2022

Global Education Alliance
We Navigate

MARKET DIGEST REPORT

Insights, Findings & Opportunities 2023

Conducted in December 2022

In this our 4th edition of the GEA Digest we have surveyed a record number of respondents across mainland China, Hong Kong and Taiwan. We are excited that across more than 500 counsellors in mainland China and nearly 200 in Hong Kong and Taiwan there is optimism that growth in enrolments can be expected. As with previous updates, the data is clear that there is still work to be done and that success will be defined by what happens between now and the intakes in September and October 2022.

As with previous editions we are also happy to share details of GEA's own performance. Having **grown applications by 9% globally**, we've actually seen **offer issuance increase by 16%** with nearly **13,000 students now in a position to make plans and begin overseas study**. This is driven in the main, in China by PGT students. We are encouraged that UG applications are also up. In fact, in Hong Kong and Taiwan our network believes that it is undergraduate level, and in pathways and schools where growth will be strongest.

There is clearly a different global market climate than the one in which our first digest was published last year and yet in our key markets, the COVID pandemic still has a significant impact on daily lives and on the ways in which student recruitment needs to take place. It is vital that this is recognised by overseas institutions in terms of the information required by students. This relates not just to safety measures but also the flexibility some will need given the challenges which English testing, visa applications and travel will bring. As with other sectors, the indirect impacts of COVID seem to be delays. An average of 60% of counsellors across major destinations state that students are still waiting for some decisions from institutions they have applied to. It is in the provision of these decisions and the details of joining information that potential growth will be actualized for those who target it.

As ever, this data is presented in the spirit of transparency and is not intended as flawless example of statistical research. It's how we run our own decision making and, we believe a good guide for how our partners can prioritise short- and medium-term actions. We believe that across the markets there are 5 main considerations critical to performance –

1) **Be clear on rules** – From alternative English language testing options given the lack of IELTS slots to late arrival dates, students need certainty, but many are still waiting for details.

2) **Conversion** – In previous cycles students would be attending summer events to facilitate decision making. Whether you engage at an academic or subject-level, or in order to help students get ready for life on your campus, they crave engagement.

3) **Events** – The period when exam results are released in July and August will be key. We expect a spike in applications and decisions and have multiple options for how you can engage directly with students.

4) **New competition** – The proximity, safety and quality of other Asian destinations (Hong Kong and Singapore) as well as onshore options in students' home markets are gaining interest. These choices are now being made by applicants in parallel to traditional choices like the UK. At the moment, many are doing so as a 'back-up' to the UK but in the medium term this will be serious competition. Institutions who engage with in-market delivery in these places may benefit from the best of both worlds.

5) **Engage in South-East Asia** – We are proud of our ability to deliver to diversity targets. To this point that has usually been at a programme level. With the new office in Kuala Lumpur we have also begun to do this geographically. The markets of South-East Asia are open and our links with schools and sponsors offer excellent opportunities to grow numbers from Malaysia, Vietnam, Indonesia and the rest of South East Asia

As we head into the busiest of summer seasons we welcome engagement in all five of these key areas as well as with to specifics of any forecasting or pipeline questions. While China, Hong Kong and Taiwan in-market activities will likely be restricted to staff based there, there are many engaging online options available. For many of you, while we may not 'see you soon' in the region, we are proud sponsors of this year's PIEoneer awards and so look forward to meeting again in person in London in September!

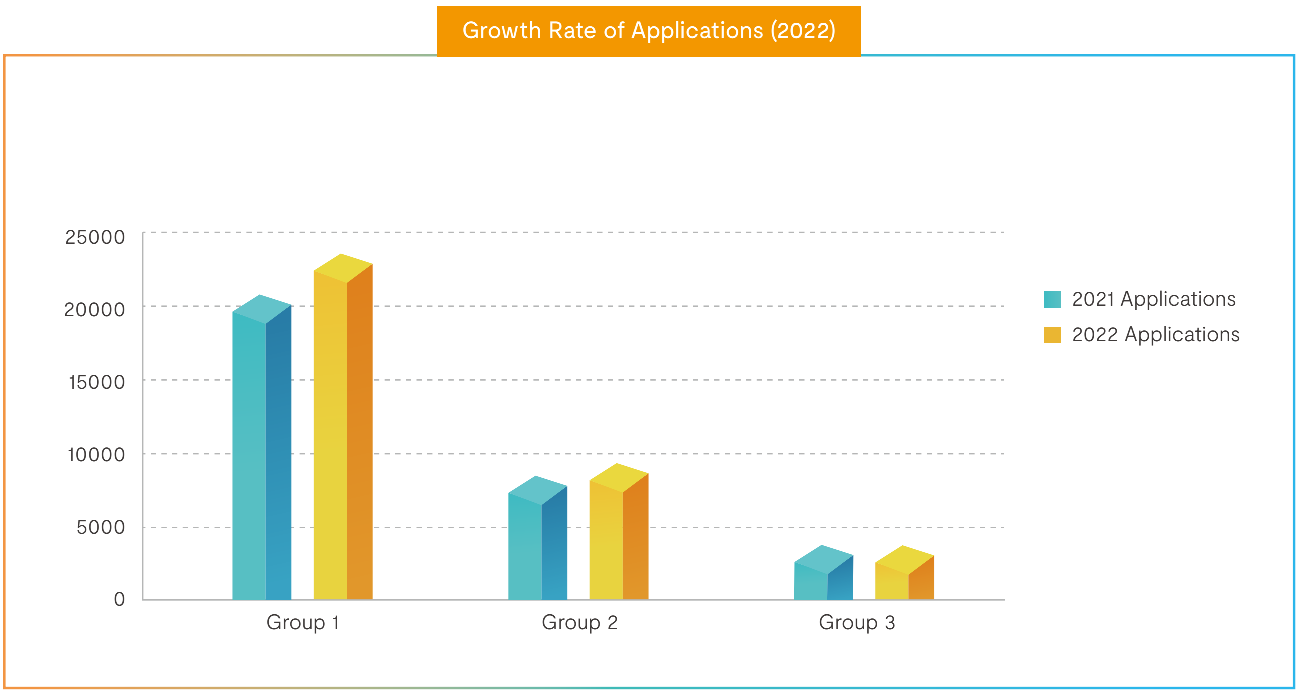
We Navigate.

Part 1 growth

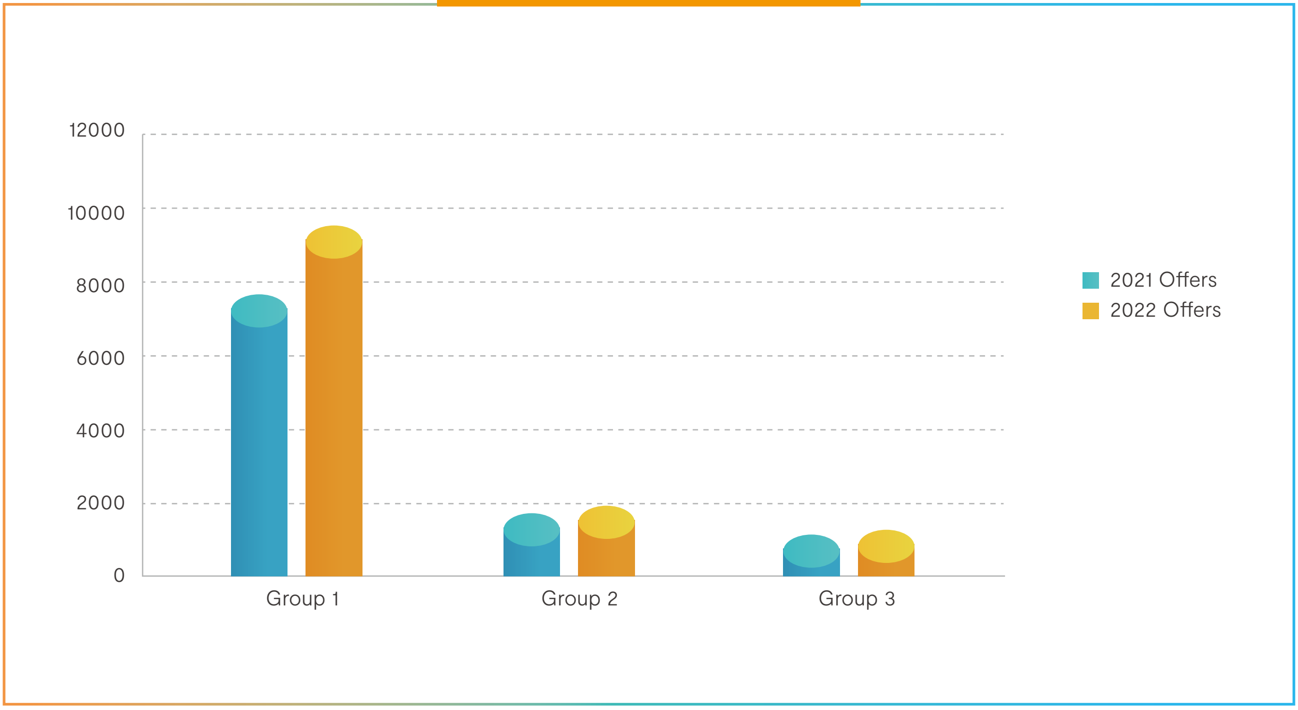
These three tables represent GEA figures relating to applications (university only) for 2022 September / October entry vs 2021 September / October entry. While we understand the challenges in filtering by overall institutional ranking (and do not focus our counselling there) there is a clear segmentation in volume of interest. For simplicity we have divided this data into 3 groups based on the QS World Rankings.

At this stage we are pleased that we are delivering the potential for growth and that in most areas the rates at which our students are being made offers is on the increase. The key issue here is the relative slowdown in students committing and paying their deposits. This is down to uncertainty on several levels – some students are waiting on all decisions / offers being made before committing to any. Some have their offers but are unable to sit IELTS tests, others still are unclear whether they will be able to travel in time for the start of their programmes – or when they need to be on on-campus.

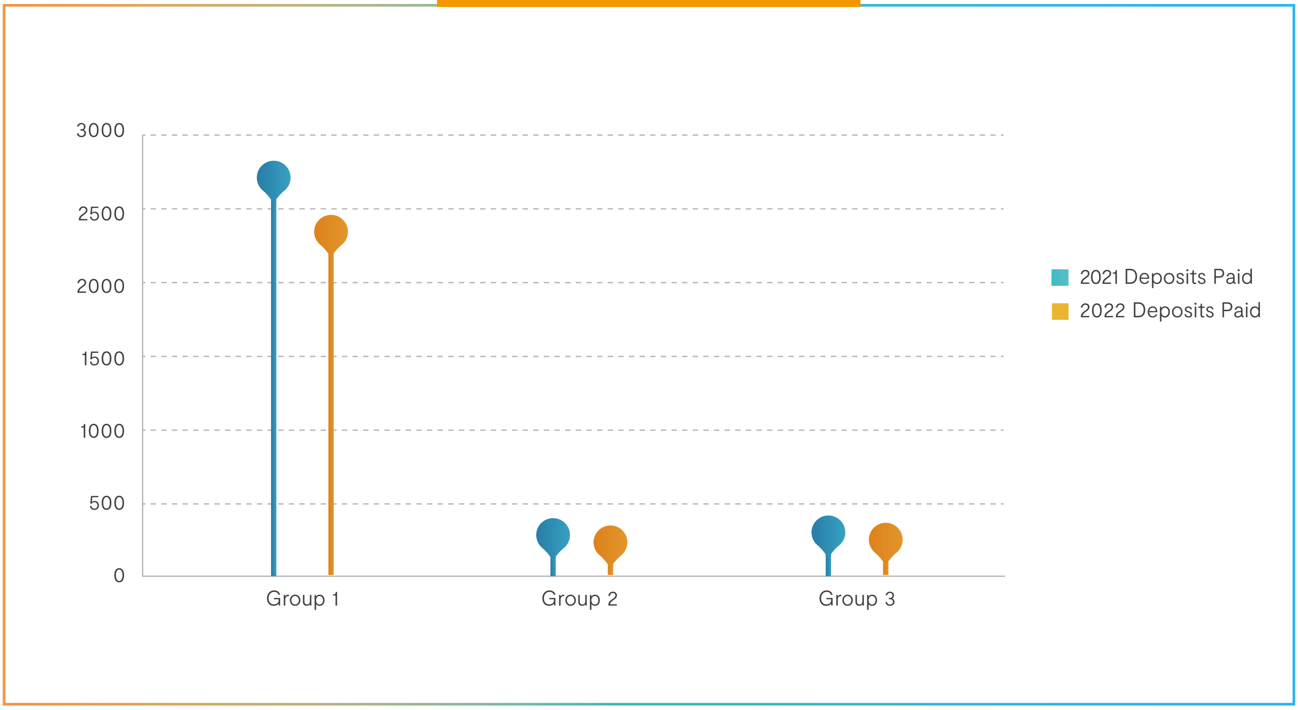
In one sense, this 'bottle-neck' creates and opportunity for those institutions willing to unclog it with clear student-friendly policy and communications. We understand that for many of our partners campus life and travel have returned to 'normal' but for students in market life and travel is arguably even more complicated than last year. We welcome direct consultation on the impact of different policies and are also able to sound out your students on their intent.



Growth Rate in Offers (2022)



Growth Rate in Deposits Paid (2022)



Group 1, QS ranking 1–190, Group 2, 190 –390, Group 3, 390+

Part 2 Counsellor Survey

Here we engage directly with more than 500 staff in mainland China and 200 in Hong Kong and Taiwan on the subject of their own student pipelines

Growth Expectations

How do you feel the final enrolment numbers this year will compare to last year for the UK?

Mainland China

Options	Proportion
Drop significantly 大幅下跌	5%
Drop a little 小幅下跌	20%
Flat 持平	19%
Increase a little 小幅上升	43%
Increase a lot 大幅上升	13%

Hong Kong / Taiwan

Options	Proportion
Drop significantly	6%
Drop a little	18%
Flat	14%
Increase a little	48%
Increase a lot	14%

How do you feel the final enrolment numbers this year will compare to last year for Ireland?

Mainland China

Options	Proportion
Drop significantly 大幅下跌	2%
Drop a little 小幅下跌	14%
Flat 持平	38%
Increase a little 小幅上升	42%
Increase a lot 大幅上升	5%

Hong Kong / Taiwan

Options	Proportion
Drop significantly	5%
Drop a little	26%
Flat	32%
Increase a little	34%
Increase a lot	3%

How do you feel the final enrollment numbers this year will compare to last year for Australia / New Zealand?

Mainland China

Options	Proportion
Drop significantly 大幅下跌	5%
Drop a little 小幅下跌	18%
Flat 持平	25%
Increase a little 小幅上升	40%
Increase a lot 大幅上升	12%

Hong Kong / Taiwan

Options	Proportion
Drop significantly	5%
Drop a little	20%
Flat	20%
Increase a little	45%
Increase a lot	11%

How do you feel the final enrollment numbers this year will compare to last year for the USA / Canada?

Mainland China

Options	Proportion
Drop significantly 大幅下跌	11%
Drop a little 小幅下跌	18%
Flat 持平	28%
Increase a little 小幅上升	41%
Increase a lot 大幅上升	2%

Hong Kong / Taiwan

Options	Proportion
Drop significantly	6%
Drop a little	15%
Flat	26%
Increase a little	34%
Increase a lot	18%

How do you feel the final enrollment numbers this year will compare to last year for the rest of Asia?

Mainland China

Options	Proportion
Drop significantly 大幅下跌	2%
Drop a little 小幅下跌	10%
Flat 持平	18%
Increase a little 小幅上升	42%
Increase a lot 大幅上升	27%

Hong Kong / Taiwan

Options	Proportion
Drop significantly	11%
Drop a little	18%
Flat	51%
Increase a little	12%
Increase a lot	6%

In all the main markets, there is optimism that growth will be delivered with the greatest positivity for the UK and most caution around North America. Interestingly, away from traditional markets, counsellors feel that markets like Singapore and Hong Kong will see good growth – with these destinations seeing the single highest score in the most positive category. In general, Hong Kong and Taiwan counsellors feel positive...but slightly less so than their mainland counterparts.

Growth Drivers

What is driving this interest and which academic areas do you think are growing most?

Mainland China

Options	Proportion
PGR&PHD 研究型硕士和博士	35%
PGT 授课型硕士	71%
UG 本科	31%
Pathway 桥梁项目	21%
School 中学	8%

Hong Kong / Taiwan

Options	Proportion
PGR&PHD	17%
PGT	37%
UG	51%
Pathway	31%
School	26%

Perhaps no great surprise that PGT interest is very strong in mainland China but it's also clear that our focus for partners this year on undergraduate study there and in Hong Kong and Taiwan is paying off. We would also expect that pathways and schools will continue to attract younger students and that in 2023 school interest from China will be strong.

Multi-country applications

When students apply to the UK as their first choice, what other destinations will they also consider and apply to the same time for 2022/2023?

Mainland China

Options	Proportion
Hong Kong 香港	82%
Singapore 新加坡	42%
Australia 澳大利亚	51%
Offshore program in China 国内项目	40%

Hong Kong / Taiwan

Options	Proportion
Hong Kong	11%
Singapore	26%
Australia	89%
Offshore program in China	3%

When students apply to the USA as their first choice, what other destinations will they also consider and apply to the same time for 2022/2023?

Mainland China

Options	Proportion
UK 英国	55%
Australia 澳洲	20%
Canada 加拿大	72%
Offshore program in China 国内项目	27%

Hong Kong / Taiwan

Options	Proportion
UK	57%
Australia	20%
Canada	71%
Offshore program in China	2%

When students apply to Australia as their first choice, what other destinations will they also consider and apply to the same time for 2022/2023?

Mainland China		Hong Kong / Taiwan	
Options	Proportion	Options	Proportion
New Zealand 新西兰	60%	New Zealand	66%
UK 英国	71%	UK	60%
Offshore program in China 国内项目	25%	Offshore program in China	3%

When students apply to Canada as their first choice, what other destinations will they also consider and apply to the same time for 2022/2023?

Mainland China		Hong Kong / Taiwan	
Options	Proportion	Options	Proportion
USA 美国	80%	USA	88%
UK 英国	44%	UK	40%
Offshore program in China 国内项目	20%	Offshore program in China	0%

The most striking interpretation here centres on additional choices UK applicants make – where HK and Singapore are popular and there is less interest in Australia and the US. This suggests that if UK-bound students are going to commit to studying in the 'west' then they don’t feel they need a ‘western’ alternative. In contrast, where students have Australia and US as their first choice, the UK is still able to ‘force’ its way into their thinking. We are actively working on partnerships with institutions in mainland China, Hong Kong, Taiwan and Singapore. TNE developments in these areas offer exciting opportunities to our partners.

Implied bottlenecks

Our data suggests UK students are hesitating before making their final decisions. Why are they waiting?

Mainland China		Hong Kong / Taiwan	
Options	**Proportion**	**Options**	**Proportion**
Not all decisions received 还在等待其他录取	66%	Not all decisions received	23%
Nervousness re COVID 对疫情担忧	54%	Nervousness re COVID (Mentally)	54%
Challanges re COVID 疫情的现实阻碍（封城，移动限制）	42%	Challanges re COVID (Physically, Lockdown etc)	38%
Waiting to get qualifications 等待资格证书（例：语言）	53%	Waiting to get qualifications (IELTS etc)	48%
Others 其他	6%	Others 其他	2%

Our data suggests AU students are hesitating before making their final decisions. Why are they waiting?

Mainland China		Hong Kong / Taiwan	
Options	**Proportion**	**Options**	**Proportion**
Not all decisions received 还在等待其他录取	63%	Not all decisions received	23%
Nervousness re COVID 对疫情担忧	52%	Nervousness re COVID (Mentally)	35%
Challanges re COVID 疫情的现实阻碍（封城，移动限制）	44%	Challanges re COVID (Physically, Lockdown etc)	45%
Waiting to get qualifications 等待资格证书（例：语言）	42%	Waiting to get qualifications (IELTS etc)	45%
Others 其他	7%	Others 其他	3%

What would help your students make their decisions-UK?

Mainland China

Options	Proportion
Quicker decisions from universities 大学更快的回应	65%
More engagement from universities 大学更多的互动/参与（例：学术分享）	29%
Incentives 给代理的激励政策	35%
Scholarships 奖学金	40%
Simplification of English language qualifications 接受更多语言类型考试，线上语言班	76%

Hong Kong / Taiwan

Options	Proportion
Quicker decisions from universities	34%
More engagement from universities	31%
Incentives to sub-agent	32%
Scholarships	58%
Simplification of English language qualifications (Online PSE etc)	25%

What would help your students make their decisions-Australia?

Mainland China

Options	Proportion
Quicker decisions from universities 大学更快的回应	55%
More engagement from universities 大学更多的互动/参与（例：学术分享）	33%
Incentives 给代理的激励政策	45%
Scholarships 奖学金	45%
Simplification of English language qualifications 接受更多语言类型考试，线上语言班	59%

Hong Kong / Taiwan

Options	Proportion
Quicker decisions from universities	34%
More engagement from universities	29%
Incentives to sub-agent	32%
Scholarships	57%
Simplification of English language qualifications (Online PSE etc)	22%

We would expect to see students 'waiting to get qualifications' in any normal year. What is clear from this data is that a) many offer holders still need reassurance on how safe campuses will be b) they are facing logistical challenges beyond their control and c) not all have had decisions made on all their applications.

Institutions can respond to (a) and (b) with information and with flexibility. Regrading (c) even if you have already made your offers, your applicants may be waiting for others. Consideration should then be given to if and how you can convert them ahead of time and / or allowing them subsequent opportunities to change their minds.

Part 3 – Market Activity

Our UK roadshow has been a key driver of the business for more than 7 years. In the past 2 years, as well as operating under new and ever evolving pandemic measures meaning smaller, distanced events or moving online, we have also been more focused on undergraduate studies. In 2022, following the completion of the GaoKao (other than in Shanghai where the exam was delayed) we held events in 10 cities.20 UK universities and more than 50 of our network partners were in attendance.

Also popular are our GEA Agent Retreats – mid year events that allow direct exchanges between key institutions and our leading network partners. These are an opportunity to liaise with and train the some of the most accomplished counsellors in the country and to find out what they and their students are focused on, not just today but for the future. Our most recent retreat was attended by 50 schools, institutions and education groups and saw participation from 150 counsellors.

We'd love to update you on opportunities which are still available for the rest of the conversion season. You can still reach counsellors, families and students, in person and virtually in order to drive conversion. Get in touch to find out how.

Part 4 – South East Asia Update

As many of you will know, our office in Kuala Lumpur has been operational since April and has already welcomed many of our university partners for training and for meetings with sponsoring bodies. The team is growing by the day and Benny welcomes as many of you as possible for visits which are already proving fruitful. GEA has already established 75 network partners in Malaysia and generated more than 200 applications for overseas study!

Benny, Bryan, Janet, Shun-Zi and Timothy look forward to helping you navigate South-East Asia





Thuy.Nguyen@geaworld.org

We're also excited to bring you news of our Vietnam office opening! Like Benny in Malaysia, Thuy Nguyen will work under the leadership of Eva Choi. Located in the prestigious Goldview Complex in Ho Chi Minh City, District 4, the office will be operational this month (July). More updates to come, but of course please reach out for more details!

About the Author
Neil Christie

Neil Christie is the Managing Director, UK for Global Education Alliance, part of the Global Education Technology (GET) network 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

Published in June 2022

Global Education Alliance
We Navigate

www.geaworld.org