



**Education
Rethink**



RETHINK CHINA: THE END OF THE AFFAIR



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Executive Summary

Growth in Chinese student flows to the major English-language study destinations – the US, UK, Canada and Australia – has slowed considerably since 2016. A number of factors are contributing to that declining trend, including the emergence of less expensive study destinations in Asia and Europe that offer what is perceived as better value and a seemingly more welcoming environment.

In this report, Chinese student mobility to the four major host destination markets is examined, along with the push-and-pull factors that are currently influencing student flows. The increasingly weighty role geopolitical issues play in international higher education is also noted. The challenges that education institutions are currently navigating apply not only to recruiting students from China, but from many countries across the globe.

Key findings:

- Chinese students continue to pursue study in the US, UK, Canada and Australia, but growth is slowing significantly
- The US and UK continue to rely heavily on China as a source country for international students
- Canada and Australia are diversifying their international student populations so as to be less reliant on China as a source country
- Total enrollments of Chinese students across nearly every level of study in the US dropped in 2018-19, with the biggest decline in language studies
- UK student visa issuances to Chinese nationals are up 21 percent, year-on-year, while issuances to the rest of the world have increased eight percent
- After surging 38 percent through the first half of 2018, the number of new study permits for Chinese nationals to Canada was flat through August 2019
- Demand for Canadian education from the rest of the world remains strong, with issuance of new study permits growing nearly 15 percent in the last year
- New Chinese student enrollments in Australia were down four percent in the last year, while new enrollments from the rest of the world are up nearly seven percent



A note from the Education Rethink team



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It's hard out there. And it's only going to get harder. With geo-political issues playing an increasingly prominent role in determining international student flows, developing sustainable recruitment and internationalization strategies has become that much more challenging.

That's where Education Rethink comes into play. Despite ongoing political volatility across the globe, we believe big data backed by robust analysis should not only remain securely in your strategy toolbox, it should also guide key decision making. A comprehensive understanding of context, from real time sources of global student flow data and relevant policies exerting push and pull factors, will provide you with a foundation when the rest of the landscape keeps shifting.

In our inaugural report, ***Rethink China: The End of the Affair***, we examine the numbers of mainland students headed to the four major English-language destinations – the US, UK, Canada and Australia – by means of student visas, or their equivalents. While visa issuance may not be a direct apples-to-apples comparison with higher education enrollment, it can get us very close to the mark, and much more quickly than other national-level sources. By casting a wide analytical net, and keeping atop the latest data sources, Education Rethink seeks to identify trends before they emerge. The choice is yours: use lagging data to inform your strategies or take a look into the future.

Education Rethink isn't tethered to agendas or loyalties, so strives to be as neutral as our data sources allow us to be. Yes, we understand the limitations of data and how the collection processes might be flawed. However, by connecting the disparate dots and examining trends across the globe, we present as complete and real-time a picture of international higher education possible today so you might rethink what you will do tomorrow.

Best,

Jeremy Chan
Anna Esaki-Smith



INTRODUCTION

With regards to the point of this report, let's not bury the lede: the latest data shows that the long-predicted end of the Chinese student boom may soon arrive for the US, UK, Canada and Australia – despite strong growth in outbound student numbers from China. In response, these major host destinations will need to develop more nuanced strategies to maintain their position in the world's most important student market, while also seeking new pools of international students outside of China for growth.

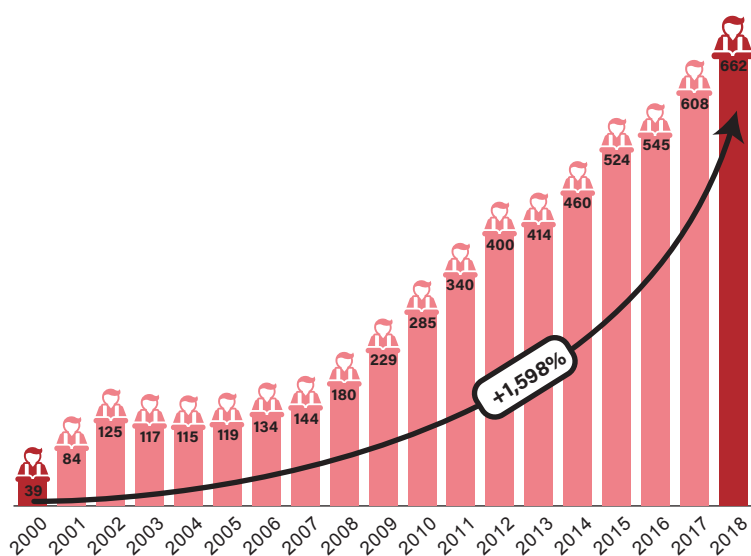
The United States almost certainly saw its total Chinese student population peak in 2017-18, and the downward trajectory has continued into 2019-20, despite a mild rebound in visa issuance this year. Australia appears to have reached “Peak China” one year after the US did and has seen new enrollments of Chinese students across all levels of study drop four percent year-on-year through August 2019. In Canada, new enrollments of Chinese students are essentially flat in 2019, even as they surge for students from the rest of the world. Indeed, among the major four English-speaking markets, only the UK will see its Chinese student population rise significantly in 2019. However, even there, an overreliance on Chinese enrollments means there is little room for further, sustainable growth beyond current enrollment levels.

In this report, Education Rethink takes a deep dive into these four major study destinations through the lens of Chinese student mobility, and then examines the extent to which these host countries are diversifying away from China. By analyzing how the latest patterns in Chinese student mobility compare with demand from the rest of the world, we can assess the overall health of each of these host countries as we anticipate a post-China world.



THE END OF THE AFFAIR

Number of Chinese students studying abroad
(Thousands)



Source: China Ministry of Education

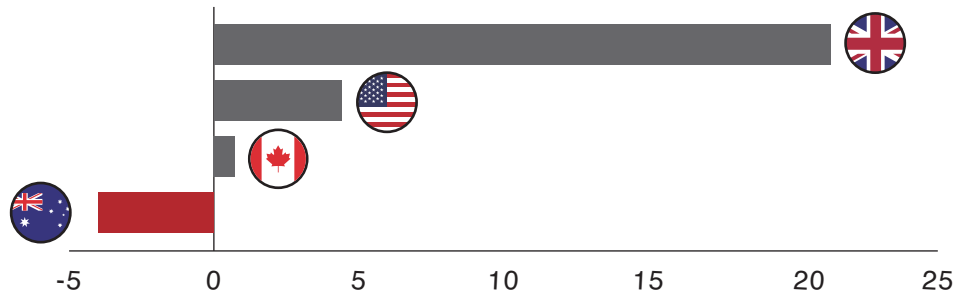
When viewed in the aggregate, growth in Chinese student demand for the four major English-language study destinations has slowed considerably since 2016. To wit, the number of student visas or their closest equivalent issued to Chinese nationals for the US, UK, Canada and Australia grew a total of 4.5 percent from 2016 through the latest period for which data is available in 2019. This may not sound like much of a slowdown, but consider that the number of total outbound Chinese students grew 22 percent from 2016 to 2018 alone.¹ Chinese students continue to go abroad in droves, but they are increasingly looking beyond the traditional host destination markets.

In fact, China's student market is still by some distance the most important one in the world. Outbound numbers from China have grown 17 times from 2000 to 2018.

The continued growth in outbound mobility from China should not come as a surprise. Due to three decades of steadily rising incomes, overseas education is now accessible to a wider range of Chinese students than ever before. As incomes have risen, the profile of the average outbound Chinese student has also shifted from a sponsored graduate student to a self-funded undergraduate. But at the same time, the available menu of study options has grown considerably, and Chinese student preferences have shifted along with them. As a result, Chinese students are seeking study

¹ China Ministry of Education

Annual % change in new Chinese student enrollments since 2018



Source: National statistical agencies, based on latest available data in 2019. Canada data based on number of new study permits through August 2019; Australia data based on number of YTD commencements through August 2019; UK data is based on number of tier-4 student visas issued through June 2019; US enrollment data is based on the number of F-1 student visas issued through September 2019.

destinations in Asia and Europe that offer some combination of better value, closer proximity to home, or more familiar and seemingly safer environments.

Given the sustained growth in outbound students from China, the apparent slowdown in demand for major English-speaking markets is particularly striking. In 2019, new enrollments of Chinese students have turned negative in Australia and slowed considerably in Canada, with both markets effectively diversifying their international student populations away from China. In the United States, total enrollments of Chinese students – traditionally a lagging indicator of student demand – indicated a net decline from March 2018 to March 2019.²

A mild rebound in U.S. student visa issuance in 2019 will not make up for three straight years (2016-18) of dramatic decline.

For now, the UK is the only one of the four major English speaking study destinations that is registering meaningful growth in Chinese student enrollments. However, for UK education institutions, absorbing so many Chinese students creates another set of challenges both in the classroom and outside of it.

A host of factors appear to be conspiring to dissuade many Chinese students from going to the major

markets. Geo-political tensions have likely made Chinese students feel less welcome in countries such as the United States and Canada. A weakening domestic currency may have caused Chinese families to be more price conscious. The emergence of competitive alternatives in non-traditional markets has eroded the advantage that traditional host countries historically enjoyed. Markets as diverse as Japan, South Korea, Germany and the Netherlands – offering more affordable study options, often closer to home – look to be winning market share at the expense of traditional host destination countries. And lastly, some of these major English language host countries appear to be actively seeking to diversify their international student populations.

Considering this backdrop, let's take a closer look at the latest data from the US, UK, Canada and Australia, and how each one is responding to the challenges posed by the Chinese student market.

² U.S. Department of Homeland Security, Student and Exchange Visitor Information System (SEVIS)



THE UNITED STATES

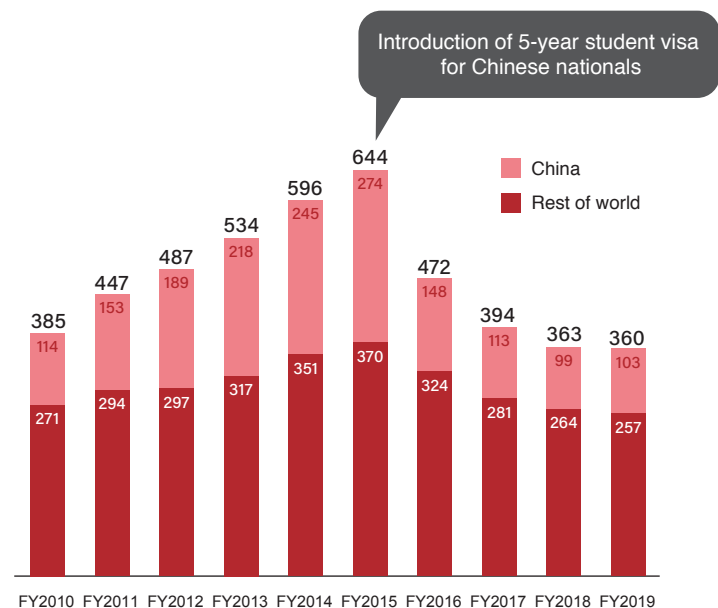
Sharp drop in pre-collegiate and ESL students bode ill for future university enrollments

- *A mild uptick in F-1 student visas for Chinese nationals in the last fiscal year masks a worrying decline since 2016.*
- *Total enrollments of Chinese students across all levels of study in the U.S. dropped in 2018-19 and will decline further in 2019-20 and beyond.*
- *The sharpest drop-off in Chinese student demand is for language studies.*

By this point, it is widely known that Chinese student demand is dropping for US education. In this regard, Chinese students are not particularly unique. The number of F-1 visas issued to students from the rest of the world also turned sharply negative in 2016 and have declined every year since. Despite this trend, the number of US student visas issued to Chinese nationals in the last fiscal year has actually rebounded, growing faster than any other top ten sending market. But this is extremely faint praise. A deeper dive into Chinese enrollment data in the United States reveals a far more troubling picture than even the topline growth figures can adequately communicate.

First, a brief aside on the source for this analysis. The closest proxy for new international enrollments in US education is the number of F-1 student visas issued in a given year, which are reported per fiscal year beginning on October 1. F-1 visa issuances are broken down by nationality and, since 2017, reported with only one-or two-months' lag, making it quite current. This gives a good approximation of new enrollments from a given country, from which we can extrapolate demand

Total number of F-1 student visas issued worldwide (Thousands)

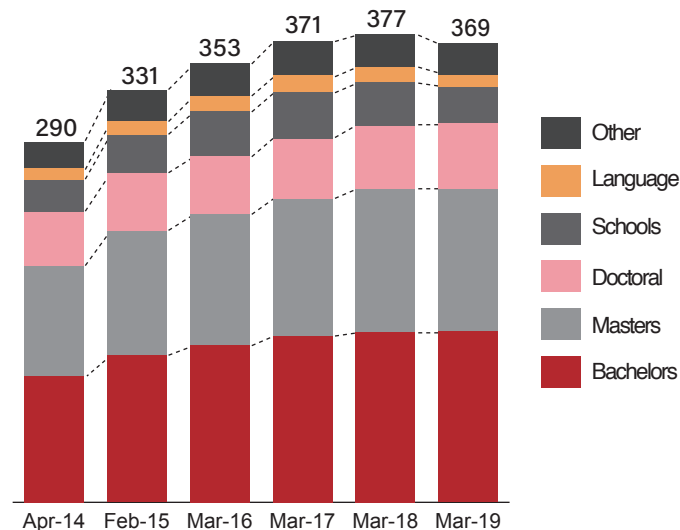


Source: US Department of State, Bureau of Consular Affairs

for US education in the contemporary period. Moreover, visa issuance figures are highly correlated with same year enrollments in both intensive English programs and higher education.

However, visa data also has limitations. Namely, it does not distinguish between level or duration of study. What's more, beginning in 2015 eligible Chinese students qualified for five-year multiple entry visas and no longer had to reapply each year. This policy shift complicates comparisons of F-1 issuance data prior to 2014 with the data that followed.

Number of active Chinese students in the U.S., by level of study (Thousands)



Source: US Department of Homeland Security, Student and Exchange Visitor Information System (SEVIS)

That said, F-1 issuance data to Chinese nationals since fiscal year 2016 (one year after the policy shift) still tells a powerful story. In fact, from 2016 to 2018, the annual number of new F-1 visas issued to Chinese nationals dropped by nearly 50,000. The fact that it has marginally rebounded in the last year by some 4,000 visas should not distract from the bigger picture – there were 45,000 fewer visas issued to Chinese students in 2019 than there were in 2016.

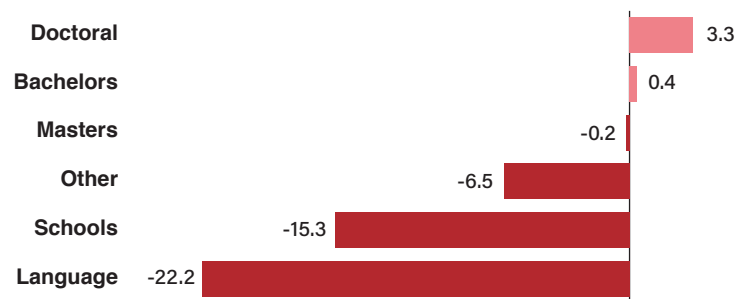
This steep drop-off in visa issuances has also shown up in the total enrollment figures reported by the Student and Exchange Visitor Information System (SEVIS), with the number of “active” Chinese students shrinking by 8,000 from March 2018 to March 2019. Given that students who have completed their undergraduate and postgraduate studies and are undergoing Optional Practical Training (OPT) are still included in the “active” population, the SEVIS enrollments figures are a lagging indicator of Chinese student demand for US education. However, even this piece of data is now confirming what F-1 visa data has indicated since 2016: Chinese student demand for US education is falling – and fast.

Two sectors have been particularly affected by the drop off in demand from China, the first being language programs, most of which are shorter in duration than K-12 or higher education programs. Given that language programs are largely indistinguishable from one country to the next, enrollments in these programs serve as a sort of canary in the coal mine for student sentiment, portending declines in other sectors as well. Many language students go on to pursue further study in the country where they first studied English as a foreign language, meaning that US higher education institutions should take note. The fact that the number of Chinese students enrolled in language programs declined 22 percent from March 2018 to March 2019 (and is down more than 37 percent from its peak in November 2016) is a very worrying sign of things to come for US education writ large.

The other sector that is experiencing a decline in Chinese student enrollments is pre-collegiate education, which encompasses both primary and secondary schools. The number of Chinese students enrolled at primary levels - admittedly a small population to begin with - declined 14 percent from 2018 to 2019, while the much larger population of secondary school students fell 15 percent. Given the historic tendency for international students who enroll at pre-collegiate levels overseas to remain in the same country for their post-secondary education, the fact that the youngest Chinese learners are leaving the United States behind at such rapid rates will undoubtedly have knock-on effects at higher levels of study for many years to come.

Notably, total Chinese student enrollments at the undergraduate and postgraduate levels were flat or slightly increasing through March 2019. However, this population of students includes either non-fee paying (doctoral students) and a significant portion of students who have completed their studies and are enrolled in OPT. Furthermore, with more than 18 percent of all Chinese students enrolled in US higher education on OPT in 2017-18³, the total population of Chinese students considered “active” in higher education is not particularly reflective of current market dynamics.

Change in Chinese student enrollment in US education since 2018, by level of study (%)



Source: US Department of Homeland Security, Student and Exchange Visitor Information System (SEVIS)

³ IIE Open Doors report. Note: Chinese student OPT enrollments as a share of all higher education enrollments increased from 17.1 percent in 2016/17 to 18.1 percent in 2017/18.

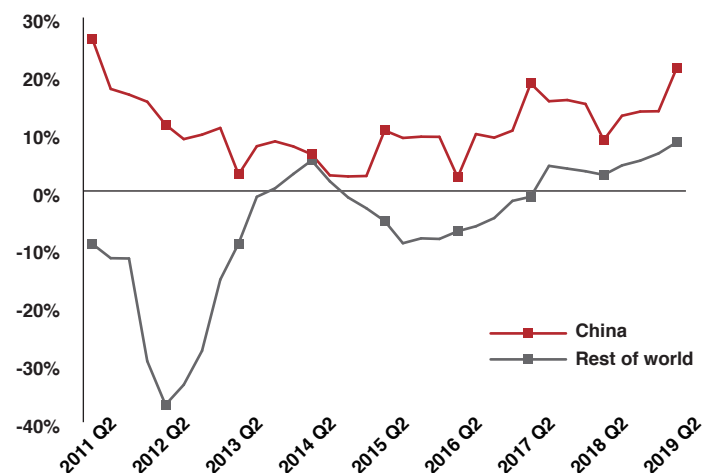


UK

Rapid rise in Chinese student demand as UK leans into China market

- *UK student visa issuances to Chinese nationals are up 21 percent year-on-year, while issuances to the rest of the world have increased 8 percent.*
- *Chinese nationals now make up 45 percent of all UK student visa recipients.*
- *Reinstatement of the post-study work visa will likely further boost enrollments from China and elsewhere in 2020.*

Annual % change in number of tier-4 visas issued
(12-month rolling sum)



Source: UK Home Office

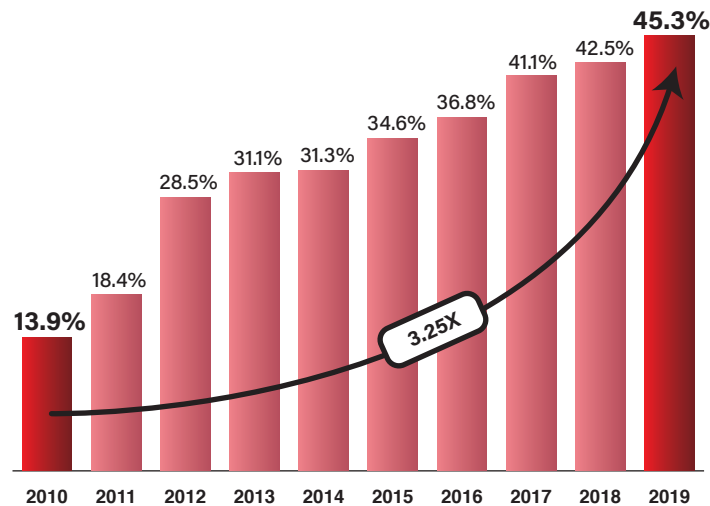
In contrast to lagging Chinese student enrollments in other major host destinations, the UK has seen inbound mobility figures from China climb significantly. Through the first half of 2019, the number of tier-4 study visas⁴ issued to Chinese students in the previous 12 months has surged 21 percent over the same period in 2017-18 – the fastest growth rate since 2011. What's more, new UK tier-4 issuances to the rest of the world have also grown more than eight percent over this period, faster than any other point in at least a decade.

This is obviously encouraging news for the UK, particularly as it saw a net decline in issuance of tier-4 study visas to the rest of the world from 2012-2018. All told, some 28,000 more UK student visas were issued worldwide in the 12 months from July 2018 to June 2019 than in the preceding year.

There are several possible reasons for the growing appeal of the UK for Chinese students. Given perceptions of less-than-welcoming environments elsewhere, the UK may be viewed more positively in that regard. Somewhat counterintuitively, the prospect of Brexit may also have helped boost demand by weakening the pound – making UK education less expensive for international students in the process – while also motivating UK institutions to seek other international markets to make up for largely-anticipated shortfalls in EU enrollments.

⁴ The UK equivalent of an F-1 student visa.

Chinese share of all tier-4 visas issued 12-month period through the first half of each year



Source: UK Home Office

Given the recent UK announcement that it is reinstating the post-study work visa that was rescinded in 2012, the UK expects to build on this rebound in demand from China and other international markets into 2020 and beyond.

However, a deeper look at the UK's 2019 growth profile unveils some concerning details. For one thing, the growth rate in tier-4 visa issuance to Chinese students was more than twice as fast as the rest of the world, continuing the decade-long trend of increasing UK dependency on the China market. The result? The share of Chinese students in the overall population of tier-4 visa recipients has more than tripled from 2010 to 2019.

Today, nearly half of all tier-4 visas are issued to Chinese students, a ratio far higher than in any of the other major host countries. To put this in perspective: in the last year, there have been five times as many UK study visas issued to Chinese nationals than to Indian students, who make up the second largest group of tier-4 visa recipients.

It is important to bear in mind that EU students currently coming to the UK do not require tier-4 visas, hence the share of Chinese students in the overall international student population is not quite as extreme as it seems in the visa issuance data. However, in the event of Brexit, the UK will almost certainly experience a decline in EU enrollments, which will further increase the UK education sector's reliance on recruiting Chinese students.

While the surge in UK enrollments from China may garner headlines, the country's ability to seek out new international markets in 2019 is a far better indicator of UK education's long-term health. Given a more accommodating policy stance, evidenced by the reinstatement of post-study work rights, the outlook for continued growth beyond China has improved in 2020 and beyond. One need look no further than Canada to witness a country that has managed to boost international enrollments while diversifying away from the China market.

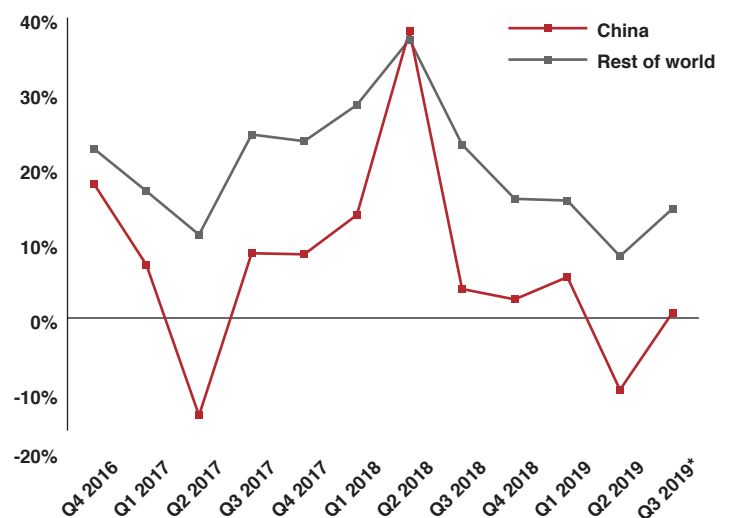


CANADA

Growth in Chinese student enrollments slows in 2019 as Canada diversifies its international student population

- *After surging 38 percent through the first half of 2018, the number of new study permits for Chinese nationals was flat through August 2019.*
- *Still, demand for Canadian education from the rest of the world remains strong, growing nearly 15 percent in the last year.*
- *The share of Chinese nationals in Canada's total international student population peaked at 33 percent in 2015 and has since fallen below 23 percent.*

Annual % change, new study permits
(12-month rolling sum)



Source: Immigration, Refugees and Citizenship Canada;
*Q3 2019 data through August 2019.

Canada began diversifying away from China's student market in 2015 and that pattern has continued ever since. Today, Canada is the only one of the major host destinations in which China is not the largest sender of international students. This represents a dramatic reversal from only a few years prior, when China was the primary engine of growth in international enrollments in Canada. However, over the last 12 months (through August 2019), growth in the number of new study permits holders⁵ from China has slowed to less than one percent, while new permit holders from the rest of the world have surged 14.5 percent.

In a complete inversion of the dynamic in the UK, Canada is becoming less dependent on Chinese student enrollments with each passing year. In fact, India overtook China as the largest recipient of Canadian study permits in 2018, and the gap has

widened further in 2019. Canada has issued 19,000 more study permits to students from India than China in the first eight months of 2019 alone. While Chinese students continue to represent the largest share of the international population at many Canadian universities and secondary schools, the winds are rapidly shifting.

The stealth diversification of Canadian international education since 2015 stands in stark contrast to the first half of the decade. From 2011-15, China contributed nearly half of all growth in the number of international study permits, attracting record numbers of Chinese students with pathways to citizenship and perceptions that the country was a safer and more welcoming alternative to the United States.

⁵ Canada's equivalent of a student visa.



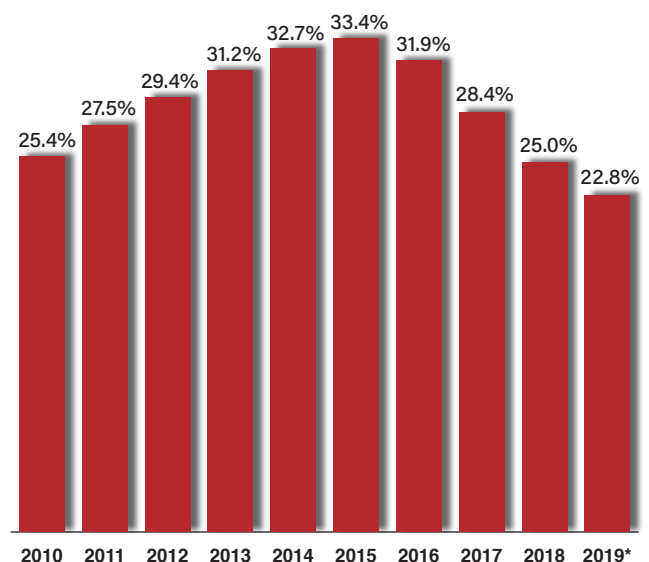
Since 2015, the number of new study permits issued to Chinese students has continued to grow at a decent pace – increasing 31 percent overall from 2015 to 2018 – but enrollments from the rest of the world have increased even faster. All told, China's share in Canada's total international student population peaked at 33 percent in 2015 and has decreased every year since. Through the first eight months of 2019, fewer than 23 percent of new study permits have been issued to Chinese nationals, making Canada the least reliant of the four major study destinations on China.

The reasons for the slowdown in new study permits for Chinese students in 2019 appear to be linked to geo-politics. Sino-Canadian relations plummeted in December 2018 following the arrest of the CFO of Huawei, Meng Wanzhou, when she was transiting through Vancouver. Huawei is not only China's largest private company, but Meng also happens to be the daughter of the founder of the firm. The arrest made international news, with diplomatic relations falling to their lowest point in a generation.

Until the rupture caused by Meng's arrest, demand out of China for Canadian education had surged, with growth in the number of new study permits for Chinese students peaking at an annual rate of 38 percent in the middle of 2018. A little over one year later, the growth rate has fallen to less than one percent.

Unlike in the United States, however, Canada has maintained strong growth in demand from the rest of the world. In fact, Canada's ability to diversify away from China over the last few years is a demonstration of the strength of its education offer and the foresight of the country's policymakers.

**Chinese student share of
all study permits in Canada**
(% of all active study permits)



Source: Immigration, Refugees and Citizenship Canada;
*2019 represents the 12-month period from Sept 2018 to Aug 2019.



AUSTRALIA

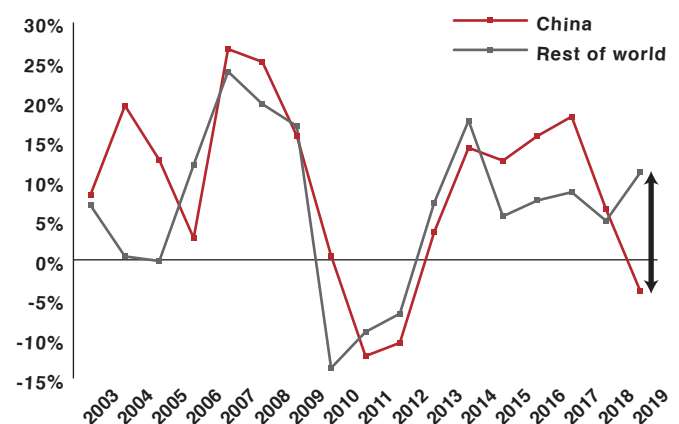
New enrollments from China dropping in 2019, as the rest of the world continues to grow

- *New Chinese student enrollments in Australia are down four percent in the last year, while new enrollments from the rest of the world are up nearly seven percent.*
- *Similar to Canada, falling enrollments of Chinese students in Australia are likely the result of geo-political tension and the rise of alternative markets.*

After growing by an average 13.3 percent year-on-year from 2013-18, new enrollments of Chinese students turned negative in Australia in 2019, declining four percent across all levels of study. As in Canada, however, the sudden slowdown in Chinese student enrollments has not dampened enthusiasm from the rest of the world, which has seen demand surge 11 percent through August 2019. For a dozen years from 2006-18, Chinese student enrollments closely tracked those from the rest of the world, but this is no longer the case. In fact, the gap between the growth rate in new enrollments from the rest of the world and from China is wider than it has been in 15 years. A deterioration in the Australia-China bilateral relationship could be keeping Chinese students away.

In the first eight months of 2019, every education sector in Australia with the exception of vocational has seen new Chinese student enrollments plummet, led by pre-collegiate schools and English language programs. In this regard, Australia resembles the United States, where declining enrollments of the

**Annual % change,
new enrollments across all levels of study (%)**

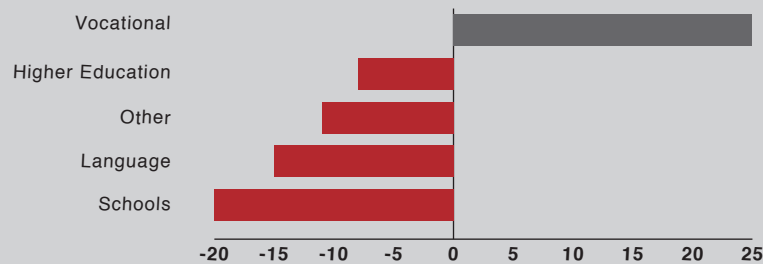


Source: Austrade, note: annual sum YTD through August of each calendar year

youngest and most mobile students are a harbinger of things to come for other sectors.

The sudden decline in demand from China in 2019 is even more significant given that it follows a half decade of remarkably strong growth. In fact, from 2014-18, the share of Chinese students among all new international enrollments increased from 24 percent to nearly 29 percent, as demand from China outstripped the rest of the world. That number has fallen below 26 percent in 2019, indicating that Australia is diversifying its international student body much like Canada.

Change in Chinese student enrollment since 2018, by level of study (%)



Source: Austrade, note: calculation based on YTD commencements through July 2018 and July 2019

What are the drivers behind the downturn in Chinese student enrollments in 2019? Most likely a combination of push and pull factors is at work. First and foremost, geo-political tensions between the two countries have been on the rise in recent years, as Australia has become more vocal in opposing Chinese activities in the South China Sea. Former Prime Minister Malcolm Turnbull's government also made efforts to reduce foreign influence in Australia's domestic affairs, a move which was widely seen as a response to China's growing reach into Australian politics. As diplomatic tensions between the two countries have risen, even industries once considered safely removed from politics are beginning to feel the effects.

Another driver may also be recent media reports that some international students on Australia's "temporary graduate visa" - also known as the 485 visa -- are engaged in menial jobs that do not require higher education degrees. With more than 90,000 temporary graduate visa holders in 2019, the local labor market may have simply run out of high-skilled jobs to offer Chinese graduates.

It's worth noting that the number of new enrollments from China in 2019 is still the second highest ever recorded (after 2018), so the sky is not falling quite yet. What's more, there is an argument to be made that Australia's education institutions were overly active in recruiting Chinese students over the previous five years, particularly in higher education, and so the decline may reflect a policy correction.

In fact, Chinese students made up nearly 40 percent of all new international enrollments in Australian higher education as recently as 2017. That figure has come down to 37.6 percent in 2019. Australia's universities, in other words, may also be feeling pressure to diversify their student bodies. That they have managed to do so while expanding their overall pie of international enrollments shows that traditional host countries can thrive even in a post-China world, but it will require new international strategies.



CONCLUSION

Diversify or be diminished

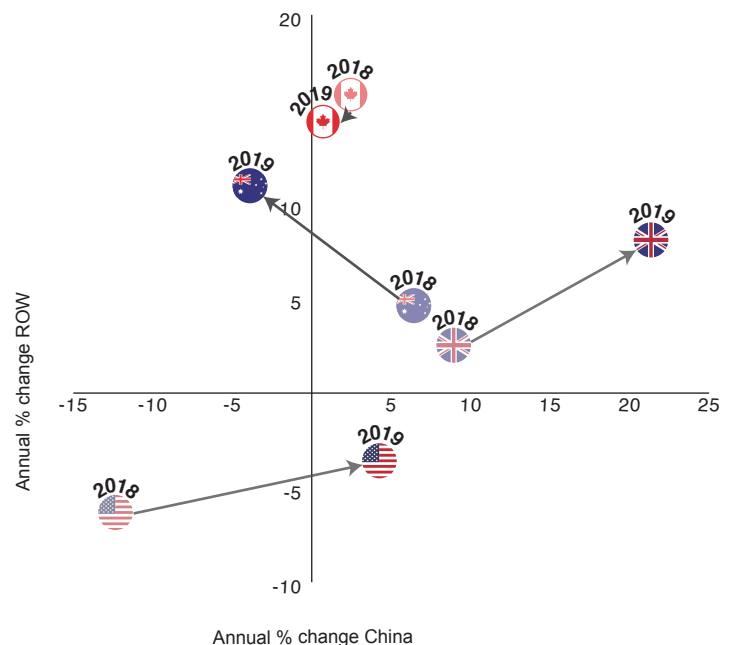
The major English-speaking study destinations are simultaneously facing two strategic imperatives: maintaining their position in China – still the world's largest sending market by some measure – while seeking out new sources of growth. Along those lines, Canada and Australia have shown that there is life after China, while the UK and United States have deepened their reliance on China's market in order to boost or maintain their overall international student enrollments.

If the data so far in 2019 shows us anything, it is that the major English speaking host countries have begun to put themselves on a more sustainable footing. New enrollments (or visa issuances) to non-Chinese international students are up 8.5 percent in the UK, seven percent in Australia, and 14.5 percent in Canada so far in 2019. Even the United States has seen the decline in F-1 visa issuances to the rest of the world moderate somewhat in 2019.

As China's student market continues to mature, the need to diversify the pool of international students will become that much more important. A slowdown in outbound Chinese mobility is inevitable given a shrinking youth population, slowing economic growth at home, and improving domestic provision. Add to that geo-political risk and increasingly competitive offers from alternative host destination markets in Europe and East Asia, and it becomes clear that the days of breakneck growth in Chinese student enrollments are likely over.

For education institutions in the US, UK, Canada and Australia, this will require a major strategic rethink: competing for market share in China by improving recruitment and marketing tactics, while also shifting resources to higher growth markets. The most effective institutions will simultaneously go deeper – segmenting China's markets in order to target high value cities and subject offerings – and go broader, casting a wider net

**Annual % change in new students
from China and rest of the world (2018 and 2019)**



Source: National statistical agencies, annual % change based on 12-month sum through most recent date available in 2019 (June 2019 for UK, August 2019 for Canada, and September 2019 for USA). Australian data represents YTD sum through August of 2018 and 2019 respectively, not 12-month sum.

to attract students from new locations. Prioritizing strategy, even when faced with finite resources, will be key when navigating today's rapidly-evolving landscape.

Staying on top of the latest trends in international student mobility is a good place to start. We are all contending with the same volatility and there's no crystal ball to show us the future. However, what will increasingly distinguish success from failure is a data-driven mindset and a desire to base decisions on tangible information. There isn't another China out there, nor will there ever be. But opportunities abound, if you know where to look.



Our Services

1

We support education institutions in the development, implementation, and optimization of their internationalization strategies. Using hard data and rigorous analysis, we provide answers to questions surrounding:

- Education policies
- Student recruitment
- Partnerships
- Subject demand
- Competitor landscaping

2

We scan the market to provide insights about the latest trends in international education, casting a wide net and always separating the signal from the noise. We combine deep knowledge of education policy with data science.

3

We develop and manage in-house indices to benchmark the performance of education programs, institutions, and markets.

4

We conduct surveys, focus groups, and targeted interviews of students and stakeholders to get the answers straight from the source.

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