

MARCH 2021

EXCLUSIVE MARKET INTEL

Is There a New Chinese Mindset on U.S. Schools?





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WholeRen



Onshore Chinese Student Support

www.wholeren.com

www.wholeregroup.com

WholeRen Education Group is an AIRC-certified agency established by Chinese and American professional educators in 2010. As a multinational education service company, WholeRen integrates academic applications, academic support, second chance, career readiness, homestay, and other services, including publication of our annual report on the Dismissal Issues of Chinese Students in the United States. Focusing on students' long-term success, we have been the trusted advisor for tens of thousands of Chinese students and families.

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Member
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Onshore Chinese Student Coach • Career Readiness and Mentorship
Onshore Student Recruitment • Second Chance Chinese Student Support

Is There a New Chinese Mindset on U.S. Schools? by Intead and WholeRen.

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How Chinese Families View Their International Academic Options

With recent news, U.S. academic leaders may be thinking the Chinese perception of a U.S. education is losing value. Those leaders would be wrong.

Intead and WholeRen Education conducted a survey of 20,000 Chinese parents and ran a follow-up focus group in February 2021. This report shares our findings and insights from our market research.

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Acknowledgements

With thanks to our awesome research and reporting team from Intead and WholeRen providing data collection and analysis, creativity, diligence, thoroughness, and enviable communications talent: Ann Marie Catabia, Carrie Bishop, Yining Zhu, Xi Chen, and Chao Wang.

I. Chinese Students in America



Lately, many U.S. academic leaders have been wringing their hands over the seeming demise of the vaunted global position an American education once held for Chinese families. Their fear: Chinese students will find alternative study destinations. After all, the decade-long growth in international student inflows to the U.S. had been slowly waning since 2017. And then, COVID-19 canceled so many visas and flights.

You may be surprised at how loudly the concern was dismissed. Chinese students represent the largest cohort of international students in U.S. colleges (35%), generating US\$15.9 billion* in tuition and living expenses annually.

These students are a welcome and integral part of the U.S. college experience, and institutions work hard to find new ways to court them. Unfortunately, Chinese students have been targets of racist and xenophobic incidents, exacerbated by the onset of COVID-19. Further, negative views of China in general have increased over 30% in the U.S. since 2016—rising 13 percentage points in 2020 alone, according to [Pew Research Center](#).

Meanwhile, during 2020 and early 2021, the world watched new reports of social stability unraveling in America's streets and in government structures as high up as the White House. Despite a new U.S. administration at the helm, global trust in the American brand may have been shaken. In November 2020, views of the U.S. among global allies had reached their lowest point in nearly two decades of Pew Research polling.

source: Bureau of Economic Analysis, U.S. Department of Commerce

And so, like you, we wondered:

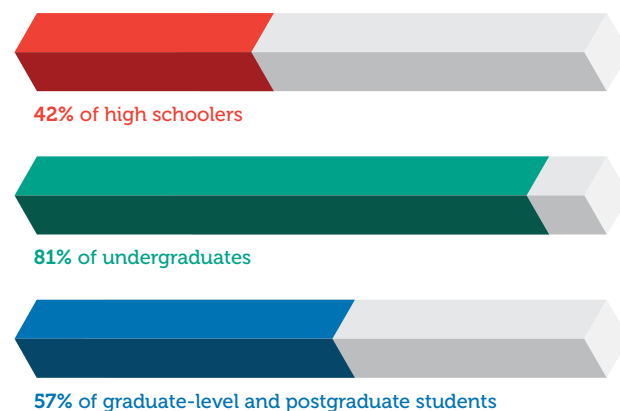
How do Chinese parents feel now about sending their students to school in America?

So, we asked.

Our respondents: 61% are parents of students currently pursuing an undergraduate degree, 29% have students in pursuit of graduate degrees or higher, 9% have students in high school or below, and less than 1% have students in a language school.

Of the 1,062 people who responded to our survey, 1,015 are parents—988 with a student currently pursuing a degree at a U.S. institution.

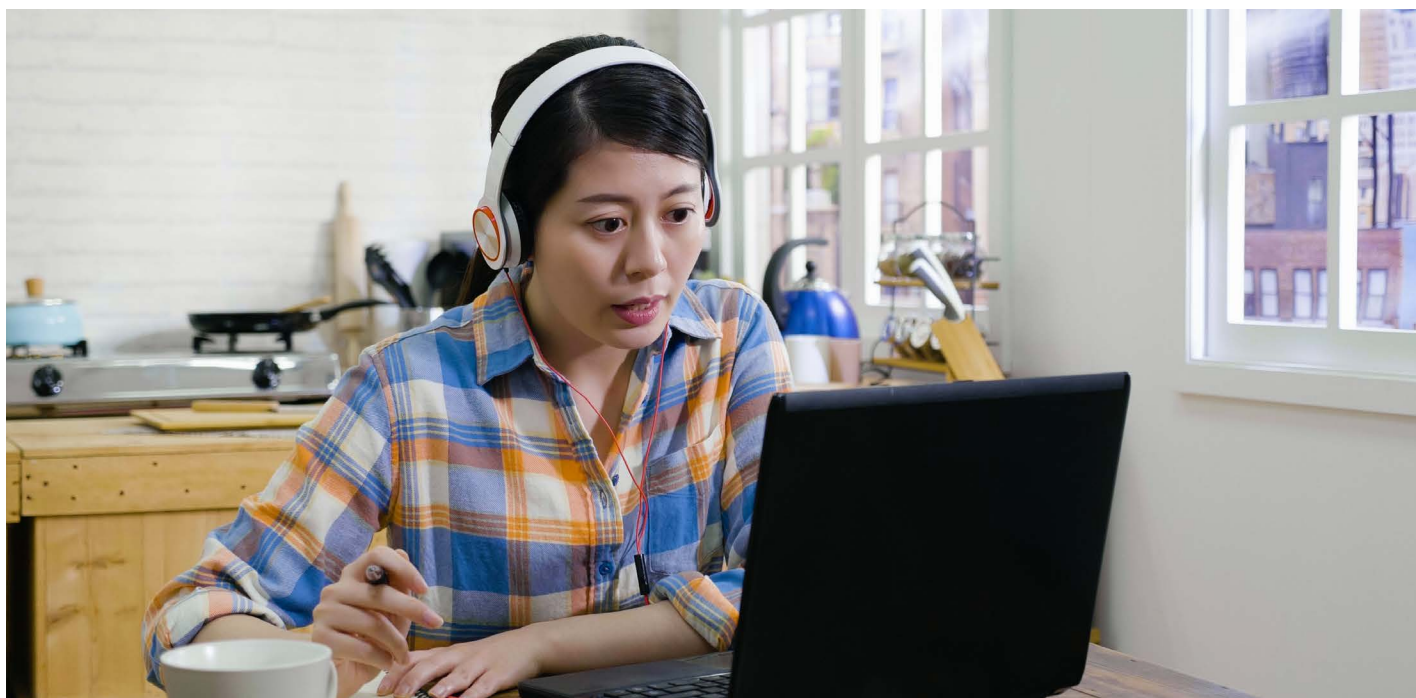
Who's studying in a remote setting?



II. Key Findings for Enrollment Leaders



- Chinese parents overwhelmingly regard **a U.S. education as highly desirable and the U.S. as their first-choice destination (97%)**.
- For Chinese students currently enrolled in U.S. programs, regardless of their study location (on a U.S. campus, remotely while in the U.S., or remotely from China), their parents are convinced the U.S. option is the best.
- Chinese students enrolled at U.S. institutions have been forced to adapt to online learning due to COVID-19 and travel restrictions, and the majority are doing it. Yet over 20% of graduate students delayed their studies for the 2020-2021 academic year.
- By far, Chinese parents found the most compelling and influential source of information about U.S. education options comes from social media posts made by Chinese graduates of these programs.



III. Strength of the U.S. Education Brand Among Chinese Parents



Despite news of serious diplomatic differences between the U.S. and China, perceived and actual violence, along with societal discord within the U.S.—not to mention COVID-19 case counts—Chinese parents **overwhelmingly** point to the United States as their preferred destination for higher education. And by a long shot.

For high school, 97% say the U.S. is best, nearly 96% say the same for undergraduate studies, and 92% say so for graduate programs, compared to study in the U.K, Canada, Australia, Germany, Singapore, New Zealand, Russia, or at home in China.

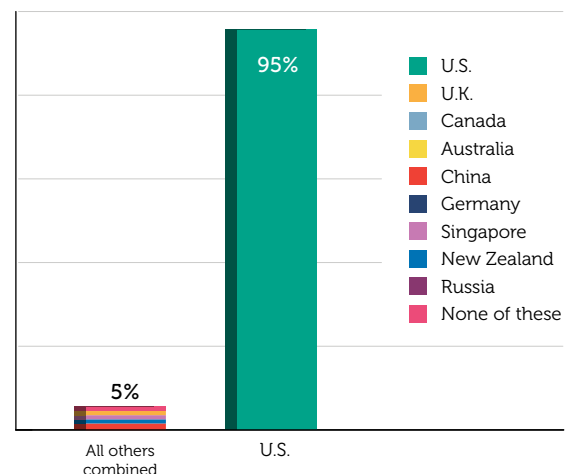
Those eager and able to study abroad have a clear destination in mind. In our 2018 report "What's on the Minds of Chinese Parents?" we found that of parents whose students had yet to enroll in a foreign study program, 70% of our sample selected the U.S. as their top choice for their student's education. Note: the 2018 report is available to Intead Plus members.



2018 Report



Which study destination is the best choice for your student's higher education?



*Data from our 2021 survey

From our focus group:

Jane, a Wuhan-based mother of a 19-year-old student, puts it plainly: "U.S. is definitely the number one place to study. If you have the conditions, you should experience a period of Western education. Western education—the United States—is more comprehensive." Jane was among the Chinese parents who participated in an Intead-WholeRen focus group in February 2021.

Quality, Creativity, and Critical-Thinking Skills

We find a disconnect between what U.S. educators *think* Chinese parents are thinking and what they are really thinking. With all the things U.S. academic leaders are worrying about (with good reason), why, then, the bullish Chinese attitude toward American education now? We asked “What are the top advantages of studying in the U.S.?” The response, in short: quality, creativity, and critical-thinking skills.

According to our survey, over three-quarters of Chinese parents view U.S. institutions as providing a better-quality education. Well over half see U.S. institutions as developing stronger personal creativity. And, 42% of undergraduate students’ parents (and 36% of parents overall) believe the U.S. is better at developing critical-thinking skills.

From our focus group:

Chen, based in Anhui, has a freshman in a China-U.S. cooperative university. He shared, “There is participation and more interactions between teachers and students among the daily classes. She can go to the U.S. for two years as an undergraduate, and I still want my daughter to go after the pandemic. In terms of Western education, the U.S. is still the strongest.”

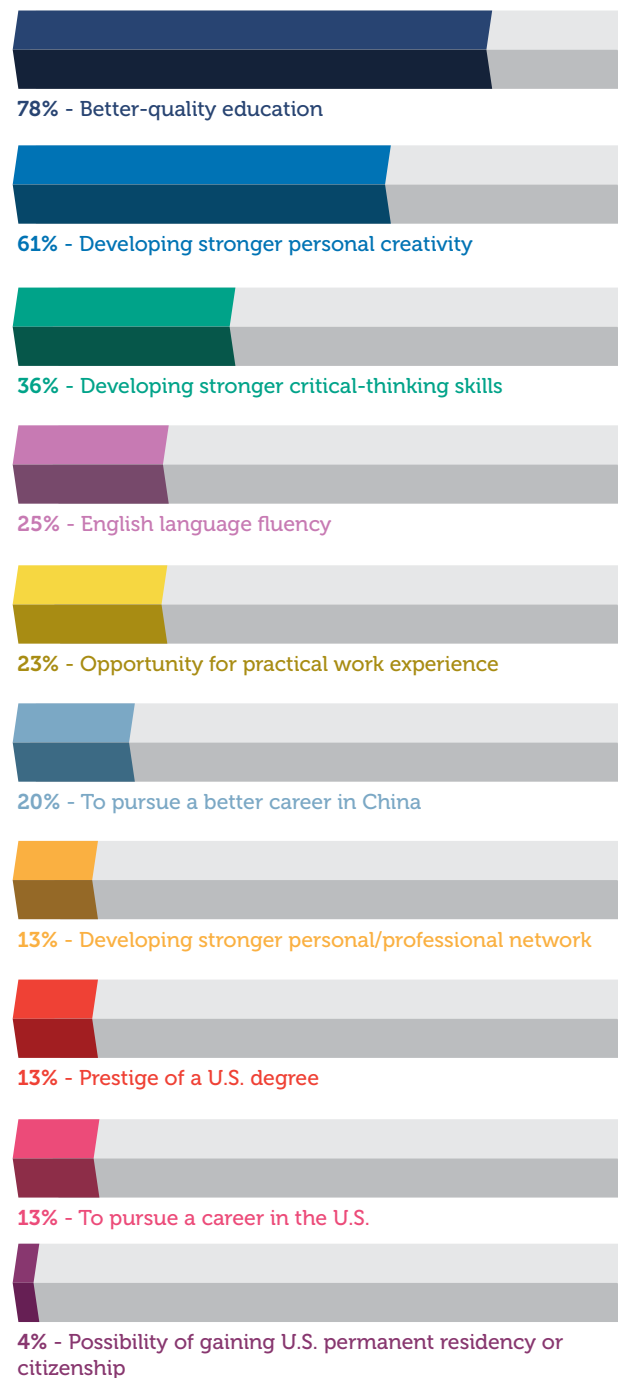
Fellow focus group participant Leo says his student started studying in America as a high schooler—8 years later, he’s still in the U.S. pursuing academic goals, including learning to think critically and gain independence and confidence. “This is what I especially want my child to gain from studying and living in the U.S.”

Parsing the Data

80%

of Chinese parents of high school students cite “developing stronger personal creativity” as a top draw to a U.S. education. 54% of parents of university students also cite this as a key benefit.

Top advantages of studying in the U.S.



Further, 33% of participants with graduate students see the U.S. as a better path toward obtaining practical work experience (OPT), while 41% of parents of postgraduates see the U.S. as an opportunity to pursue a better career in China.

From our focus group:

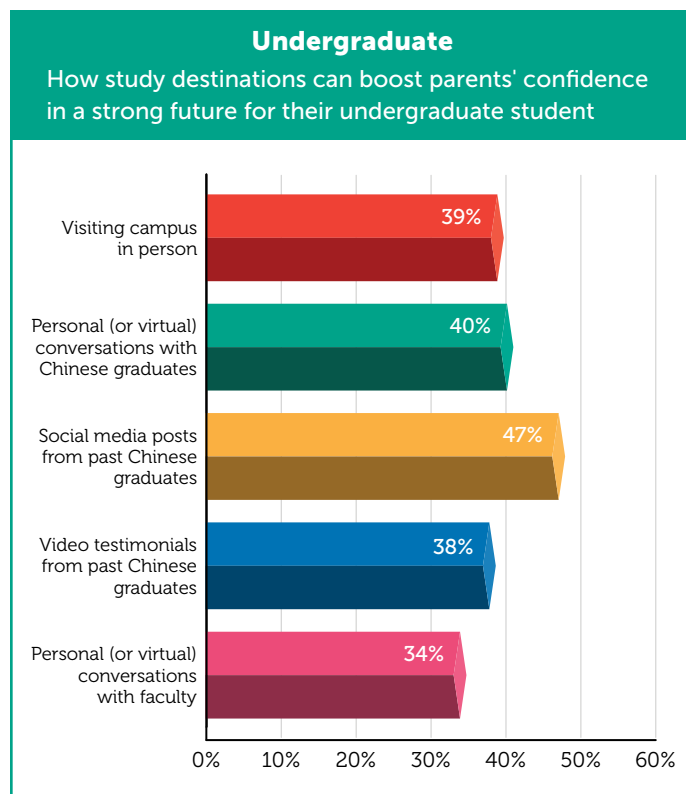
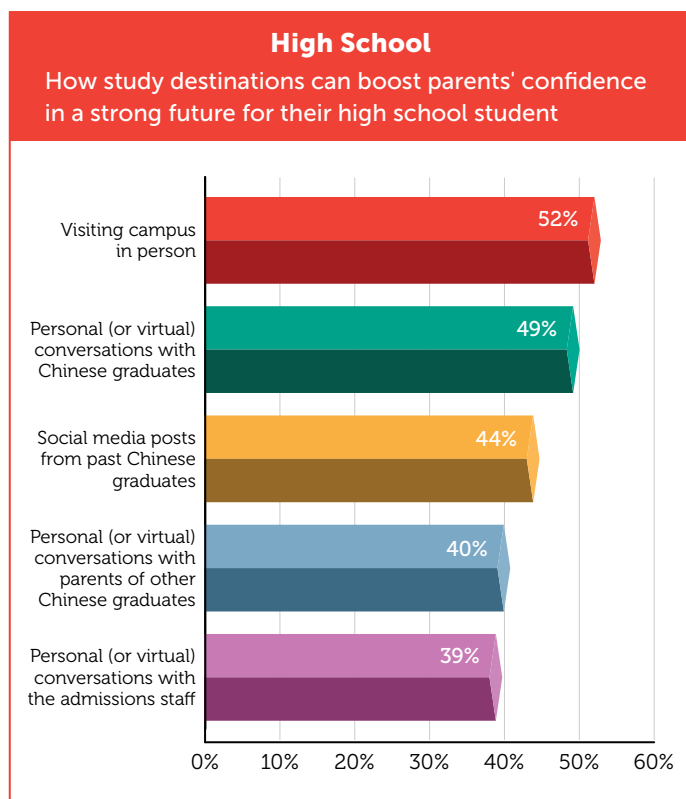
Yueli, who resides in Beijing, hopes her child can stay in the U.S. for 3-5 years beyond graduation. "We have a very clear goal of working in the U.S. in the beginning," she says. Her statement aligns with the views of many parents whose students opt to study in the U.S.

Key Recruitment Drivers

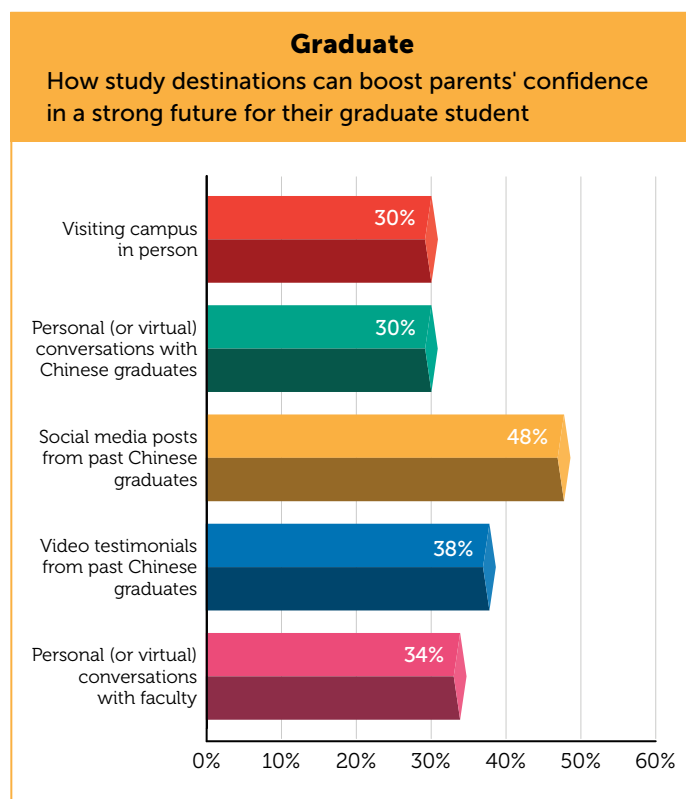
As recruitment and enrollment leaders, we must understand how our target audiences are making these important decisions. Intead has researched and written extensively on the strongest messages, messengers, and other influencing factors. With each new report, we learn more about the changing landscape of student mobility.

"Who is the major decision maker?"

The student is. Or so say 77% of parents of college-level students and higher. Even a full 43% of parents of high schoolers and below say the student is the decider. Interesting. From our [past research](#) and anecdotal experience, those paying the tuition bill are typically the final deciders. The survey responses do indicate, at the very least, the strong influence the student has over institution selection.



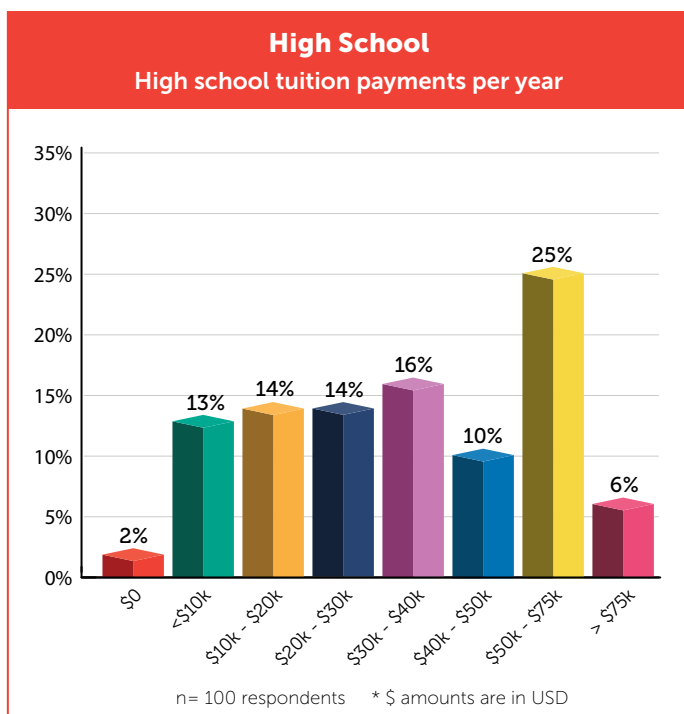
Students themselves are the key to the decision about where to study.



U.S. Brand Strength and Cost of a U.S. Education

The strong brand of an American education bears financial benefits for the U.S. economy. The industry generated nearly \$41 billion and supported over 450,000 jobs during the 2018-2019 academic year, according to NAFSA: Association of International Educators.

Chinese families are paying high tuition rates and those at the higher end of the scale are more demanding of strong student support services. This emphasizes the importance of delivering on the promise more broadly than just conferring a diploma.

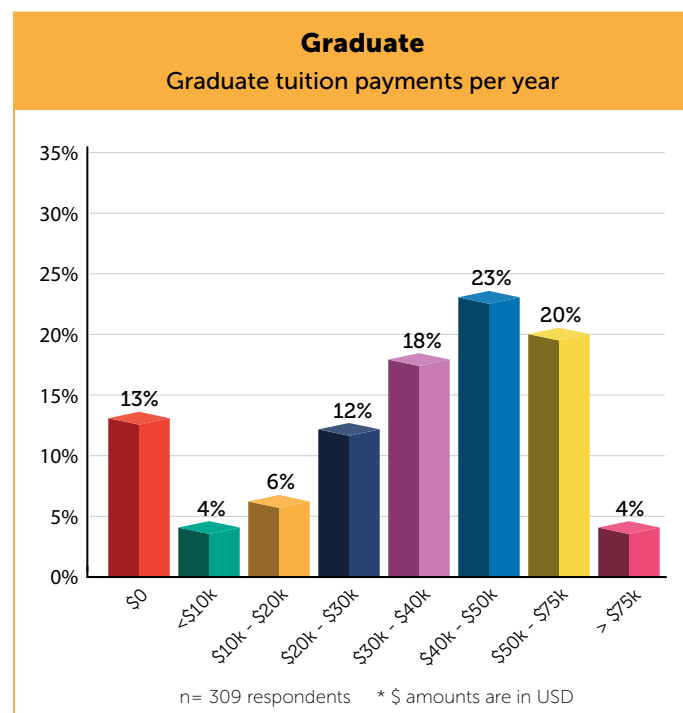
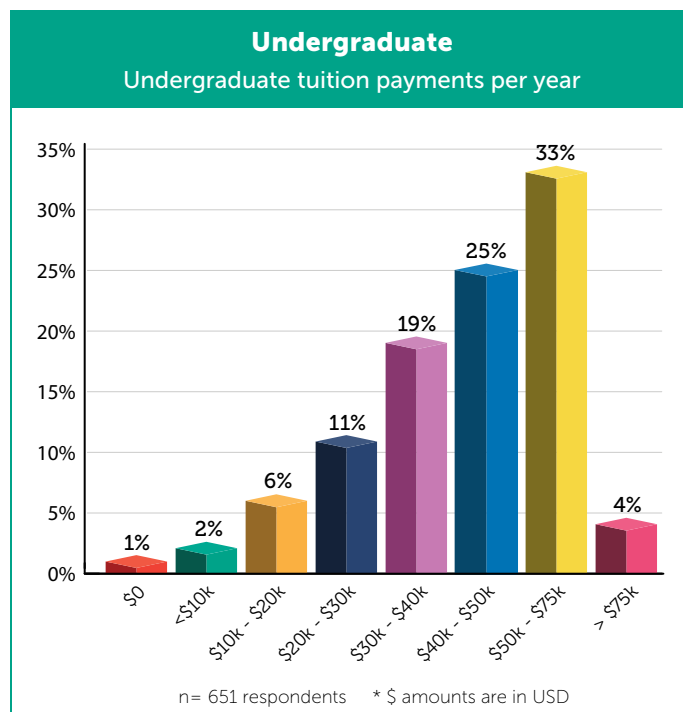


From our focus group:

Chinese parents tell us they want more insight into their student's education. "It would be helpful if the school had someone to give parents real feedback about their child's situation, quarterly or monthly," says Leo.

Others want more comprehensive international student support for their children. "Even if [your child] gets a high score on the listening test, you will still face a lot of difficulties at school. The child still has to go outside and find a training station. I hope the school might give more support," says Yueli.

Recruitment marketers take note: Chinese parents are willing to pay for a quality education. One factor they'd like to hear more about is better support services for international students.



IV. Factors Beyond an Institution's Control



Politics

We wondered:

“What would make choosing to study in the U.S. easier for parents?”

Overwhelmingly, Chinese parents said they want to see the U.S. president and government grow more friendly toward Chinese students. They want COVID-19 under control, less travel restrictions, more assistance with job hunting, and easier access to visa services. There is hope that F-1 visa regulations will stabilize, even ease, to allow more students the opportunity to get a U.S. education. Like you, Chinese parents want their students on campus for the 2021-2022 school year.

The COVID-19 Effect

The education sector has attempted to create a valuable and engaging educational environment for students at every level despite COVID-19. The reality students face is new and it's remote. In fact, 81% of surveyed Chinese parents say their undergrads were taking classes remotely at the time of the survey (February 2021). The same goes for 57% of graduate students and 57% of postgraduates. Forty-two percent of high schoolers are also remote. A significant number (22%) of graduate-level students have simply taken a gap year.

One phrase we heard often “Lower tuition fees for international students due to online classes.”

Elements that make choosing to study in the U.S. easier for parents



77% - The president and U.S. government are friendlier toward Chinese students.



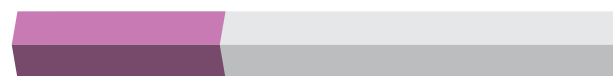
76% - COVID-19 is under control



41% - More accessible visa services in China



35% - General availability of vaccines to international students



34% - Remove Chinese student 14-day third-country travel rules



22% - The “ranked” schools are more “friendly” to Chinese students and easier to get into.

From our focus group:

Beijing-based mom Tina says, “The entire education system of the U.S., being top in the world, makes it very difficult to apply. Under the pandemic, it is indeed very tangled.” Her top concerns: her student's health/the pandemic, COVID-related travel restrictions, and the visa process.

V. What This Means for Your Recruitment Marketing



Sentiments Indicate Opportunity

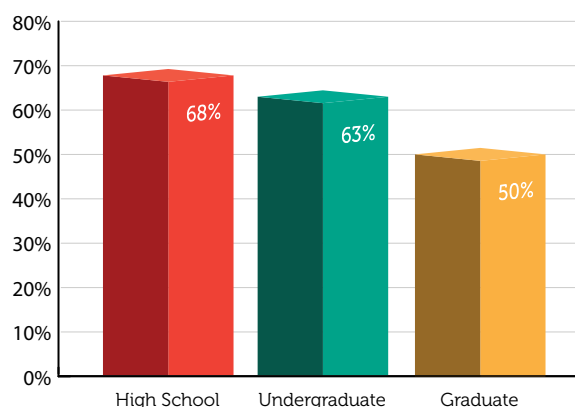
As Chinese parents and their students look to fall 2021, the majority, 60% of parents surveyed, expect their student to proceed with plans to study in the U.S., whether their institution opts for online or on-campus learning.

Chinese parents want to see their kids benefiting from a U.S. education. Those institutions too cautious or flummoxed to engage in recruitment marketing right now (and many are, for a variety of reasons) will suffer the international student enrollment declines the news media love to report. Those engaging these students (and parents) with thoughtful messaging will find an eager audience.

From our focus group:

Institutions' 2020-2021 pivot to remote learning leaves Chinese parents undeterred from choosing a U.S. education for their students. Jane says, "We feel that children [in U.S. schools] are very involved in learning. Even if it is an online class, they are very active. I can imagine that when he gets to the U.S., my child will probably receive more information."

Percent of Chinese students who intend to study in the U.S., even if their classes are remote



Parents cited the importance of personal interactions during the recruitment process.

When we asked,

“What would give you confidence that a study destination can provide a strong future for your child?”

Parents answered: “It’s all about personal points of contact.”

Of parents of high school students, 52% want to visit the campus in person and 49% want personal (or virtual) conversations with Chinese graduates from the institution. Parents of university-age students would like to see social media posts from past Chinese graduates from the institution; video testimonials from past graduates are also sought. The common thread, of course, is the strong lead-nurturing value of human connection.

Nearly half of all Chinese parents want to see social media posts from recent graduates of their prospective U.S. institutions. The opportunity here is clear, and we’ve written about this before. Low-cost marketing through alumni testimonials and social channels has real value. Your best marketers may also be your cheapest.

On the flip side, video testimonials from parents of Chinese students from the institution ranked low among participants. Chinese parents simply did not feel the need to hear from their peers.

The news from China is surprisingly good. Parents prefer a U.S. education. Their students intend to come to the U.S. to study—when the pandemic allows. With the right recruitment tools in place, American academic institutions are primed to capture the coveted Chinese market.



[Read our report](#) on the underutilization of alumni for recruitment marketing

Our research, yet again, points to the underutilized and relatively inexpensive value of using alumni as a prominent and consistent element of any international student recruitment strategy—particularly in China.



Beyond Alumni

83%

of respondents cite education consultants as being “somewhat” or “very helpful.” Consider these agents as valuable influencers in your recruitment process.

VI. Research Methodology



We surveyed 20,000 Chinese parents connected to WholeRen Education. The 16-question survey was shared in Chinese in late January and early February 2021, and 1,062 people currently living in China, predominantly in the Beijing area, completed the survey (a better than 5% response rate). The vast majority (96%) are parents, 97% of whom have a student who is pursuing a degree at a U.S. institution.

Of those parents with a student enrolled at a U.S. institution, at the time of the survey, 47% of the students were located in China and about 52% were studying in the U.S. Most are taking classes remotely regardless of location: 42% of high schoolers, 81% of undergraduates, and 57% of graduate-level and post-graduate students.

In addition, we ran a focus group of Chinese parents living in China on February 6, 2021, to get a deeper understanding of their current mindset. We spoke with five parents about their perspective on having a child study abroad. The focus group was conducted in Chinese.

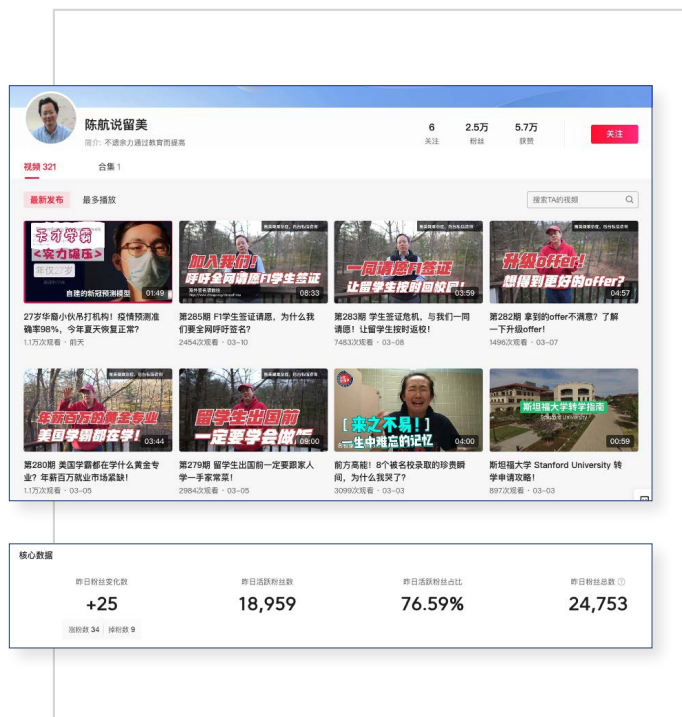


VII. Appendix: Online Sources of Information Used by Chinese Parents and Students

WholeRen Marketing Network:
A matrix of marketing channels that directly connects institutions with targeted students who are either studying in the U.S. or are ready to come to the U.S. to study.

Toutiao (Video Platform)

<https://www.ixigua.com/home/87673498573/>



U.S. Campus Website

Launched in March 2020 during the pandemic, this website has become the top choice for families in China to access updated, firsthand information about U.S. universities as well as opinions from international education experts. It has been visited more than 9 million times since inception.

<https://c.wholeren.com/>



WholeRen Marketing Network: WeChat Official Accounts

陈航说留美，北美留学君，留美导师



WeChat Groups

WholeRen owns 80+ WeChat groups with over 20,000 Chinese parent and student subscribers. Five percent of those are active users.



Government Information Website: Chinese Service Center for Scholarly Exchange (CSCSE)

<http://www.cscse.edu.cn/>

About

CSCSE is managed by the Ministry of Education of China. It provides services for students studying abroad, international students, and students coming back to the country.

Services

CSCSE offers resources for ...

- Students returning to China after study abroad: career fairs, job postings, authentication of diplomas and degrees
- Chinese students considering studying abroad: info on school fairs, visa Q&A, school recommendations
- International students considering studying in China: information on Chinese universities, summer camps, learning Chinese

Summary

On the website, there are several job placement ads targeting graduates of overseas universities. The main navigation bar is right beside the website logo. In the middle, visitors find a box listing the latest notifications from the government (e.g., how long it takes to finish the authentication of a diploma).



Promo opportunities:

CSCSE is managed by the Ministry of Education of China and does not host paid university advertisements. However, you can send CSCSE info on school fairs and other events. They may post them.

Baidu

<http://www.baidu.com/>

About

Founded in 2000, Baidu is the dominant Chinese-language search provider. It boasts over 220 million daily active users, and its combined PC and mobile search business represents over 70% of China's internet-search market share by page views.



Promo opportunities:

Baidu offers paid ad placements based on keywords and is a proven way to reach your target audience in China. Paid marketing opportunities include:

- Pay-per-click campaigns
- Display advertising across Baidu's 600,000 sites
- "Brand Zone" advertising for branded presence on search results page

Marketers must go through a vetting process to establish a Baidu account. It requires a bit of legwork, so working with a partner who understands the process and can guide your institution on the best, most effective approach is valuable.

Intead can help.

WeChat Official Account College Daily

About

Founded in 2014, College Daily provides an information platform for Chinese students currently studying in North America, prospective students, and their parents. The account publishes daily content about international education and global news. It is the most influential WeChat official account on the international education industry, with the largest number of followers.

- WeChat Official Account followers: 1.6M
- Headline average views: 100K+
- Non-headline average views: 40K

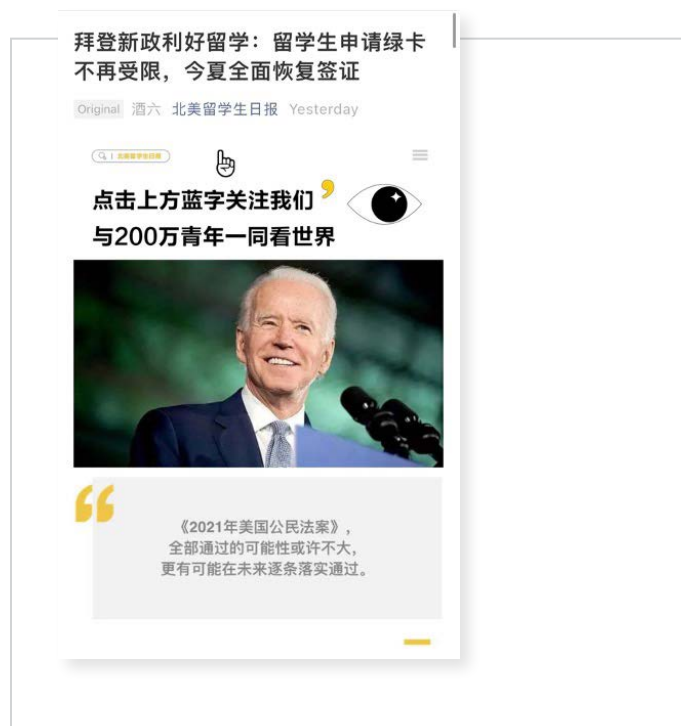


Promo Opportunities:

WeChat offers paid ad placements on channels for pushing out info to your Chinese audience. This is an effective route for reaching prospective students. However, you must have a Chinese company license. Don't worry: [Intead](#) can broker those placements through Chinese partners. And there are other approaches.

Another option is to place ads/paid posts through other popular WeChat official accounts. CollegeDaily, pictured right, is one example of a paid account that posts promotional content for universities. Intead can help you identify the best channels and secure those paid placements.

If you want to learn more about how to set up your institution's WeChat official account, download a free guide to WeChat [here](#).



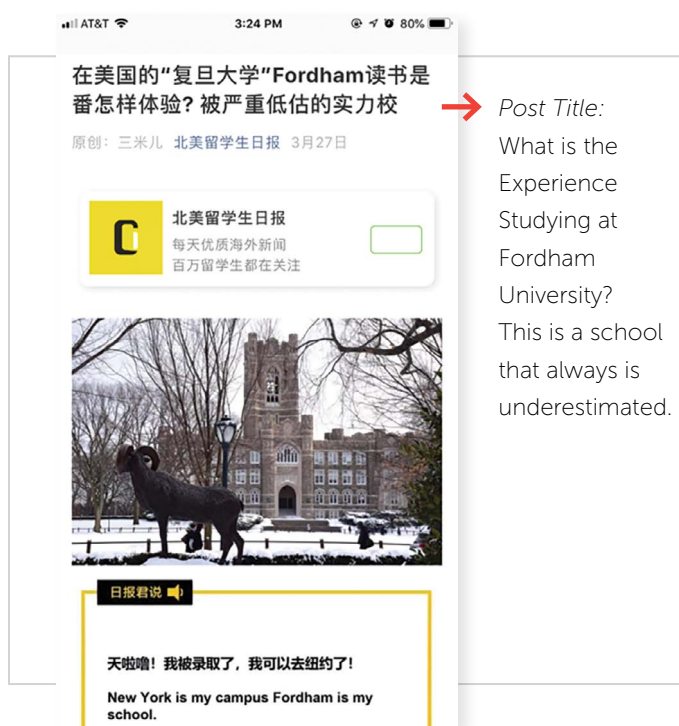
WeChat Official Account College Daily (continued)

Main Page Screenshot

College Daily publishes an average of 6 posts each day. Below is an example from one day. On June 15, 2018 (screenshots on top right), they had one headline post and six non-headline posts. At the bottom of the page, we can see the navigation menu including "browse previous posts," "Q&A community" and "Contact us".

Sample Post

The following post is an article introducing a university in New York City. It yielded 28,173 views, 91 likes, and many comments.



Forums

GTER

<http://bbs.gter.net/>

About

Founded in 2000, GTER is a forum focused on global education, including information about testing, applications, and student life abroad. GTER has built an objective, reliable system for rating universities abroad.

GTER encourages students to take a DIY approach to applications, rather than working with an agent. They aim to provide a one-stop source of information and discussion for study abroad. GTER's website includes a GTER discussion forum, a school database, an "offer index" where students share and discuss their acceptance letters, online organization tools that help students manage their application files, and more.

User Persona

GTER's users are mainly 20-35 years old with a dream of studying abroad. Users are mainly located in Beijing, Shanghai, Guangdong province, Jiangsu province and some other first-

and second-tier cities in China. There are a smaller number of users from Hong Kong and North America. The site is about equally popular among men and women.

Visitors coming to GTER are looking for information about test preparation, school applications, and visa applications. Forums are organized by topic, including discussions focused on the GRE, TOEFL, student experience in the U.S., and student experience in Europe (to name a few). GTER provides a platform for visitors to discuss their experience and post materials that they used for exam preparation. GTER content is largely generated by users on the forums.

Online User Experience

Homepage

On this homepage, there is a navigation bar at the top. Below the navigation, there are ad placements from schools. On the left, you can find the popular sections (e.g., Study abroad in the U.S.) in the forum.

Ads currently posted to the website

- IELTS
- National University of Singapore
- The Open University of Hong Kong
- Singapore Management University
- China, Unicom



School Ads

Promo Opportunities:

Paid ad placements available.
Intead can help.

Forums

GTER

<http://bbs.gter.net/>

Online User Experience

Language

Content is mostly in Chinese.

Navigation (Main Menu)

Forum

Topics include tests (GRE, GMAT, SAT, TOFEL), majors (law school, business school, medicine, etc.,) and student life (visa, flight tickets, etc.).

Offer Index

Students self-report the offers they have received from schools to which they applied. All users who post offers from Columbia University, for example, can compare scholarships offered with other users, weigh this offer against other schools to which they were accepted, and so on.

Promo Opportunities:

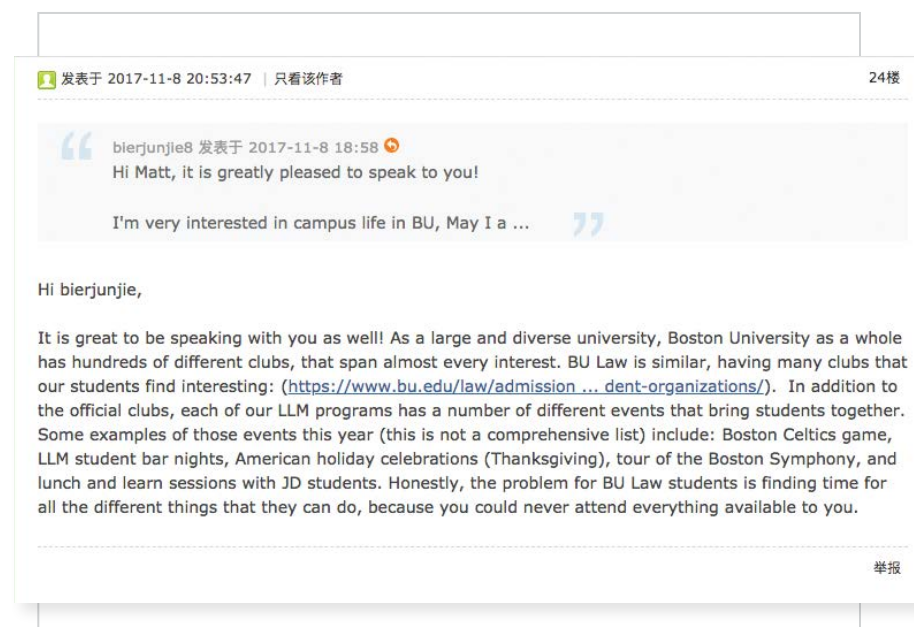
There is a “Hello Admissions Officer” section in the forum. Each school has its own post. Users ask different questions in the post and the admissions officer answers these questions during a predetermined time window. Many participating schools are from Hong Kong and Singapore, but American schools like Boston University, Indiana State University, University of Southern California, and Worcester Polytechnic Institute have also participated.

See below for screenshot from a chat with BU.

School Database:

Users can search schools by name, major, country, region and ranking.

School profiles are very simple. Rather than providing information about the school, the database is more focused on calculating how many GTER users have applied to the school, how many received an offer, and how students evaluate and rate the school. Universities are not charged for building a basic profile.



Application Management Tool

This tool helps users manage information about schools in which they are interested, and organize the application materials required by different universities.

GTER's Social Media Presence

- Weibo Account
- WeChat Official Account
- Renren Account

Forums

1point3acres

<http://www.1point3acres.com/bbs/>

About

The website 1point3acres follows a similar format to GTER but is more heavily focused on STEM programs. This forum is run by an individual administrator. There is no advertising from schools right now. The owner of this forum wants it to be a clean platform for visitors to share information about studying and working in the U.S.

Founded in 2009, 1point3acres was built by an international student who goes by the name "Warald" online. Warald has since worked in the IT industry in North America. He first started the site as a blog where he could share his experience about test preparation, school applications, and career development. As his blog gained popularity, he started a forum to allow his users to also share experiences.

User Persona

1point3acres users are young Chinese professionals and students, but parents actively monitor this site. Users are seeking information about the GRE, GMAT, TOEFL, and other exam prep; STEM program applications (particularly computer science, information technology, and electrical engineering); career networking (with a particular focus on computer science); visas; and immigration.

Online User Experience

Homepage

On the homepage, below the navigation bar, visitors find three recruiting ads from technology companies. Under the ads section, there is a big box listing the popular posts in each section (e.g., My interview experience at Facebook).

Forums

1point3acres (continued)

<http://www.1point3acres.com/bbs/>

Online User Experience (continued)

Language

Content is mostly in Chinese.

Navigation (Main Menu)

1. Forum Management
2. Study Abroad Applications
3. Global Citizenship
4. Life Tips
5. Networks
6. Advertisements
7. Chat Room
8. Job Hunting in the U.S.
9. Job Hunting in China
10. Suggestions on Job Hunting
11. Lifelong Learning
12. Technological Majors-Related Information
13. Immigration Policies

1point3acres's Social Media Presence

- WeChat Official Account
- YouTube Channel
- Twitter



Navigation	
论坛管理	1
留学申请	2
世界公民	3
生活干货	4
人际 关系	5
分类广告	6
只想聊聊	7
北美求职	8
回国求职	9
职场达人	10
终身学习	11
专业技术	12
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Promo Opportunities:

Paid ad placements available.

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Forums

ChaseDream (CD)

<https://www.chasedream.com/>

About

ChaseDream is in many ways similar to GTER (next page) but is more heavily focused on business school applications.

User Persona

Founded in 2003, ChaseDream is dedicated to developing a leading international online and offline community of young Chinese professionals and students to share experiences on GMAT and TOEFL preparation, business school applications, student life, career development, and business opportunities.

Online User Experience

Homepage

The navigation bar is at the top of the homepage. School ads float around the page. On the left, there is a long bar with information on school fairs and presentations both online and offline. In the third column, we can see headlines listing the popular posts (e.g., *My interview experience with SMU MSBA program*).

Ads currently posted to the website

- NYU Shanghai Masters in Business Analytics Program
- Hong Kong University MBA program
- TOEFL
- UCLA MBA program info section
- Manchester University MBA program info section
- National University of Singapore MBA program
- Duke Fuqua School of Business Online Info Session



Language

Content is mostly in Chinese.

Navigation (Main Menu)

Forum

ChaseDream forums cover a variety of topics related to business school programs. The average page view per member is as high as 22 per day. Members post over 1,500 articles on the forum daily.

ChaseDream's Social Media Presence

While ChaseDream has accounts on various social media channels, they are not active.

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