Essential China Updates

The Great Reopening of 2023 and What It Means for HEIs

David Weeks, Co-Founder & COO @ Sunrise International
March 16, 2023

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Sunrise International is a Beijing-based full-service media production studio and education company that is flexible and attuned to your needs. We are experts at providing cross-border digital services, whether it is a short promotional campaign or a comprehensive marketing solution, Sunrise has the experience and network to help deliver your message to Chinese students, parents, and schools.
1. Broad Ecosystem Updates
2. COVID Reopening: What’s Done
3. Predictions for Final Reopening Steps
4. Implications for Institutions
Ecosystem Updates

### INTERNATIONAL STUDENTS BY ACADEMIC LEVEL

<table>
<thead>
<tr>
<th>Academic Level</th>
<th>2020/21</th>
<th>2021/22</th>
<th>%Total</th>
<th>%Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>125,616</td>
<td>109,492</td>
<td>37.7</td>
<td>-12.8</td>
</tr>
<tr>
<td>Graduate</td>
<td>118,859</td>
<td>123,182</td>
<td>42.5</td>
<td>3.6</td>
</tr>
<tr>
<td>Non-degree</td>
<td>7,458</td>
<td>6,213</td>
<td>2.1</td>
<td>-16.7</td>
</tr>
<tr>
<td>OPT</td>
<td>65,366</td>
<td>51,199</td>
<td>17.6</td>
<td>-21.7</td>
</tr>
</tbody>
</table>

Source: IIE Open Doors 2022

### CHINESE STUDENTS IN TOP ANGLOPHONE DESTINATIONS

Source: WES 2022, Australian Dept of Education, UK HESA, IRCC, IEE Open Doors
Ecosystem Updates

International students applications via UCAS

Data: UCAS

Source: UCAS, as reported in the PIE
Ecosystem Updates

- Anecdotal evidence suggests substantial pickup in applications after reopening in January 2023.
- Further expansion of international schools market and school number, despite higher regulatory hurdles from 2021 going into effect.
- 406,037 students enrolled at international schools in China.
Private schools expand in absolute terms, but quirks of new regulations are resulting in a growth spurt for expat schools, despite shrinking expat populations in China.
Ecosystem Updates

Trend of applying to university in multiple countries:

- New Oriental survey in 2021: 30% intent to increase the number of countries they will apply to
- Yi School survey: Before the pandemic, only 10%-20% of Chinese students would consider applying to colleges in multiple countries, but now roughly 70%-80% will.

Interest in emigration amid economic uncertainty, possible return to the prior trend of boarding school growth.

Push factors remain in place: *gaokao*, education inequality, over-concentration of resources in C-9 League and Double First Class universities.

Economic circumstances make value for money and ROI a greater priority.
Reopening Updates

January 8, 2023: International arrivals to China no longer required to quarantine or get health code. Only requirement is to test 48 hours before departure.

February 6, 2023: Hong Kong border fully reopens, no PCR needed

February 23, 2023: Epidemic is “basically over”, according to health authorities
February 27, 2023: PCR testing not required for travelers from New Zealand, South Africa, and 4 other countries. Hong Kong ends indoor mask mandates.

March 15, 2023: All unexpired visas issued before March 2020 are valid once again. All visa classes are open to application (including tourism, short-term study, family visit visas which were the last classes of visas to come back). Visa free travel to Hainan returns. Port visas return.
Moderation in Diplomacy


Reopening Updates

- “Wolf Warrior” Chinese foreign ministry spokesperson Zhao Lijian has been transferred to a department that manages land and sea borders.
- Qin Gang, former US ambassador, is promoted to foreign minister.
Reopening Updates

- China hoped to increase flights with a goal to restore the country's average daily passenger flight volumes to 70% of 2019 levels by end of January.
- 53 countries now served.
- January: 76 new flight routes announced
- Cathay, Etihad, and domestic airlines are bringing old routes back, with much higher frequency. Delta to resume direct flights.
Reopening Updates

Restored Outbound Destinations (Announced 12/25 - 1/8)

- Oceania
- North America
- Europe
- Asia
- Africa

<table>
<thead>
<tr>
<th>Date</th>
<th>Oceania</th>
<th>North America</th>
<th>Europe</th>
<th>Asia</th>
<th>Africa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec 21 - Dec 31</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jan 1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jan 7</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jan 8</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jan 15</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jan 16</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jan 22</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jan 31</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Feb 1 - Feb 28</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mar 1 - Mar 27</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
# Reopening Updates

<table>
<thead>
<tr>
<th>Foreign Carrier</th>
<th>Cities</th>
<th>Change</th>
<th>Effective date</th>
</tr>
</thead>
<tbody>
<tr>
<td>United</td>
<td>SF &gt; Shanghai</td>
<td>4x per week</td>
<td>2/1</td>
</tr>
<tr>
<td>Delta</td>
<td>Detroit and Seattle &gt; Shanghai</td>
<td>no more technical stops in Korea</td>
<td>3/3</td>
</tr>
<tr>
<td>Singapore</td>
<td>Beijing, Shanghai, Guangzhou, Shenzhen, Chongqing and Chengdu</td>
<td>restoration to pre-pandemic level</td>
<td>2/4-3/25</td>
</tr>
<tr>
<td>KLM</td>
<td>Shanghai, Amsterdam</td>
<td>5x per week total</td>
<td>1/30</td>
</tr>
<tr>
<td>Air France</td>
<td>Beijing, Shanghai, Hong Kong</td>
<td>weekly to daily flight</td>
<td></td>
</tr>
<tr>
<td>Fiji</td>
<td>Hong Kong</td>
<td></td>
<td>4/1</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Shanghai</td>
<td>4x / week</td>
<td>2/1</td>
</tr>
<tr>
<td>British Airways</td>
<td>Shanghai, Beijing</td>
<td></td>
<td>Shanghai 4/23, Beijing 6/3</td>
</tr>
<tr>
<td>Lufthansa</td>
<td>Shanghai</td>
<td>+3x per week (VIE, FRA), 20 routes now live</td>
<td>2/15</td>
</tr>
<tr>
<td>Quantas</td>
<td>Hong Kong</td>
<td>daily</td>
<td>2/27</td>
</tr>
</tbody>
</table>
## Reopening Updates

### Flights to China

<table>
<thead>
<tr>
<th>Region</th>
<th>Direct</th>
<th>Direct % Change</th>
<th>Indirect</th>
<th>Indirect % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA Average</td>
<td>$2,514</td>
<td>-26.36%</td>
<td>$965</td>
<td>-11.52%</td>
</tr>
<tr>
<td>Canada Average</td>
<td>$1,333</td>
<td>-23.06%</td>
<td>$988</td>
<td>-19.86%</td>
</tr>
<tr>
<td>Europe Average</td>
<td>$1,348</td>
<td>-46.23%</td>
<td>$681</td>
<td>-19.85%</td>
</tr>
<tr>
<td>Australia Average</td>
<td>$1,441</td>
<td>-50.57%</td>
<td>$688</td>
<td>-18.64%</td>
</tr>
</tbody>
</table>
## Reopening Updates

### FROM China

<table>
<thead>
<tr>
<th></th>
<th>Direct</th>
<th>Direct % Change</th>
<th>Indirect</th>
<th>Indirect % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA Average</td>
<td>$1,472</td>
<td>6.73%</td>
<td>$798</td>
<td>11.31%</td>
</tr>
<tr>
<td>Canada Average</td>
<td>$1,068</td>
<td>22.02%</td>
<td>$583</td>
<td>-4.11%</td>
</tr>
<tr>
<td>Europe Average</td>
<td>$765</td>
<td>-2.58%</td>
<td>$514</td>
<td>-8.87%</td>
</tr>
<tr>
<td>Australia Average</td>
<td>$1,128</td>
<td>-15.67%</td>
<td>$601</td>
<td>-2.04%</td>
</tr>
</tbody>
</table>

### Flights from China

- **Direct from China (Dec):** USA Average: $1,472, Canada Average: $1,068, Europe Average: $765, Australia Average: $1,128
- **Direct from China (Jan):** USA Average: $1,500, Canada Average: $1,100, Europe Average: $800, Australia Average: $1,150
- **Indirect from China (Dec):** USA Average: $798, Canada Average: $583, Europe Average: $514, Australia Average: $601
Reopening Updates

Important but less noticed reopening steps since 12/26/22:

- December: Dismantling of testing infrastructure makes these policies very hard to reverse.
- Jan 6: Tests no longer required for students or faculty to enter schools in Beijing.
- Jan 6: 10th edition of the diagnosis and treatment protocol for COVID-19 released. The Chinese term for COVID-19 changed from "novel coronavirus pneumonia" to "novel coronavirus infection." The protocol no longer requires the identification of suspected cases or the quarantine of positive cases.
- International flights to Beijing come back on January 8th (previously were re-routed)
- Jan 8: COVID reclassified as Class B illness
- Feb 1: Taiwan affairs office calls for more direct flights.
Reopening Updates

Important but less noticed reopening steps since 12/26/22:

- Jan 24: Dongxiang District in Fuzhou initially announces a mass testing requirement, and is immediately forced to delete it and apologize.
- Jan 28: CSCSE no longer recognizing purely online foreign university credits earned in spring 2023 and later; student must return for in-person study overseas. Some impact for us, but huge for Australia where 1/3rd of Chinese student visa-holders are online.
- Chinese New Year - largest human migration in history, nearly returns to pre-pandemic levels without crisis.
- Exit surge of cases is winding down, fears are subsiding.
- Informal study from Amherst College: more than 80 percent of the 82 Chinese international high schools represented said they planned on hosting admission visitors in the upcoming spring semester.
Chatter on Weibo and Douyin:

Excitement about study abroad and overseas tourism

My first int'l travel after reopening, Thailand I'm coming!

On Feb.2, first int'l tour group flying out of China to Pattaya

People in Shenzhen waiting in long queue for Hong Kong travel permit application

First trip in 2023, the Red Sea is as clear as a sapphire
Beijing Education Bureau Official Li Yi (Jan 6):
-School aged students should spend winter holidays meeting with friends, going to museums, seeing family. “We need to recuperate together.”
-At present, the epidemic prevention and control has entered a new stage.
-The goal of formulating a new school prevention and control work plan this time is to stick to the bottom line of preventing large-scale campus clusters of infections.
Reopening Updates

Ministry of Education released the "Work Plan for the Prevention and Control of Novel Coronavirus Infection in Schools". Notable lines:

- Schools without large outbreaks should carry out normal offline teaching activities.
- The local health, disease control and education departments guide and support colleges and universities to create conditions to build school health stations, create relatively independent accommodation conditions for asymptomatic infections and mild cases on campus as needed, and set up fever clinics in campus dormitory areas and other student gathering areas.
- Schools should maintain a reserve of treatment drugs and rapid tests to accommodate 15-20% of the total population.
Reopening Updates

College fairs and recruitment tours have returned:

- Yew Cheng International School Shanghai Fair (March)
- Shanghai United International School Fair (March)
- Sunrise recruitment tours (April - May)
- China Education Expo (February)
- CACIE (February)
- Vision of International Schools Conference (March)
Sunrise Recruitment Tours

UNDERGRADUATE TOURS 2023 SPRING

SUNRISE APRIL TOUR

April 17-21 Mon - Fri
Hangzhou - Nanchang - Nanjing

April 22-23 Weekend
Break

April 24-28 Mon - Fri
Ningbo - Fuzhou - Shenzhen

https://calendly.com/gavinnewtontanzer/chinadigital
Sunrise Recruitment Tours

2023 UNDERGRADUATE FALL TOURS

**SUNRISE OCTOBER TOUR**
- Oct. 16 - 20 Mon - Fri
  - Qingdao/Weihai - Zhengzhou - Hefei
- Oct. 21 - 22 Weekend Break
- Oct. 23 - 27 Mon - Fri
  - Nanchang - Fuzhou - Xiamen

**SUNRISE NOVEMBER TOUR**
- Nov. 6 - 10 Mon - Fri
  - Changsha - Lanzhou - Chongqing /Chengdu
- Nov. 11 - 12 Weekend Break
- Nov. 13 - 17 Mon - Fri
  - Wuhan - Nanjing - Haikou

[https://calendly.com/gavinnewtontanzer/chinadigital](https://calendly.com/gavinnewtontanzer/chinadigital)
Admitted Student & Alumni Receptions Return

- Babson College admitted student reception in April
- Fitzwilliam College alumni reception in December (HK)
- Columbia University Parent Info Session in early 2023 (Beijing)
Further Reopening Predictions

In December, we laid out this map of the phasing of reopening. We’re currently done with Phases 1-4.

- **Phase 1**: Relaxed domestic travel / quarantine / PCR testing.
  Reopening will be gradual; the first to feel this will be universities with in-country staff or authorized alumni reps (who have faced lockdowns and domestic travel limits).
- **Phase 2**: Relaxed limits on large-scale gatherings (including fairs).
- **Phase 3**: Further relaxation of international travel limits: rules on flight cancellations, operations of foreign carriers, lower international arrival quarantines.
- **Phase 4**: Elimination of quarantine upon arrival.
- **Phase 5**: Elimination of testing requirements for international travel; relaxation of mask requirements.
Further Reopening Predictions

Remaining Reopening Steps:

• More international flights to come online
• Price of international flights to China is likely to decrease in the next couple months.
• Business (M) visas are being issued, but tourist visas (L) and short term study visas (X2) are not being issued. If you had an L visa or a 10 year M or F visa, you should apply for an M visa.
• 48 pre-departure test is likely to stay for some time.
• Masking requirements will stay for some time.
Implications For Higher Ed

• “Stay in China because it’s safer” will ring hollow in 2023.
• Consider recruitment travel in spring to get a head start on your competitors. China will have a huge influx of recruiters in the fall, but the spring will have first mover advantages.
• Tier 2 cities have been especially deprived of visitors. Expect the warmest welcome there.
• Know that very few agents have grown over the past 3 years. Some have closed. Most have shrunk.
• It is worthwhile to check in on interuniversity partners, particularly since there has been much personnel turnover on both sides.
• Turnover among counselors has been significant, so plan early for high school visits.
• Bring in some of the knowledge you picked up from doing webinars into your info sessions.
• Be ready to answer questions about COVID, visas, and the pandemic related questions, as well as some broader-lens questions. People have generally not gone overseas for years.
• Be more prepared to talk about employment and affordability than before. The economy will be recovering over the next 12-18 months.
How We Can Help

• Contact us at contact@sieconnection.com or book a time to chat with us.

• Have a look at our recent white papers and reports at sieconnection.com/insight

• Learn more about recruitment tours and admitted student receptions: sieconnection.com/tours

• Douyin, Weibo, and Wechat account management

• VR tours and Augmented Reality (hologram) mailers

• Partner, agent, or strategic research
Thanks

CONTACT US

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david@sieconnection.com
gavin@sieconnection.com
Localize Your Website!

- Search yourself on Chinese search engines and social media. You’ll be surprised at what you find!
- Contact Us for a Web Presence Report
Websites, the Great Firewall, and Search Engines in China
Showcases of universities We Work With

New Jersey Institute of Technology
www.njit-china.cn

Michigan State University
www.michigstates.edu

Iowa State University
www.iowastate.edu
Don’t Forget Your ICP

- An Internet Content Provider license is necessary for appearing during a search.
- Allows organizations to host a website in China.
- Necessary for pay per click campaigns on Baidu and other platforms.
- Requires a Chinese business license to obtain, which a domestic business partner like Sunrise can help with obtaining.
When searching Seattle University’s Chinese name ‘西雅图大学’, the top 4 results are from different studying abroad agencies and the 2nd result is from baidu baike. Neither official website nor Chinese webpage can be found in the top results.

When searching University of Arizona’s Chinese name ‘亚利桑那大学’, their Chinese website built by us are shown in the top 4 results.
Chinese Search Engine Market Share

Data source: StatCounter
Welcome to Zhihu

80 Million
Daily Active User

400 Million
Total Registered Users

54 Billion
Monthly Average Views
Q: Private vs. Public universities: Which Option Is Better?
A: Strength of public universities: lower tuition, active atmosphere, flexible, diverse students and research oriented.
Strength of private universities: better location, smaller class, better engagement, etc.

Q: What is your overall opinion of Iowa State University?
A: Iowa State University (ISU) for short. Founded in 1858, it is one of the 62 member schools of the Association of American Universities (AAU), the prestigious academic alliance of top universities in North America. The campus is located in Ames in central Iowa, less than a 40-minute drive from the state capital Des Moines ...

Q: How do you think of Manhattan College?
A: "I love my experience at MC! The professors and classes are great, the professors want their students to be successful and are helpful both inside and outside the classroom. The learning environment is very friendly and open. Also, the location is amazing and provides a great experience.”
344 Million
Monthly Active Users

1.5 Million
Average Articles Released Per Day

76 Minutes
Average Daily Time Spent per User

60%
of Mobile Users in China Installed the APP
● It pulls stories from over 4,000 partner sources (including many of China’s largest digital publications like Xinhua and Caixin) and, using AI, delivers a tailored news feed to users.
● Users spend an average time of 76 minutes on Toutiao, resulting in 1.5 billion articles read every day.
Trending Articles Posted on Toutiao

Chinese students still rank No.1; full analysis of the future trend of studying in the United States

Analysis of the official data for international students from the Canadian Immigration Service

2023 US study abroad fees at a glance, which schools have raised tuition again
When users search “福特汉姆大学加贝利商学院”, the Chinese official website that we set up for Gabelli School of Business - Fordham University will appear as the 1st result on the first page. And when search “福特汉姆大学 (Fordham University)”, an articles that we posted will appear on the first few pages of results as well.
## China Social Platforms, Compared

<table>
<thead>
<tr>
<th>Platform</th>
<th>Popularity (MAU)</th>
<th>Content Format</th>
<th>Owner</th>
<th>Use</th>
<th>Advertisements for Universities?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wechat</td>
<td>1.3 Billion</td>
<td>Medium-Form Article</td>
<td>Tencent</td>
<td>Engaging people in your network</td>
<td>No (only shares, no in-platform)</td>
</tr>
<tr>
<td>Weibo</td>
<td>584 Million</td>
<td>Images and Short-form text</td>
<td>Sina</td>
<td>Expanding your network</td>
<td>Yes</td>
</tr>
<tr>
<td>Douyin</td>
<td>550 Million</td>
<td>Short-Form Video</td>
<td>Bytedance</td>
<td>Expanding your network</td>
<td>Yes</td>
</tr>
<tr>
<td>Bilibili</td>
<td>333 Million</td>
<td>Video Streaming and Sharing</td>
<td>Bilibili Inc.</td>
<td>Expanding your network</td>
<td>Yes</td>
</tr>
</tbody>
</table>
WeChat

1.3 Billion Monthly Active Users

45 Billion Messages Are Sent Daily on the App

66 Minutes Spent on the App per Day by the Average User

360 Million Users Read Official Account Articles

700 Million Monthly Active Users of WeChat Search

90% of Users Named WeChat as A Top Choice for Workplace Communications

115 Billion USD in Transactions through E-commerce Mini-programs
What’s New On WeChat

- **2020/2021**
  - Paid Content Publishing
  - “Video Accounts” let people post short videos.
  - Livestream through mini-programs and Tencent Live.
  - WeChat work updates include hosting more people.
  - Post with “Hashtags”
  - Bigger size for sharing files, up to 200M

- **2022**
  - Teenager mode
  - Transfer voice message into text message
  - Extract image text
  - New emojis!
WeChat Official Accounts

- **Subscription Accounts (订阅号)**
  - Focus on information, promotion, and public communication.
  - Makes more sense for admissions offices recruiting students through WeChat.
  - You can publish one to six articles per post per day.

- **Service Accounts (服务号)**
  - Useful for e-commerce brands and customer service situations.
  - Can set up WeChat pay and a WeChat store.
  - Can post once a week but as a push notification to a person’s phone.

- **Mini-Programs (小程序)**
  - “Sub-applications” within WeChat.
  - Simple features, no downloads.
  - Fun and engaging.

*Official accounts can require Chinese Domestic Business license or Overseas Business license as well as other documents.*
Personal account  vs.  Subscription account
Weibo

584 Million
Monthly Active Users

253 Million
Daily Active Users

95 %
Rate of Mobile Users Among Monthly Active Users

$453 Million
Quarterly Advertising Revenue
Neglected But Important: Weibo Official Accounts

- Total user has surpassed Twitter
- Content driven and high frequency of posting; open platform.
- Great diversity in forms of content including short videos, live streaming and 360-degree pictures
- One of the most popular social media marketing channel
Targeting Users, Demographically and By Interest
Weibo PPM Targeted Ads, very similar to Facebook Ads.

Weibo Raffle promoting a brand or an event

Examples of Weibo Ads and Campaigns
Weibo Stories – same features and positioning as Instagram Story. But users can see content/accounts that they are not following too.

Weibo is more diverse - 360-degree pictures and videos/short films are all common forms of content.
Topics about Studying in the US

Viewer volume of the topic #美国留学# (study oversea in the US) : 710 Million

number of people who are discussing this topic

Students vlogs & plogs about studying in the US
Douyin

- **550 Million**
  - Monthly Active Users
- **241 Million**
  - Daily Active Users
- **94%**
  - Rate of Mobile Users Among Monthly Active Users
- **1.5 Million**
  - Monthly Weibo Advertisements
Bilibili

333 Million
Monthly Active Users

90 Million
Daily Active Users

96 Minutes
Average Daily Time Spent per User

21 Year-old
Average Age of Bilibili Users
Bilibili, a Resurgent Video Platform

- Also known as B Site or “B Zhàn.”
- In 2022 Q3 report, data shows that users remained highly engaged and the average daily time spent on Bilibili reached a 96-minute record high.
- Youtube with a dash of Netflix.
  - Vlogging/Gaming/Anime
  - Live-stream
  - Documentary
  - Web Series
- Rise of educational influencers began in 2019, with over 20 million users focused on tutorials and educational content.
- One unique feature of Bilibili — “bullet comments” or “danmu” in Chinese — has set it apart from many other video sharing platforms, including YouTube. Bullet comments are just lines of brief comments that fly across the screen during a video, engaging viewers in a playful way.
- Interesting use cases: “demo” classes from famous professor, cross-posting, video ad campaign.
"It has been half a year since I came to the United States for exchange. I think studying in the US is expensive but worth it. They have world-renowned faculties, expansive industry networks, novel teaching methods and state-of-art labs, things that I was never given the chance to experience in China." 

'There are indeed many benefits to studying abroad. You can explore different cultures…"
How We Can Help

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• VR tours and Augmented Reality (hologram) mailers

• Partner, agent, or strategic research
Thanks

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