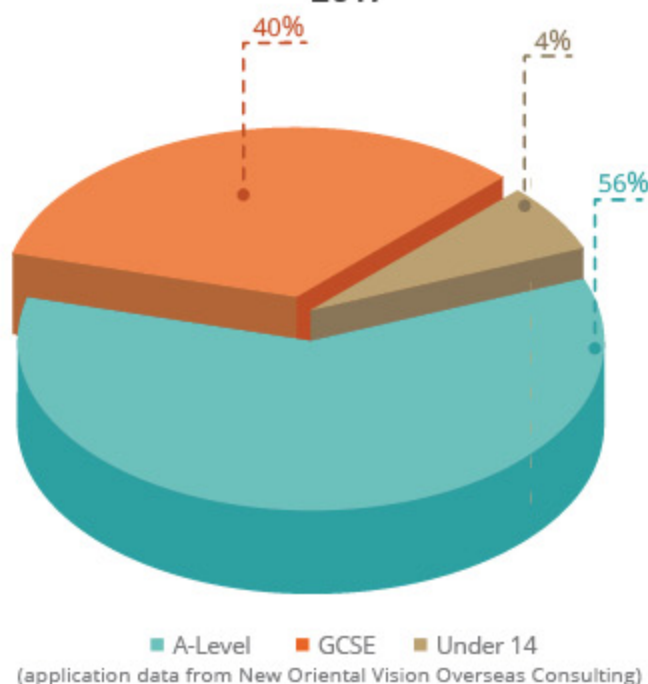
On the other hand, interest for Accounting and Finance (-10%), Economics (-11%), Engineering (-12%) and Media (-17%) is on a decline.

UK

As with the US, Chinese students represent the majority of foreign student enrolments in the UK, making up around 20% of international students. This makes them a vital demographic. According to Universities UK, Chinese students and their visitors generate around £5 billion (US\$6.5 billion) for the UK economy through on- and off-campus spending.³⁹

Parents are also sending their children to the UK for schooling at younger ages, attracted by its rigorous traditions, profound cultural heritage and a reputation for “high breeding”. The vast majority of young Chinese students are enrolled in high school. Of the Chinese primary and high school students in UK institutions, 56% of them are enrolled in Years 12 and 13 (for A-levels) and 40% of them are enrolled in Years 7–11. Only 4% start their British education in primary school, reflecting a growing pragmatism among Chinese parents. (While the view is often “the earlier, the better”, the significant costs of British educational institutions is likely making parents think twice about just how early their children should start.)⁴⁰

level distribution of elementary and secondary school enrolment in the UK in 2017



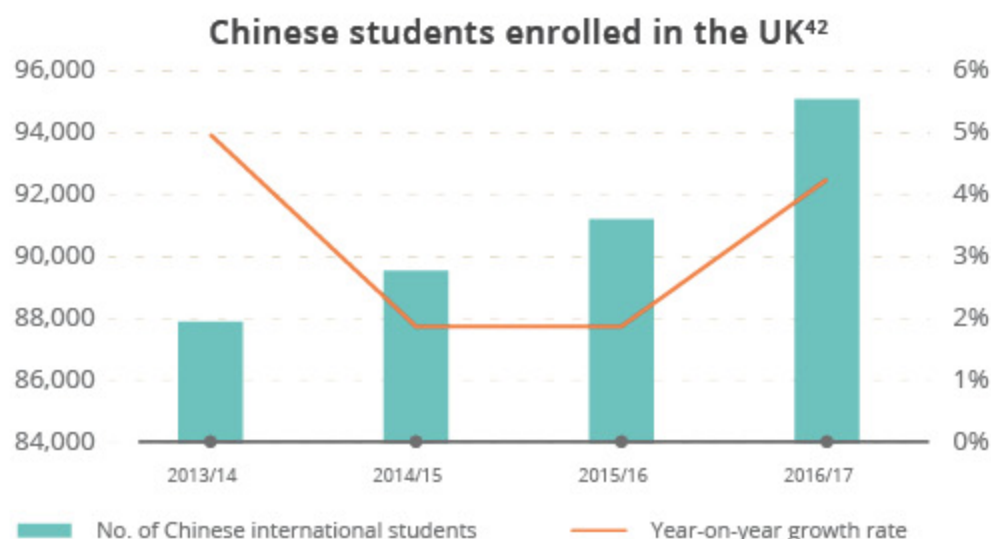
Despite the high quality of British education, however, the UK’s competitiveness in the global market appears to be waning. Foreign enrolments in British higher education have been essentially stagnant since 2010–11, while other destinations – notably Canada and Australia – have seen large gains in international numbers over the same period. Indeed, enrolments of Chinese international students in

³⁹ “Higher Education May 2017: International Facts and Figures”, Universities UK International, 2017. [https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/International/International_Facts_and_Figures_2017.pdf]

⁴⁰ “Report on Chinese Students’ Overseas Study”, New Oriental Vision Overseas, 2018.

Canada and Australia have now outstripped the UK, which has gone from the 2nd most-preferred destination to the 4th. Commentators have attributed this stagnation to migrant reforms, including visa restrictions and changes to post-study work opportunities, as well as concerns about Brexit, which is viewed as being fuelled by anti-immigrant sentiment.⁴¹

The good news is that Chinese student enrolment may be starting to pick up — as indicated by the strong increase in search volume for learning institutions in the UK. However, universities hoping to compete with fast-growing markets like Canada and Australia, they may want to take a more aggressive approach in marketing to this important demographic. Marketers at UK institutions need to consider how they communicate the fact that many international students have very positive experiences on their campuses



– according to Universities UK, in 2015–16, undergraduates and postgraduates ranked the UK as the destination they were most likely to recommend.⁴³ They may also like to look at ways to make Chinese students feel more welcome, as well as draw focus to any post-study work opportunities the institution offers.

Unsurprisingly, Oxford and Cambridge universities take out the top two spots in terms of the most popular institutions in 2018. Interestingly, The Open University takes out the number-three spot for the second year in a row, indicating a strong demand for distance learning. Brunel University London has shot to the number-four despite not being in the top 20 list in 2017, while the University of Huddersfield and Nottingham Trent University are also newcomers. Coventry University has also risen 11 spots, from no. 17 to no. 6.

⁴¹ Viggo Stacey, "UK: Chinese student recruitment weaker than expected", The PIE News, 27 Oct 2017. [<https://thepienews.com/news/uk-chinese-student-recruitment-poorer-than-expected/>]

⁴² "Top ten non-European Union countries of domicile in 2016/17 for HE student enrolments 2012/13 and 2016/17", HESA [<https://www.hesa.ac.uk/data-and-analysis/sfr247/figure-11>]

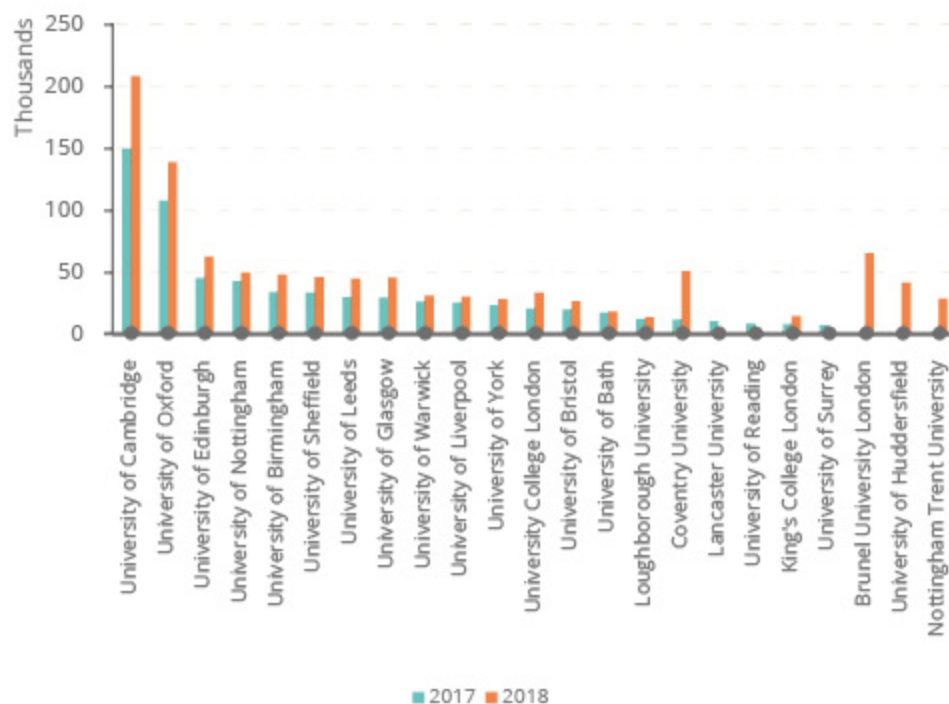
⁴³ International Student Barometer, i-graduate, 2015 and 2016.

Top 20 searched for universities in the UK



2018 ranking by search volume	Change in search popularity position compared to 2017
1. University of Cambridge	-
2. University of Oxford	-
3. The Open University	-
4. Brunel University London	Not previously in top 20
5. University of Edinburgh	-1
6. Coventry University	+11
7. University of Nottingham	-2
8. University of Birmingham	-2
9. University of Sheffield	-2
10. University of Glasgow	-1
11. University of Leeds	-3
12. University of Huddersfield	Not previously in top 20
13. University College London	-
14. University of Warwick	-4
15. University of Liverpool	-4
16. Nottingham Trent University	Not previously in top 20
17. University of York	-5
18. University of Bristol	-4
19. University of Bath	-4
20. King's College London	-

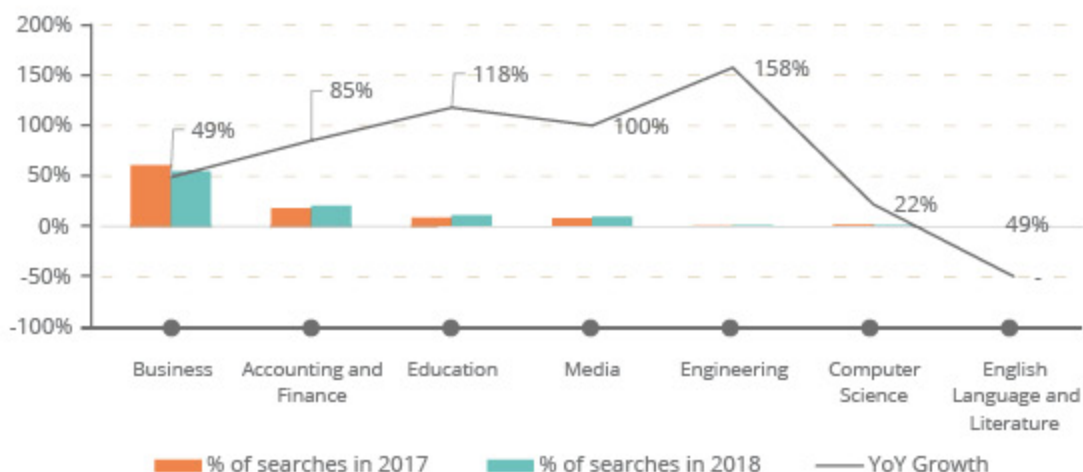
Search volume for top 20 universities in the UK, 2017 & 2018



Top searched for fields of study in the UK

While Business (55%) and Accounting and Finance (21%) remain the most popular fields of study in the UK, other subjects are showing some impressive growth. Demand for Engineering is up by 158% - albeit starting from a low base - while interest in Education has increased by 118% in 2018 compared to 2017.

Popular fields of study in the UK by % of search requests, 2017 & 2018

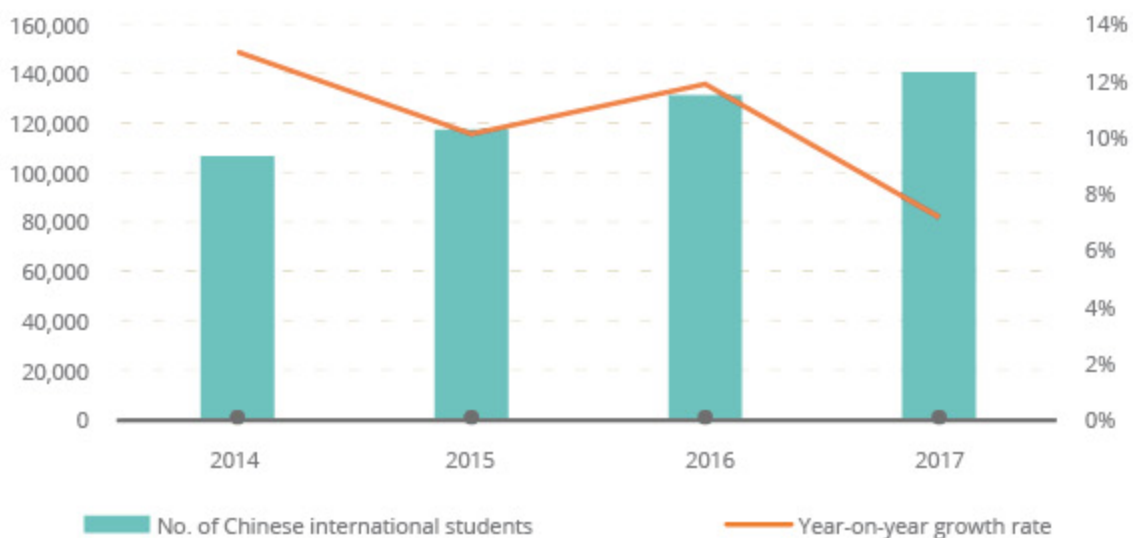


In fact, the only subject experiencing a decline in search volume is English Language and Literature (down by 49%). However, search volume for terms related to this subject has always been relatively low compared to other fields of study in the UK that are popular amongst Chinese students.

Canada

As in the US and UK, Chinese students are a highly significant demographic in education, making up 32% of the international student cohort, and contributing around C\$3.7 billion (US\$ 2.8 billion) to the economy annually. But while enrolments of Chinese international students in the US and the UK have been slowing, in Canada they have been steadily growing, with Canada experiencing an average year-on-year growth rate of around 10% from 2013–17.⁴⁴

Chinese international students enrolled in Canada⁴⁵



Offering a welcoming environment for immigrants, relatively low tuition fees (especially when compared to the US), a favourable exchange rate, a stellar reputation for safety and attractive post-study work and permanent residency opportunities, Canada is becoming increasingly attractive to Chinese students. Indeed, while the US appears to be putting up roadblocks

to Chinese students in the way of visa application difficulties, Canada in contrast is tearing barriers down in order to make the process easier – in 2017, Immigration, Refugees and Citizenship Canada (IRCC) opened seven new visa application centres in China in order to support the growing demand for visas.⁴⁶

While continuing to focus on the many positives of Canada, Canadian institutions should also be focused on communicating the reputation and quality of its institutions, which has been shown to be of particular importance to Chinese students.

⁴⁴ "Study permit holders with a valid permit on December 31st by country of citizenship, 2000–2017", Immigration, Refugees and Citizenship Canada, Government of Canada.

⁴⁵ Immigration, Refugees and Citizenship Canada (IRCC)

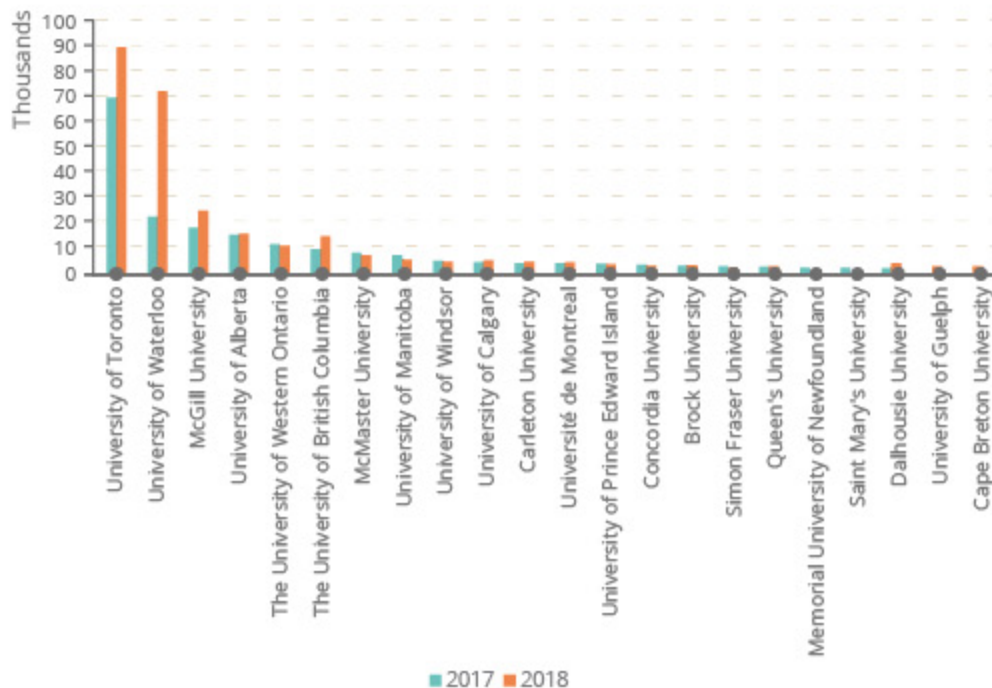
⁴⁶ Kerrie Kennedy, "Canada: Seven new visa centres opening in China to meet demand", The PIE News, 24 Nov 2017. [<https://thepienews.com/news/canada-seven-new-visa-centres-opening-china/>]

In 2018, there was little movement in terms of the top 20 most popular institutions, with the University of Toronto, the University of Waterloo and McGill University again taking out the top three spots. Dalhousie University has also managed to rise 3 spots from the previous year to no. 17. Cape Breton University and the University of Guelph have also made it onto the top 20 list this year, taking out no. 19 and no. 20 respectively.

Top 20 searched for universities in Canada

2018 ranking by search volume	Change in search popularity position compared to 2017
1. University of Toronto	-
2. University of Waterloo	-
3. McGill University	-
4. University of Alberta	-
5. The University of British Columbia	+1
6. The University of Western Ontario	-1
7. McMaster University	-
8. University of Manitoba	-
9. University of Calgary	+1
10. University of Windsor	-1
11. Carleton University	-
12. Université de Montreal	-
13. University of Prince Edward Island	-
14. Brock University	+1
15. Concordia University	-1
16. Queen's University	+1
17. Dalhousie University	+3
18. Simon Fraser University	-2
19. Cape Breton University	Not previously in top 20
20. University of Guelph	Not previously in top 20

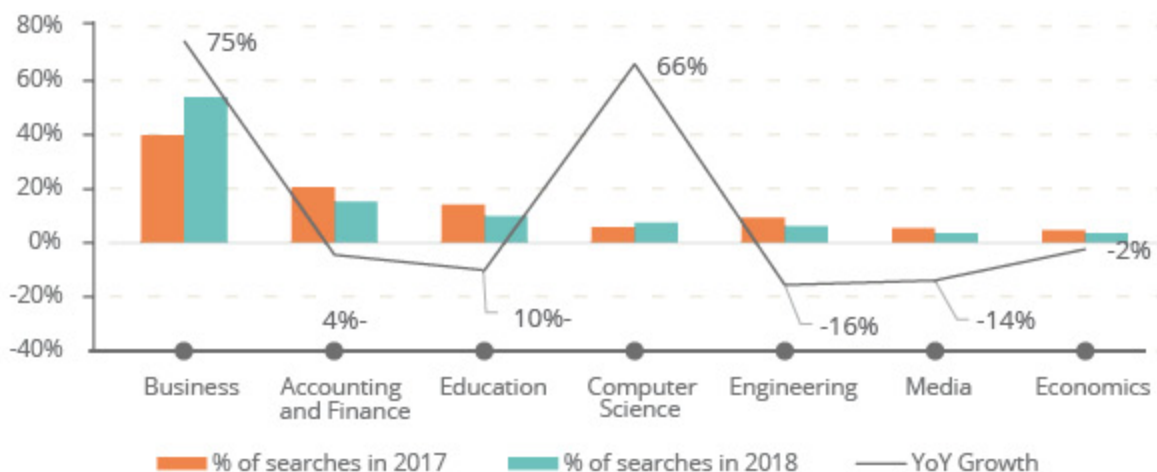
Search volume for top 20 universities in Canada, 2017 & 2018



Top searched for fields of study in Canada

Business is not only taking the top spot in terms of overall demand for studying in Canada, with 54% of all search requests relating to this field, it's also showing an impressive 75% growth in search queries year on year.

Popular fields of study in Canada by % of search requests, 2017 & 2018



While Accounting and Finance (15%), as well as Education (10%) are still popular, the subjects could soon be overtaken by the Computer Sciences (8%) which have experienced a 66% year on year increase.

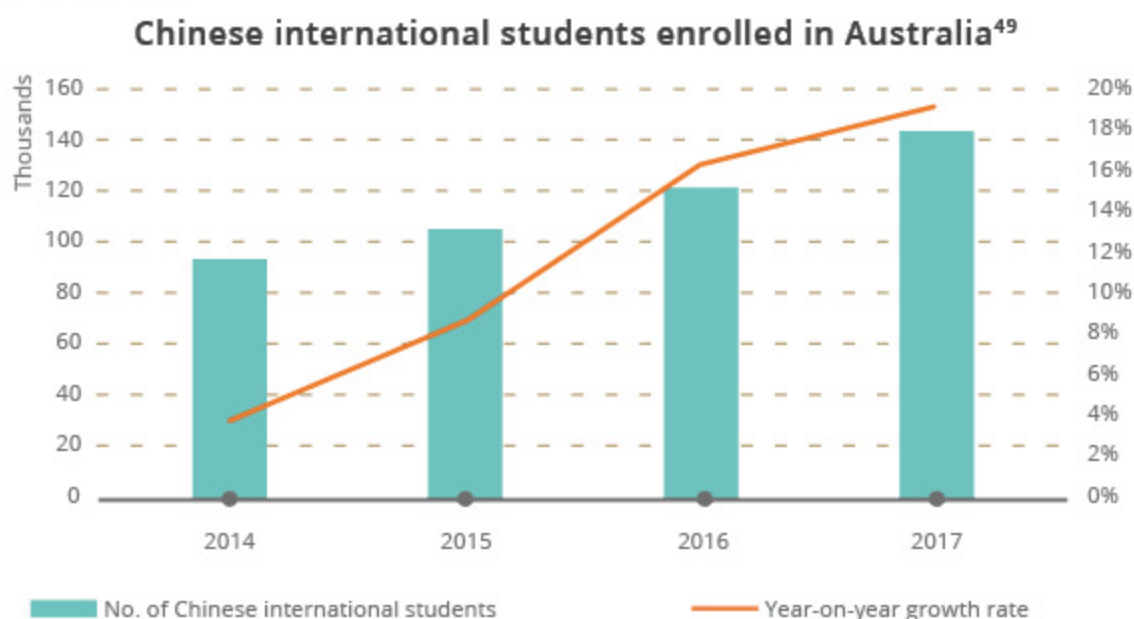
Australia

International students make a highly significant contribution to the Australian economy, with their fees and expenses representing Australia's third largest export, behind iron ore and coal. In 2017, international students generated a record A\$32 billion (US\$22.7 billion), around \$10 billion (US\$7 billion) of which came from Chinese international students, who make up around 30% of all international student enrolments.

Australia has experienced stunning year-on-year growth for several years now – in 2017, there were a whopping 133,540 new enrolments from Chinese students, representing a growth of 19% on the previous year.⁴⁷

As in other destinations, Australia is also seeing a growth in the number of Chinese primary and high school international students. According to data from the Australian Trade and Investment Commission, in 2017 there were around 13,500 international school students from China, representing about 50% of the entire international school student population.⁴⁸

This represents a growth of 30% since 2015 – likely a direct result of changes made to the student visa in 2016, which allows international students from age 6 to apply for them. Guardian visas were also made more accessible for those accompanying these students. This has made Australian education far more accessible for younger students.

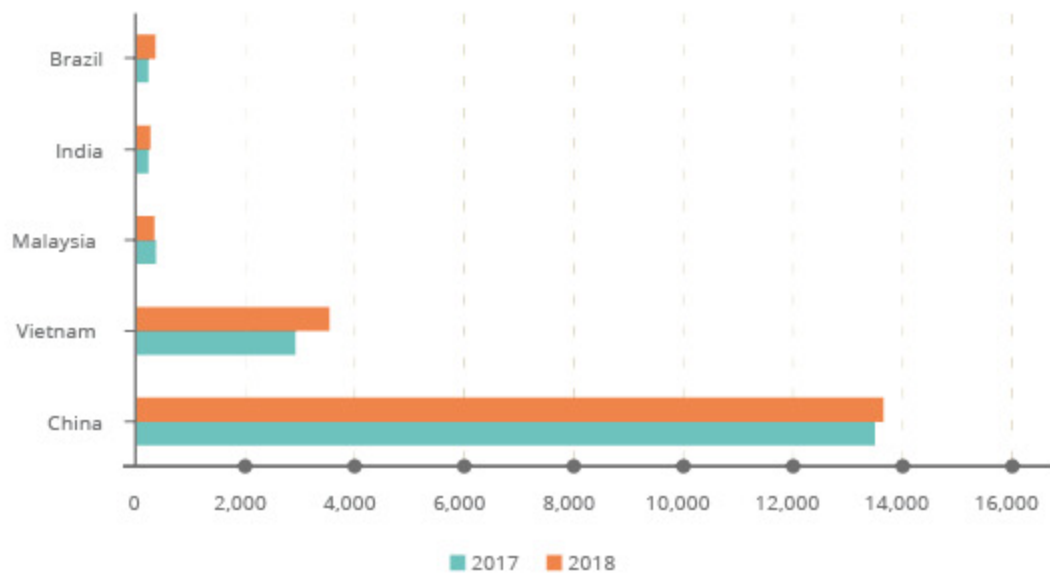


⁴⁷ "End of Year Summary of International Student Enrolment Data – Australia – 2017", Department of Education and Training, Australian Government.

⁴⁸ Education data, Australian Trade and Investment Commission, Australian Government, accessed 14 Feb 2018. [<https://www.austrade.gov.au/Australian/Education/Education-Data/Current-data/pivot-tables>]

⁴⁹ Austrade

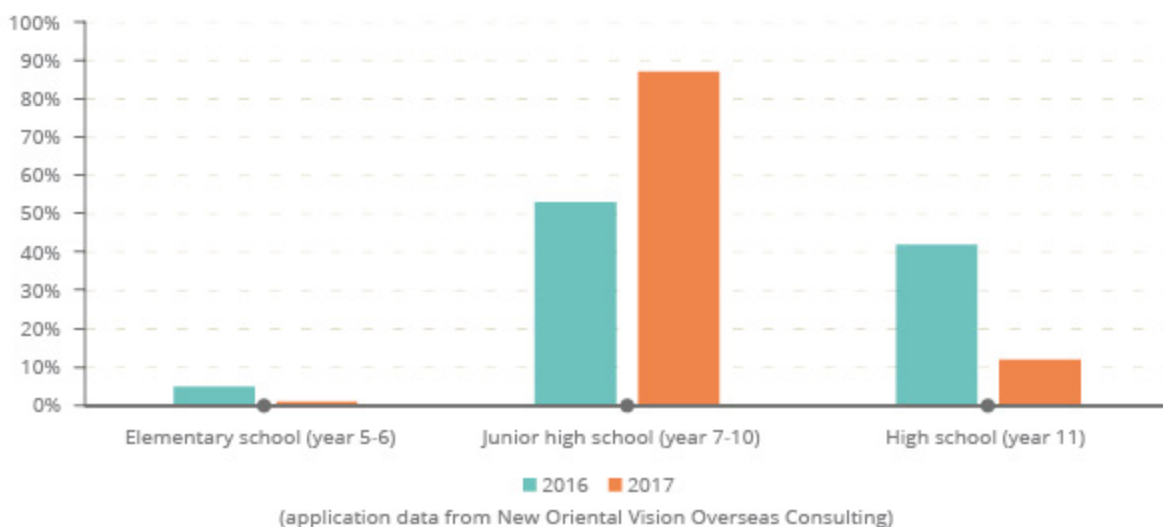
International student enrolments in Australian primary and secondary schools



Of these students, 87% opt to start in Years 7–10, which is a significant increase from the previous year, where 53% of students enrolled at this stage. Similarly, the number of students who enrolled in Years 11 and 12 dropped significantly in 2017 compared to 2016. This may be due in part to the vast differences in the education systems in China and Australia, with Chinese

students finding it difficult to adapt to the Australian classroom environment in a relatively short period of time. Parents are therefore opting to send their children to Australia earlier in order to give them more time to acclimatise, therefore increasing their chances of performing well in the higher education entrance exams at the end of Year 12.⁵⁰

Grade distribution of Australian secondary school application in 2016/17



Similarly to Canada, these students are drawn by the high quality of the education, the affordability of study costs (which are lower than the US and the UK), a more

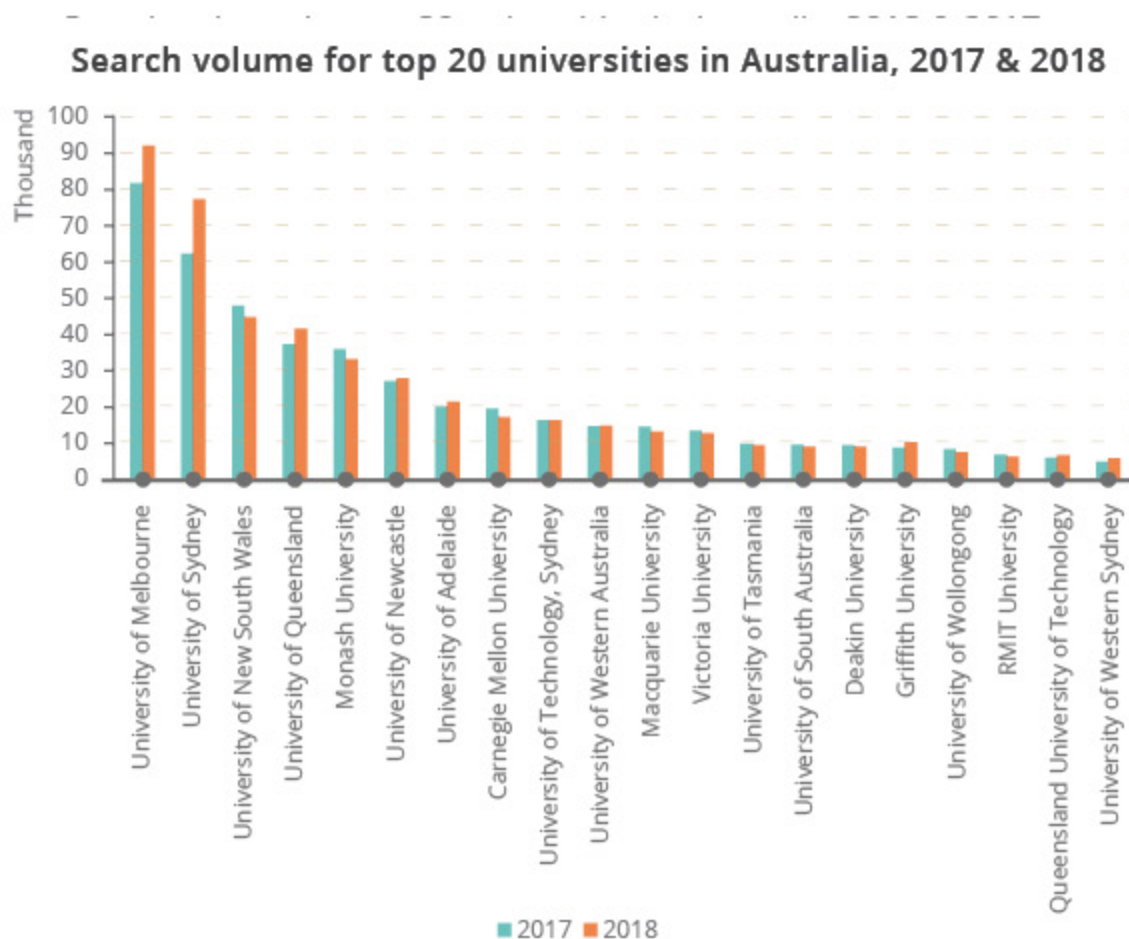
50 "Report on Chinese Students' Overseas Study", New Oriental Vision Overseas, 2018.

straightforward visa application process, the possibility of post-study work and permanent residency, the safe environment and the open and welcoming culture. No doubt the country's relative proximity to China also plays a factor.

In terms of top universities, there's been little movement at the top of the scale, with the University of Melbourne, the University of Sydney and the University of New South Wales being the three most popular institutions two years in row. Australian marketers need to continue to play to their strengths while being

Top 20 searched for universities in Australia

2018 ranking by search volume	Change in search popularity position compared to 2017
1. University of Melbourne	-
2. University of Sydney	-
3. University of New South Wales	-
4. University of Queensland	-
5. Monash University	-
6. University of Newcastle	-
7. University of Adelaide	-
8. Carnegie Mellon University	-
9. University of Technology, Sydney	-
10. University of Western Australia	-
11. Macquarie University	-
12. Victoria University	-
13. Griffith University	+3
14. University of Tasmania	-1
15. Deakin University	-
16. University of South Australia	-2
17. University of Wollongong	-
18. Queensland University of Technology	+1
19. RMIT University	-1
20. University of Western Sydney	-



mindful of factors as such rising tuition fees, government budget cuts that can cause university rankings to drop, and political tensions between Australia and China, all of which could potentially deter students from choosing Australia as their preferred destination.

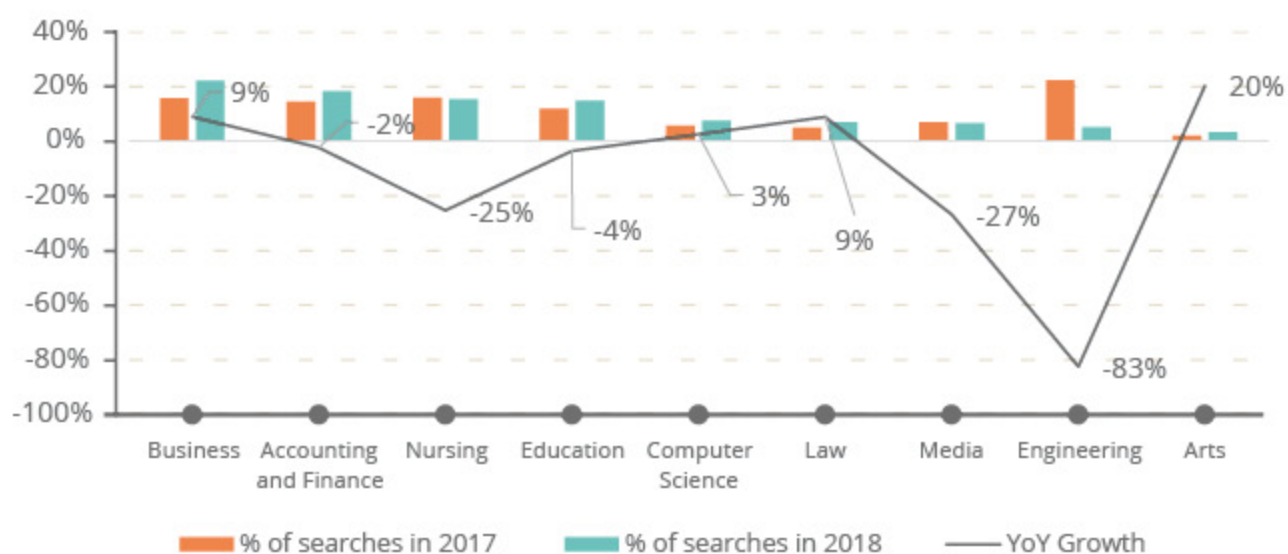
Top searched for fields of study in Australia

Business (22%), Accounting and Finance (18%), Nursing (15%) and Education (15%) are the four most popular fields of study for Chinese students looking for overseas education in Australia.

While the demand gap between these subjects is nowhere near as large as between the top performers in other study destinations, Business is the only subject within this group that has seen an increase in related search queries year on year (9% gain).

While Nursing degrees have dropped by 25% in search volume popularity from 2017 to 2018, Engineering has seen the most dramatic change (83% drop year on year). The subject had been the by far the most searched for degree in Australia with 22% of search queries relating this field of study and is now in second last position with only 5% of all searches relating to it.

Popular fields of study in Australia by %of search requests, 2017 & 2018



TRENDS IN ELICOS: HOW ENGLISH LANGUAGE COURSE PROVIDERS CAN MAXIMISE THE OPPORTUNITY IN CHINA

While this paper is focused largely on Chinese international higher education students, there is also significant scope for ELICOS (English Language Intensive Courses for Overseas Students) institutions. In Australia in 2017, for example, there were around 45,000 ELICOS students from China, making up about 25% of all ELICOS students. ELICOS is incredibly important to Chinese students in particular, as they often have to meet English proficiency standards before they can commence with their studies.

But while the majority of ELICOS students do go on to undertake higher education, there may be other areas of opportunity that ELICOS providers are overlooking.

To find out more about the latest ELICOS trends in the Chinese market, and how ELICOS education providers can take advantage of these, we

spoke to the CEO of English Australia, Brett Blacker. (English Australia is the national peak body for the English language teaching sector, whose members include independent ELICOS providers, vocational ELICOS providers, TAFE colleges and universities.) Here are some of his insights.

ELICOS numbers are steadily increasing

Australia remains a highly popular destination for Chinese university students, currently making up around 38% of the international student cohort. What may be less widely known, however, is that the numbers are also increasing in other educational sectors. In vocational education, for example, China is now the number-three source market, making up around 9% of the cohort as of November 2018 – this represents a year-on-year growth of 10%. China is also now the number-one source of international students for the primary and secondary school sector, and while the numbers are relatively small, particularly compared to the higher education numbers – as of November 2018, Australia was hosting around 5,800 Chinese international school students – this number is still significantly higher than the number-two destination, Vietnam (1,700 students).



This, of course, has a knock-on effect for ELICOS providers, as Chinese students must have a certain level of English language proficiency before starting their studies – around 70% of ELICOS students will go on to other forms of study, whether it be higher education, vocational training or school (only 6% of Chinese students solely took ELICOS courses). From 2016 to 2017, the number of ELICOS students from China grew by around 15%. That being said, the numbers aren't growing at quite the same rate, says Blacker.

“One thing that is interesting to observe in the latest data is that the rate of growth in those higher education and vocational sectors is actually higher than in ELICOS. This would indicate that students are improving their language proficiency either offshore or through other channels before commencing their studies in Australia.”

“Executive” ELICOS

This tendency for students to work on their language proficiency prior to going overseas for schooling means ELICOS providers may need to start looking to other market segments. One key area of opportunity, says Blacker, is offering short-term (i.e. one to four weeks) “executive” ELICOS courses that blend tourism and language education. These would be aimed at young, affluent professionals wishing to boost their language skills and increase their employability, while also gaining cultural and travel experiences.

It's important to remember that this demographic prefers to travel around the Spring Festival (Chinese New Year) when they tend to be given several days off, so ELICOS providers should time their courses accordingly.



Transnational ELICOS study

English language courses within China are becoming increasingly sophisticated, with students paying high fees to participate in highly individualised courses, either one-on-one or in small groups, which blend online and offline learning. In order to compete, ELICOS providers need to consider how they can make their packages more attractive, and how they can maximise their opportunities offshore as well as onshore.

Another key trend is the rise of transnational education – many higher education institutions, for example, are co-delivering some of their English language courses in China, helping to ensure that students' language proficiency is already up to par before they commence their studies. Another area of opportunity worth exploring is teacher training, for which markets like the US, the UK and Australia are well

"It still remains a really valuable part of our framework, as we look to make sure that we're not just recruiting students purely onshore, but we are looking at enriching our relationships offshore by co-delivery and other modes," says Blacker.

respected. Again, a transnational education would be highly desirable for this demographic, as it gives them the best of both worlds: they can remain close to family and friends and seek local employment, but also progress their language and teaching skills and have an international experience.



CASE STUDY: UNE CRACKS NEW CHINESE STUDENT RECRUITMENT CHANNELS WITH SINORBIS

Responsible for international marketing at the University of New England in Armidale, Chris Daly, Marketing Manager – UNE International (UNEI), identified early that China was a strategic focus for growth. UNEI Director Ingrid Elliston encouraged new methods to break into a highly competitive market.



And with UNE's strength in Business, Law and IT, a large Chinese community plus a family campus feel, the International team knew UNE had all the ingredients to make it an attractive option for Chinese students wanting a study experience outside a major city.

The challenge: Reaching Chinese student in a unique digital ecosystem

UNE traditionally recruited Chinese students through pathway partners, but UNEI recognised the key to growth was attracting direct Chinese applications by raising UNE's profile and building trust with local Chinese agents. This required creating a digital presence and conversation within China.

Initially UNE's team tried to set up Chinese websites and social media accounts by themselves but, in Daly's words, "these attempts kept falling over. We tried to set up our own Chinese website, but ended up faltering at the last hurdle. It simply wasn't visible in China."

Applying for a verified WeChat Official account also turned out to be a confusing process. “We were told we needed a local address inside China and we weren’t willing to set up an office there, so for the WeChat part we didn’t even get to the application stage on our own,” says Daly. “So given all these roadblocks, we decided that we needed a reliable partner to support our China marketing plans.” Plus: the internal feedback has been nothing short of amazing. “We have shown the platform and our site to the business school and a member of the marketing faculty and to see something as practical and effective as Sinorbis, it blew them away.”

Solution: Easy-to-use software and a reliable partner

Within weeks, Sinorbis had created a Chinese website that met local user preferences and could be loaded fast behind the Great Firewall. And UNE’s digital presence in China soon started to trigger the first results.

“We received applications from Chinese students who first learned about UNE through our new website within the first year of launching. That’s much sooner than we would have expected,” states Daly.

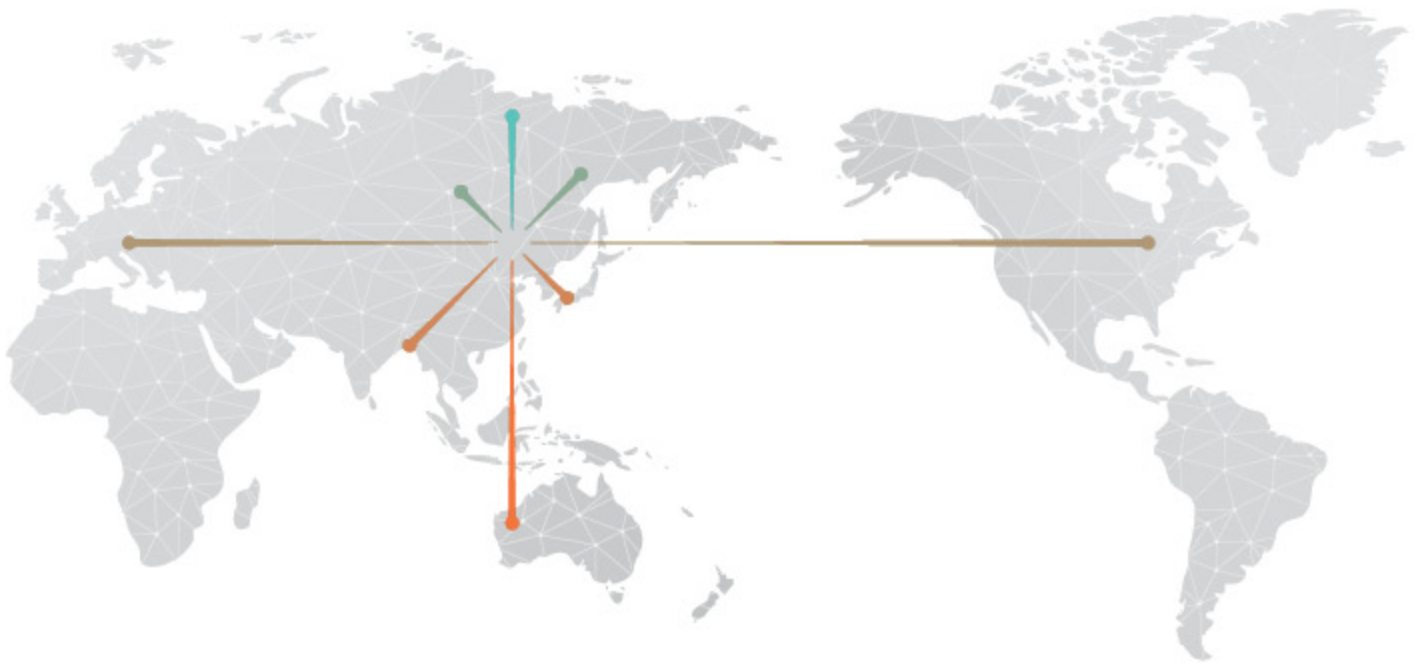
An accessible user interface and the ability to unlock the Chinese marketplace with the help of the Sinorbis team has made Daly’s life easier.

As a Tencent partner, Sinorbis was also able to help UNE to apply for verified WeChat Universal account. “Working with the Sinorbis team on this has made the process a whole lot smoother. Without them, I am sure we would have missed something or things would have got lost in translation.”


Looking forward, UNE plans to capitalise on their solid new Chinese digital marketing foundations. They are looking to embark on partner advertising and add more content to their website, while starting to build their WeChat presence to engage and recruit more students once their account application has been approved.

Results

- First student applications triggered by new Chinese website
- Quick, simple implementation. Fast to market.
- WeChat account set up and promoting content to a local Chinese community



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