

Transnational Student Mobility and Future Employment Trends in 2017

How universities and students must work together to achieve industry demand

A market research study by DIAC & BMI Media
October, 2017

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Market Research Study Objectives

DIAC and BMI Media partnered to launch a market research study in 2017. The study comprises 2 parts, one focusing on transnational student trends, and the other focusing on universities.

The study looked at the following:

- A strong focus on transnational students from developing nations, these are students that are willing to leave their home countries and travel for international education opportunities.
- Understand the types of courses students are looking to study and where they are willing to travel.
- Understand employment ambitions of students after graduation.
- Understand why students are willing to travel abroad and what are the factors that affect this decision.
- A focus on leading international universities in various countries around the world.
- How are their transnational student numbers growing and where are these students coming from?
- Develop a roadmap and strategy for universities to attract more transnational students.
- Understand upcoming student mobility trends and demand for university programmes.
- ***The study will be broken up into two parts, one focusing on transnational student trends, the other will be focused on university operations and will be launched later in the year.***

Target Markets for Study

Two target markets were identified for the study. The first were transnational students, the second are universities. The students were sourced from approximately 50 countries and all were qualified as a potential or current transnational student. Students were drawn from multiple databases of more than 500,000 students.

Target Market 1: *Transnational Students*

- Sample space of 2,700 students.
- All students are identified as potential transnational students, i.e willing to travel abroad for international education opportunities.
- Aged between 17 to 25, Male and Female.
- Looking for university placement.
- From a large selection of countries with a focus on developing nations such as GCC countries, India, Brasil, Asian Countries, South American Countries.
- Students were emailed a questionnaire for the survey.

Target Market 2: *Universities*

- Looking for 100 to 200 universities
- Should have been in operation a minimum of 5 years so they have graduates and alumni.

Transnational Student Mobility Landscape

The transnational student market is growing each year. The “Big 4” host countries of USA, Australia, UK and Canada are wary of losing dominance with the rise of growing education hubs in developing nations such as the UAE and Malaysia. With recent political situations affecting student enrolments in the US, it is important to evaluate growing education hubs that includes international universities.

- In 2014 over 5 million students enrolled in higher education abroad
- Numbers tripled since 1990, with annual growth rate around 8%
- By 2022 expected to reach 7 million
- Largest supply markets are China, India, South America & South Korea
- Asian students represent 53% of all HE international students
- USA, UK, Germany, France, Australia & Canada together host over 50%
- 29% of students study in the US and the UK (51% in 2000)
- Europe receives 48%, North America 21% and Asia 18%
- International student numbers have almost tripled in Oceania since 2000
- Market forecasts = greater global demand for post-graduate & vocational training

Source: OECD, Education at a Glance 2016

Key Drivers for Student Mobility

Before reviewing this market research study, it is important to understand the drivers behind the recent trends in international student mobility.

The following represent the reasons why students are looking to travel abroad for university studies.

- International university brand and reputation
- Global rankings & ratings of programmes & institutions
- Work opportunities while studying and post-graduation employment opportunities
- Price / budget / currency exchange rates
- Availability of Scholarships
- Recommendations from agents
- Recommendations from friends and family
- Economic development, political situations, election outcomes, price of oil
- Lack of supply / capacity / provision in home country

Source: Global Trends & Disrupters in International Student Mobility – Where are international students going and why? ICEF 2016

Executive Summary

The Transnational Student Mobility study identifies transnational student trends and future employment preferences across a wide selection of developing countries. The DIAC survey, in partnership with BMI, looked to find what motivates potential students worldwide: where they would like to study; the reasons why; perceived obstacles and more

- The sample size consisted of **2,700 students** from more than **50 countries**. The survey consisted of 17 questions, some single answer, some multiple and some ranking questions. The survey was emailed to students for completion. The survey also gathered more general demographic information: age; nationality; gender; previous education and so forth.
- English speaking western countries are the most popular international study destinations (USA, Canada, UK, Germany & Australia).
- UAE is more popular as a study destination than Switzerland, Brazil, Mexico, South Korea, Singapore and China.
- **UAE similar in popularity to Sweden, Netherlands, Switzerland and New Zealand, all of which are long term established destinations for international students.**
- **UAE's ranking in preferred study destinations outranking Singapore and South Korea shows the region as an emerging global player in international education.**
- **Quality of Education** is the primary reason for transnational students to travel abroad – Universities need to promote their academic rankings and reputation to position themselves as leading education destinations.
- **Employment** is the next major reason for international education travel – students see higher education as an investment in their future and expect returns when travelling abroad. Universities should focus on career fairs, career placement and internship initiatives.

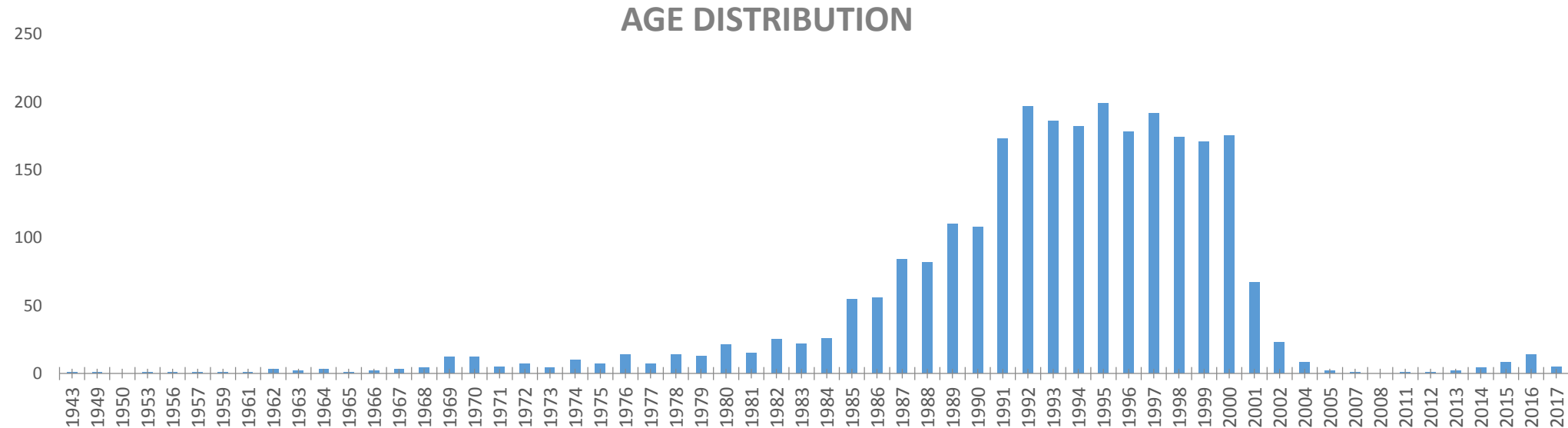
Executive Summary Part 2

- **Quality of Life and Safety are very important to transnational students.** International study destinations like the **UAE** are widely regarded in these areas, being **ranked as the 2nd safest country in the world** in the World Economic Forum Travel and Tourism Competitiveness Report 2017, as well as Abu Dhabi being ranked as the safest city in the world, and Dubai being ranked as the 12th safest city in the world in the Numbeo Crime Index 2017.
- Students are very price conscious when travelling abroad - the high cost of living is a major obstacle to students looking to travel for their studies.
- **Visas are also a major concern** – UAE universities need to push the ease of visa acquisition as it is a major obstacle to transnational students travelling, however it is very easy to obtain a student visa for any UAE university. The part time student visa policy launched in the UAE also helps alleviate concerns with fees.
- The third ranked obstacle is employment issues. **Students are also seeing countries who allow them to work while they study as more favourable destinations.** The UAE is well placed to capitalise on this, in line with the new “Earn While You Learn” Part Time Visa Policy, as are other countries such as Canada, Ireland and Australia who allow students to work while studying.
- Internet Search is incredibly important for Students looking for new universities. **A strong website and digital presence is needed to attract these students.** Live Chat and Online Help along with multiple language translations may be beneficial to Universities.
- Education fairs and academic agents are also rated highly, suggesting students trust expert opinion as much as they trust the ideas of peers and family. Direct interactions with universities may also be valued after initial research online.
- **Business, Management and STEM programmes** are seen as the most popular, with Language courses also seen as important to international students. Universities may benefit from offering transnational students a foundation language course.

Executive Summary Part 3

- There is an even split between students wanting to enter the workforce after graduation, and students wanting to undertake post-graduate degrees. **A growing base of students (11%) are looking to become Entrepreneurs** and this should be encouraged by universities by offering additional development programmes for students.
- **A staggering 69% of respondents intend to stay in their new country after graduation.** This presents an opportunity for the Education Hubs who are seeking to attract educated skilled workers to help drive economic growth, by retaining intellectual capital within their country of study.
- **Student accommodation** is the priority consideration for students when looking at facilities an institution offer. Educational facilities also outweigh the extra-curricular facilities revolving around sports and recreation. **The types of facilities students prefer tend to reflect their importance in securing employment post graduation, while “non essential” facilities based on sports or community do not rank as highly.**
- The importance of future employment prospects becomes apparent, with students selecting ‘**work experience**’ as the most important extracurricular activity.
- Extra-Curricular Clubs are ranked very highly, which may also represent students looking for activities that increase their chances of gaining employment or networking opportunities for the same. **Career fairs also seen as important to students.**
- **CSR events, Sports Tournaments and Community Concerts/Gatherings are seen as the least important for transnational students.** Universities often look to provide a “balanced” education experience, however these **students are looking for initiatives which increase their chances of employment.**

1. Student Date of Birth

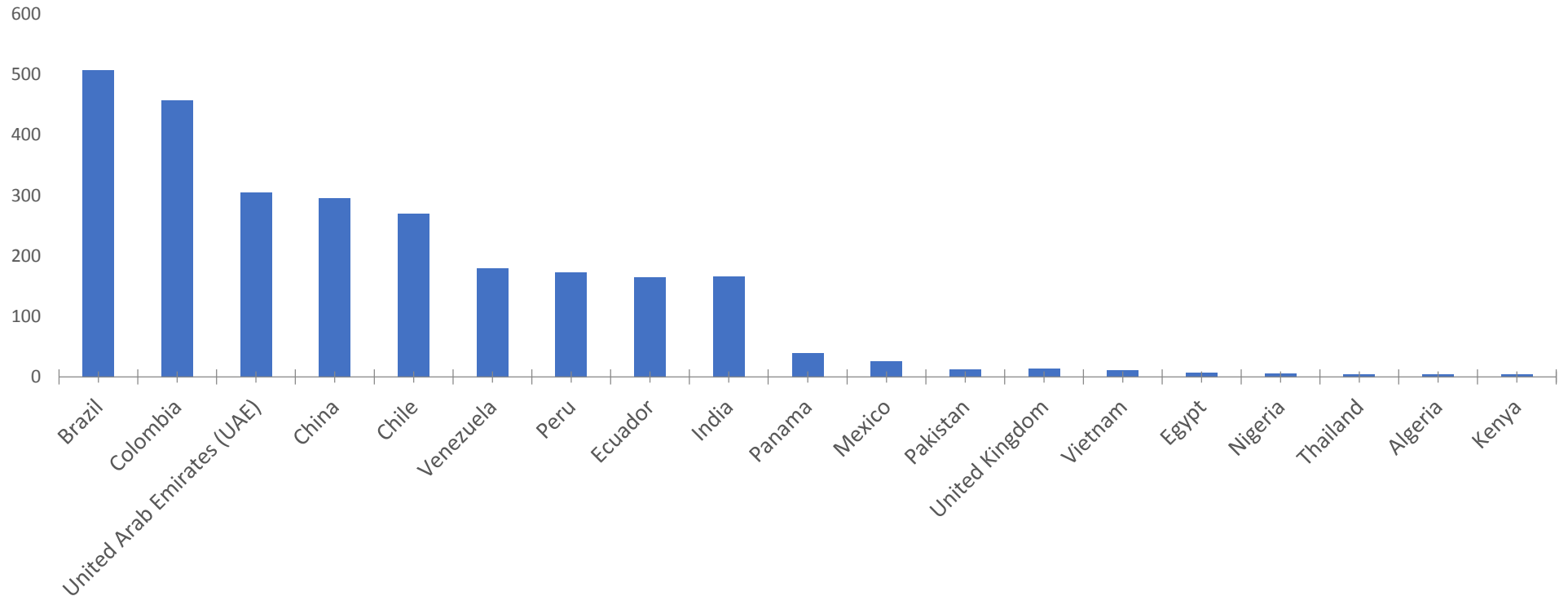


- **68%** born between the years of 1991 and 2000, ages between **16 and 26**
- **18%** born between 1985 and 1990, ages between **27 and 32**
- The 68% group are students who are currently studying at university or looking for undergraduate studies.
- The older group includes those of typical postgraduate age 22-26, indicating either an eagerness for continued education, post-original degree, or perhaps commencement of an undergraduate course as a mature student.

2. Student Country of Residence

TOP 20 COUNTRIES OF RESIDENCE

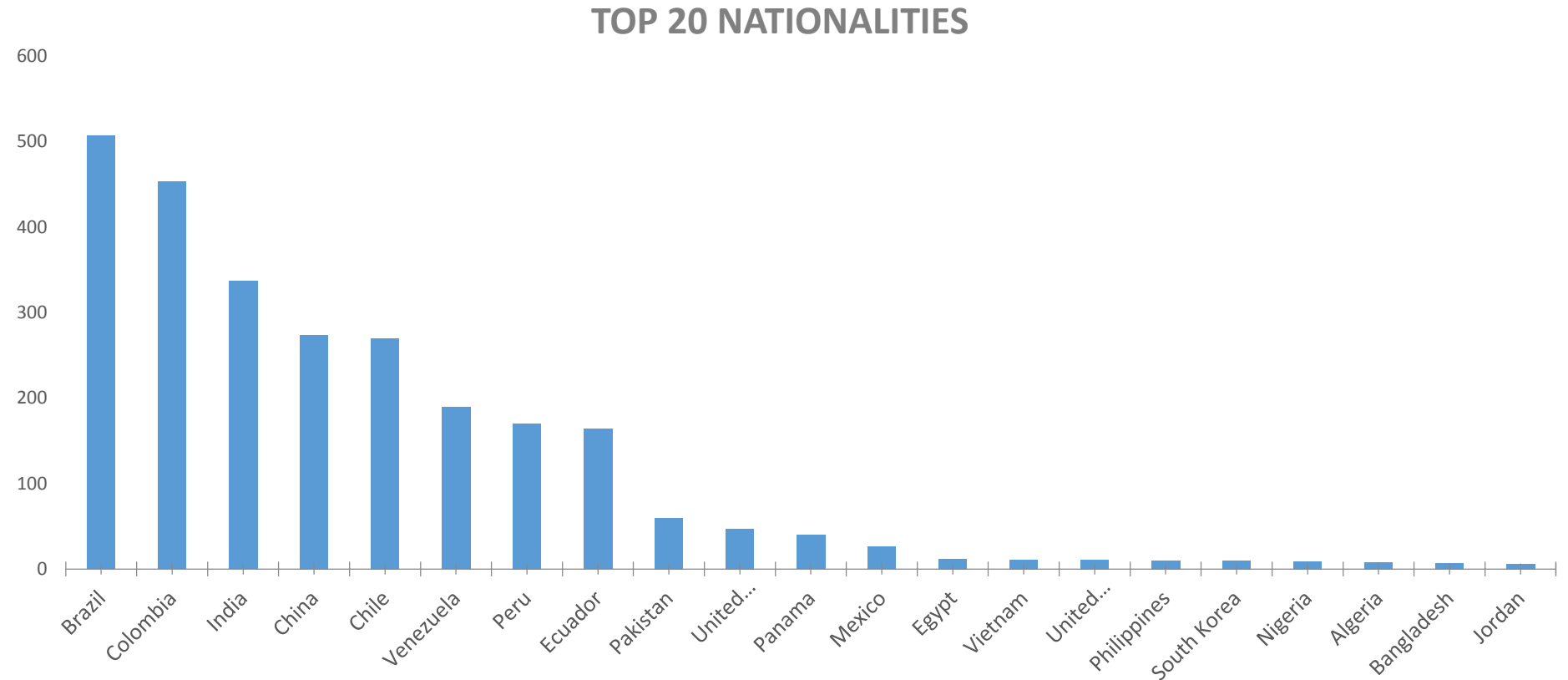
- 18.8% Brazil
- 16.9% Colombia
- 11.3% UAE
- 11% China
- 10% Chile
- 6.7% Venezuela
- 6.4% Peru
- 6.1% Ecuador
- 6.1% India



- Developing nations within South America are looking to study abroad at international universities.
- Of the catalogued UAE students, 85.9% are Indian nationals.

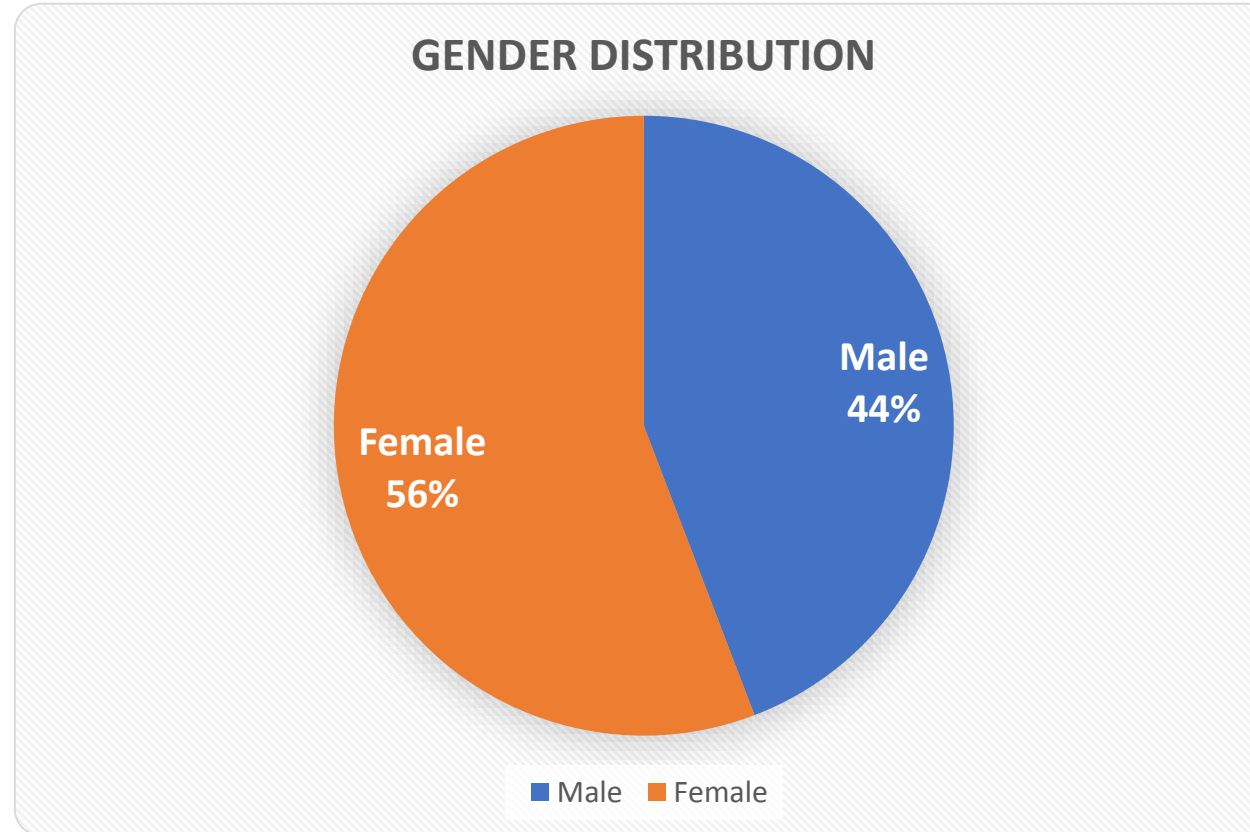
3. Student Nationality Mix

- **18.8% Brazilian**
- **16.8% Colombian**
- **12.5% Indian**
- **10.1% Chinese**
- **10% Chilean**
- **6.3% Peruvian**
- **6% Ecuadorian**
- **2.2% Pakistani**



- The largest region represented originates from South America.
- Large numbers of Indian and Chinese students are looking to study abroad for university degrees.

4. Student Gender Distribution

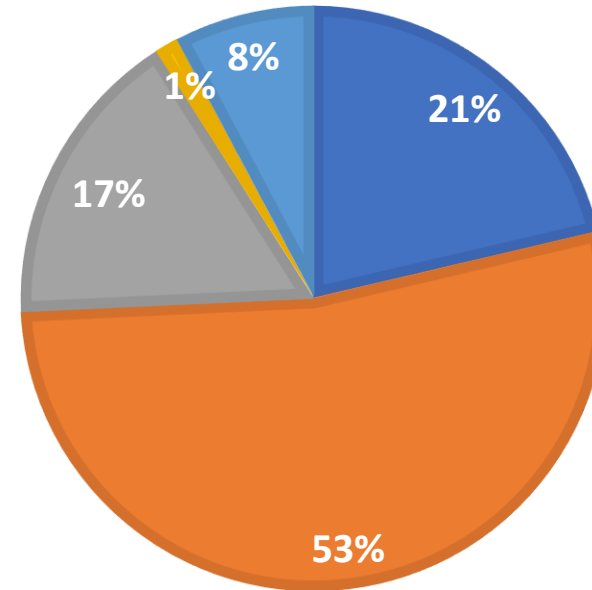


- Gender distribution is fairly evenly split, with a slight increased number towards females.
- 1,193 males and 1,507 females.

5. Student Study Level Distribution

CURRENT STUDY LEVEL DISTRIBUTION

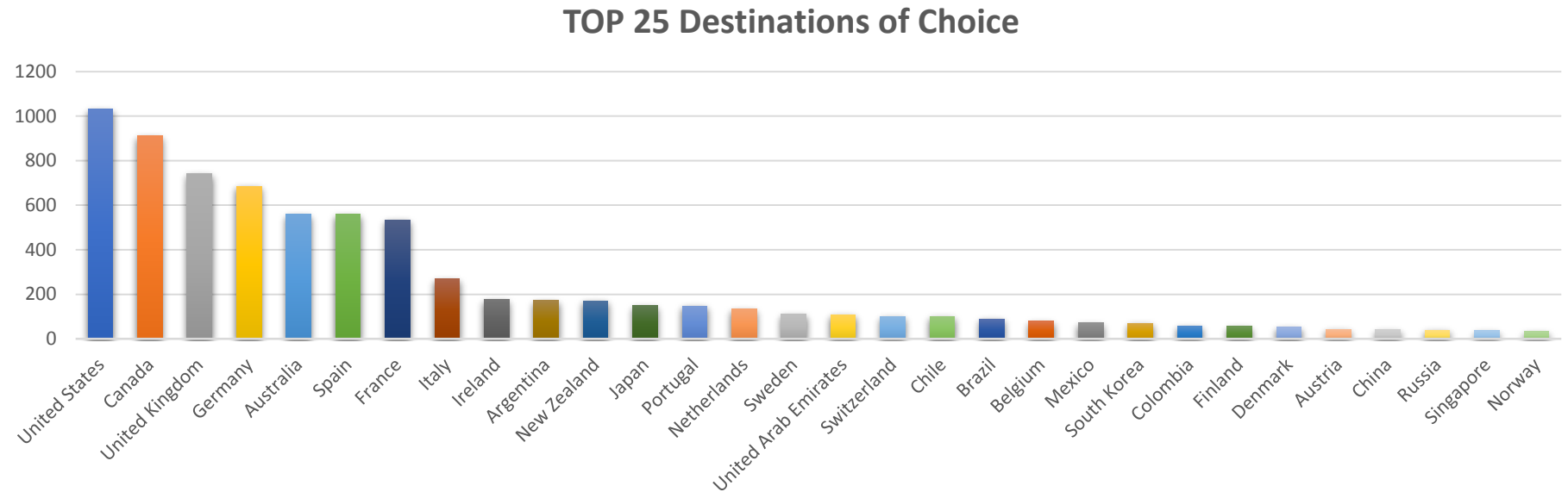
■ High School ■ Undergraduate ■ Masters ■ Doctorate ■ Other (please specify)



- A great number of respondents are currently in university, either as undergraduates or masters students (70% of respondents), This would suggest that most students looking to study abroad already have some university experience.
- 21% of students are currently at the high school level and therefore present interesting insights for universities looking to recruit at the undergraduate level.

6. Preferred Study Destination

- **38% United States**
- **33.8% Canada**
- **27.4% United Kingdom**
- **25.4% Germany**
- **20.7% Australia**
- **20.7% Spain**
- **19.8% France**
- **4% UAE**



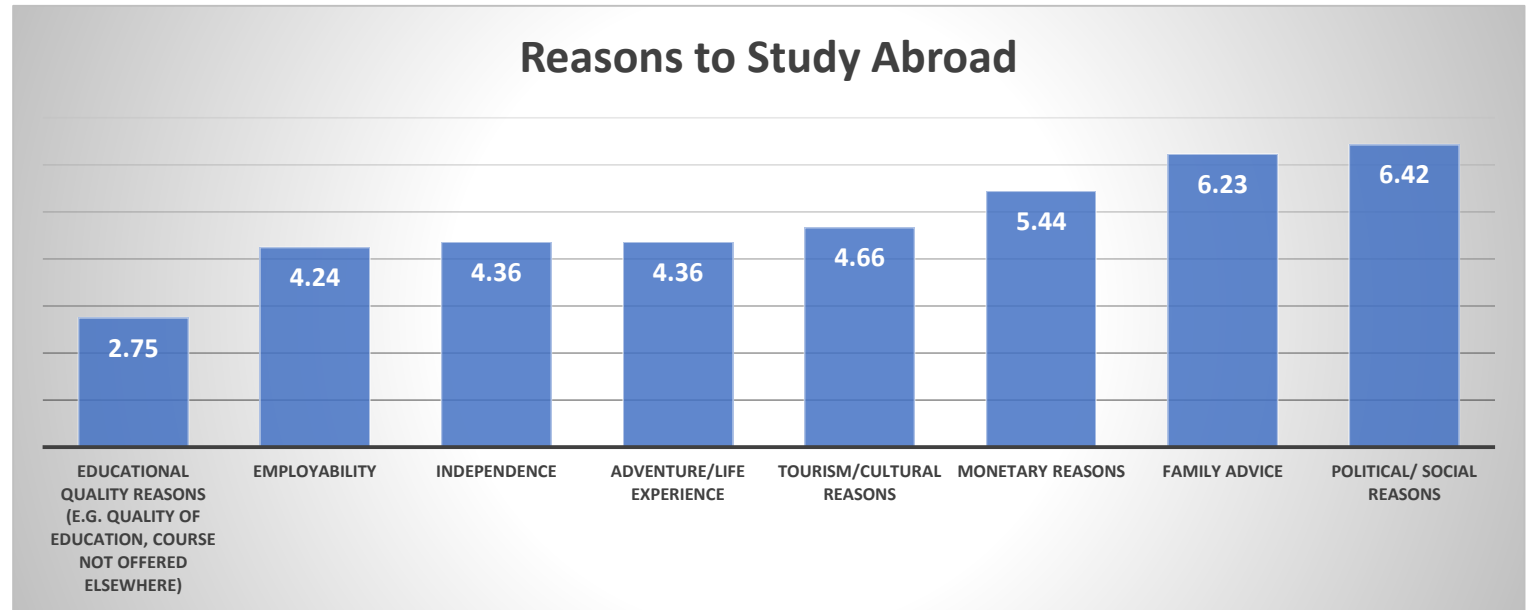
- English speaking western countries are the most popular.
- European destinations also proving popular.
- UAE as a study destination is more popular than Switzerland, Brazil, Mexico, South Korea, Singapore and China.
- UAE similar in popularity to Sweden, Netherlands, Switzerland and New Zealand, all of which are long term established destinations for international students.
- The UAE's ranking in preferred destinations outranking Singapore and South Korea shows the region as an emerging global player in international education destination of choice for students around the world.

7. Reasons to Study Abroad

Ranked Reasons

1. Education Quality: 2.75 (Most Important)
2. Employability: 4.24
3. Adventure/Life Experience: 4.36
4. Independence: 4.36
5. Tourism/Cultural reasons: 4.66
6. Monetary reasons: 5.44
7. Family Advice: 6.23
8. Political/Social reasons: 6.42
9. Other: 6.55 (Least Important)

(Ranked from 1-9. The lower the average, the better)

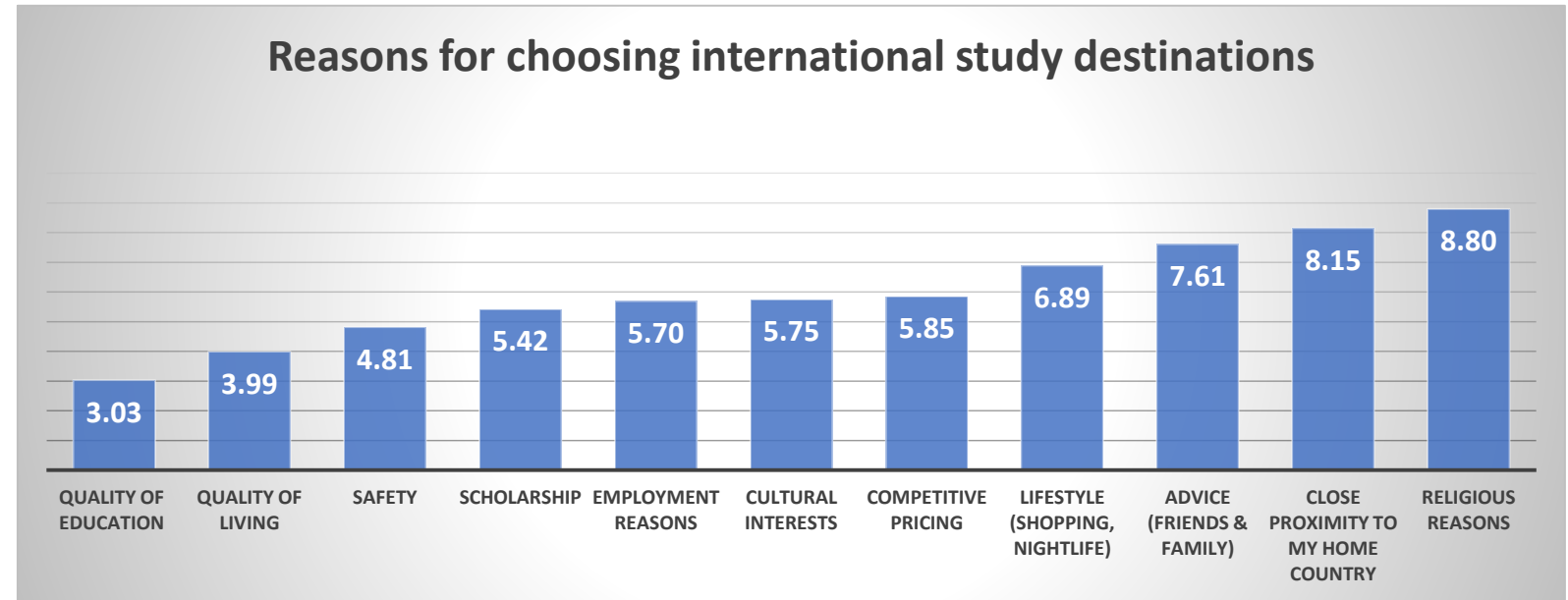


- Quality of education clear standout motive for education travel. Students are looking for quality international universities to further their future employment opportunities.
- Education Hubs need to promote globally recognised universities to position themselves as leading education destinations.
- Employability is the second most popular reason for studying abroad. Students see overseas study as an investment in their future career, it is important to have employment placement services for transnational students.
- Life experience, independence, tourism/cultural reasons next most popular. These opportunities are available in the UAE and play well to the UAE's global positioning as a vibrant culture and tourism hub.

8. Reasons for Choosing an International Study Destination

Ranked Reasons

1. Quality of Education: 3.03 (*Most important*)
2. Quality of Living: 3.99
3. Safety: 4.81
4. Scholarship: 5.42
5. Employment reasons: 5.70
6. Cultural Interests: 5.75
7. Competitive Pricing: 5.85
8. Lifestyle (Shopping, Nightlife, etc): 6.89
9. Family Advice: 7.61
10. Close proximity to home country: 8.15
11. Religious reasons: 8.80 (*least important*)



(Ranked from 1-9. The lower the average, the better)

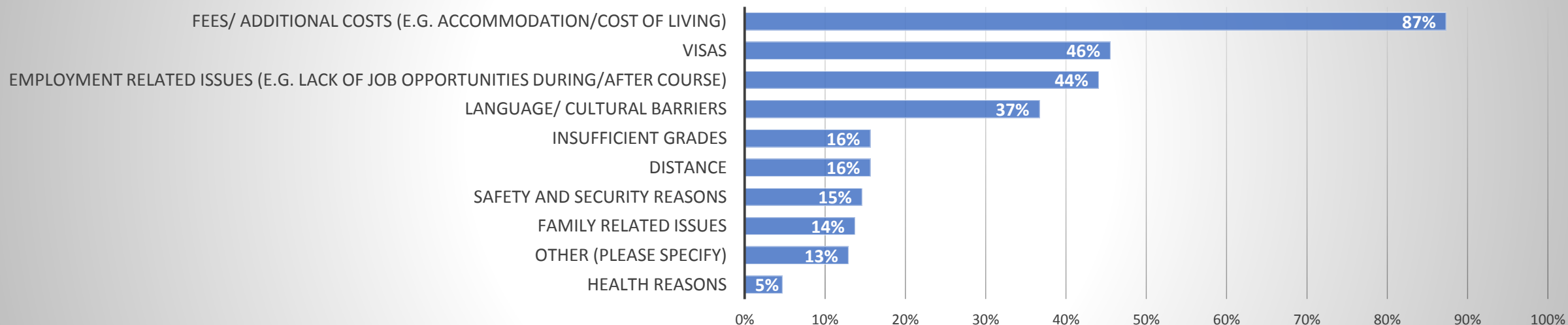
- Quality of education is the foremost reason for students choosing an international study destination. Students are driven to overseas study due to insufficient education options in their home country and the fact that employers place a greater value on international qualifications.
- Quality of Living and Safety are hugely important to transnational students. International study destinations like the UAE are widely regarded in these areas, being ranked as the 2nd safest country in the world in the World Economic Forum Travel and Tourism Competitiveness Report 2017¹, as well as Abu Dhabi being ranked as the safest city in the world, and Dubai being ranked as the 12th safest city in the world in the Numbeo Crime Index 2017².
- Distance to the home country does not play a major part in the decision making process, meaning students are willing to travel further distances for international education. Universities can increase their catchment areas for promotional activities to attract international students.
- While Employability remains an important reason to study abroad, it is less important when choosing a particular country which may indicate that some students are looking to return home for work.

1. <http://reports.weforum.org/travel-and-tourism-competitiveness-report-2017/ranking/#series=TTCL.A.02>

2. <https://www.numbeo.com/crime/rankings.jsp>

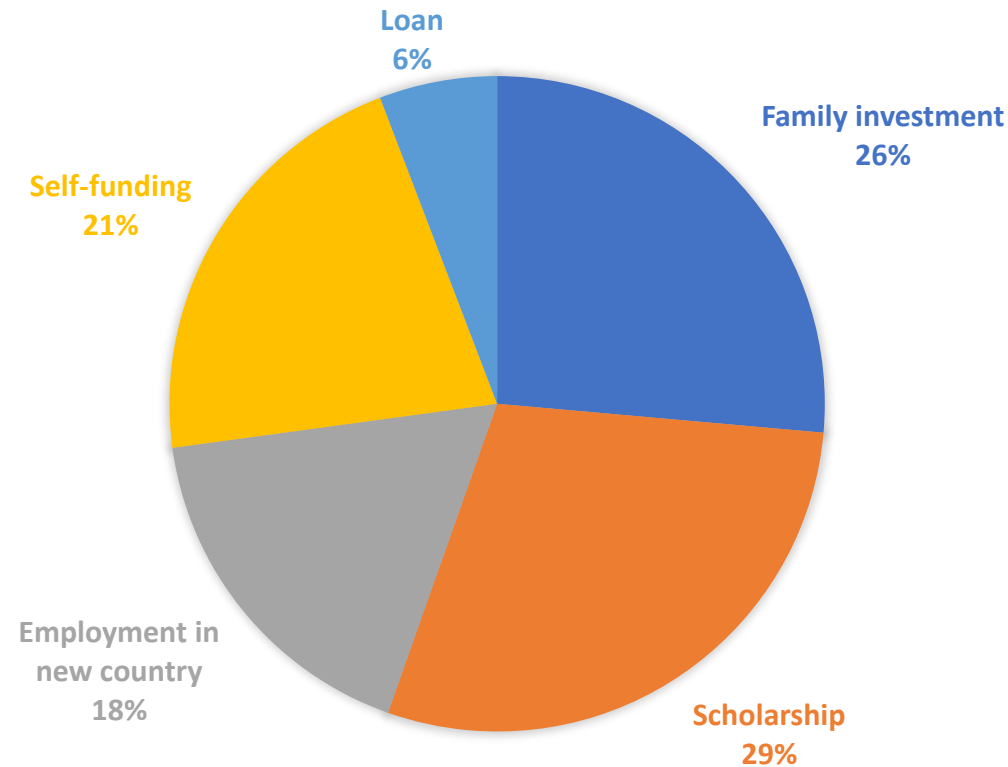
9. Main Obstacles to Studying Abroad

Main obstacles to studying abroad



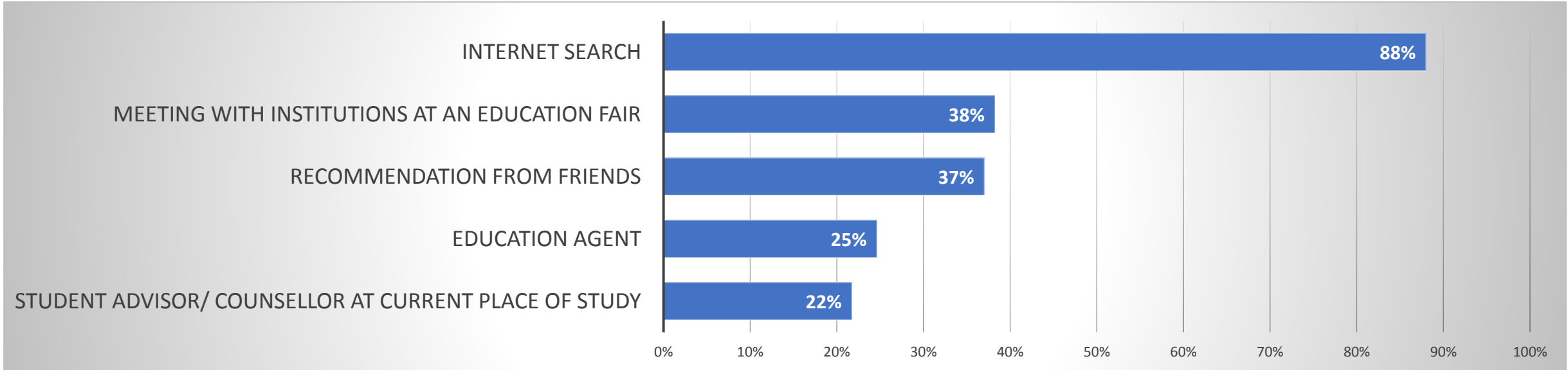
- Students are clearly price conscious when it comes to studying abroad – the high cost of living is a major obstacle to potential transnational students.
- Visas are also a major concern – UAE universities need to push the ease of visa acquisition as it is a major obstacle to transnational students travelling, however it is very easy to obtain a student visa for any UAE university. The part time student visa policy launched in the UAE also helps alleviate concerns with fees.
- The third ranked obstacle is employment issues. This compounds the earlier observation that students see international education as an investment in their career and that post-study work rights is very important factor for students. Students are also seeing countries who allow them to work while they study as more favourable destinations. The UAE is well placed to capitalise on this, as are other countries such as Canada, Ireland and Australia who allow students to work while studying.
- While safety is important to students travelling abroad, it will not stop them from pursuing their education, this shows how important education is to transnational students.

10. University Degree Financing



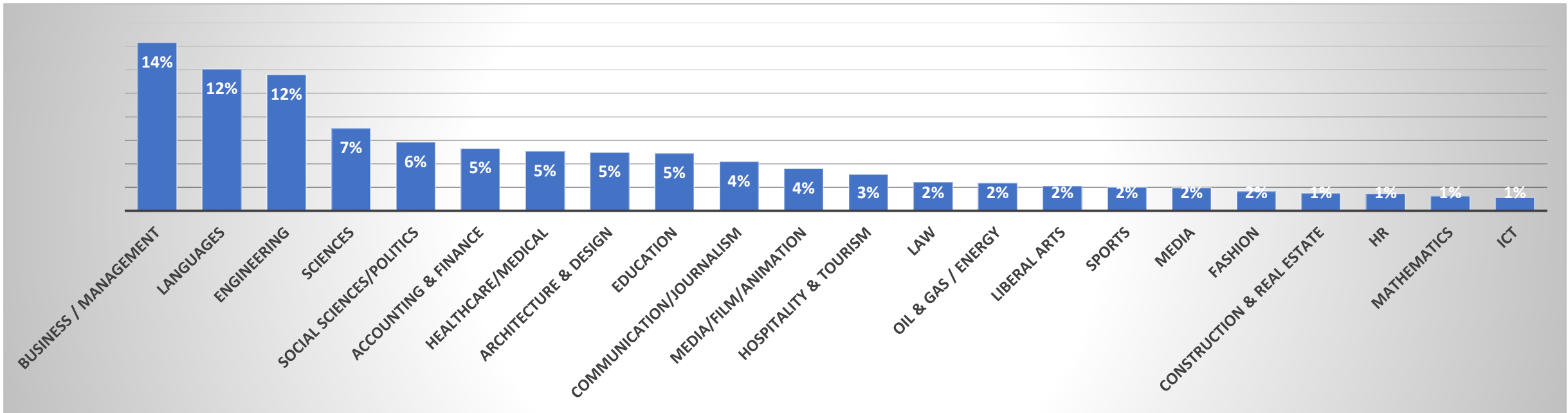
- 47% of respondents are able to fund their studies themselves, or with the help of their families.
- Only 18% of students will rely on funding via employment in their new country.
- 29% of students are seeking a scholarship to study abroad. Universities should look to advertise their scholarship programmes in international markets or education fairs if they wish to attract these students.

11. How Students Discover Universities



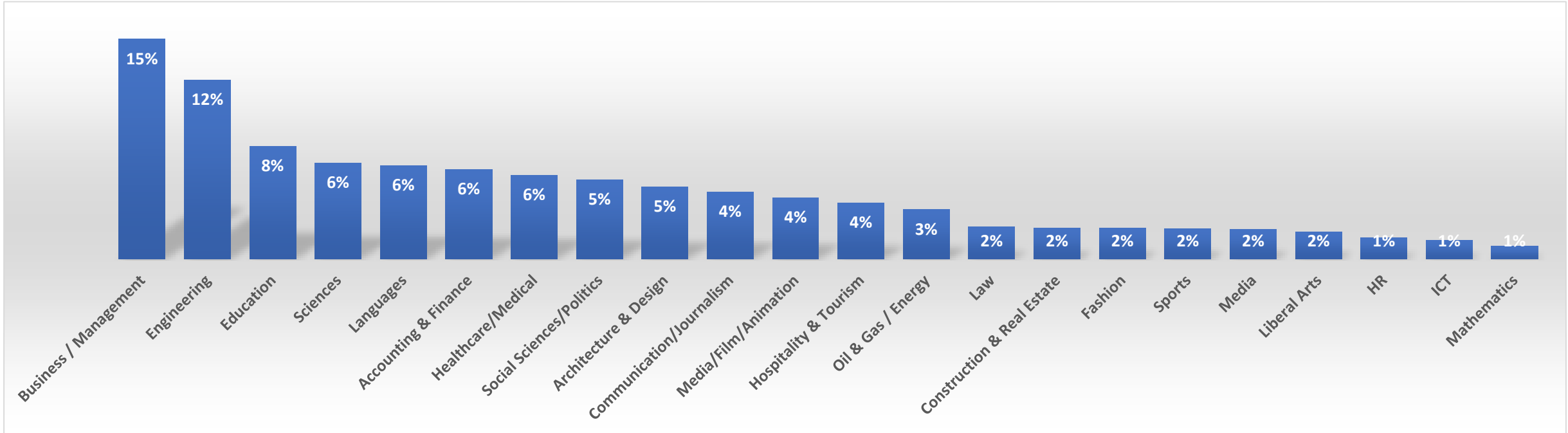
- Internet search is incredibly important for students looking for new universities. A strong website and digital presence is needed to attract these students. Live Chat and Online Help along with multiple language translations may be beneficial to universities.
- Education fairs are rated highly, suggesting students trust expert opinion as much as they trust the ideas of peers and family. Direct interactions with universities may also be valued after initial research online.
- Word of mouth communications from friends is considered valuable.
- 25% of students are using education agents, which may be beneficial for international universities to use in order to drive transnational student numbers.

12. Student Degree Interest and Intent



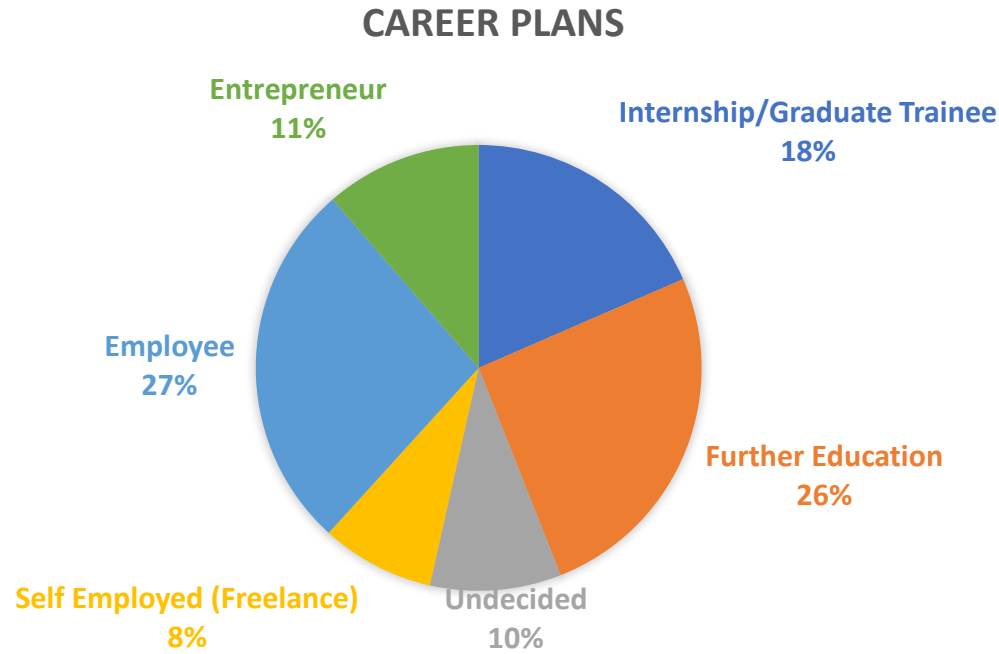
- Business and Management are the most popular subjects, with students choosing these programmes for a greater chance to secure employment after graduation.
- STEM subjects also proving popular across universities and markets world-wide.
- Travelling abroad for languages also very popular- students often travel internationally for short term language programmes – Universities may benefit from providing foundation language courses to transnational students as part of their university programmes.

13. Industries that Students Aim to Work In



- Many students looking for business employment or engineering based jobs. These industry choices generally align with the programmes studied previously.
- 'Languages' decreases by 6%, indicating language would be used as tool for employment rather than focus of career.

14. Next Career Steps

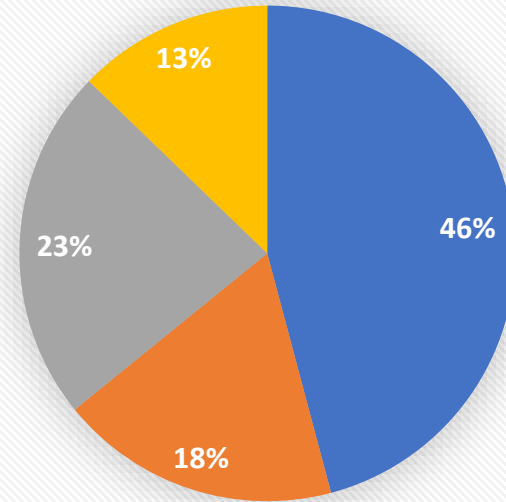


- A fairly even split between becoming an employee and pursuing further education, but when additional forms of education are taken into account, 64% are looking to go straight into work, compared with 26% further education.
- Following a familiar pattern, the link between investing in international studies and employment is undeniable.
- 26% of students would seek further study after completing their degree. This demonstrates an opportunity for the universities to establish long term relationships with international students.
- 11% of students looking to become entrepreneurs shows a growing trend that should be encouraged by universities to offer development programmes for students.

15. Post Study Employment and Mobility

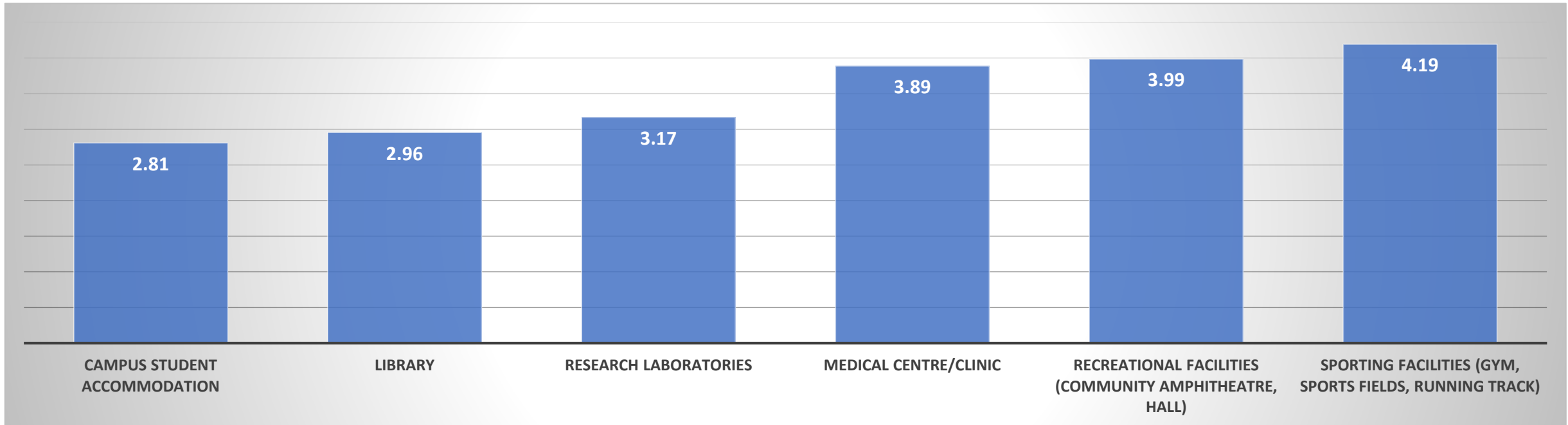
POST-STUDY PLANS

- Stay in Country to work
- Return Home
- Stay in Country for Post Graduate degree
- Move to different country



- Students are globally mobile and see international study as a platform to be able to gain international experience.
- A staggering **69%** of respondents intend to stay in their new country after graduation. This presents an opportunity for the Education Hubs who are seeking to attract educated skilled workers to help drive economic growth, by retaining intellectual capital within their country of study.
- The student's primary post-study concern is employment, showing that universities would benefit from establishing internships and career placement initiatives.

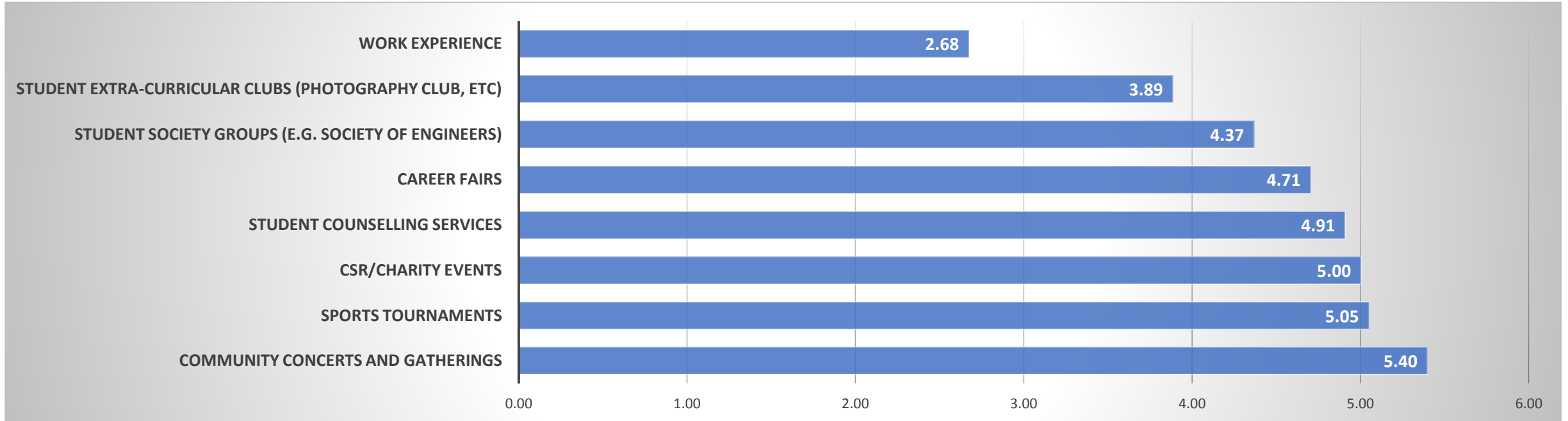
16: Most Important University Facilities



Ranked from 1-6. The lower the average, the better

- Student accommodation is the priority consideration for students when looking at facilities an institution offer. We surmise this reflects the personal welfare concerns of the student.
- Educational facilities also outweigh the extra-curricular facilities revolving around sports and recreation.
- The types of facilities students prefer tend to reflect their importance in securing employment post graduation, while “non academic” facilities based on sports or community do not rank as highly.

17. Extra Curricular Activities at Universities



Ranked from 1-8. The lower the average, the better

- The importance of future employment prospects becomes apparent, with students selecting ‘work experience’ as the most important extracurricular activity.
- Extra-Curricular Clubs/Society Groups are ranked very highly, which may also represent students looking for activities that increase their chances of gaining employment or networking opportunities for the same. Career fairs also seen as important to students.
- CSR events, Sports Tournaments and Community Concerts/Gatherings are seen as the least important for transnational students. Universities often look to provide a “balanced” education experience, however these students are looking for initiatives which increase their chances of employment.

Key Learnings and Next Steps

International universities should be mindful of the following key messages from this study.

- **Quality of Education** is the most important category for transnational students. Universities need to promote their rankings and quality of programme offerings.
- Education Hubs need to promote **globally recognised universities** to position themselves as leading education destinations.
- **Universities need to promote their employment and job placement initiatives.** Besides the quality of the university, securing employment is the number one reason for a student to study abroad. **Major supporting activities and initiatives should focus on driving employment opportunities for students. 64% of university students are looking to enter the workforce after graduation.**
- **Promote the safety and QOL of your city** and country as this is very important to students.
- Promote how easy it is to **acquire visas** to your country, as this is a major issue for many international students.
- Universities need to have a strong digital presence, including websites and social media. **Multiple language offerings may be beneficial to universities in attracting transnational students.**
- Education fairs and education agents help students make informed decisions on the choice of university after initial research has been completed.

Key Learnings and Next Steps Part 2

- Promote your **Business, Management and STEM offerings**, as these are the most popular programmes according to the findings.
- Encourage students to stay in your country post graduation, as **nearly 70% of students want to remain in the country they studied in after graduation**. Internships and career placement initiatives can help with this. Work experience is also highly valued.
- **Student accommodation facilities** are very important to students and should be promoted.
- Transnational students care more about education facilities rather than extra curricular facilities.
- Extracurricular clubs focused on networking or future employment opportunities are highly valued to students, along with career fairs.
- Transnational students are less interested in CSR events, sports tournaments or community gatherings and would **prefer initiatives focused on increasing their chances of employment**.

Appendix - DIAC

Dubai International Academic City

Dubai International Academic City (DIAC) is the world's largest free zone dedicated to higher education. Since launching in 2007 with the aim of creating a robust knowledge economy in the UAE, DIAC has grown to accommodate 27 universities offering more than 500 recognised programmes.

Today, more than 25,000 students from 149 nations choose DIAC to achieve their academic ambitions, creating a unique learning experience, which exemplifies the global nature of the UAE.

DIAC universities provide students with a wide choice of academic options, ranging from diplomas to undergraduate, post graduate, and PhD programs; many of the courses on offer focus on emerging and high-growth industries, including engineering, finance, diplomacy, nanotechnology, healthcare management, and animation.

DIAC's holistic approach to the educational ecosystem helps students to prepare for life beyond campus. At DIAC, students gain access to academic service providers, education services providers, non-academic support services, freelancers and early learning centres, which create real impact for students and the progression of their careers. Furthermore, businesses from across TECOM Group's communities contribute to student development by way of trainings, internships and permanent jobs.

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Appendix - BMI

BMI Media

Founded in 1987, BMI are the experts in international student recruitment. BMI was established to help institutions from around the world increase their international students from Asia, Brazil, India, Latin America, The Middle East and the UK.

This is achieved through market-leading international student recruitment fairs, agent workshops, high school visits, university networking events and online digital marketing services.

Well known as the organiser of the largest and most important recruitment fairs in Latin America, BMI's clients include universities, language schools, government associations, higher education colleges, boarding schools and educational agencies from over 36 countries.

BMI Quick Facts

- 30 years old – Founded in 1987
- BMI Media are the world's leading education events organizer, with more than 60 events per year and have been operating for more than 30 years.
- BMI have a database of more than 500,000 students, aged between 16 to 28 years old.
- They have 11,000 academic recruitment agents signed with them.
- Over 360,000 students visited their events last year.
- 26 countries are covered with their events and representation.
- More than 20,000 educational institutions and are partnered with them.

