2023

Global Education Alliance
We Navigate

MARKET DIGEST REPORT

Insights, Findings & Opportunities 2024

Conducted in December 2022

Contents

Introduction

In this, the 6th edition of our GEA Digest, we are excited to report on the progress of applications and market sentiment under the 'most normal' conditions in which the report has been produced.

Having started in May 2021, this is the first edition in which the external environment (pandemic, borders, modes of study) is almost as it was in 2019. Of course, the full resumption of travel options to all major study destinations and the ability of our academic partners to return to market visits (we're nearly there with China) does not mean nothing has changed.

As ever we update, transparently, on our own GEA applications pipeline and where the opportunities and challenges are. This will be the first full year of operations in South-East Asia where activity and bookings are already at the level of our final performance last year. In Taiwan and Hong Kong it will be important to maximize conversion – potentially through more face to face events than were possible in 2020-2022. The Hong Kong DSE 'peak season' should return to the same level of prominence as in the past. Of course, the largest number of applicants are still from mainland China where we see the real strength as having come after the re-opening in January. That also points to potentially later conversion peaks. It will be even more important to look at key factors which will influence student decisions. Many of you will be aware of the traditional focus in China on both postgraduate programmes and institutions within the 'QS Top 100'. While we still see applications weighed toward those areas, we are pleased to see the bespoke plans built with partners who want to prioritize certain subject areas and levels is paying off.

In this edition we also focus on what the expectations of students and counsellors are. Interestingly these expectations have almost all been reactively set rather than communicated. Nevertheless, this should allow you, our academic partners, to be clear on the steps you can take to exceed what the market is used to. We also look at the key drivers which will affect how counsellors and students make choices.

Beneath this overall report of course lies an individual picture for each institution. The Digest will allow you to compare what you see in your own data with this wider snapshot which shows –

- Applications and deposits from mainland China growing healthily vs 2022. This is driven by applications made after the lifting of pandemic restrictions in January 2023.
- For partners who want to do so, we have been able to drive specific priorities in the pipeline, not just by subject and level but also by focusing on the right experience for the right student rather than just ranking.
- In Hong Kong and in Taiwan, success may well depend on institutions ability to communicate effectively and in a timely manner on the issues applicants care about.
- There are still ample opportunities to grow in Southeast Asia.
- Expectations re turnaround time have been developed reactively through experience. Very few institutions have communicated how long decisions at each stage should take.
- If offers are going out within a week, institutions are doing well. If it's taking more than 4 weeks there should be concern. If you are in the middle of these time frames, it will be important to stand out in other ways. As we head into the visa application season, the same will apply but on a tighter timescale.
- Accommodation is a concern to many students and most see institutions as responsible, but there may be options beyond providing it directly.

The key takeaways are –

- Be clear with counsellors and the market where their expectations should be re. each stage of the application process – and be aware that if you can't meet the timelines you set, there is material risk.
- Scholarships are a driver of behavior but only if counsellors and students know about them.
- Accommodation has always been important, but the challenges of last year mean counsellors and families will require more certainty ahead of key intakes in 2023. Not being able to provide this will likely lead to delays in students committing their choices.

Finally, we see this Digest as the starting point for discussions and not as an example of perfect statistical analysis. It's what we use to drive our decisions and we share it in that spirit. We look forward to individual discussions with you as follow-up and hope to see many of you in market in the weeks and months ahead.

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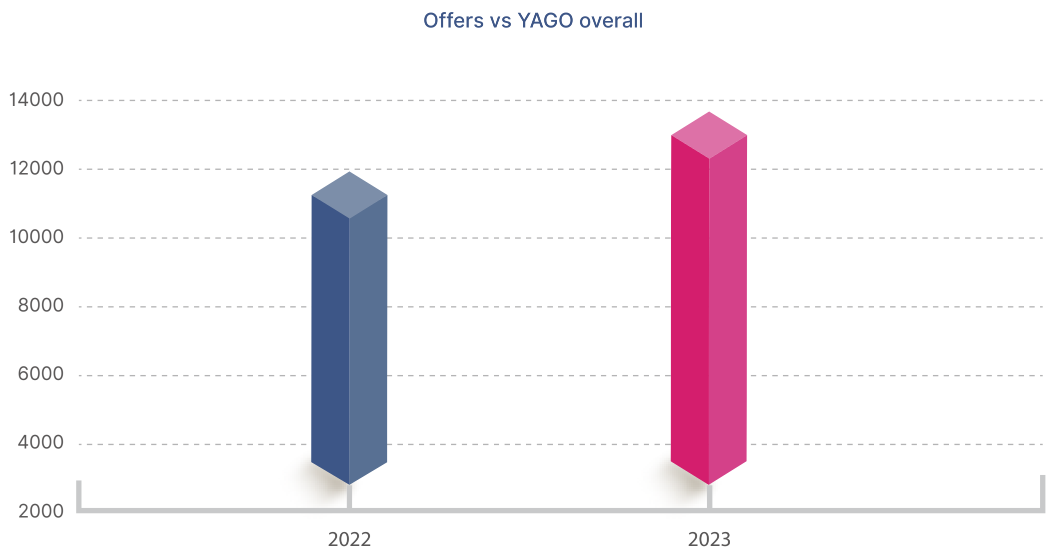
Numbers

Overall, our offers are up roughly 13% vs the same point last year. This reflects a similar rise in the number of applicants with the increase in the number of applications each student makes (from China) settling after the rise we saw and reported on in our previous Digest. Our focus from here is both on conversion and on the generation of 'late' offers. At this point last year, around 70% of our total offers for September had been generated.



(YAGO = Year Ago, same date)

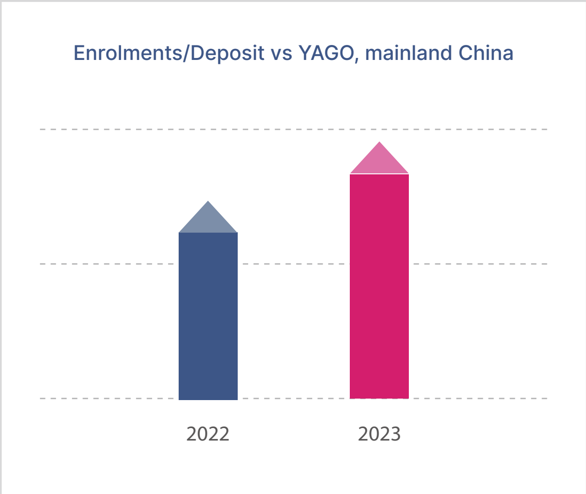
Within the above global numbers, the largest individual contributor remains Mainland China. Here, the most significant issue is the date of the pipeline build.

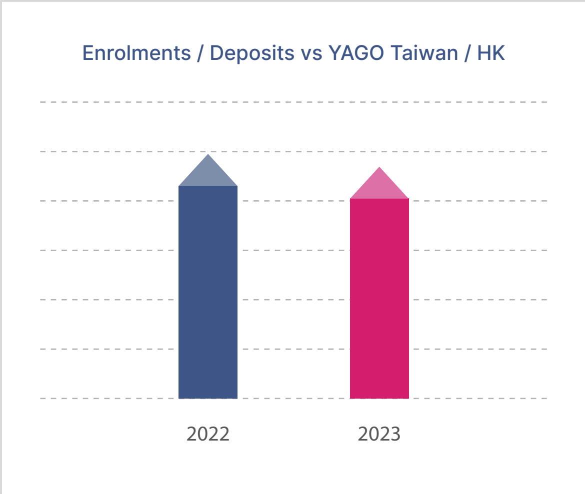
While UCAS and others report a drop in numbers we have seen interest grow – but later than it built in 2022. While no one factor can be credited, there is evidence of –

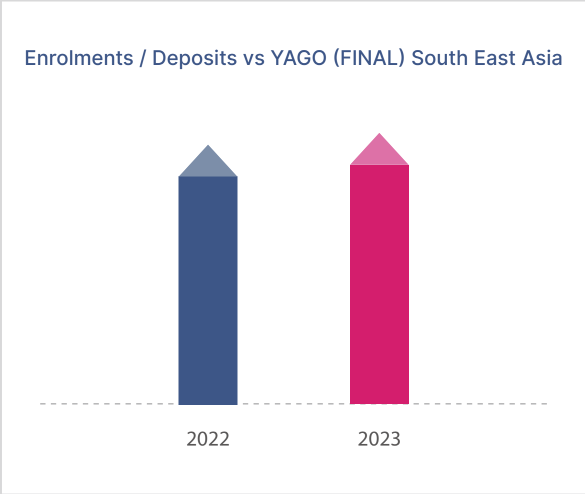
- Applications being made after the 'opening up' in January.
- Longer processing times by institutions meaning delay in applications moving to offer stage.
- Specific campaigns we undertook before and after Chinese New Year generating interest.

Importantly, this data shows that there is still time to generate offers through activity conducted from this point and that it may allow for more offers to be generated from here than the 30% (of total) last year.

As we move into conversion, it is more important to look at the enrolment and conversion data so far. Here we see dierent pictures across our three main areas of operation in mainland China, Taiwan and Hong Kong and South-East Asia.







China appears not only to be generating more (and later) offers but has built up healthy (c30%) growth in enrollments suggesting a strong year overall.

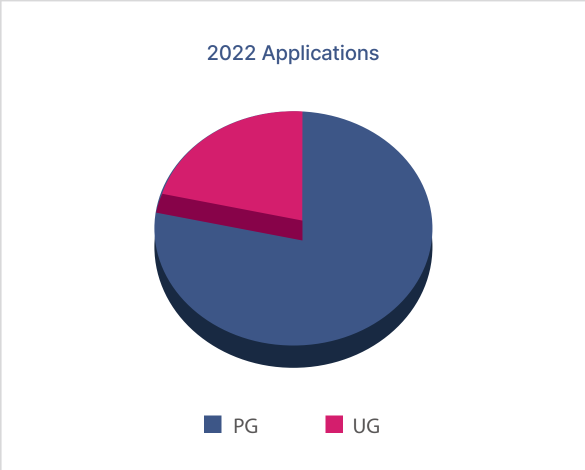
There is more work to be done in Taiwan and Hong Kong but with relative strength in offers we believe committed conversion plans with institutions can drive growth overall. Recent face to face events in Taiwan and clear, efficient processes by institutions around the Hong Kong DSE result release will be crucial to success.

In Southeast Asia, a year of effort, events (and of being supported by you) is clearly paying off. With the office opening last April, growth at this point was perhaps easy enough to predict but we are also thrilled to report we already have more confirmed enrolments than our total figure for 2022.

Just as there is more time for offers (as we saw above) there is much more to be done in enrolments. The global number at this point last year was around 35% of the total number we achieved in 2022. The most important work is that which is done from this point onwards to drive enrolments and then arrivals.

Areas of Study

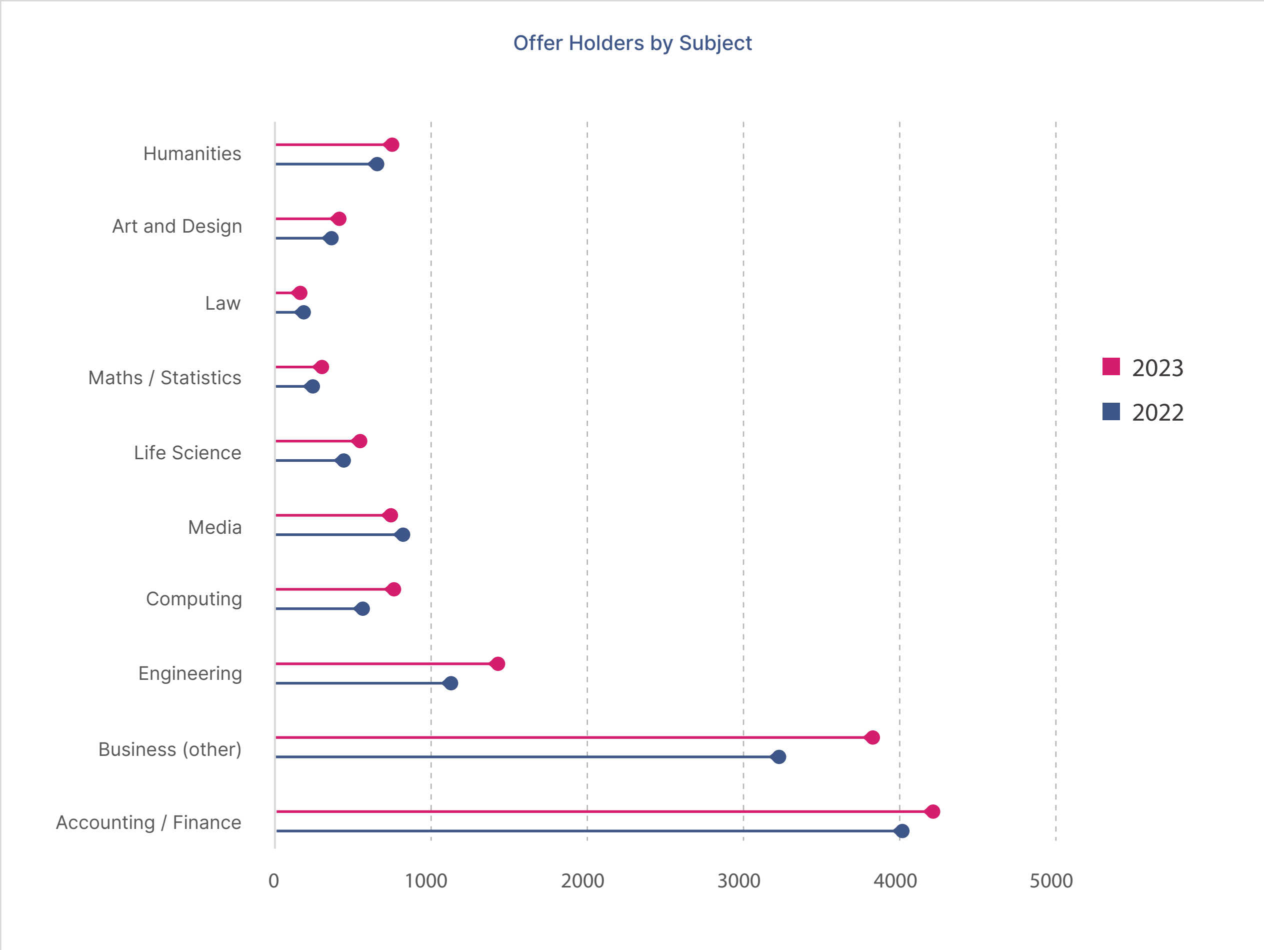
To better understand the numbers, it’s worth looking at the type of students who are applying.



More undergraduates. While China in particular remains heavily PG focused, we are continuing year on year on increase the number of undergraduate applicants – both from China and Southeast Asia. Hong Kong – where numbers remain flat has always been a Bachelor’s degree market. Our links with schools have driven this and a number of you have been involve and benefitted from campaigns.

Within the overall number interestingly, this year for the first time we have a number of UK partners specifically prioritizing PG recruitment (over that of UG). As such, the growth for those who have focused on the UG area is even stronger.

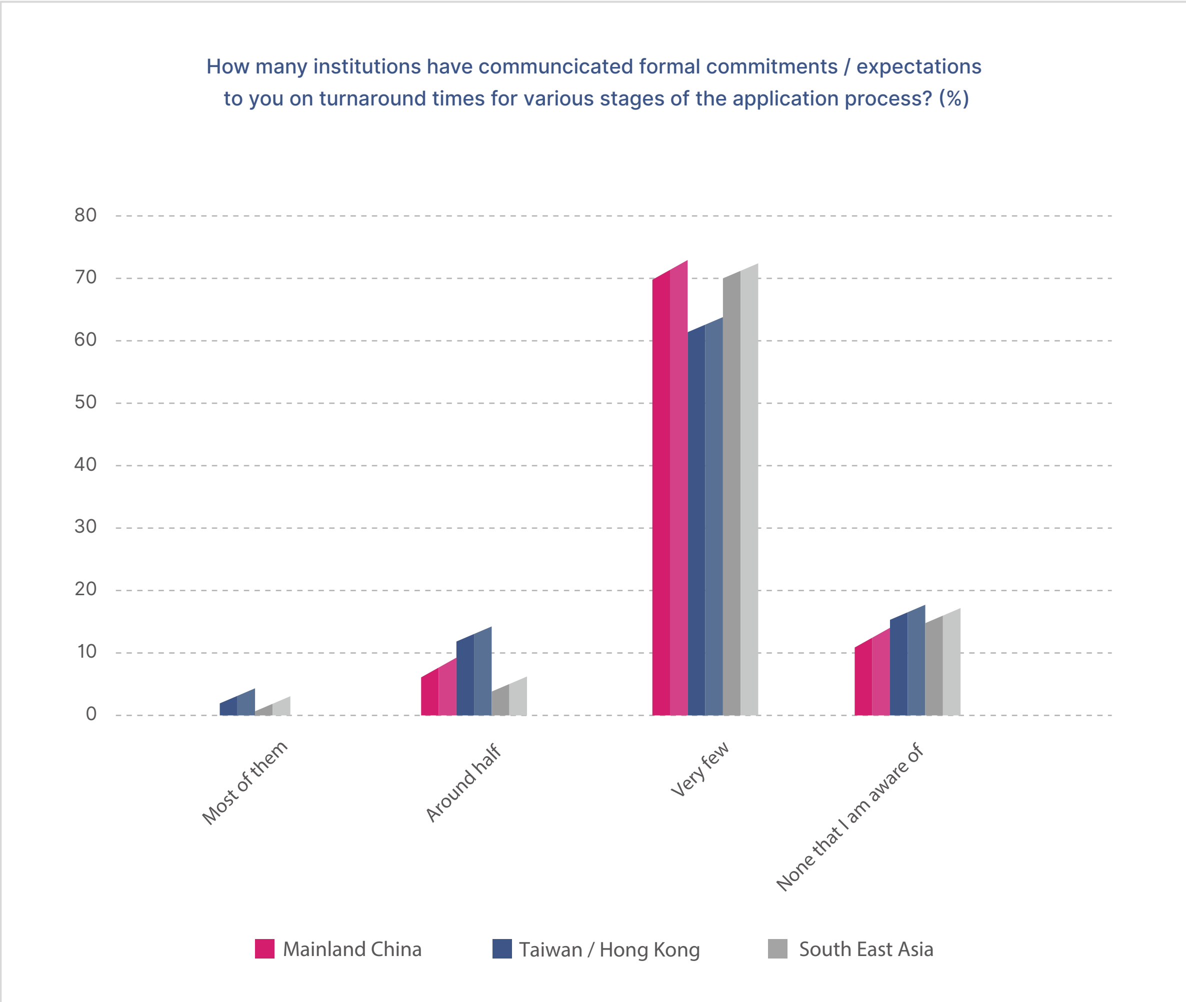
We also see that there is less reliance (relatively speaking) on the 'QS Top 100' which is the measure this Digest has always used to reflect ‘ranking’. While prospective students still use this as a guide, an increase in the number of specific campaigns highlighting individual programme strengths,promotion of scholarships and work opportunities upon graduation (South East Asia focus) is impacting decision making. Note also that because we are looking at applications here, we will have students who currently consider a 'QS Top 100' institution to be their first choice and at least one other outside that group. Depending on the speed at which others come back conversion activities need to consider what matters most to the individual.



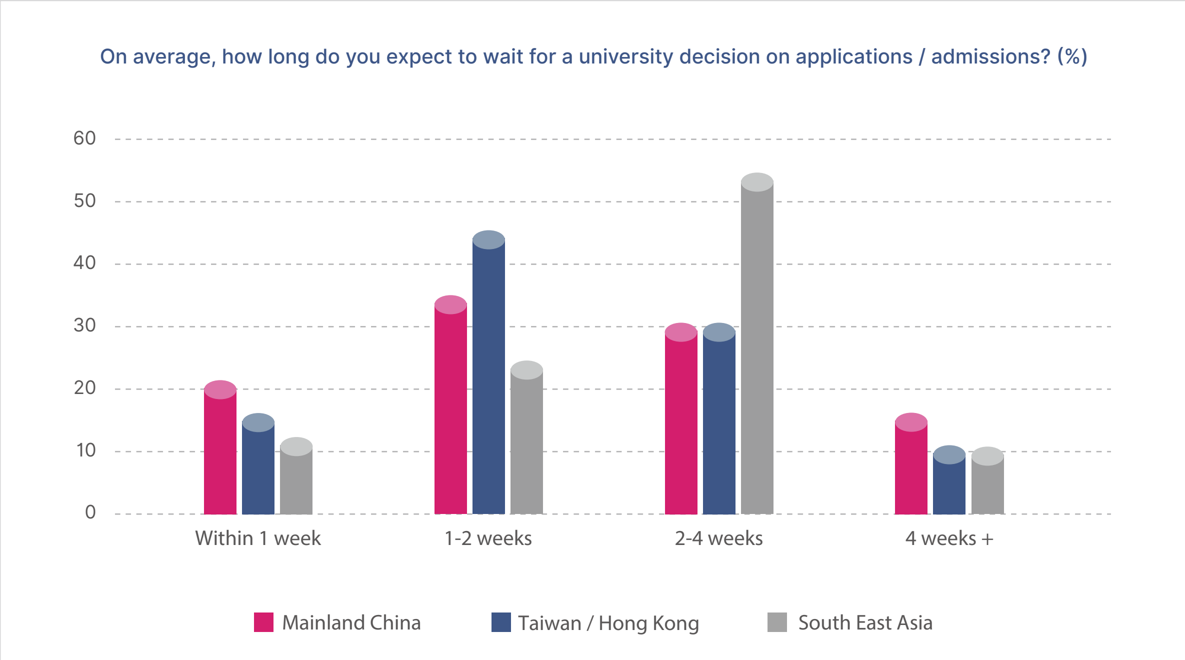
In terms of subjects the real insight will of course lie at the level of individual institutions. Of note overall is the rise in the Business area outside of Accounting and Finance. This is partly driven by growth in Marketing but also related to the placement / classification of some newer programmes and more interest in MBAs. We also see strong performance in Computing – advanced level programmes in FinTech (Computing based), Big Data and AI underpin this.

Application process – counsellor expectations

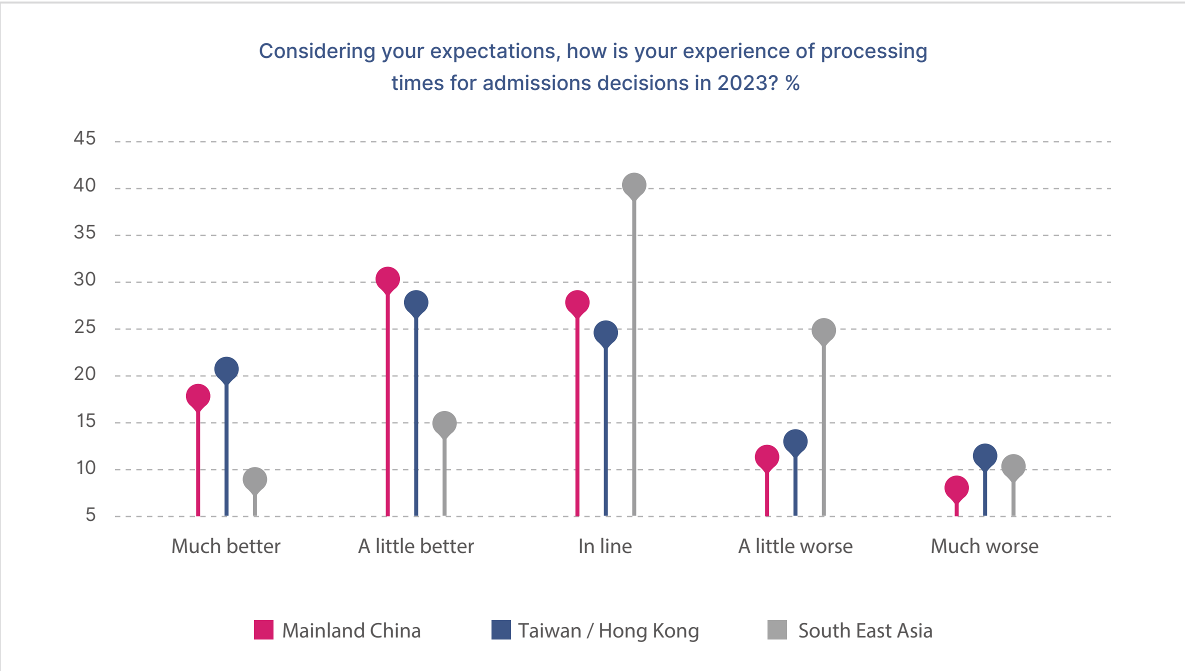
As we reported on for 2022, delays at various stages of the application process impacted confidence and, for individual institutions, performance. Students were generally committed to overseas study when the challenges occurred and so did not drop out but ended up in some cases choosing to go elsewhere. We approached the survey this time round intending to uncover whether institutions were meeting the expectations counsellors had.



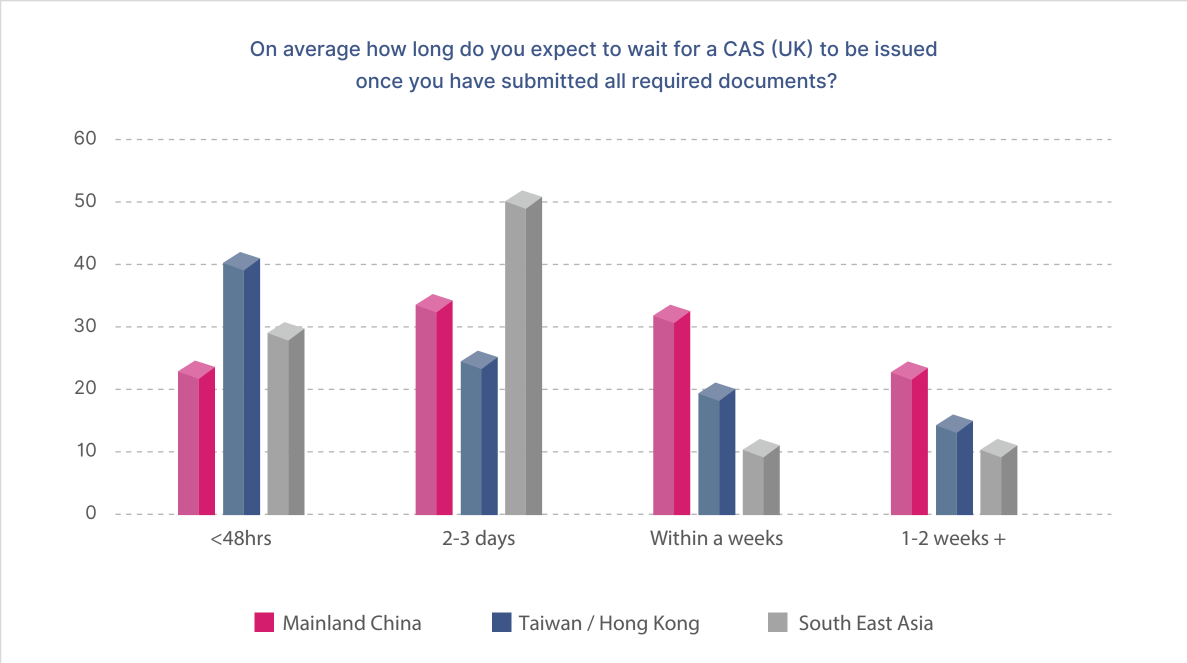
One challenge to this is the fact that very few expectations have been committed to. This creates problems at individual levels as colleagues don't have a clear picture of if/ when to chase or escalate cases and are left 'waiting'. This can be overcome when there is a strong individual connection but it's clearly an area in which improvement can yield benefits.



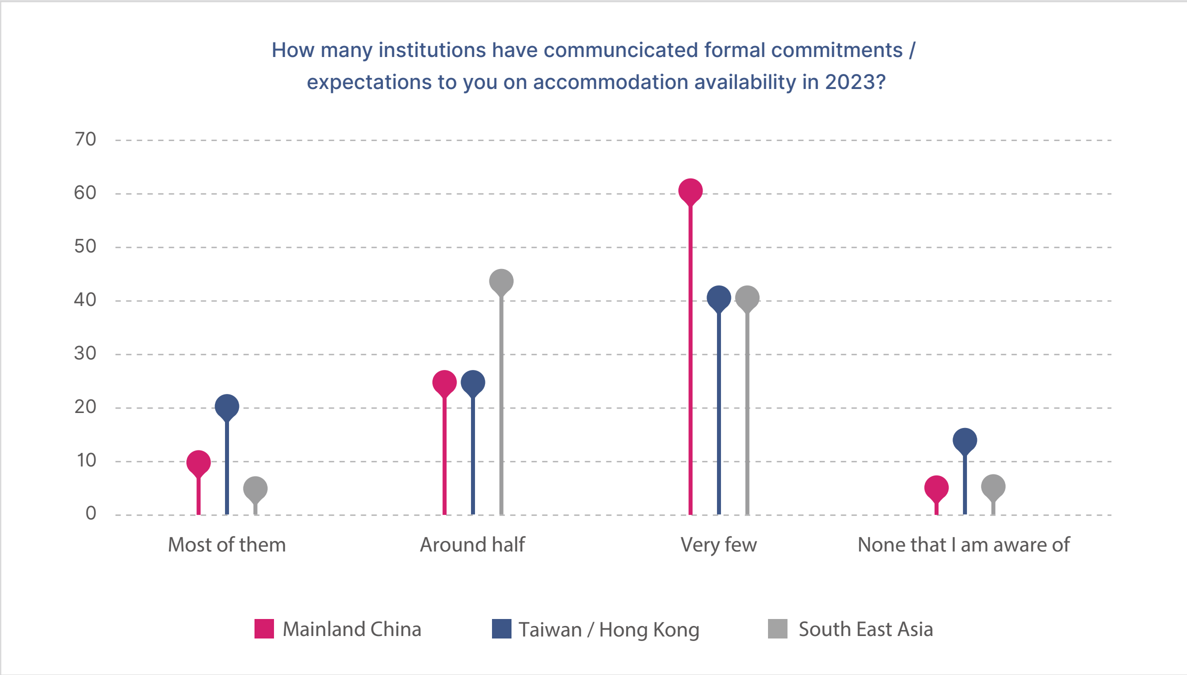
China has the greatest expectation (within one week) but also is prepared for the worst. This is perhaps related to some institutions prioritizing key counsellors and others struggling with volumes. Suggestion from this is that issuing offers reliably and consistently within 2 weeks ought to put an institution in a reasonable position.



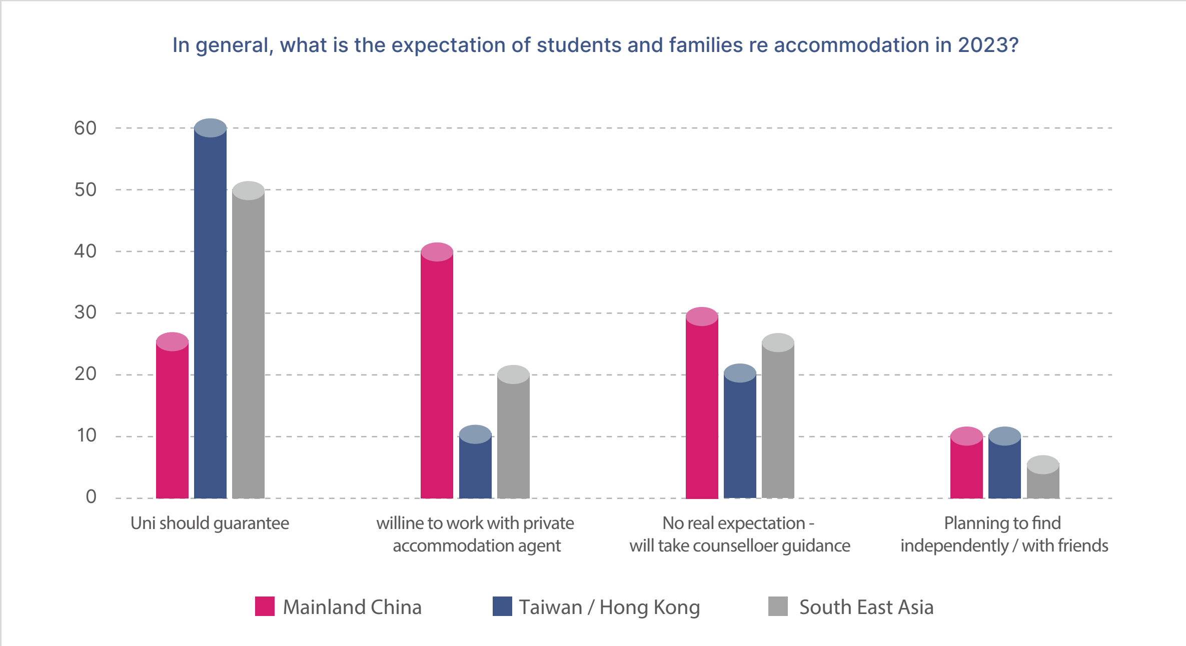
Outside of Southeast Asia, the majority of institutions are meeting or exceeding the expectations of counsellors – remembering that those expectations are largely self-set.



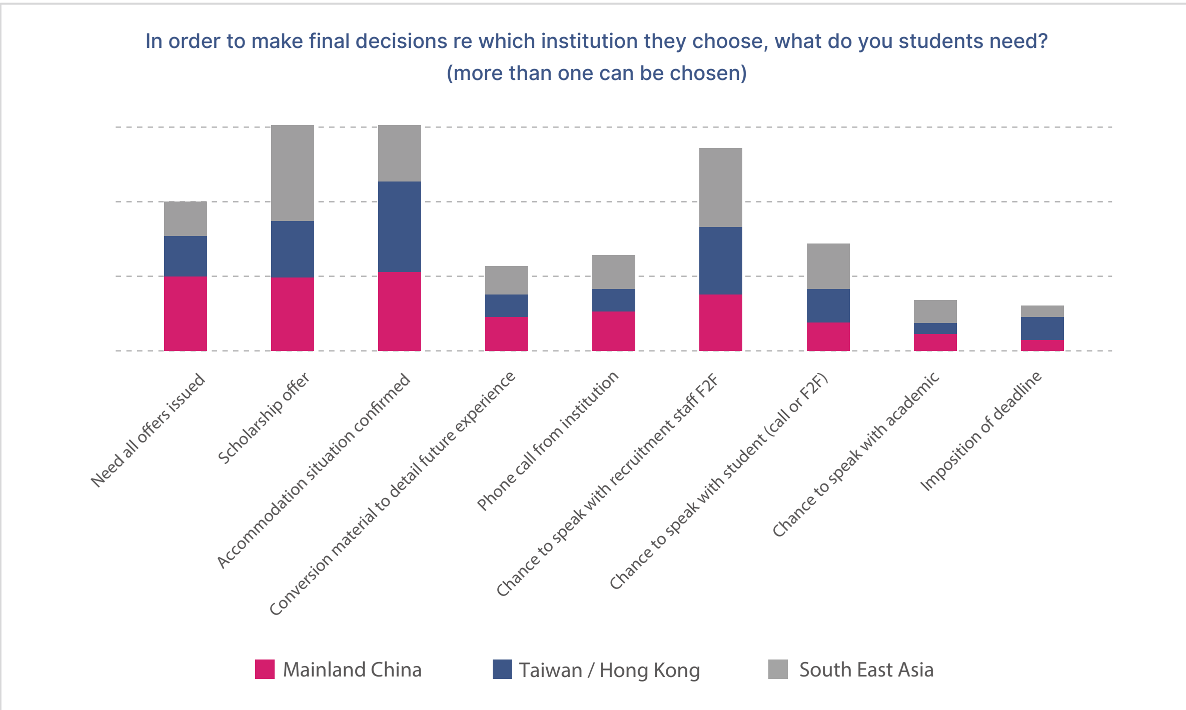
For the UK specifically, while CAS issuance has not begun at any volume yet, it's clear that globally the expectation is that this can be done within a week. This will be an important test as we move toward intakes.



As with turnaround times, the market is still, in the main, unclear what institutions will be able to commit to in terms of accommodation provision. Given the challenges experience late in the cycle in 2022, this is a potential area of concern.



The concern stems from the default position of many families that the university will be responsible – particularly high in Hong Kong given the heavy undergraduate bias. If accommodation is available or can be arranged, institutions should consider going early with this reassurance. Counsellors do have an influence here but as per the earlier chart, most don't currently know the position of all institutions well enough to explain it.



(Numbers are proportionally adjusted so that all 3 geographies have equal weight)

As we see in this chart, accommodation is the top (equal) issue students want clarity about before making their final decision and is equally important across all three geographic areas. Of course, the key to any institution's success will be in their own pipeline data. In general, meeting staff in market, being told where they will live and being offered a scholarship is a (seemingly) simple recipe for conversion improvement.

2023 Activities so far

From 'honeymoon breakfasts' (you know who you are…) through counsellor training, school visits, our annual conference and a full EduCanada roadshow, we've been thrilled to host more and more of you in market again. The most important events, weeks and months are head of us in shaping 2023 intakes.

How can we make sure that work leads to success? Our findings suggest –

- Prioritize the programmes and regions you need to succeed.
- Communicate those priorities and what counsellors should expect (and how they can escalate when things slip).
- Plan specific conversion events, including in person.
- Be clear on accommodation.
- Tactically deploy scholarships if required.
- Reach out for detailed data at an institutional level.

We look forward to hearing from you, seeing you in market and working with you.

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2023 GEA Roadshow
长沙站
07


Global Education Alliance
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2023 GEA Roadshow
武汉站
Tomato Education
INTERNATIONAL

Lancaster University

A world of possibilities
Un monde de possibilités
ÉduCanada
Saturday
25 February 2023
10am to 6pm
Level 3C Sheraton Petaling Jaya Hotel Jalan Utara C
Direction
Education in Canada
A World of Possibilities Awaits
Schedule of Presentations
Topic | Times | Venue
Education in Canada – A World of Possibilities Awaits! By the High Commission of Canada in Malaysia | 12.30pm & 3pm | Pinnacle 2 (Level 3D)
Studying in Canada – How to Apply for a Study Permit By Immigration, Refugees and Citizenship Canada from the High Commission of Canada in Singapore | 12.50pm & 3.20pm | Pinnacle 2 (Level 3D)
EduCanada.ca
EduCanada Fair Participation Institutions
Acadia University
University of Calgary
Concordia University
York University
Carleton University
Ontario Tech University
Lakehead University
Humber College Institute of Technology
Columbia College
Huron University
University of Regina
Huron at Western University
Mount Saint Vincent University
University of New Brunswick
Queens University
Trent University
University of Waterloo
St Francis Xavier University
Brock University
A world of possibilities
Un monde de possibilités
ÉduCanada

About the Author

Neil Christie

Neil Christie is the Managing Director, UK for Global Education Alliance, and the Founding Director of TEN Education an allied organization working mainly in TNE and compliance.

Having spent his whole career in education sales and recruitment – other than a brief period as 'Keeper of the Doves' at the University of St Andrews – Neil is passionate about improving the experiences of, and services offered to international students. He believes that while technology is a key driver in the improvement of provision, understanding students needs and desires and that of their families, will should always underpin any approach.

Neil notes, "I met my first recruitment agent in China in 1998. What struck me recently and throughout the pandemic was how little the approach of some universities and agents had changed over time. Insight was often something that was up to institutions to figure out. At the same time agents were left to create marketing messages for China and South East Asia based on adapting material aimed at UK students.

I have known the GEA team for years. They are committed to constantly improving and adapting services to institutions and students. With the survey, we hope to help our partners understand what's happening at a time when they may have no staff, or only one or two staff in market.

We're all eagerly awaiting the chance to meet up in person with our partners again and until then, as we say at GEA – We Navigate!"

Co-authors

Draco Hong,
Product Manager (UK), GEA

Cindy Chang,
Regional Director of GEA Taiwan

Eva Choi,
Managing Director
Australia and New Zealand, GEA

Benny Toolseram,
Regional Director (Southeast Asia), GEA

Ben Chen,
Chief Marketing Officer & Executive VP, GEA

Freeman Yeung,
Founder & CEO, GEA

Designed by:
Lily Chen

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This report is provided free of charge.
Published in April 2023

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