

China Trend: Online activities of teenagers and how it influences school choice

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EduGlobal China

Statistics of Internet Usage

June, 2010, the number of net citizens in China has reached 420 million. Those under 25 amount to close to half that number:

- Internet penetration - 55% of households
- 69% use blogs, 51% on social networking sites
- CNNIC reports that China youth (under 25 years old) Internet users reached 195 million, accounting to half of the total Internet users in China
- 70% of China youth Internet users access Internet by mobile phone

Statistics of Internet Usage

- Net citizens are online 19.8 hours/week
- Mobile usage is very high, many people have only data plans (no voice). Avg. mobile user = 150 minutes per day
- Ages 18-27 are online an average of 5 hours/day, 41% of this time is on social media sites
- New users are older, less affluent (parents, first in family collegiate?)

Top Internet-based Activities

Chinese students most popular things to do online:

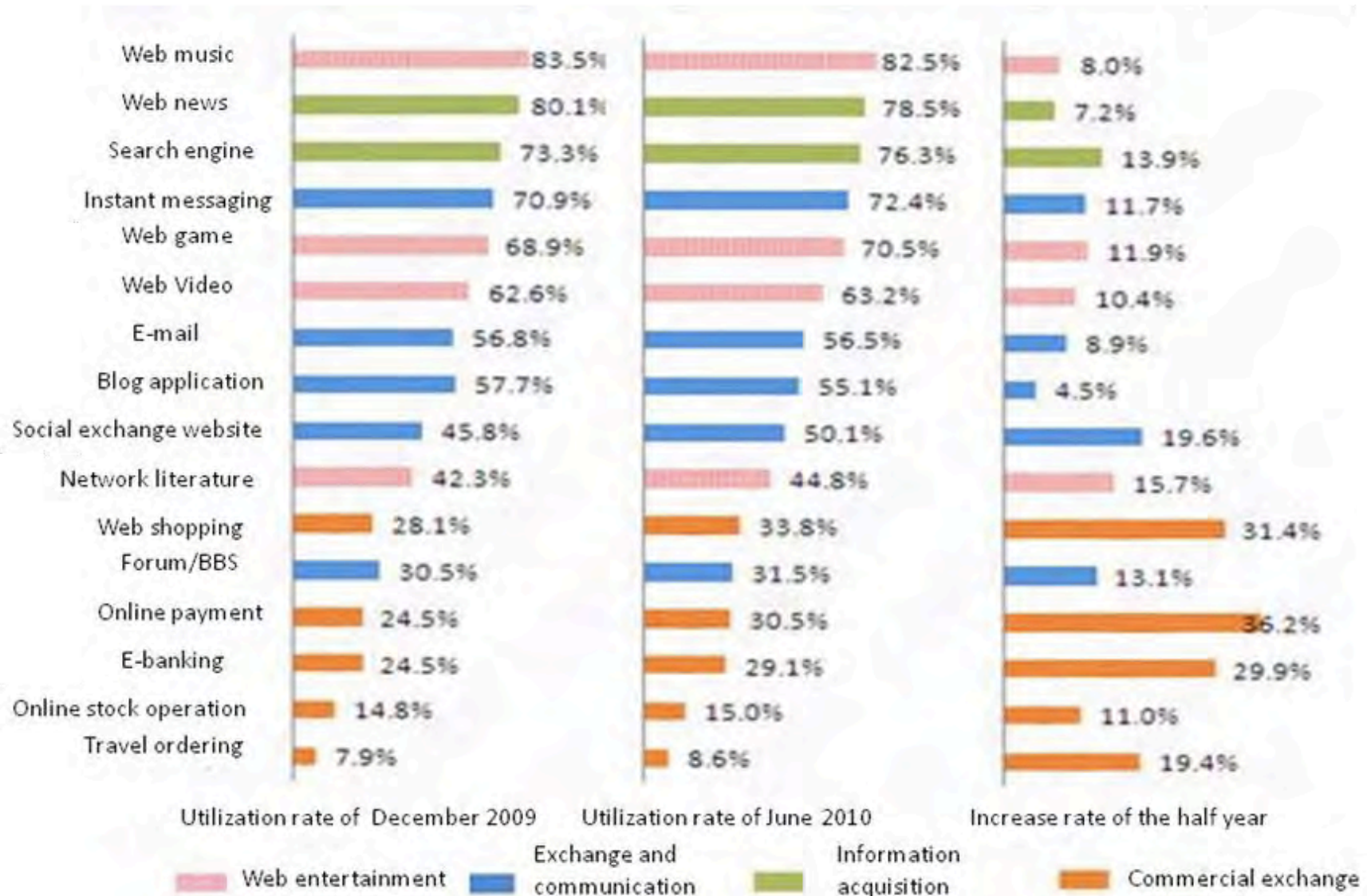
- Information Searching
- Communication
- Entertainment



“Annual growth rate of users for online payment, web shopping and e-banking was about 30% on average, far beyond other network applications. The users of social exchange websites, network literature and search engine also increased rapidly.”

Online music (88%), gaming (77%) and video (67%) are the top things young Chinese Internet users do online.

Internet Activity Adoption



Internet Activity Growth

	Services	Categories	% Compound Growth Rate/per Month	10 2010-10 2011 Trend of Monthly Effective Viewing Duration
	Microblog	social network	12.5%	
	group buying	E-commerce	11.9%	
	comparison shopping	search service	9.3%	
	P2P source	entertainment	8.3%	
	online insurance	financial service	6.9%	
	online video	online video	5.1%	
	training organization	education service	4.9%	
	classified informations	marketing service	3.9%	
	B2C mall online	E-commerce	3.2%	
	education informations	education service	2.1%	

Baidu.com King of the Search Engines

- China web search requests reach 77.51 billion in Q3 2011, growing by 6.1% compared to Q2 2011 and by 16.3% over the same period last year
- Baidu has an 85.5% market-share, up 1.7% over Q2, with steady growth. Google's share drops to 7.4% in Q3, a 0.8% decrease from last quarter.
- Sogou and Alibaba/Yahoo far behind

Search Engine Traffic

iUserTracker- Q2 2010 - Q3 2011 China Web Search Requests



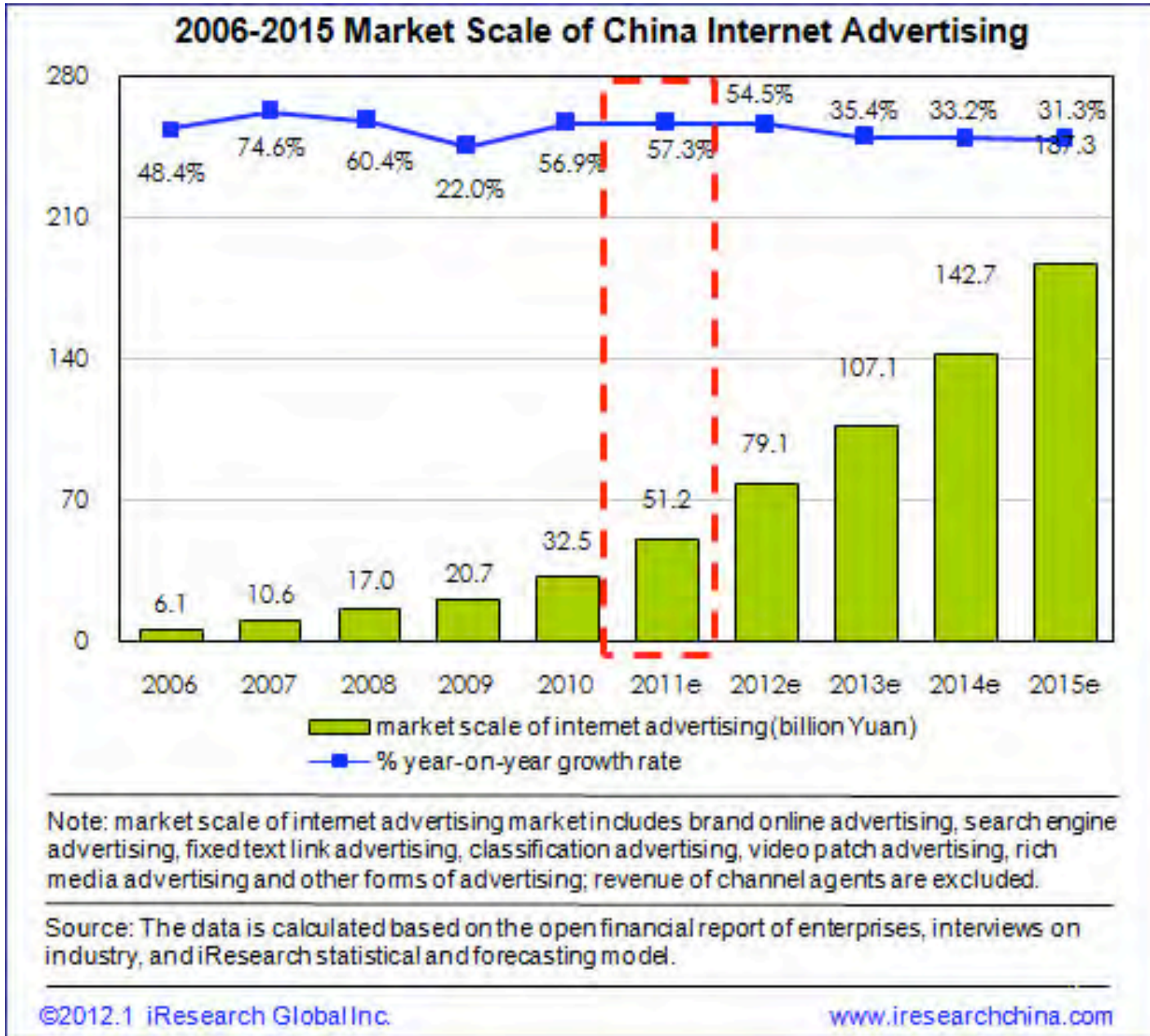
Note: search requests indicate the number of times users' inputting key words to search engine but it does not include users' visits of multiple pages among search results. Data above only counts web search requests and excludes requests of search service, such as image, music and community.

Source: iUserTracker. Home & Office Version of October 2011. Data is calculated based on long-term monitoring of over 200,000 Internet users' online behaviors at home & office locations (excluding public places).

Baidu.com

- 6th most popular web site in the world
- Baidu provides an index of over 740 million web pages, 80 million images, and 10 million multimedia files. Baidu offers multimedia content including MP3 music and movies.
- NASDAQ stock, first Chinese company to be listed.
- Proprietary search technology that mixes indexing of the web with matching advertising. Advertising can be segmented by region or specific local market.
- Baidu Union consists of several third-party websites and software applications. 230,000 partner web sites.
- Baidu TV a growing network of video advertising.

Internet Advertising Growth



Online Advertising Top Media in China by 2012?

China Internet advertising market has reached 51.19 billion Yuan in 2011, growing by 57.3%

Internet advertising now exceeds newspaper advertising (RMB 45.36 billion) and poised to overtake TV advertising (RMB 72.44 billion) in 2012 or 2013

China search engine advertising reached RMB 18.78 billion in 2011, a year-on-year growth of 70.2%

Growth of China search engine market is predicted to average 40% over the next few years

Search capability expanding into local and hyper-local markets

Social Media, Chinese Style

China's "social identity platform"

- Sina Weibo (microblog) (120 million users summer 2011, 250M now)
Outgrowth of Sina.
- Renren – Most Facebook like,
Renren's target customers are campus students. However, Renren loses users when they start working. As the competition in social network intensifies, Renren is losing on-campus users to both Weibo and Tencent.
- Tencent (200M) = Outgrowth of IM (636M)
TencentBuddies quickly grabbed 100 million users in 100 days after it was launched in January 2011. The quick ramp up was due to the 670 million registered users it had on its existing instant messenger called QQ.

Shifting Landscape

- Sina Weibo had 56.5% of China's microblogging market-share (users) and 86.6% market-share of browsing time.
- The top 100 users had over 485 million followers combined
- Jeremy Lin – 600,000 followers Jan 2012, 1.7 million Feb 2012
- Sina reports that more than 5,000 companies and 2,700 media organizations in China uses Sina Weibo

Rapidly Changing Landscape

- 28 is average age of Social Media User
- 76% of Social Media users post content vs. 24% in USA
- 47% of Social Media users comment on content vs. 12% in USA
- “Micro broadcasting” – thousands of events broadcast live daily

Actively Engaged

- Sites rapidly adding features and tools to engage users (publishing tools, IM, mobile integration, games, e-commerce, video streaming)
- Publishing explosion as Internet becomes replacement for TV and print media
- Web video broadcasting (Laptops vs. TV trucks)
- Multiple accounts, multiple identities a growing problem

Who is publishing education content?

Education is a popular topic on the web:

- Media companies, publishers, bloggers
- Agents, consultants
- Zinch, Zinch-clones
- Test-prep companies
- Ambitious parents, family members

University Activity

- Live broadcast of Shanghai Jiao Tong University Graduation by Career Centers (hire students, recruiters and engaged parents pushing what's next)
- Live tracking of accreditation visit at Zhejiang University, School of Management (tell the accreditors what a great place this is)
- “**Social Capital**” is a sociological concept which refers to the value of **social** relations and the role of cooperation and confidence to get collective or economic results
- Universities trying to tilt perception by aggressive promotion on social media

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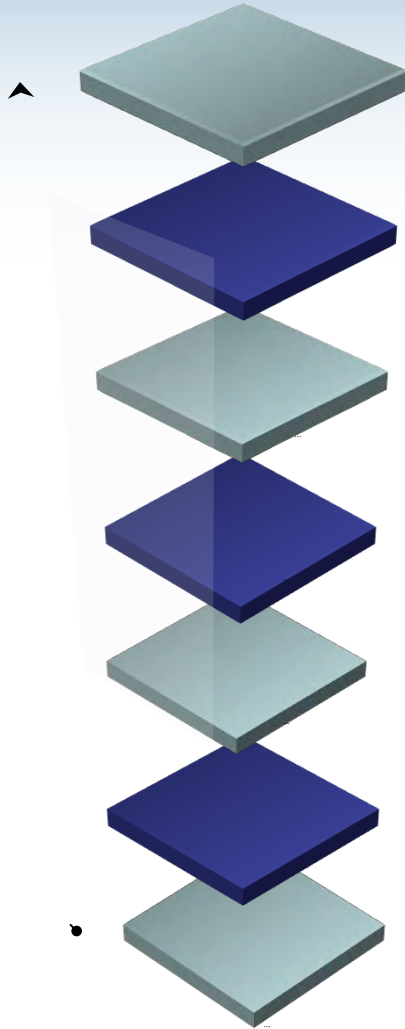
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China Study Abroad Market

2009 - 2015



- Family wealth increases
- 20 mil high school leavers
- 300,000 students going abroad
1 mil by 2015
- US / Canada can triple capacity
- RMB Appreciation
- Overseas Market: AUD 20 Billion
to AUD 70 Billion
- Domestic Market: AUD 4 Billion
to 15 Billion

Business Management is the Most Popular Major Reported Across Provinces

Cohort 2010 – SAT students from China and top 8 provinces

47% students reported choice of major

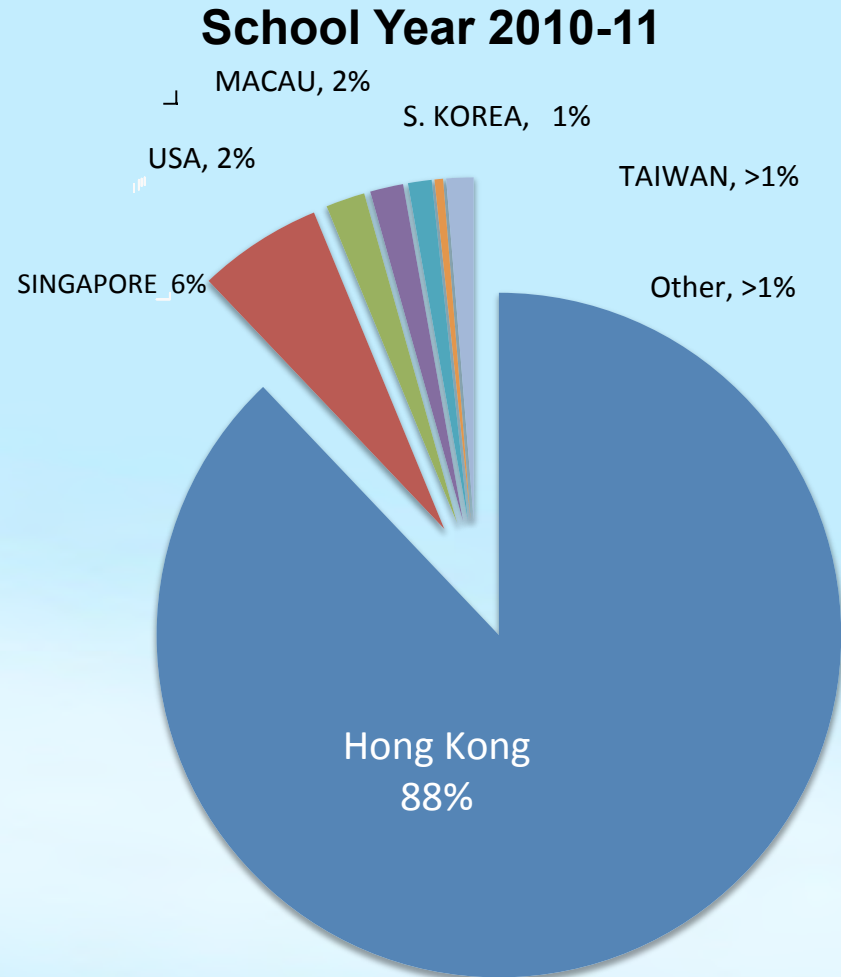
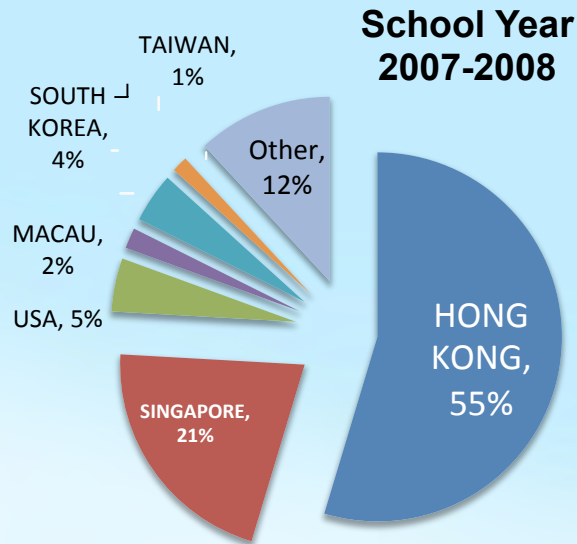
	Popularity of Major - Ranking by Province (1=most popular)								
	China	Beijing	Shanghai	Jiangsu	Guangdong	Liaoning	Zhejiang	Sichuan	Shandong
Business management, marketing, and related support services	1	1	1	1	1	1	1	1	1
Engineering	2	2	2	2	2	2	2	3	3
Biological and biomedical sciences	3	4	3	3	3	3	5	3	2
Mathematics and statistics	4	3	9	4	4	3	3	3	4
Communication, journalism and related programs	5	6	5	10	10	8	8	5	4
Psychology	6	7	4	9	5	8	5	-	-
Social sciences	7	5	9	7	7	10	8	5	6
Computer and information sciences and support services	8	8	13	5	7	5	8	-	7
Architecture and related services	9	10	11	8	11	7	4	2	-
Physical sciences	10	9	12	6	5	6	7	-	-
Visual and performing arts	11	13	6	10	7	-	-	-	-
Health professions and related clinical services	12	11	8	13	12	-	-	-	7
Undecided	13	12	6	10	13	-	-	5	-
Engineering technologies/technicians	14	15	14	14	14	-	8	-	-
Education	15	14	14	16	15	-	8	-	-
Legal Professions and Studies	16	17	16	16	-	-	-	-	-
Natural resources and conservation	17	18	-	14	-	-	-	5	-
Liberal arts and sciences, general studies, and humanities	18	15	21	-	-	-	-	-	-
History	19	20	17	-	16	-	-	-	-
Other	20	-	19	-	-	-	-	-	-
English language and literature/letters	21	19	-	-	-	-	-	-	-
Foreign languages, literatures, and linguistics	22	-	19	18	16	-	-	-	-
Public administration and social services professions	22	-	22	-	-	-	-	-	-
Multi/interdisciplinary studies	24	-	18	-	-	-	-	-	-
Agriculture, agriculture operations, and related sciences	24	-	-	-	-	-	-	-	-

Universities Most Frequently Searched within collegeboard.org's College Search engine, by Chinese province

#	Beijing	#	Shanghai
1	New York University	1	New York University
2	Cornell University	2	Cornell University
3	University of California: Berkeley	3	University of California: Berkeley
4	Harvard College	4	University of California: Los Angeles
5	University of Illinois at Urbana-Champaign	5	Boston University
6	University of California: Los Angeles	6	University of Michigan
7	Boston University	7	Columbia University
8	University of Michigan	8	University of Illinois at Urbana-Champaign
9	Brown University	9	University of Southern California
10	Yale University	10	University of Washington
#	Guangdong	#	Jiangsu
1	New York University	1	University of Illinois at Urbana-Champaign
2	University of California: Berkeley	2	University of California: Berkeley
3	Cornell University	3	University of Michigan
4	University of California: Los Angeles	4	Cornell University
5	University of Illinois at Urbana-Champaign	5	University of California: Los Angeles
6	University of Michigan	6	New York University
7	Boston University	7	University of Washington
8	University of Southern California	8	Boston University
9	Stanford University	9	University of Wisconsin-Madison
10	Brown University	10	Harvard College

Today, Tens of Thousands of Chinese Students Travel to More Than 30 Countries to Take the SAT®

Most Chinese test-takers go to Hong Kong.



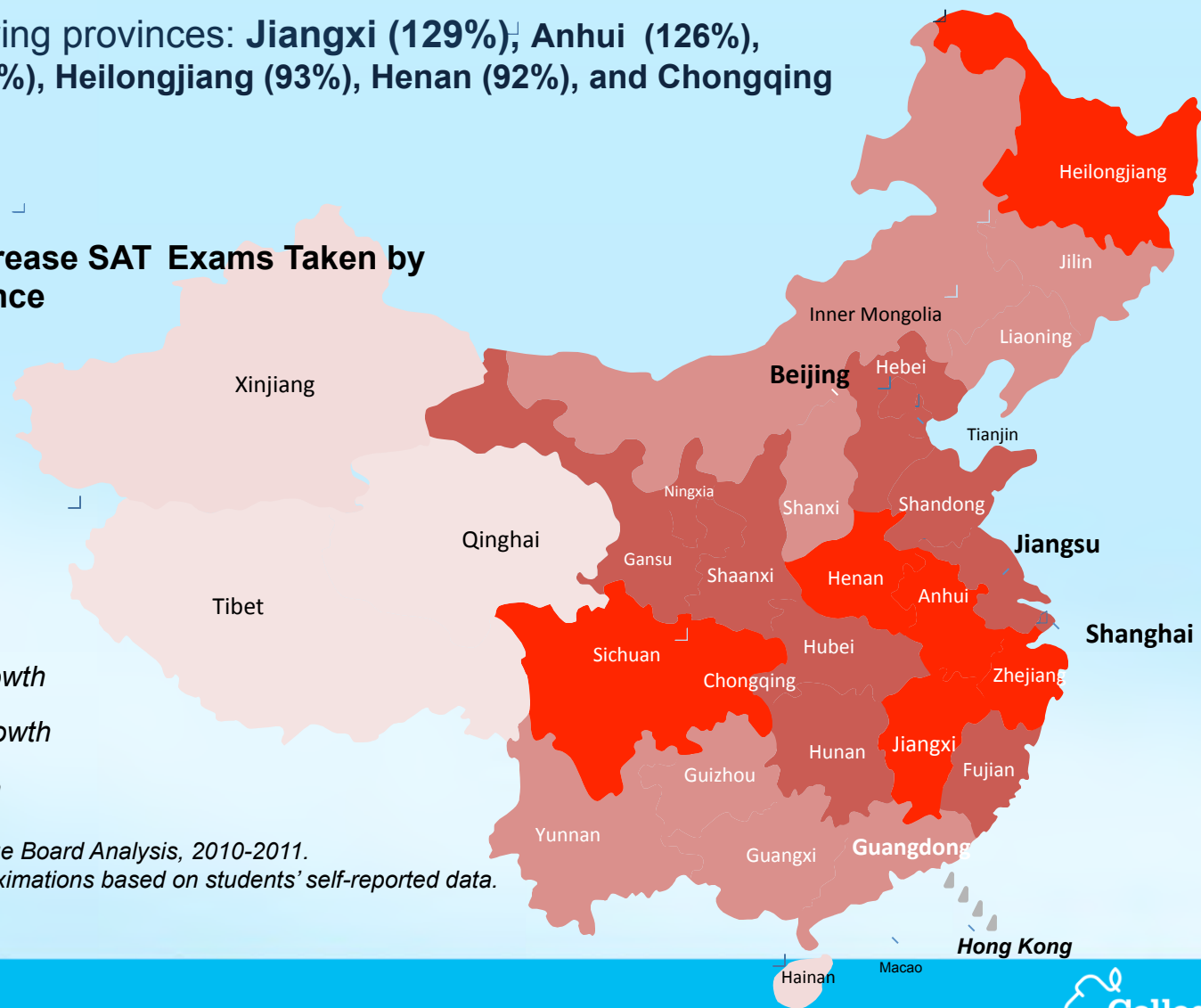
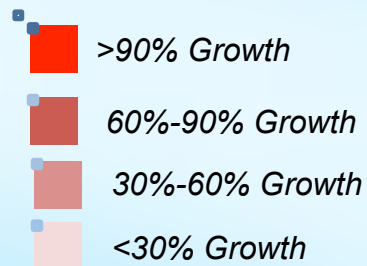
Total registrations have more than doubled since 2007-2008, and grew 68% year over year in 2011

Source: Internal College Board Analysis, 2011.

All Provinces are also Growing

- Fastest growing provinces: **Jiangxi (129%)**, **Anhui (126%)**, **Zhejiang (102%)**, **Heilongjiang (93%)**, **Henan (92%)**, and **Chongqing (90%)**.

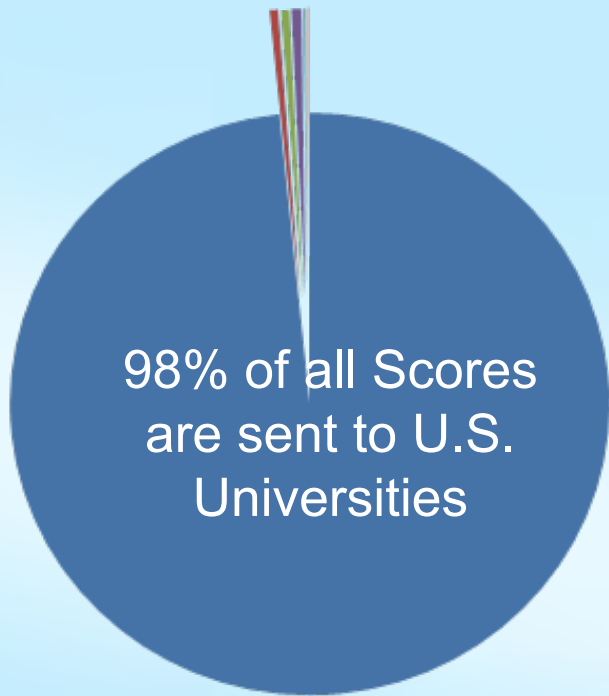
% Increase SAT Exams Taken by Province



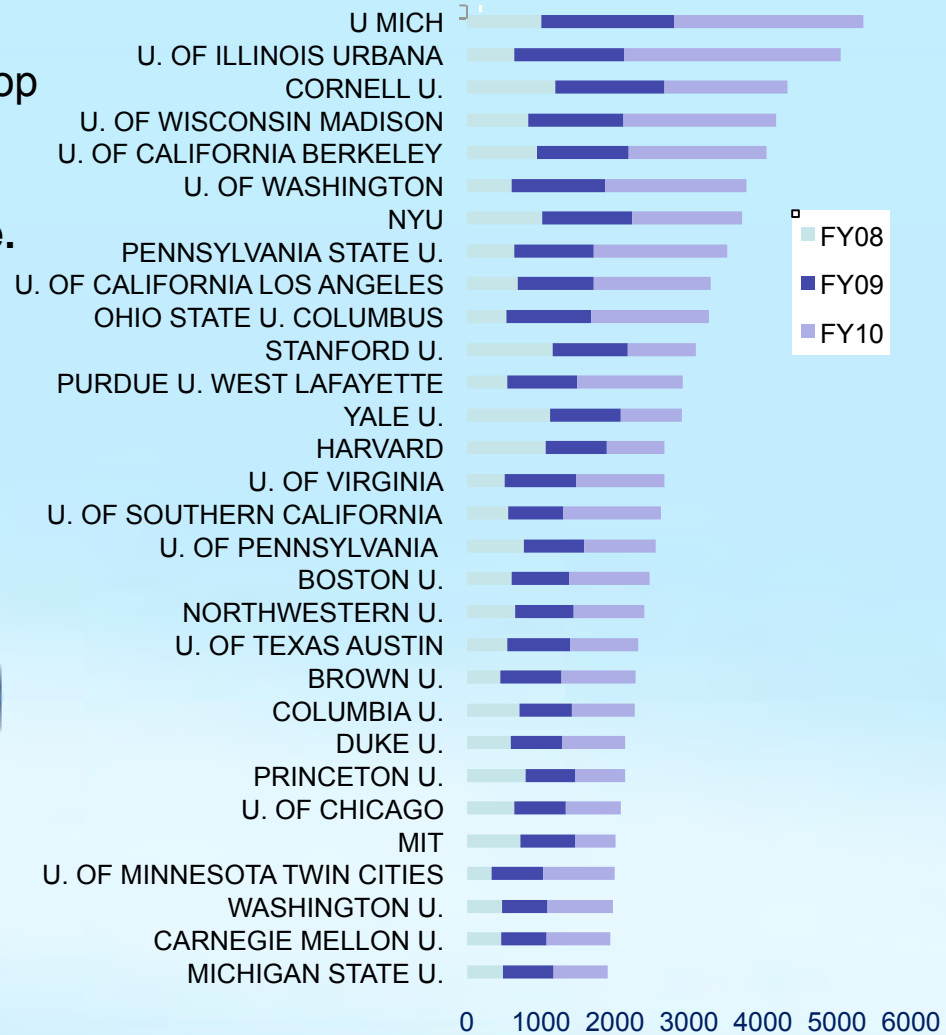
Source: Internal College Board Analysis, 2010-2011.
Percentages are approximations based on students' self-reported data.

Chinese Students Currently Send Most of Their SAT® Scores to U.S. Universities

However, scores sent to non-U.S. universities are growing rapidly. The top non-U.S. universities receiving test scores from Chinese students are in **Canada, Hong Kong and Singapore.**



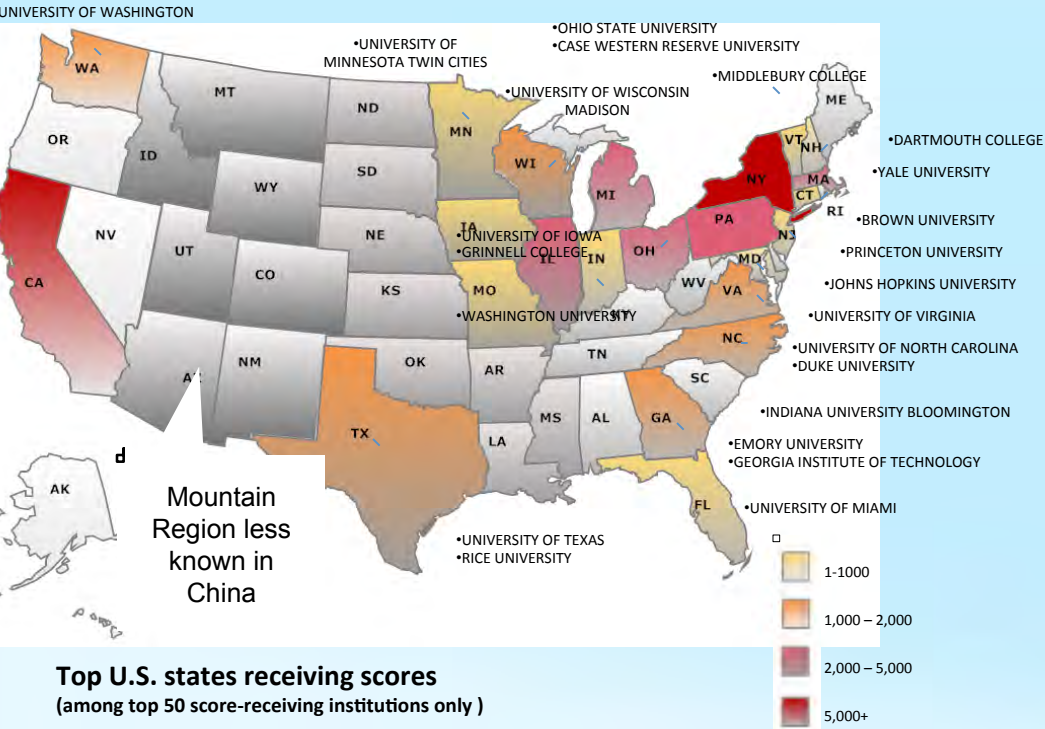
Top 25 Score-Receiving U.S. Universities 2008-10



Source: Internal College Board Analysis, Sorted by Totals from academic years 2008, 2009, 2010, & 2011.

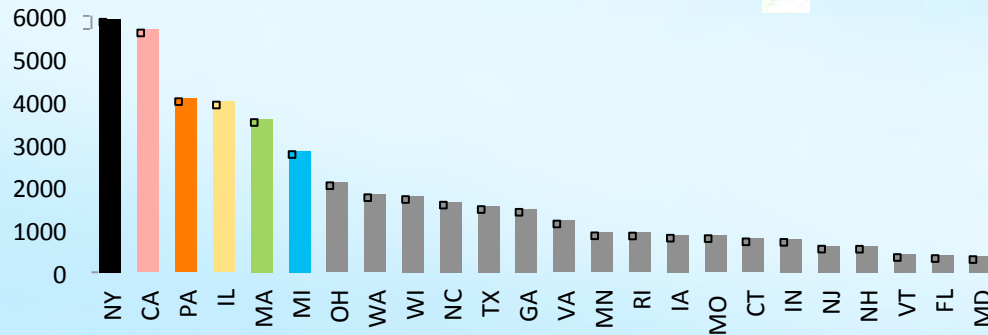
Top 50 SAT score receiving U.S. institutions

Total number of score reports received, by state

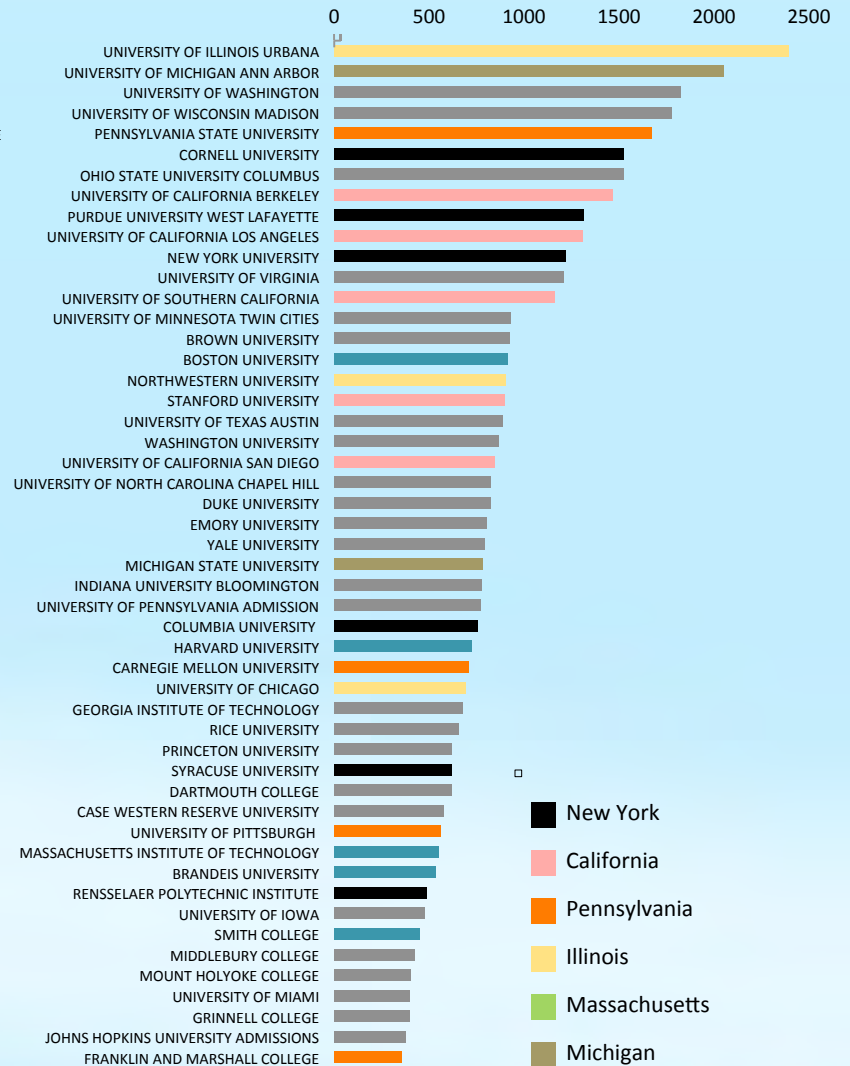


Mountain Region less known in China

Top U.S. states receiving scores (among top 50 score-receiving institutions only)



Number of score reports received, by institution, 2010-2011



Large Publics, especially the Big Ten, Receive the Most SAT Scores, but University Preferences Vary By Province

Popular Score Send Institutions - Ranking by Province (1=most popular)																
	China	Beijing	Shanghai	Jiangsu	Guangdong	Liaoning	Zhejiang	Sichuan	Shandong	Hubei	Tianjin	Henan	Hunan	Shaanxi	Chongqing	Fujian
UNIVERSITY OF ILLINOIS URBANA	1	1	1	1	1	1	1	1	1	1	1	1	3	4	2	2
UNIVERSITY OF MICHIGAN ANN ARBOR	2	2	2	4	2	2	2	5	5	3	3	1	5	4	3	4
UNIVERSITY OF WASHINGTON	3	4	4	6	3	4	6	5	2	3	4	10	1	3	5	1
UNIVERSITY OF WISCONSIN MADISON	4	8	9	2	5	5	4	2	5	2	7	5	5	7	1	7
PENNSYLVANIA STATE UNIVERSITY	5	9	7	5	4	7	3	4	4	6	9	8	11	9	8	15
OHIO STATE UNIVERSITY COLUMBUS	6	14	16	3	7	3	11	3	3	5	9	3	1	1	4	21
CORNELL UNIVERSITY	6	5	3	8	8	9	7	9	7	7	5	5	8	10	7	7
UNIVERSITY OF CALIFORNIA BERKELEY	8	3	6	10	6	6	5	14	9	10	2	1	22	17	10	9
PURDUE UNIVERSITY WEST LAFAYETTE	9	15	11	7	13	11	12	7	9	8	13	19	11	5	11	15
UNIVERSITY OF CALIFORNIA LOS ANGELES	10	6	8	12	9	10	9	26	23	19	6	13	17	10	12	6
NEW YORK UNIVERSITY	11	7	5	27	10	12	10	14	13	22	7	31	31	17	15	12
UNIVERSITY OF VIRGINIA	12	12	17	11	12	8	8	8	13	14	20	10	5	10	5	13
UNIVERSITY OF SOUTHERN CALIFORNIA	13	10	10	26	10	12	16	9	24	11	13	31	24	17	9	2
UNIVERSITY OF MINNESOTA TWIN CITIES	14	32	33	9	18	19	27	12	8	9	42	5	17	14	13	15
BROWN UNIVERSITY	15	17	20	19	16	17	17	24	31	16	20	13	17	14	15	15
BOSTON UNIVERSITY	16	13	12	30	15	20	21	46	31	18	16	43	31	17-		26
NORTHWESTERN UNIVERSITY	17	11	15	28	22	25	21	28	28	24	27	19	45	36-		21
STANFORD UNIVERSITY	18	16	14	31	27	16	28	22	24	14	16	8	14	33	15	21
UNIVERSITY OF TEXAS AUSTIN	19	28	31	13	14	20	23	19	12	13	31	17	14	10	15	13
WASHINGTON UNIVERSITY	20	18	25	19	19	22	13	26	16	31	37	31	13	28	15	9
UNIVERSITY OF CALIFORNIA SAN DIEGO	21	23	13	21	17	35	14	49	26	49	24	43	35	41-		15
UNIVERSITY OF NORTH CAROLINA CHAPEL HILL	22	27	35	14	25	15	20	22	13	11	32	10	31-		13	26
DUKE UNIVERSITY	23	20	18	23	32	22	32	34	17	34	19	23	38	41	25	11
EMORY UNIVERSITY	24	25	21	15	28	26	18	24	34	34	27	22	45	36-		25
YALE UNIVERSITY	25	21	24	40	36	18	39	16	19	17	20	17	3	28	15	15
MICHIGAN STATE UNIVERSITY	26	34	30	24	21	14	19	28	17	19	12	29	35	5	22	31
INDIANA UNIVERSITY BLOOMINGTON	27	38	29	21	20	29	24	13	11	19	20	29	8	28	15	4
UNIVERSITY OF PENNSYLVANIA	28	22	18	34	31	24	26	34	28	22	11	13	38	41	25	41
COLUMBIA UNIVERSITY	29	18	21	37	29	32	30	43	28	44	13	23	43	36-		26
HARVARD COLLEGE	30	26	26	42	26	36	36	37	21	31	16	23	8	28	22	21

The Great Firewall of China

Censorship or protectionism? Either way, the way to play is inside the firewall.

- Google.com, Facebook, Flickr, YouTube, Twitter, Yahoo are blocked, or hampered (Linkedin is OK)
- Mirror sites and other aspects of firewall bypass (Tunneling – Proxy servers, proxy sites, VPN) risky and face unknown consequences
- Search engines index Chinese Language Websites, hosted in China
- Search is still the most effective web advertising (more than 100x that of Social Media)

Takeaways

- NOISY – Short messages, quick impressions, high volume of activity
- NOISY – Lead quality, lead source, multiple accounts all put digital identities in question
- National Debate on Verification
- Ready, Fire, Aim – Rapid pace of development will erase mistakes quickly

Takeaways

- China driven media for China-speaking world.
(Mayor of San Francisco used messaging on Weibo to get out the vote)
- Firewall perhaps protectionism of China language media, media companies?
- Connect with Chinese second language community - Vietnam, Malaysia, Indonesia?

Takeaways

- If you're not doing it, someone else is. "Google yourself?" "Weibo yourself?"
- Verifying identity is key to any formal process management of Social Media/Web site response
- Segment your message to multiple audiences, multiple sites for multiple missions?
- Web sites, search engines are still the anchor of the Internet
- You can't do this from Tupelo



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Sources

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- Clay Hensley, Director, International Strategy & Relationships, The College Board, Email chensley@collegeboard.org
- <http://international.collegeboard.org/>
- AIEA Session – Engaging China Social Media –Sam Robfogel (Chair), Georgetown University, David Joiner, University of Wisconsin-Madison, Pei Liu, Georgetown University
- Search Engine traffic from iResearch Global - [IresearchChina.com](http://iresearchchina.com)