

# **2011 CHINESE STUDENTS STUDY ABROAD FORECAST**

## **EIC GROUP**

*Translated by the BC Council for International Education*

To help BC institutions fine-tune their marketing strategies toward Chinese international students, BCCIE has completed a full translation of the report to the best of our interpretation and cannot guarantee the accuracy of the data. The original report (Chinese only) is posted at <http://liuxue.eic.org.cn/Edushow/2011diaocha/>.

## **Proclamation:**

The **2011 Chinese Students Study Abroad Trend Report** is issued solely by the EIC Group.

## **Lead:**

In 2010, China's study abroad market sounded the bells of victory; the study abroad services sector developed rapidly, marching into a brand new era; the number of Chinese students studying abroad peaked at 250,000. Looking forward into 2011, we believe the group of study abroad students from China will further expand, and the study abroad market will advance as a bull market. The release of the **2011 Chinese Students Study Abroad Forecast** aims at identifying: the trends in study abroad destinations; trends in academic requirements of study abroad applications; trends in the motives for studying abroad; the overall considerations of students as well as some of the factors that may influence the students' choice of country, institution and field of studies.

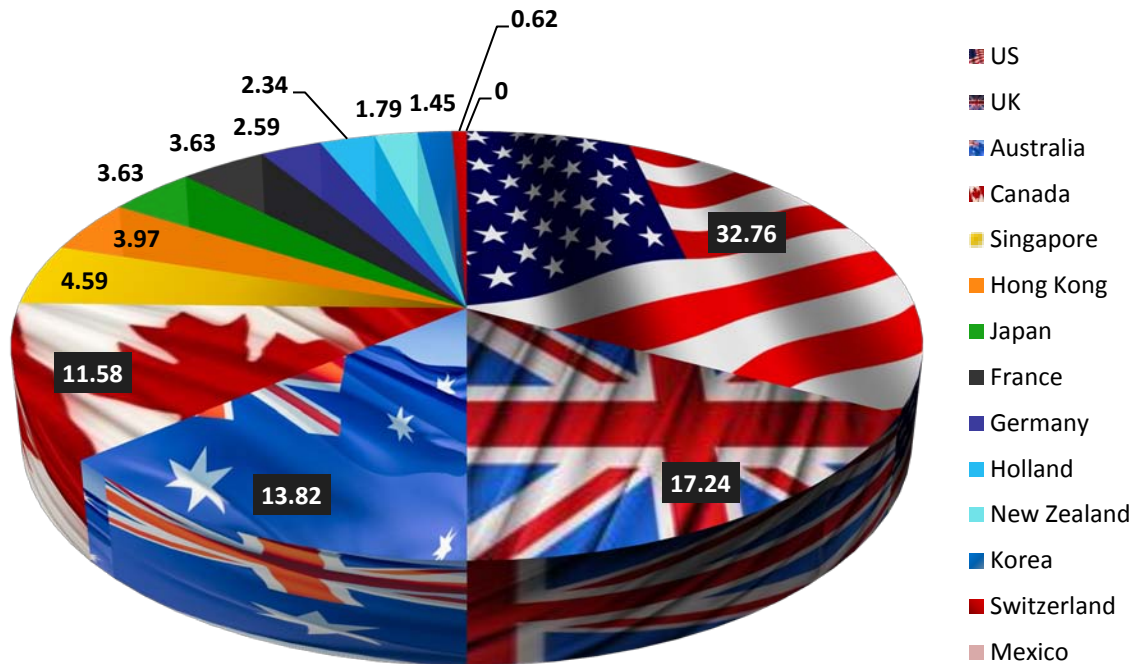
EIC Group General Manager, Mr. Chao Zhang, observed that this year's statistics reflect the study abroad trends of Chinese students in 2011. As family income increased for China, more and more parents choose to let their children study abroad at a younger age. The phenomenon of decreasing age of students studying abroad will become main stream, the competition of high school students for certain countries will become fiercer, and in choosing an institution and fields of study students will become more rational and practical. In 2011, the study abroad market will engage in deep operations, the US, UK, Canada and Australia will continue to be top choices of destination, the desirability of European and Asian destinations will continue to elevate, and the diversification of the study abroad market is sure to continue.

## **I: US Study Abroad Market Enters Golden Era**

*Figure 1: US Stands Head and Shoulders Above Others*

Conducted in fourteen cities across China, the data collected from 17,500 students and parents shows that Chinese high school and university students are most interested in the following destinations: US, UK, Australia, Canada, Singapore, Hong Kong, Japan, France, Germany, Netherlands, and Korea. The majority of the interests are still held by the four traditional study abroad destinations: US (33%), UK (17%), Australia (14%), and Canada (12%).

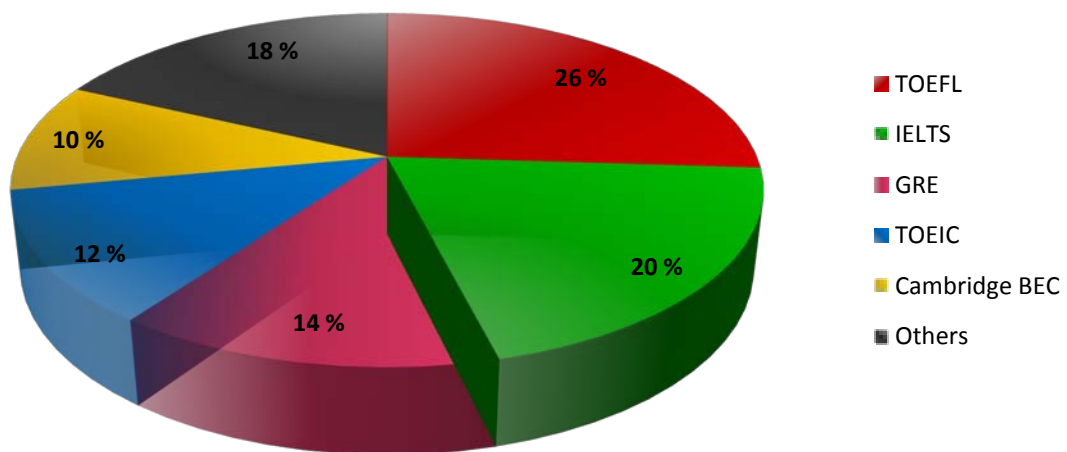
**Figure 1: US Stands Head and Shoulders Above Countries**



*Figure 2: Trends in Training*

Figure 2 data shows that training for the TOEFL and GRE tests occupies up to 40% of the total academic training activities, while training for IELTS occupies up to 20%, thus indicating that the majority of the students still choose to study abroad in English-speaking countries such as the US and the UK.

**Figure 2: Trends in Training**



### *Overall Data Analysis:*

[US] For the academic year of 2009-2010, the number of Chinese students studying abroad in the US grew by almost 30%, totaling 128,000 people. It surpassed India and again became the US's primary source of overseas students after nine years. In 2010, the US's overseas student recruitment sector performed very well, and the enthusiasm Chinese students have for studying abroad in the US heightened to an unprecedented degree.

[UK] Compared to 2009, the number of students studying abroad in the UK rose significantly this year to a sustained 17%, and ranks second place after the US as the most chosen study abroad destination.

[Australia] Surprisingly, the growth of student interest for Australia in 2010 is significant compared to last year, occupying 14% of the survey population's interest. This shows that Chinese students are regaining their confidence in studying abroad in Australia.

[Canada] A country belonging to the North American education system with the US, Canada attracts price-sensitive students and parents with its superior educational resources, and garners 12% of student interest, a noticeable increase from the 2009 data.

[Asia] Among the Asian regions, Singapore, Japan and HK SAR received a sudden rise of interest. The number of students applying to study abroad in Singapore and Japan grew significantly, and close to 5% of the survey population choose to study in Singapore. The education system of Singapore combines the strength of both Chinese and Western cultures, is comparatively less expensive than its European and American counterparts, and is increasingly targeted at working class families.

[Europe] The number of Chinese students studying abroad in countries of less-predominant languages shows signs of rapid growth in 2010. France, Germany, Netherlands and Nordic countries are garnering increasing student interests and applications, with plenty of room for future growth.

## **II: Education Quality and Cultural Atmosphere Become Primary Considerations in Choosing Study Abroad Destinations**

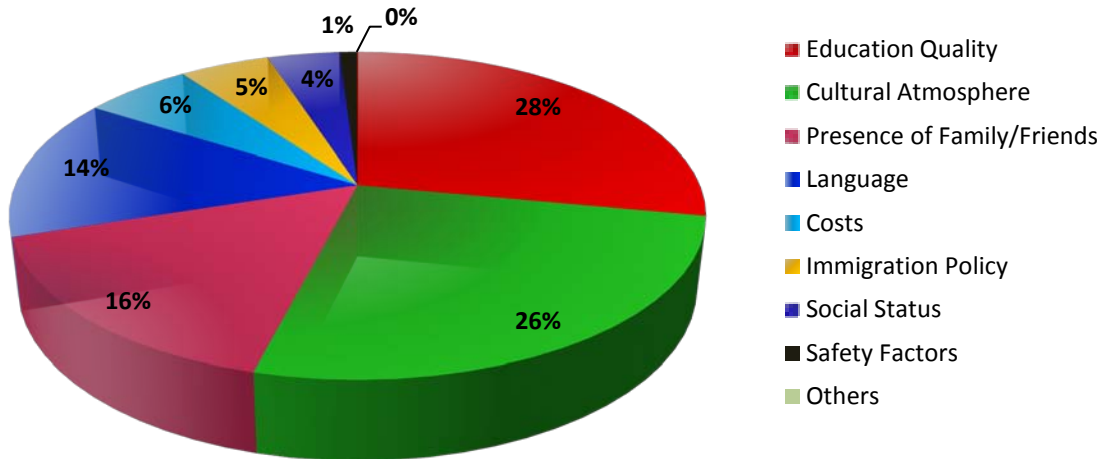
*Figure 3: Primary Considerations in Selecting Study Abroad Destinations (Education Quality and Cultural Atmosphere)*

Ever since studying abroad shed its labels of unattainable "public expense trip" and "elite education", more and more ordinary families have come to understand the excellent educational standards and abundant educational resources of foreign educational institutions.

Furthermore, countries overseas have vibrant or long-standing cultures that allow Chinese students furthering their studies overseas to broaden their perspectives, to enrich their experience, to encounter various cultural atmospheres, and to thus build a solid foundation for becoming a global person.

Education quality and cultural atmosphere have become the primary considerations of students, occupying 30% of all student consideration in choosing a study abroad destination.

**Figure 3: Primary Considerations in Selecting Study Abroad Destinations**



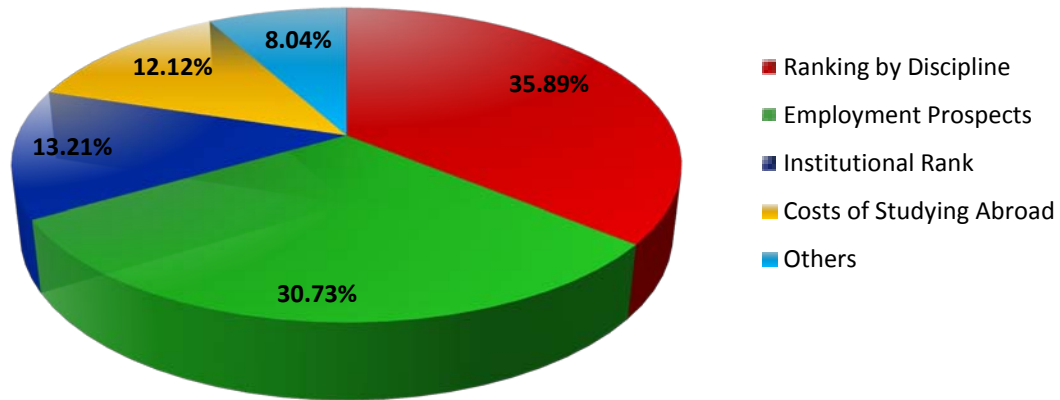
### III: Institutional Ranking No Longer a Leading Influence in Selection of Institution

*Figure 4: More Rational Consideration in Selection of Institution*

When asked what factors influence one's school selection, and "Professional Rank" and "Employment Prospects" were considered foremost by potential foreign students, at 35.89% and 30.73% respectively. "Institutional Rank" is also considered by many students, at 13%, and the "Costs of Studying Abroad" by 12% of the students.

This data exhibits an increasingly rational and practical selection process of students, who would fully consider future employment and career plan rather than blindly going with the tide.

**Figure 4: More Rational Consideration in Selection of Institution**



**IV: Discipline Selection More Rational, Practical, and Multi-dimensional**

*Figure 5: Liberal Arts Gain Popularity in Discipline Selection*

In 2010, the most selected fields of study by students planning to study abroad still belonged to the study of commerce, such as finance and accounting, marketing and sales, business administration, etc., but the proportion of students choosing commerce has decreased from one-third to less than one-quarter of the surveyed population. This suggests that students are more mature in their discipline selection, and have better understanding of foreign education systems and professional settings. They have begun to depart from the trend of favouring such disciplines as commerce and computing science, while disciplines in the arts are receiving more attention. Students consider multi-dimensional factors, including career development potential and personal career plans.

**Figure 5: Liberal Arts Gain Popularity in Discipline Selection**

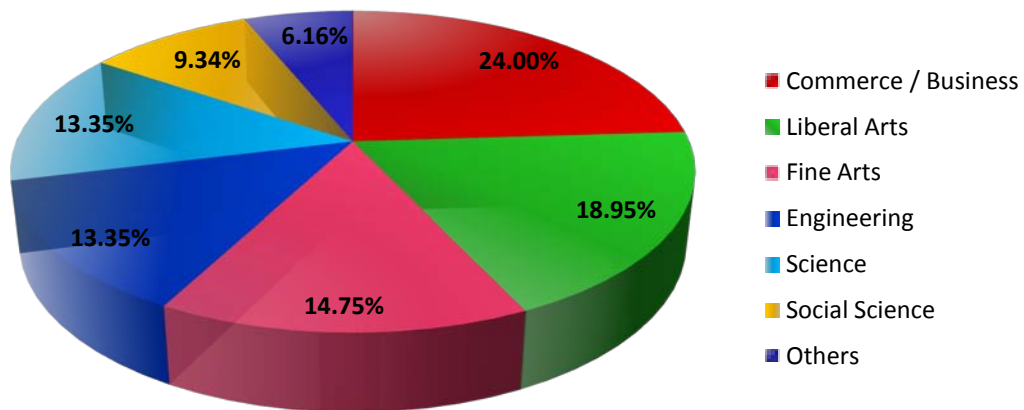
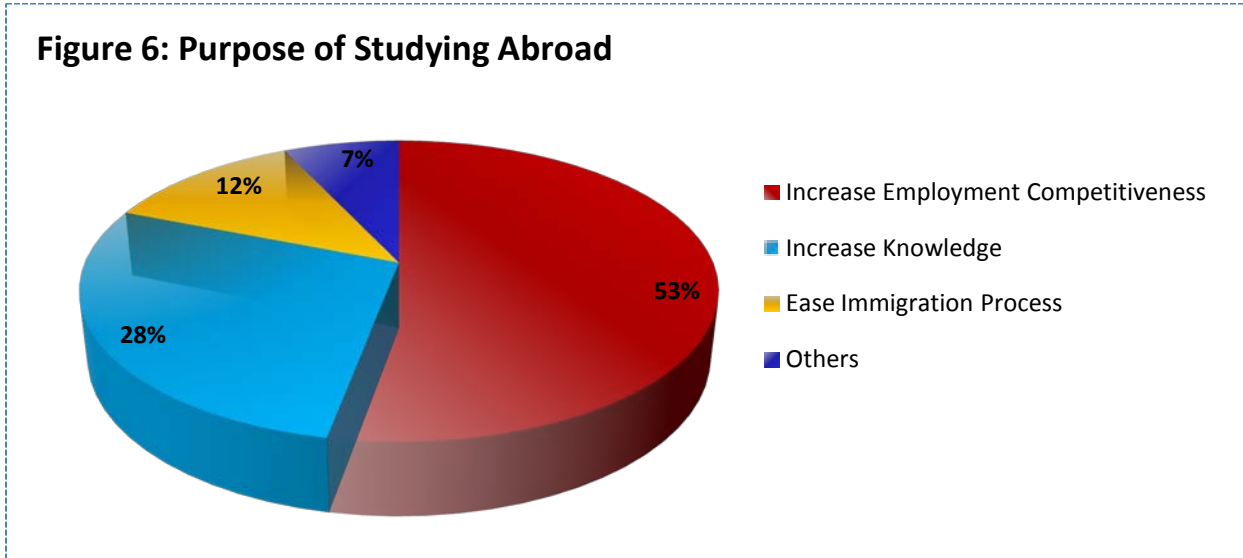


Figure 6: Purpose of Studying Abroad

Over 50% of the surveyed students choose to “increase employment competitiveness” as their main purpose for studying abroad. The proportion of students that selected the liberal arts as their intended fields of study increased greatly since 2009, and closely follows commerce with an 18.95%. At the same time, the proportion of students that selected to study fine arts greatly increased. This data demonstrates that students are rational in their choice of discipline, their purpose for studying abroad is guided by career considerations, and they focus more on personal needs.



## V: Study Abroad Sector Finds New Force in University Undergraduates – Over 50% Plans to Further Studies Abroad

Figure 7: Undergrads Have Absolute Advantage in Formal Schooling Records Among Prospective Study Abroad Students

Among all prospective study abroad students: over 55% are undergraduates, 17.17% are high school students, 10% are junior college or vocational high school students, and 7% are graduates that plan to further their doctoral studies abroad.

These data show that currently in the study abroad market, undergraduate students own half the market with their educational background, and the number of high school students is increasing. The troop overall is fast expanding, collecting students from junior colleges and vocational high schools along the way.

In recent years, study abroad organizations have expanded their activities in just the higher education sector, especially the graduate and doctorate programs, to engage with other levels such as high school, junior college, and undergraduate programs.

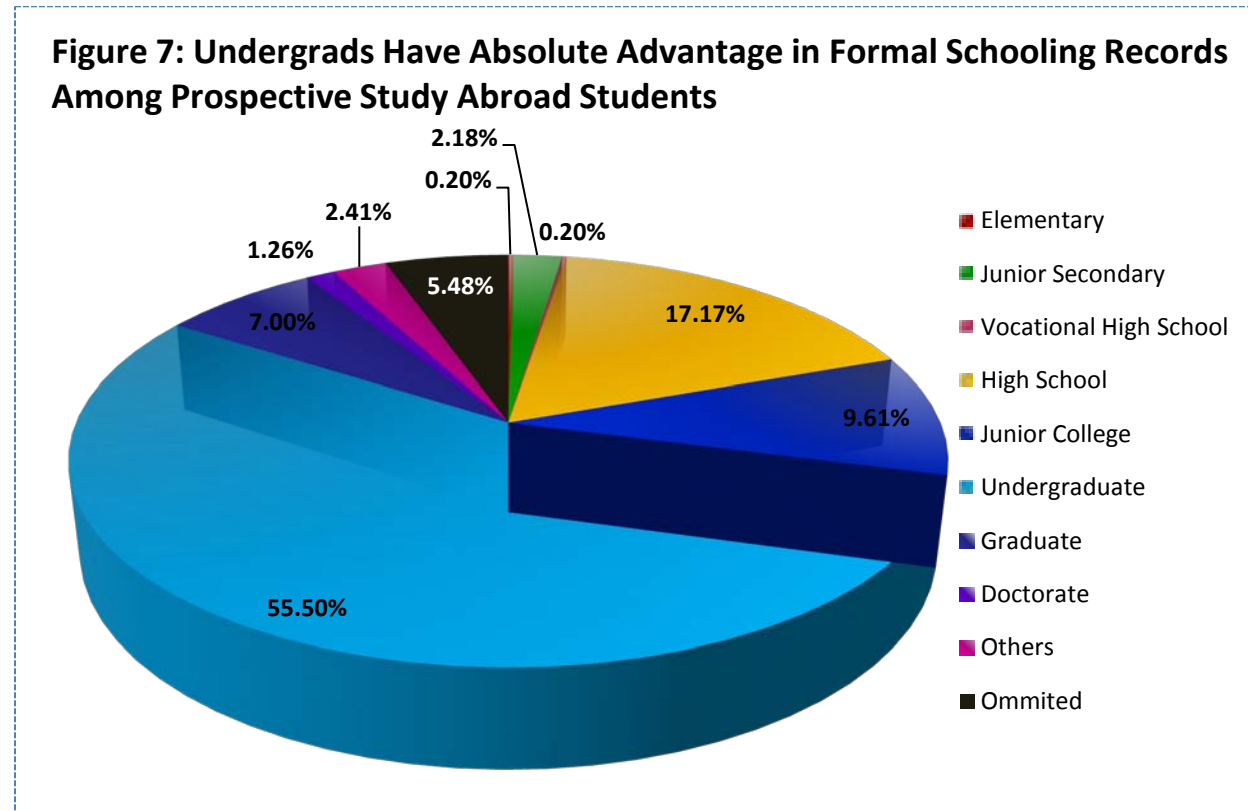


Figure 8: Most Surveyed Students Plan to Study Abroad After Graduation

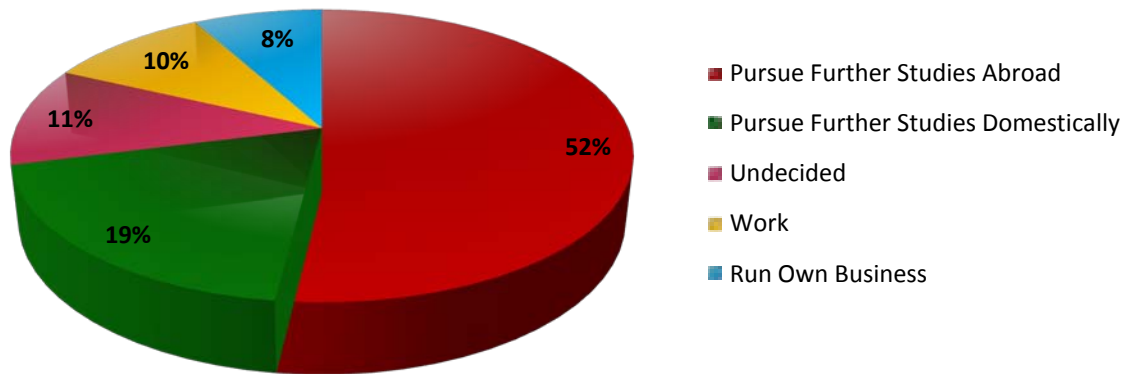
Among the post-graduation plans of surveyed students, 52% are to study abroad. Among that 52%, over 60% choose to pursue a master's degree. In the face of increasingly severe competition for employment,



national examinations for post-graduate studies and civil service admission, more and more students are directing their attention to the greater scope and selection offered by overseas institutions.

After further compiling the survey responses of 7,500 students, it was discovered that over 13% of the students planned to pursue undergraduate studies.

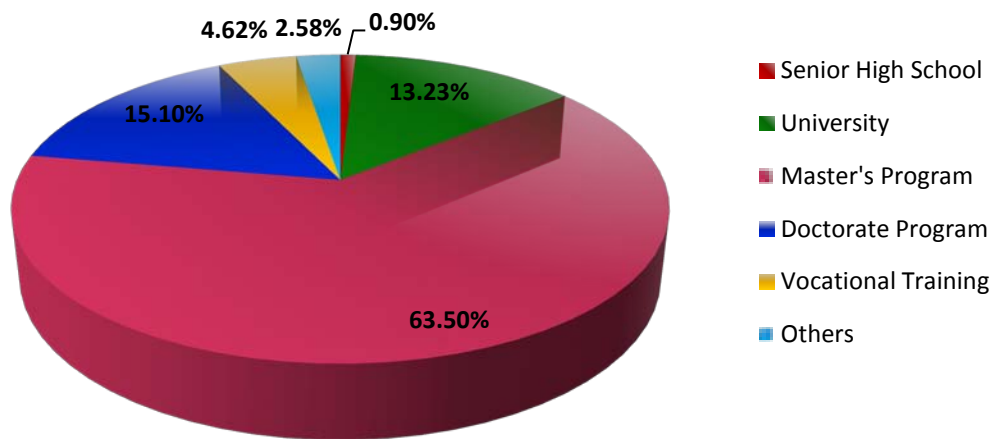
**Figure 8: Most Surveyed Students Plan to Study Abroad After Graduation**



*Figure 9: Over 50% of Surveyed Students Plan to Apply for Post-graduate Studies*

Mr. Chao Zhang believes that the number of young age students studying abroad this year reached a peak in recent years. The number of students going abroad for senior high school rose by 20 – 30%, and the number of high school graduates participating in foreign standardized exams for universities overseas rose by 10% from past years. The number of students going to the US for their undergraduate studies is predicted to close-in on the number of students going for their graduate studies.

**Figure 9: Over 50% of Surveyed Students Plan to Apply for Post-graduate Studies**

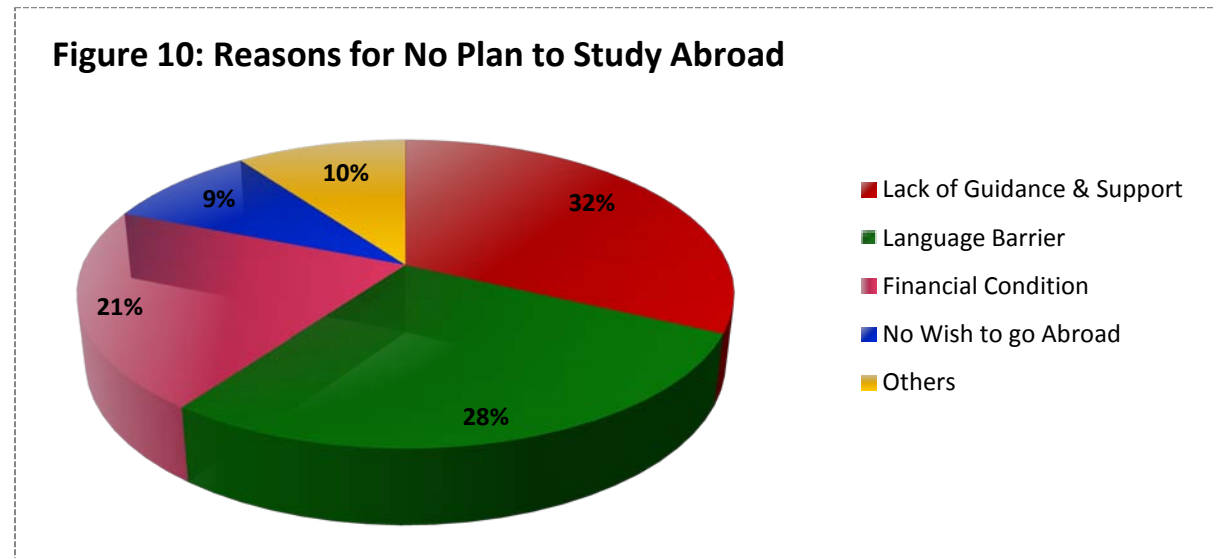


## VI: Primary Impediments to Students Studying Abroad are Language Barrier and Lack of Guidance

Figure 10: Reasons for No Plan to Study Abroad

28.3% and 31.5% of surveyed students selected language barrier and lack of guidance and support as the main impediment to their plan and proceedings to study abroad. Many university and high school graduates-to-be are at a loss in the face of employment and further education possibilities.

Mr. Chao Chang, manager of the Study Abroad and Employment Department of EIC Group, indicates that although more and more students are going abroad, following every batch that goes overseas, substantial study-abroad intents emerge domestically. These new batches of students also need professional language training and consultation services so they are guided and supported with professionalism and accuracy on their path going overseas. Hence, as a study abroad organization, it is important while innovating in services to publicize basic study abroad knowledge.

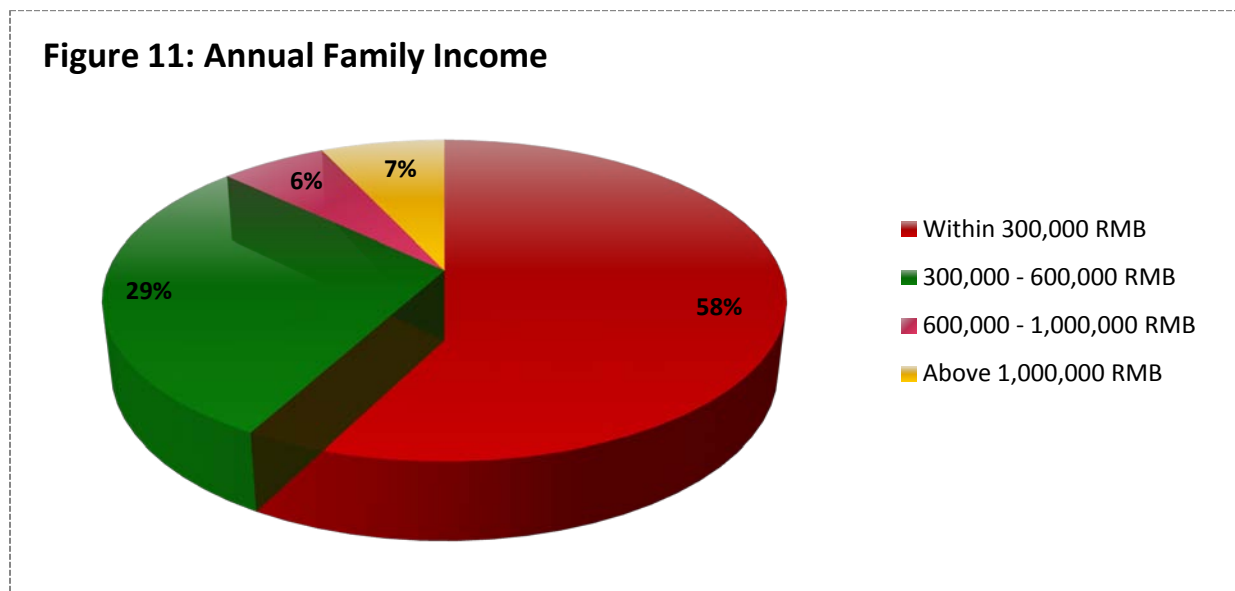


## VII: Studying Abroad Becomes More Accessible to Ordinary Households

Figure 11: Annual Family Income

A few years ago, only 2% of all students studying abroad came from ordinary households, but this number is rising quickly. Among the students that intend to or are about to study abroad, 52.28% come from households with annual income of lower than 300,000 RMB, indicating that studying abroad has become just as accessible to the ordinary households. As the RMB and the average household income strengthen, studying abroad has become less exclusive to elite households, and more and more Chinese families see it as an educational investment.

EIC Group President, Mr. Zhu Li, explained, “from this data, we can see that studying abroad has evolved from an elitist process to an advantageous experience to the pursuit of dreams and materialization of personal values.”



## VIII: Newspapers and Websites are Main Sources of Study Abroad Information

*Figure 12: Sources of Information*

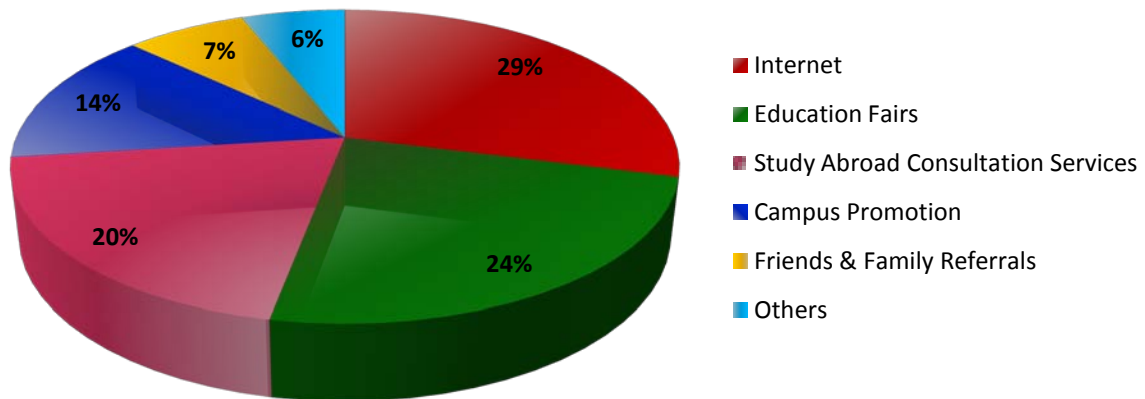
The internet and newspapers have become the main sources of information on studying abroad for high school and university students and parents. 21% of the surveyed population obtained information from newspapers, 20% from websites or search engines, and 13.46% from a variety of posters at school, fliers, and seminars.

It appears from the collected data that the internet has become the main channel for high school and university students to obtain information on studying abroad. One statistic indicates that 80% of the high school and university students would turn to the internet and search engines for more information.

Whether or not high school and university students can study abroad, though, is in the end decided by the parents. Parents between the ages of 40 – 55 mainly source their study abroad info from the newspapers and study abroad service providers. Also, 9% of students would turn to family and friends as a source of information. Compared to the promotion of study abroad service providers, people find that word-of-mouth referrals from teachers, classmates, friends or family are more reliable.

Mr. Zhu Li points out, “Only quality, brand-name study abroad service providers can benefit from word of mouth; 30% of our customers are referred to by old customers.”

**Figure 12: Sources of Information**

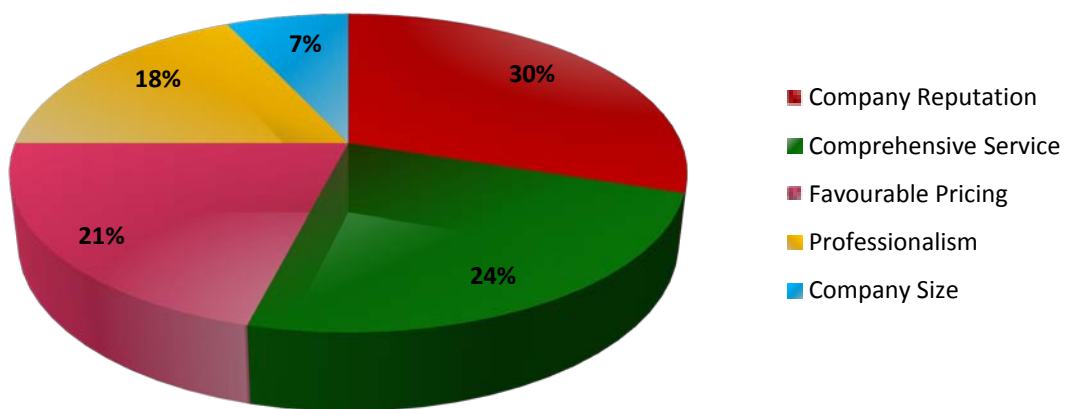


### VIII: Solid Reputation and Professional Service Win Customers

*Figure 13: Selecting a Study Abroad & Training Service Provider*

30% of students believe company reputation is the primary interest of students in selecting a study abroad and training service provider. Following this, comprehensive service and favourable pricing are also very important.

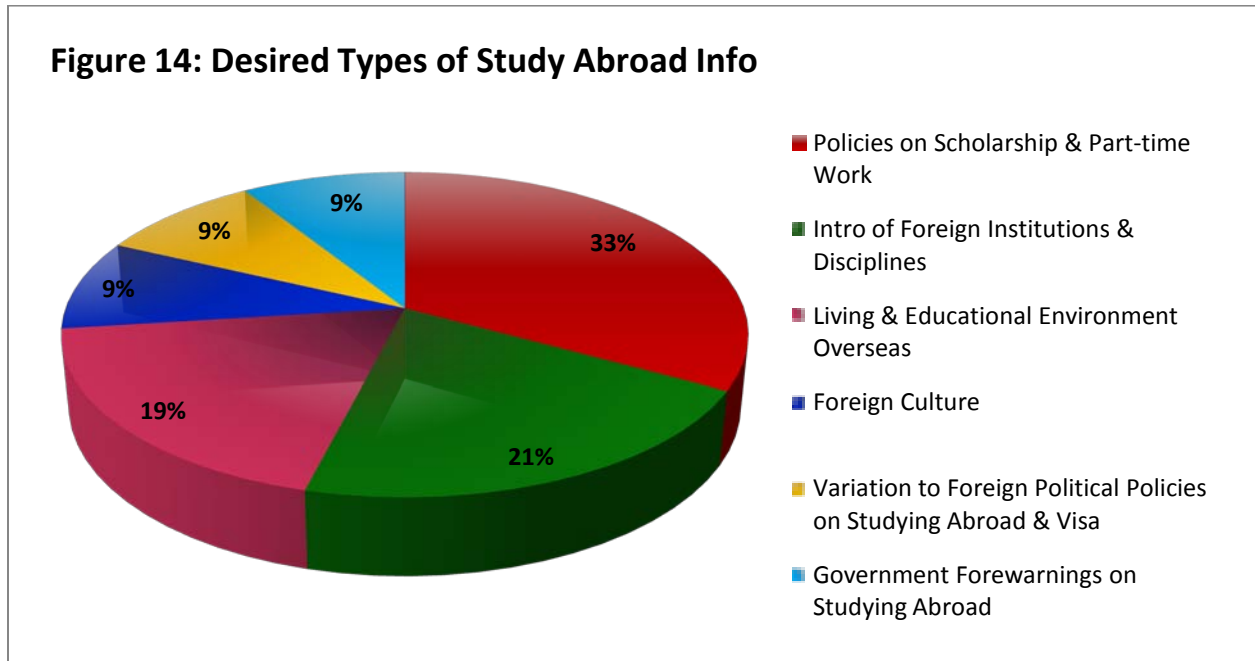
**Figure 13: Selecting a Study Abroad & Training Service Provider**



*Figure 14: Desired Types of Study Abroad Information*

After selecting a study abroad service provider, students are most interested in learning about policies on scholarships and part-time work, introductions of foreign institutions and disciplines, living and

educational environment overseas, and other such practical information. This indicates that students have higher and stricter expectations of the product and services provided by the consultation services. Unlike some dishonest organizations in the market, brand-name service providers support themselves in the market with solid reputations and professional services, and are more capable of fulfilling the increasingly professional and multi-dimensional needs of students.



#### *Overall Data Analysis*

Mr. Chao Zhang summarizes that the current study abroad market is becoming more segmented, and students and parents are more attentive to brand and service. Therefore, by upholding quality brand reputation, and continuously expanding the scope of services to ensure they are comprehensive and professional, organizations remain firmly competitive in this market.