

2012 Agent Survey Analysis

Background

The British Council China has been and remains committed to raising the profile of UK education and exploring maximum opportunities for UK institutions in the Chinese market. For this purpose, we have established solid relationships with over 500 Chinese licensed education agencies and work closely with them; these agencies are recognised as “frontline soldiers” and “key influencers” in the student recruitment market. Therefore it is essential to obtain updated agent profiles and collect market information from agents.

The survey was conducted by the British Council China in March 2012. A total of 102 China agents completed the questionnaires. The information collected is valid from January to December 2011 and mainly covers the following dimensions:

- Market information of studying in the UK and other competitor countries
- Evaluation of British Council’s products and services
- Evaluation of student visa system

Top line findings

1. As a channel of marketing, **digital marketing** attracted most of the spotlight in 2011, and it has actually started moving towards the centre stage since 2009 according to the agent survey.
2. Overall, agents felt that business **for US, UK and Canada increased**. While **1/3rd** of agents expressed that their business for **Australia** remained **unchanged** compared to the previous year and the same percentage of agents thought it increased in 2011.
3. Agent’s performance in 5 different sectors in different countries: The **US** has experienced growth in all sectors, esp. in **UG** and **PG**. For **UK** bound, students’ interest in **PG, UG, and school** sectors all increased, but over 20% of agents said business in **ELT and FE declined**.
4. Reasons for being popular or unpopular: **Tuition fee, living cost, scholarship opportunities, safety, education quality, and work opportunities** were the most mentioned reasons. The **UK** is popular because of its **high education quality, safety, and low maintenance fees**. In contrast, the reasons for not choosing the UK are **high tuition fees and less scholarship and work opportunities**. It is obvious that our main competitors have many of the unfavourable aspects of studying in the UK, e.g.: U.S is popular because there are more scholarship and work opportunities, which is lacking in the UK.
5. Over 60% of agents see the **school sector** as the fastest growing market, as the PG market has been quite mature with severe competition with many students preferring to apply by themselves.
6. One aspect that was highlighted in this survey was that the interest in the subject of **visual and creative arts** has increased over the previous year.

7. Agent's business is becoming more and more diversified, which suggests that we should **segment agents** to reach a more targeted type of agent for our different products.
8. For our **agent services and products**, agents appreciated our support in building up relationships with UK institutions and providing updated information about studying and living in the UK. Over **90%** of agents found our agents' activities including Agent Newsletter, Agent Conference, and Agent Workshops are useful or very useful.
9. **The UK, Australia and the US** are the top 3 countries with the most attractive visa system.