



QS World Grad School Tour

Applicant Survey 2016

Emerging Markets

November 2016



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INTRODUCTION

While China, India and South Korea still account for more than a quarter of all international student enrollments, universities worldwide are increasingly seeking to diversify their international intakes – keen to avoid becoming overly dependent on too few sending nations, and to respond to growing demand from other parts of the world. Emerging economies with burgeoning young populations, a lag in domestic provision, and often with national scholarship schemes to support international study, are increasingly being bumped up the priority list for recruitment drives.

In different parts of the world, but all fitting this general pattern, are Nigeria, Indonesia, Brazil and Turkey – all regular contenders in lists of the next major source countries for international recruitment. These four key audiences are considered here, alongside a selection of other potential growth markets, grouped into regional clusters. Brazil is profiled alongside Mexico and Colombia; Indonesia is compared with the Philippines; and Nigeria is explored alongside Ghana and Kenya. The final two countries featured are Bangladesh and Pakistan, home to two more of the world's largest tertiary-age populations.

Examining students' motivations for postgraduate study, considerations when selecting a study destination and priorities when choosing an institution, this report aims to provide useful insights for universities hoping to break into or increase enrollments from these emerging markets. While the profiled nations share certain elements in common, they are also distinct in geographic, historic, economic and cultural terms – and these differences are reflected in the divergent choices and preferences of their outbound students.

The data shared is based on responses to the QS World Grad School Tour Applicant Survey between June 2014 and June 2016. A total of 15,746 responses were collected during this period, of which 2,096 came from the 11 profiled emerging markets. All survey respondents were in the process of applying for a postgraduate degree, with a focus on international study (see pages 25-33 for more in-depth analysis of the demographics). In addition to the highlighted emerging markets, survey responses from students in India and China are also included for comparative purposes.

KEY FINDINGS

- **Career progression is the leading driver for master's applicants worldwide – but not in all emerging markets.** In the majority of markets, the most-cited reason for pursuing a master's is to progress on an existing career path. However, in several markets – particularly prominently in Bangladesh and Pakistan – the most-cited motivation for master's study is 'to progress to a higher-level qualification (e.g. PhD)'.
- **Subject-specific reputation is more important than overall institutional reputation in five of the eleven profiled markets.** When choosing an institution, prospective postgraduates in the featured Latin American nations are more likely to prioritize subject-specific reputation, as are those in Indonesia and Turkey. The reverse is true of applicants in the profiled African countries, as well as Bangladesh and Pakistan. Filipino applicants report considering each type of reputation equally often.
- **Latin American applicants are particularly likely to prioritize cultural and lifestyle factors.** Some 82% of Brazilian respondents, 71% of Mexicans and 67% of Colombians cite 'cultural interest and lifestyle' as a key factor when choosing a study destination – more than in any of the other profiled emerging markets. The next closest are the Philippines (64%) and Turkey (63%).
- **Applicants in Bangladesh and Pakistan differ significantly from those in neighboring India.** As well as more often approaching master's study as part of an academic rather than professional pathway, Bangladeshi and Pakistani applicants also differ from their Indian peers in being notably less likely to express an intention of staying to seek work in their chosen study destination. Those in Bangladesh and Pakistan are also less likely to say they want to study in the US or UK, instead favoring Germany and Australia.
- **Turkish applicants align with Asian applicants on some issues, and Europeans on others.** When asked about their motivations for pursuing a master's degree, Turkish applicants align closely with overall trends from the Asia-Pacific region, while also following a similar pattern to that reported across Africa and the Middle East. However, they are closer to the European averages when reporting their reasons for choosing a study destination and institution. Turkish master's applicants also stand out from the other profiled markets in being particularly likely to prioritize employability when choosing an institution.
- **Applicants in Indonesia and the Philippines do not fit the same mold.** Though geographically proximate, applicants in these two South East Asian nations differ on several points. Those in the Philippines are significantly more likely to choose a destination where they intend to seek work, and to prioritize cultural interest and lifestyle, while Indonesians are more likely to value networking opportunities. The two groups agree, however, on the importance of financial aid.

MOTIVATIONS FOR POSTGRADUATE STUDY



Survey participants were asked to share their primary motivation for undertaking a postgraduate degree. Overall, the most-cited reason for pursuing a master's program is 'to progress in my current career path'. This is also the leading motivation in eight of the eleven profiled emerging markets – reflecting the fact that many applicants are seeking further qualifications after gaining some professional experience (see figure 24).

The desire to 'progress to a higher-level qualification (e.g. PhD)' is the second most common motivation for master's applicants overall, followed by the drive to 'improve my employment prospects'.

For PhD applicants, the leading incentive is – unsurprisingly – to pursue a career in academia. Progression on an existing career path is the second most-common primary stimulus for pursuing a PhD, followed by personal interest.

The charts in this section refer to responses from master's applicants, with notable variation among PhD applicants highlighted in the text.

MOTIVATIONS FOR POSTGRADUATE STUDY

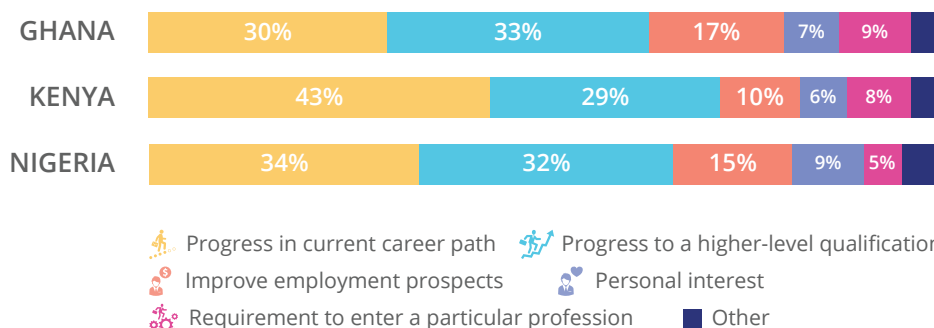


Fig.1

Among the three profiled African nations, respondents from Kenya are most likely to be motivated by developing within an existing career path. Ghanaians are most likely to be driven to progress to a higher-level qualification, while Nigerians are almost equally likely to cite these two factors as their top priority.

All three groups are more likely to be motivated to advance along a current career path than to improve their employment prospects more generally. Nigerian respondents are slightly more likely to cite personal interest as their primary driver.

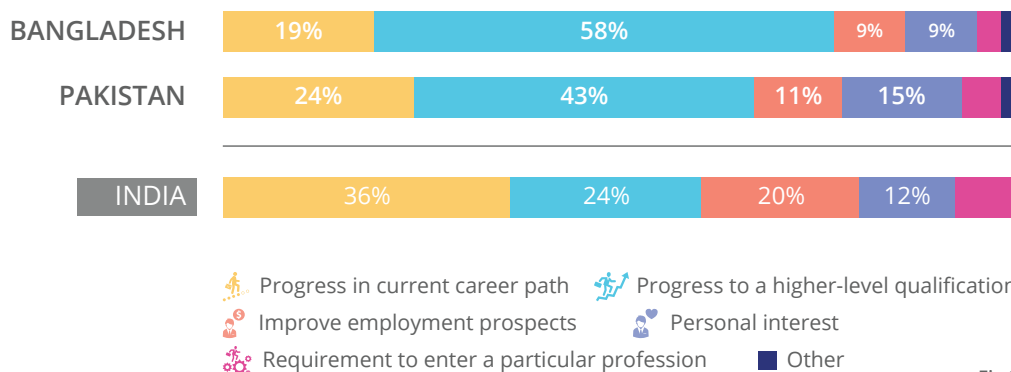


Fig.2

Respondents in Bangladesh and Pakistan stand out for their widespread focus on progressing to a higher-level qualification such as a PhD, which is a more prevalent motivation in these countries than factors explicitly related to career progression. This trend is particularly prominent in Bangladesh, where progressing to a higher qualification is over three times more likely to be selected than progressing in a current career.

Both countries differ significantly from neighboring India, where career progression and stronger employment prospects are much more commonly cited motivations for master's level study. Of the two groups, Pakistani respondents display a more diverse spread of motivations, with personal interest reported as the key driver for 15%, compared to only 9% in Bangladesh.

MOTIVATIONS FOR POSTGRADUATE STUDY

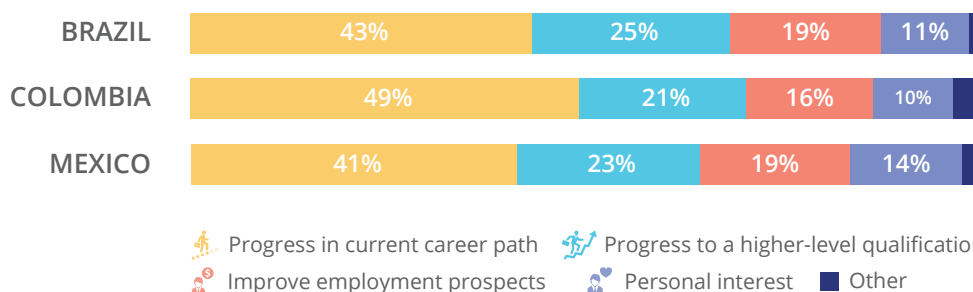


Fig.3

There is a striking degree of consistency in response rates from the three profiled Latin American nations. They share the same top four primary motivations for pursuing a master's degree, and the proportions of respondents selecting each option are remarkably close. The greatest difference is Colombians' stronger focus on progressing in their current career path, though even this falls within 10% of the Brazilian and Mexican response rates.

Interestingly, Mexico is one of only two cases (alongside the Philippines) of PhD applicants being more likely to cite 'progress in my current career path' as their primary motivation, over the desire to 'pursue a career in academia'. It seems applicants from these nations are more likely to view the PhD as a route to more specialized and advanced roles within their current sector – rather than the first step to a lasting career in academia.

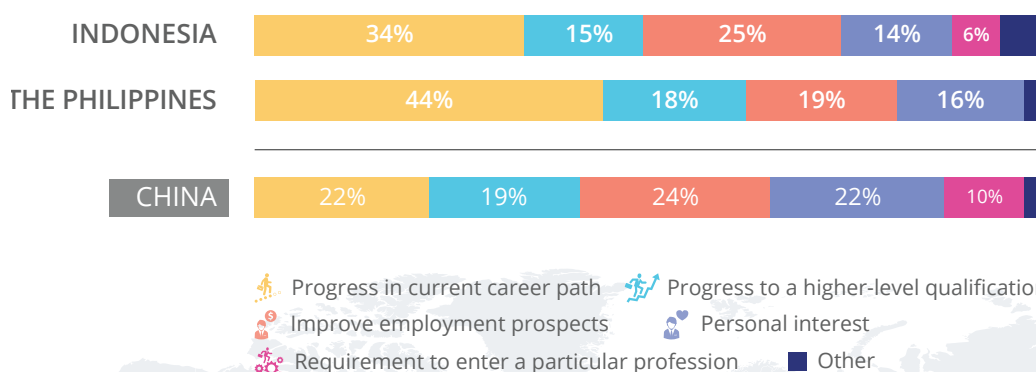


Fig.4

Among the profiled emerging markets, master's applicants in Indonesia and the Philippines are the least likely to be motivated by progressing to a higher-level qualification. Compared to applicants in China, both Indonesian and Filipino applicants are more likely to say they want to progress in a current career path – in accord with their much greater likelihood of being in full-time work rather than applying directly from undergraduate level (see figure 24).

MOTIVATIONS FOR POSTGRADUATE STUDY

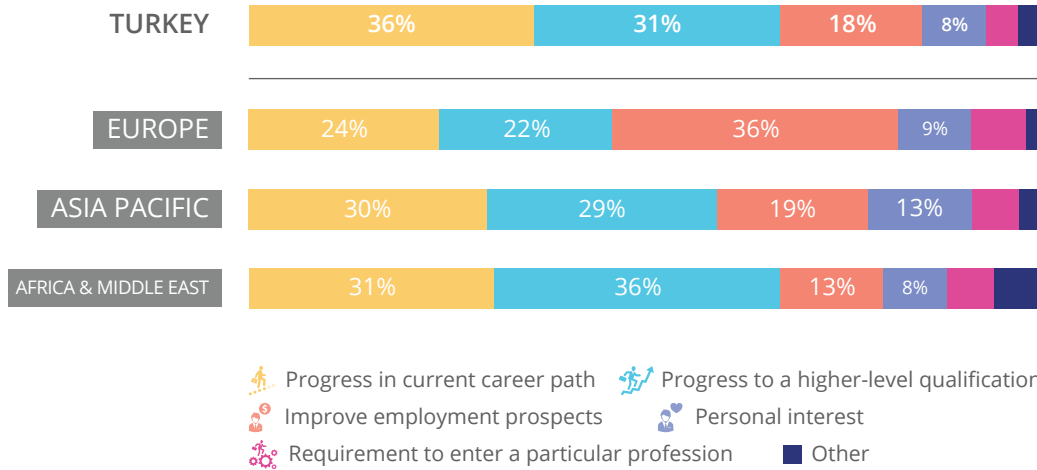
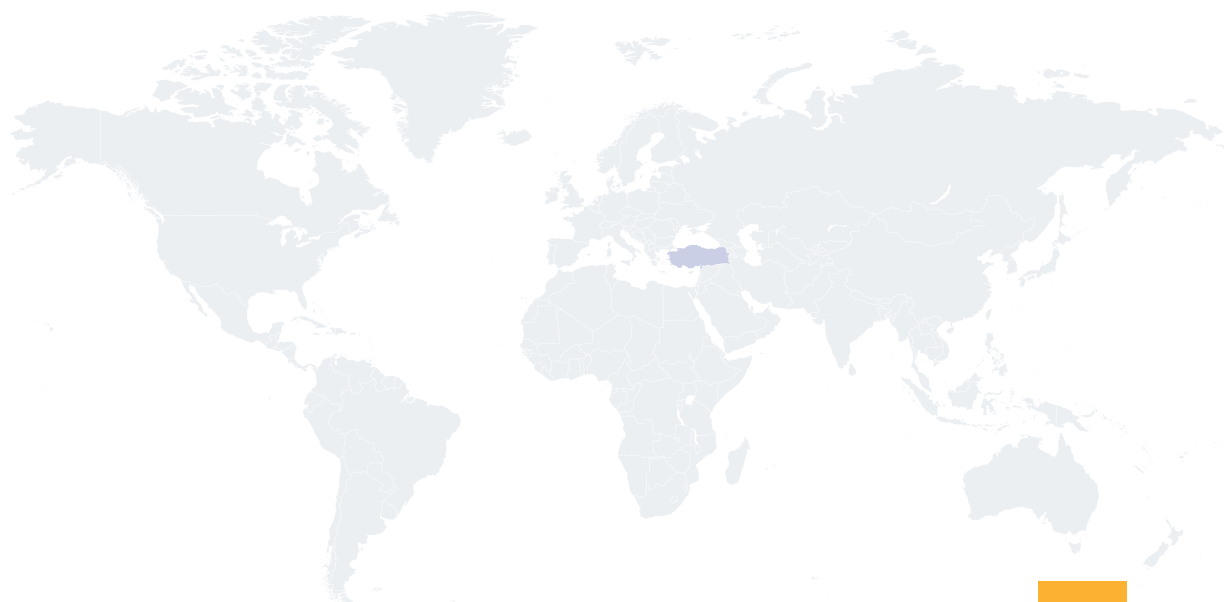


Fig.5

Located at the juncture of several world regions, Turkish respondents appear closest to their peers in Asia when asked about their motivations for pursuing a master’s degree, while also following a similar pattern to that reported across Africa and the Middle East. Compared to their counterparts in Europe, they’re less likely to be motivated by generally improved employment prospects, and more often focused on progressing in an existing career or to a higher-level qualification.

A particularly high proportion of Turkish respondents are interested in PhD programs, and this group follows the expected trend in being driven predominantly by the goal of pursuing a career in academia.



PREFERRED STUDY DESTINATIONS



Participants in the survey were asked to identify countries they were considering studying in, choosing as many options as applied. Unsurprisingly, the US and UK top the list of desired destinations in most surveyed nations, joined in the overall top five by Canada, Germany and Australia. Western European countries in general enjoy a widespread appeal, while New Zealand, Singapore and Japan also feature in the top 20 most-selected countries for survey respondents overall.

A similar pattern is seen in the emerging markets featured here, with many showing the same top five choices, though there are some interesting variations. As would be expected, study destination preferences tend to correlate to some extent with geographical proximity, as well as the global reputations of national higher education systems, and broader cultural reach.

There are some significant differences in the average number of destinations chosen by each group of applicants. Brazilians tended to choose the most potential destinations (an average of 8.8), followed by Turkish applicants (7.0). Nigerians were the most selective, choosing an average of just 3.2 destinations.

PREFERRED STUDY DESTINATIONS

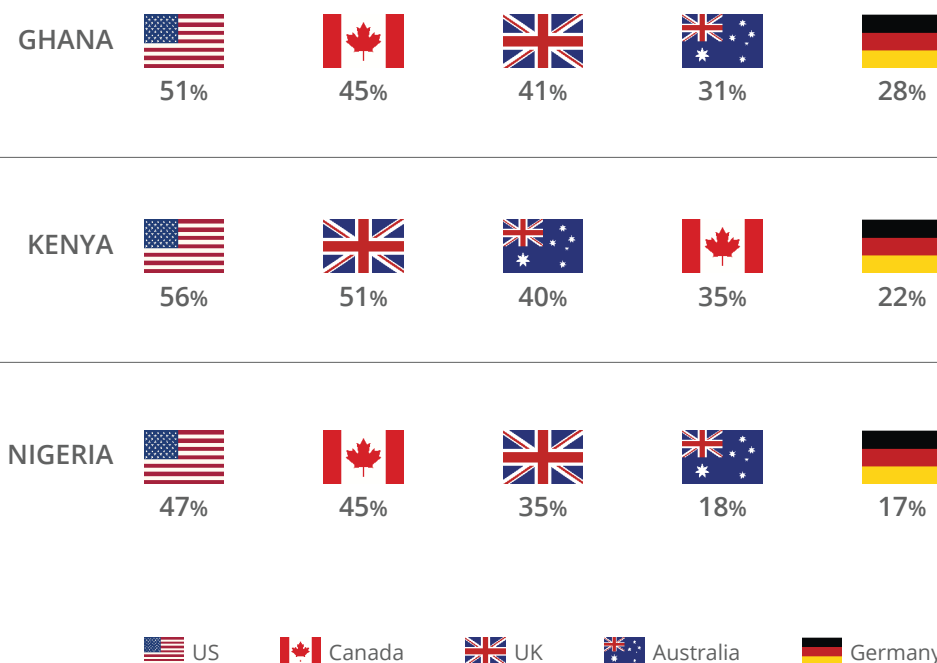


Fig.6

The three profiled African nations share the same top five destination choices, though with varying levels of popularity. Canada is comparatively less favored in Kenya – though seemingly not due to the travel distance involved, as the US is in particularly high demand among Kenyan applicants – while Germany’s fast-growing appeal appears to have made biggest inroads in Ghana. Australia is chosen by notably fewer Nigerians, and this accords to some extent with the latest UNESCO data on student mobility, which shows Australia outside of the top 10 destinations for Nigerian students, yet within the top three for Kenyans.

For the most part, the remaining top 10 for each group is composed largely of European countries; the Netherlands and Switzerland appear prominently, alongside Nordic nations Sweden, Norway, Denmark and Finland. South Africa is a particularly popular choice for Kenyans, selected by 20% of respondents (compared to 10% in Ghana and 8% in Nigeria). The United Arab Emirates is also a fairly popular choice, selected by 9% of respondents in Nigeria, 7% in Ghana and 6% in Kenya.

While Nigerians chose an average of just 3.2 destinations, Ghanaians selected an average of 4.9 and Kenyans 5.5. Kenyans were most likely to select their own country, which actually came fifth in their list, selected by 28% of respondents.

PREFERRED STUDY DESTINATIONS

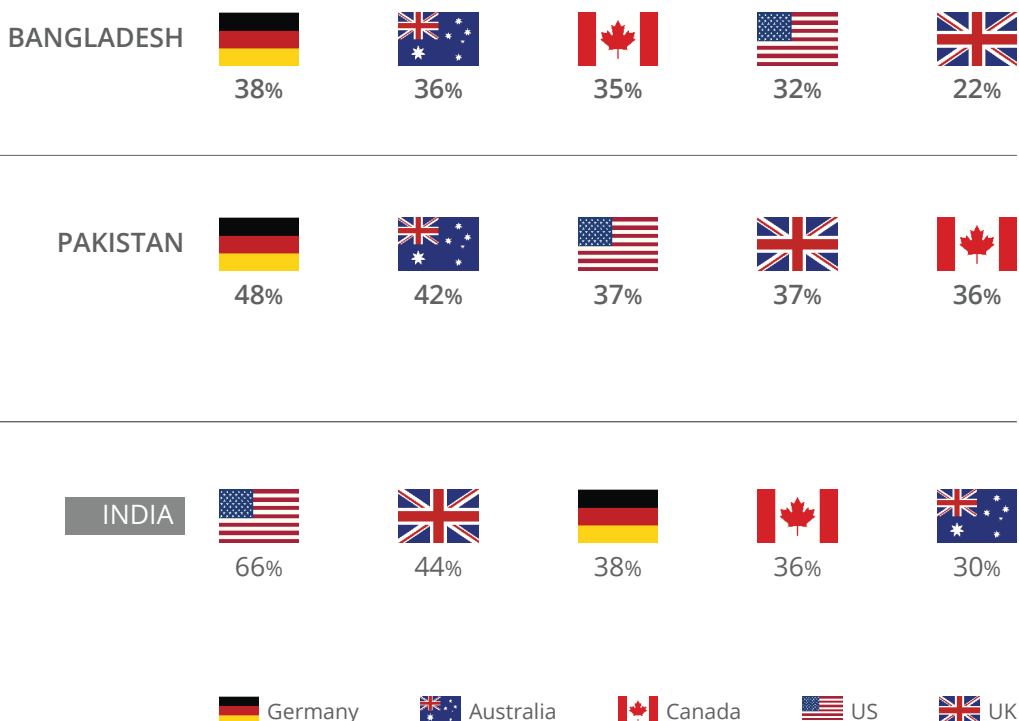


Fig.7

Both Bangladesh and Pakistan buck the general trend of having lists topped by the US and UK, instead favoring Germany – selected by almost half of those in Pakistan – and Australia. As highlighted by the comparison with India, this is not just a case of Germany and Australia being selected more frequently, but also of the US and UK being chosen less often, particularly in Bangladesh.

New Zealand appears in sixth place for applicants in both countries, selected by just under 22% in Bangladesh and 19% in Pakistan (similar to the figure for India, which is 17%). Aside from the typical selection of European destinations, Bangladesh's top 10 also features Japan and Malaysia (each chosen by over 17% of respondents), while Pakistan's top 10 includes Turkey (18%). Singapore, the sixth most-selected destination for surveyed Indian students, is outside of the top 10 but within the top 20 for applicants in both Pakistan and Bangladesh.

Indian respondents chose an average of 5.0 destinations each, compared to 5.3 in Bangladesh and 5.7 in Pakistan – all towards the middle of the range, compared with the other profiled nations.

PREFERRED STUDY DESTINATIONS

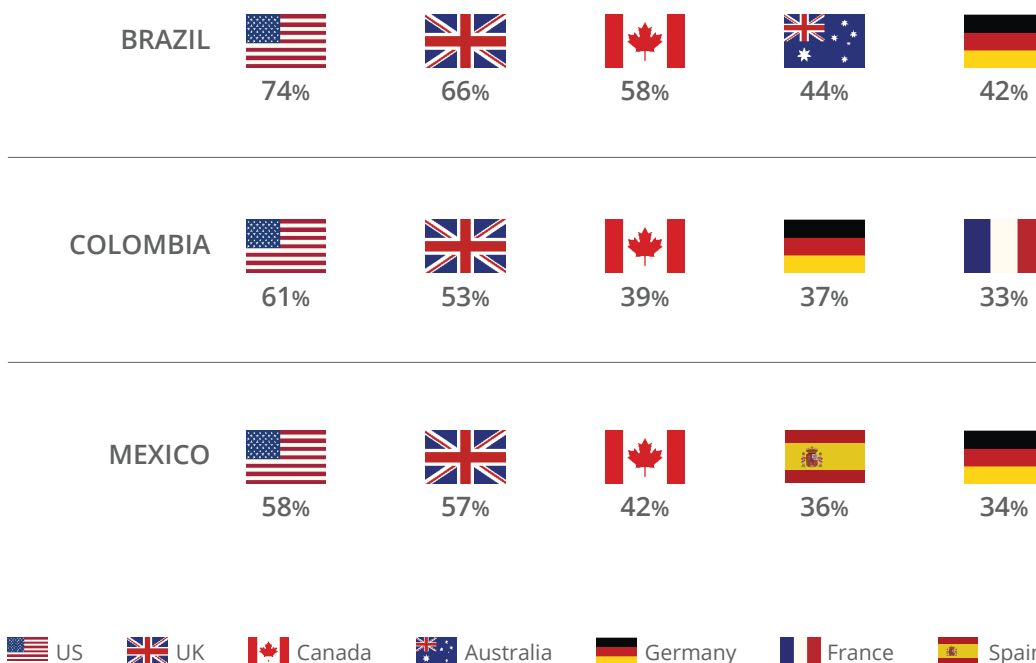
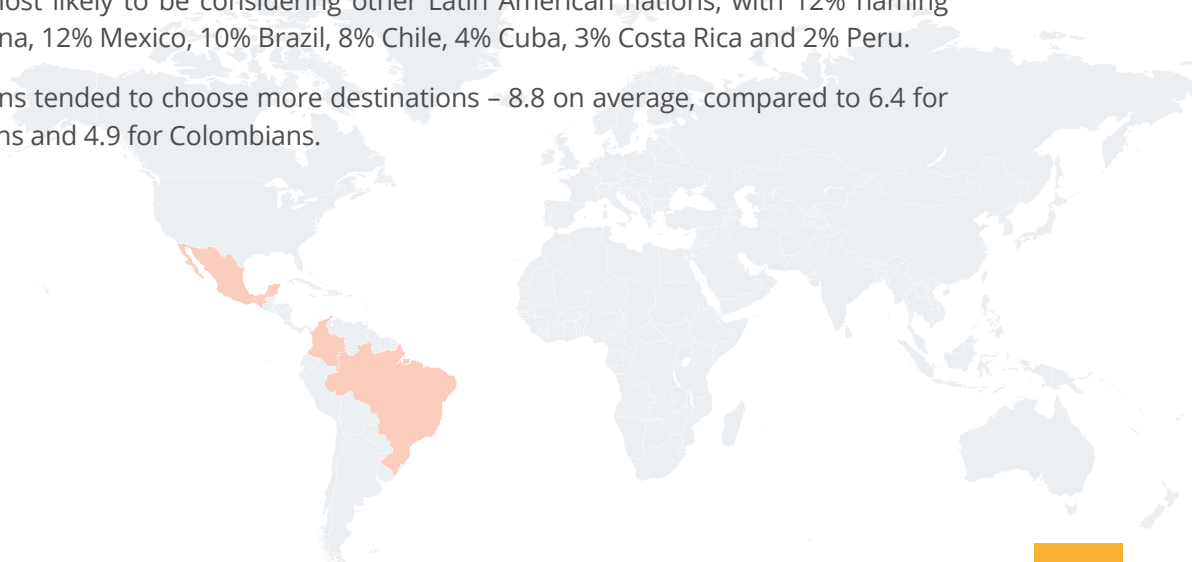


Fig.8

These three Latin American nations share the same top three destinations – US, UK and Canada – and are also united in featuring Germany as a popular choice. Colombia and Mexico break the general pattern by excluding Australia from their top five, though it is not far outside; selected by 30% of Colombians and 32% of Mexicans, it comes seventh in the list for both groups.

As well as featuring among the top five choices for Colombians, France appears as the sixth most popular destination for both Brazilians and Mexicans. Spain, within Mexican students' top five, comes sixth for Colombians and eighth for Brazilians, while Portugal is also within Brazilian students' top 10. Almost 20% of Mexican respondents chose their own country, as did 17% of Brazilians and 15% of Colombians. The latter were most likely to be considering other Latin American nations, with 12% naming Argentina, 12% Mexico, 10% Brazil, 8% Chile, 4% Cuba, 3% Costa Rica and 2% Peru.

Brazilians tended to choose more destinations – 8.8 on average, compared to 6.4 for Mexicans and 4.9 for Colombians.



PREFERRED STUDY DESTINATIONS

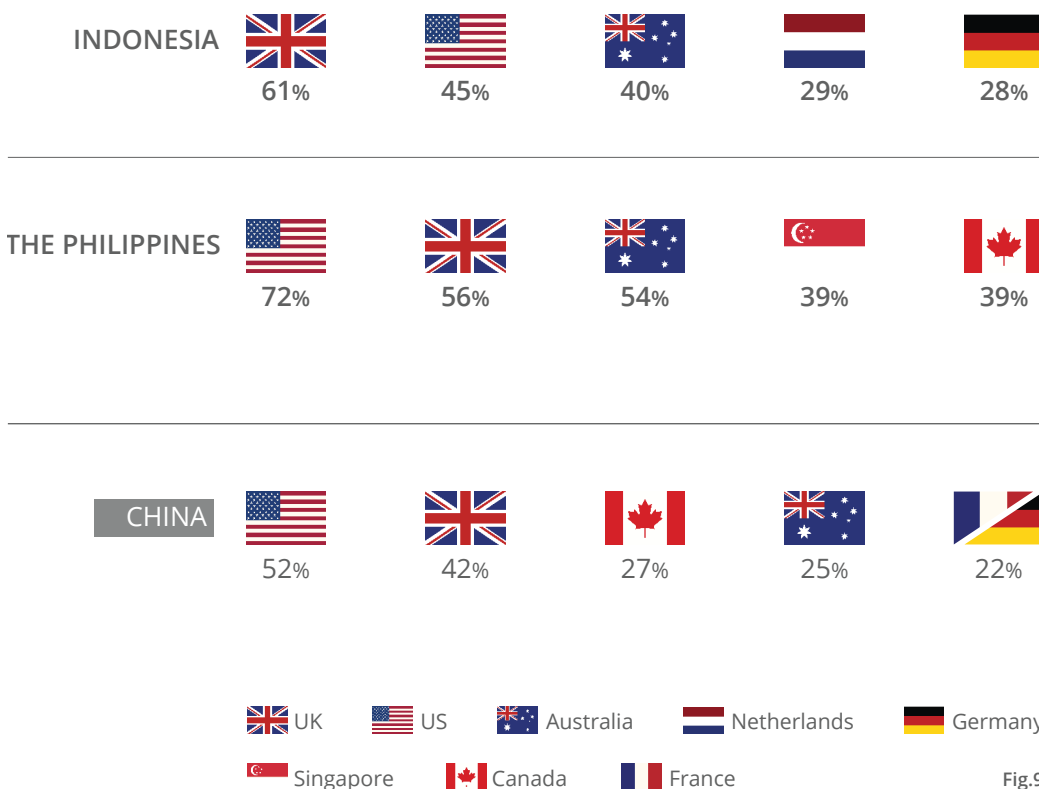


Fig.9

The two profiled South East Asian countries share the same set of top-three countries, but where the US attracts more Filipino students than the UK, the reverse is true of Indonesians. Compared to Chinese survey respondents, both groups are significantly more likely to say they want to study in Australia – unsurprising given their greater geographical proximity. New Zealand is also popular, selected by 18% of Indonesians and 31% of Filipino respondents – putting it at seventh place in both lists.

The Netherlands stands out as a popular choice for Indonesian students, reflecting historic ties, and current exchange programs, between the two nations. Singapore, joint fourth in the Philippines, comes sixth in Indonesians’ list (chosen by 21%), consistent with its status as a popular study hub throughout the region. Japan also features in the top 10 for both countries, while Hong Kong comes seventh for Filipino respondents (26%), just above Germany (25%). France is particularly popular for students in the Philippines, appearing in sixth place and chosen as a target destination by almost a third of Filipino respondents, compared to 13% of Indonesians.

Filipino applicants tended to select more destinations than Indonesians – an average of 6.8, compared to 3.8.

PREFERRED STUDY DESTINATIONS

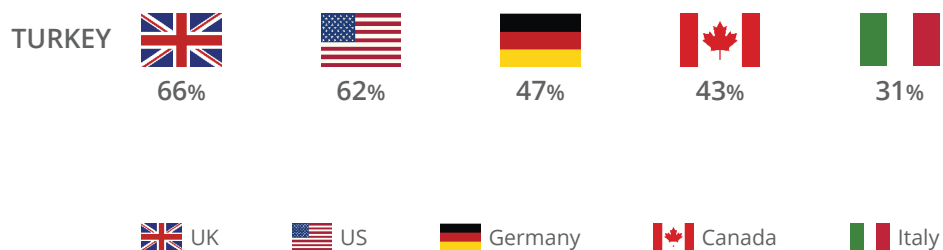


Fig.10

Immediately noticeable here is Italy's presence in the top five, and this is in fact just the start of a run of popular European destinations, followed closely by Sweden (29%), Spain (28%), the Netherlands (27%), Switzerland (25%) and France (24%). Meanwhile Australia, chosen by 22% of Turkish respondents, is relegated to 11th place. This particularly strong preference for European destinations is understandable in the context of Turkey's location, though the popularity of the US and Canada shows that Turkish students are certainly not averse to travel.



DRIVERS OF DESTINATION CHOICE



After selecting their target destinations, survey respondents were asked to identify the main reasons for their choices (multiple answers were allowed). Looking at the overall results, the most commonly cited reason is 'international recognition of qualifications', reflecting students' desire to ensure their qualification will be valued wherever they choose to seek work. The second most-cited factor is the availability of scholarships or other financial aid, followed closely by cultural interest and lifestyle. Recent years have also seen a growing proportion of survey respondents relate their choice of destination to a desire to stay and seek work after their studies; this is the fourth most-cited factor overall, followed by opportunities to improve language skills.

Comparing overall global trends by gender, both male and female applicants are equally likely to prioritize international recognition of qualifications, while a slightly higher proportion of males cite financial aid. Female applicants are significantly more likely to identify cultural interest and lifestyle as a key consideration (57%, compared to 49% of males). Both groups are equally or similarly likely to cite the other factors listed, including the desire to seek work afterwards, build a network, and improve language skills.

There are no major differences in the response rates for applicants at master's and PhD level. The greatest discrepancy is in the stronger tendency of PhD applicants to prioritize the availability of financial aid (63%, compared to 57% of master's applicants).

DRIVERS OF DESTINATION CHOICE

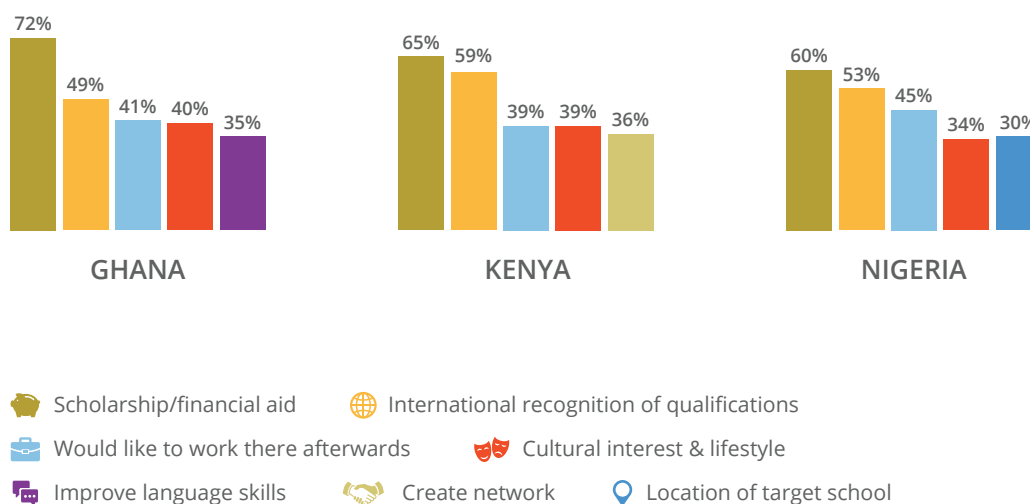
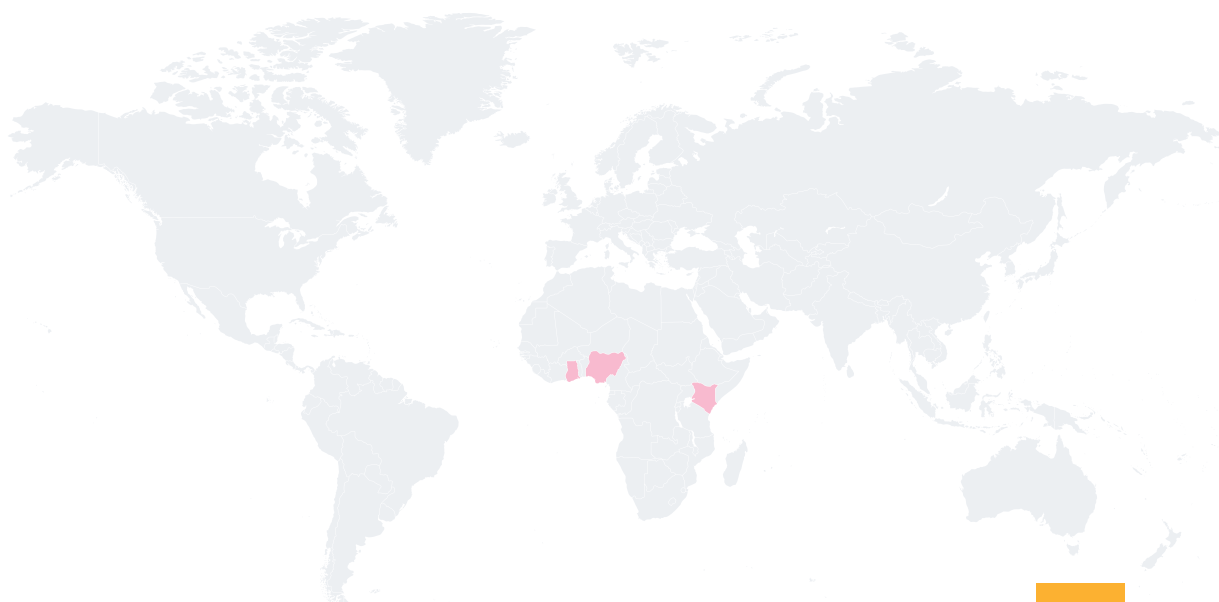


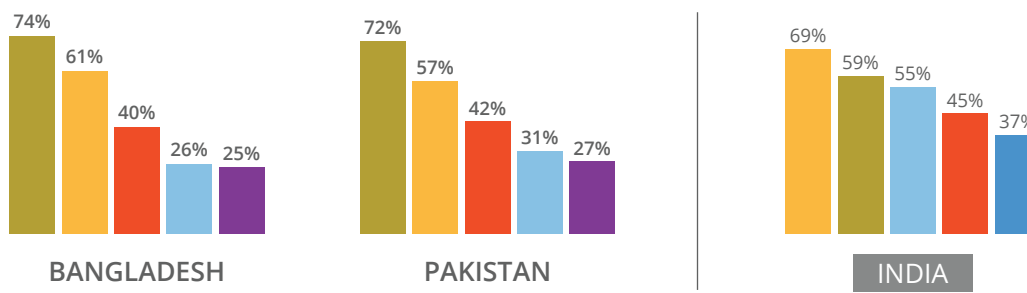
Fig.11

Scholarships and financial aid are identified as the leading priority when choosing a study destination for students in all three of these African countries, followed by international recognition of qualifications, post-study employment, and cultural/lifestyle factors. The ambition of building a network is also prominent, selected by 36% of respondents in Kenya, 33% in Ghana and 24% in Nigeria.

Approximately 30% of respondents in each country also cite 'location of target school' as an important factor, indicating that they may be shortlisting institutions before deciding on a country. The desire to choose a location conducive to language skills development is particularly marked among those in Ghana, where it's cited by 35% of respondents, compared to 27% in both Kenya and Nigeria. The visa situation was identified by 14% of Ghanaian respondents as an important factor, more than in any of the other countries featured here by several percentage points.



DRIVERS OF DESTINATION CHOICE

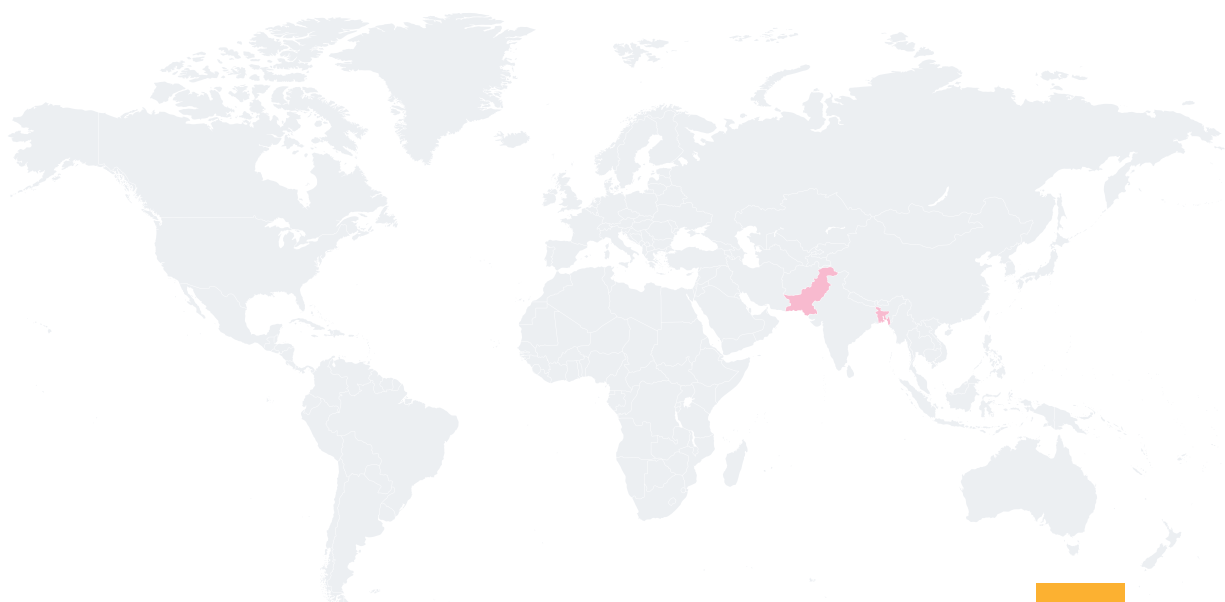


- Scholarship/financial aid
- International recognition of qualifications
- Cultural interest & lifestyle
- Would like to work there afterwards
- Improve language skills
- Location of target school

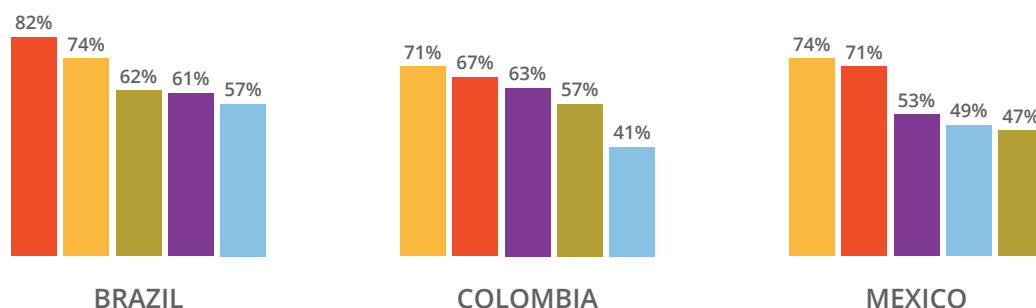
Fig.12

As in the African countries profiled, a large majority of students in Bangladesh and Pakistan relate their choice of study destination to the availability of financial aid. Overall, there is a strong correlation between the two countries, both within their top five reasons and further down the list. For both groups, the desire to create a network comes sixth – but, chosen by 17% in Bangladesh and 13% in Pakistan, this is still a priority for fewer students in these countries than in the other emerging markets profiled.

Both Bangladesh and Pakistan present a notably different picture to neighboring India, where respondents are considerably more likely to be targeting post-study work experience and to cite the location of a target school (37% in India, compared to 9% in Bangladesh and 12% in Pakistan).



DRIVERS OF DESTINATION CHOICE

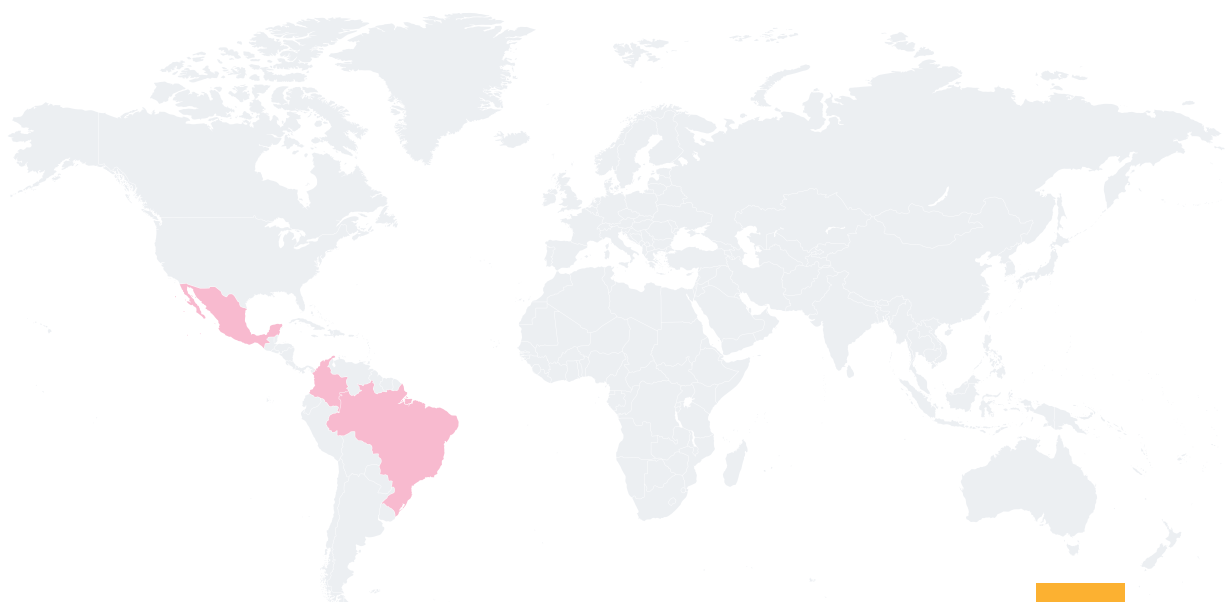


- Cultural interest & lifestyle
- International recognition of qualifications
- Scholarship/financial aid
- Improve language skills
- Would like to work there afterwards

Fig.13

Applicants from this region stand out for their strong tendency to prioritize cultural interest and lifestyle when choosing a study destination, as well as opportunities for language development. Scholarships and financial aid remain a significant factor, as does the international recognition of qualifications, and a significant proportion of students in each of these countries cite a desire to stay and work after graduation.

Network creation is also fairly prominent, selected by 41% of Brazilian respondents, 30% of Colombians and 28% of Mexicans. The latter group were most likely to cite the location of their target school (45%, compared to 39% in Colombia and 35% in Brazil).



DRIVERS OF DESTINATION CHOICE

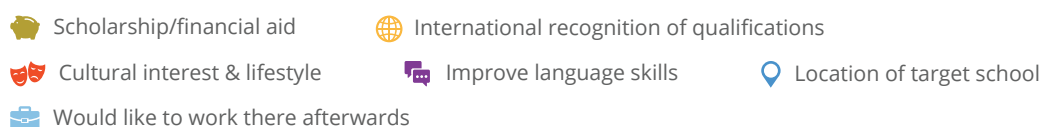
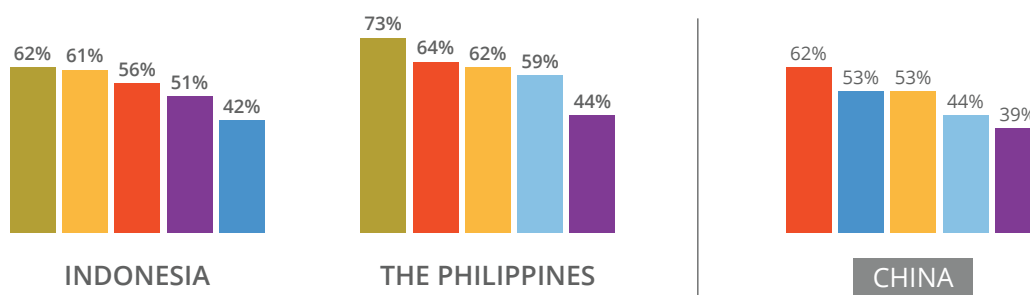


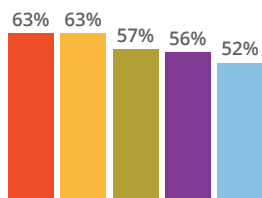
Fig.14

Here financial aid once again tops the list. Cultural interest and lifestyle is also a prominent consideration for both groups, but particularly those in the Philippines – and this is also the case among Chinese survey respondents. Filipino applicants are more likely to express an intention of seeking post-study employment (59%, compared to only 36% in Indonesia), while Indonesians are slightly more likely to focus on language development, though this is a markedly high priority in both nations. Both groups are also equally likely to cite the location of their target school as an influence on country choice (42% in each case).

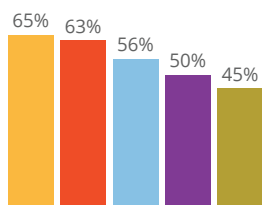
A little further down the list, 17% of respondents in the Philippines report family connections as a deciding factor – more than in any other of the emerging markets profiled. Indonesians, on the other hand, are particularly keen to choose a destination conducive to networking; this was selected by 38% of Indonesian respondents, more than any of the nations featured, with the exception of Brazil (40%). At the other end of the spectrum, only 2% of Indonesian respondents said the visa situation had impacted on their choice of destination, compared to 9% in the Philippines, and lower than in any of the other countries profiled.

In accord with the popularity enjoyed by Australia and New Zealand in these South East Asian countries, respondents were comparatively likely to say they had been influenced by geographical proximity (7% in the Philippines, 9% in Indonesia). These levels are matched only by Turkish respondents (7%), in accord with their strong interest in European destinations, and Kenyans (9%), reflecting their higher likelihood of choosing their own country.

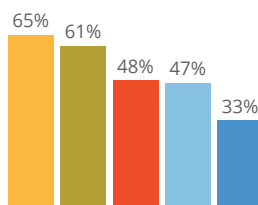
DRIVERS OF DESTINATION CHOICE



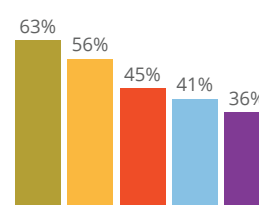
TURKEY



EUROPE



ASIA PACIFIC



AFRICA & MIDDLE EAST

- Cultural interest & lifestyle
- International recognition of qualifications
- Scholarship/financial aid
- Improve language skills
- Would like to work there afterwards
- Location of target school

Fig.15

On this occasion, Turkish students align more closely with the response trends from Europe, rather than the Asia-Pacific or Africa and the Middle East – though with a notably stronger emphasis on the availability of financial aid than Europeans.

To a slightly lesser extent than Latin Americans, but on a par with the general trend across Europe, Turkish applicants stand out for their high prioritization of cultural interest and lifestyle, which is tied with international recognition of qualifications as their leading reason for choosing a destination. Almost equal numbers cite financial aid and language skill development, with post-study work opportunities not far behind – all factors selected by over half of Turkish respondents. Location of target school comes next (47%), followed by network creation (33%), with the other options available each selected by only 5-7% of respondents.

PRIORITIES WHEN CHOOSING AN INSTITUTION



Survey respondents were asked to identify their main priorities when choosing an institution for postgraduate study. Overall, the most commonly cited priority was the reputation of the school in the respondent's own subject (selected by 47% of master's applicants and 49% of PhD applicants). For master's applicants, this is closely followed by overall institutional reputation (45%), employment prospects (40%) and funding (34%). For PhD candidates, funding is the second most-cited priority (42%), followed by overall reputation (36%). Though employability comes fourth in the list, this was chosen by only 22% of PhD applicants, compared to 40% of master's applicants.

Students at both study levels are similarly likely to identify location as a key factor (20% at master's level, 18% at PhD), while the cost of the program is more often considered by master's candidates (17%, compared to 13%). Conversely, PhD applicants are more likely to prioritize the reputation of the department (18%, to 13%).

The charts in this section show the survey responses for master's applicants, with notes in the text to indicate instances in which PhD responses differ significantly.

PRIORITIES WHEN CHOOSING AN INSTITUTION

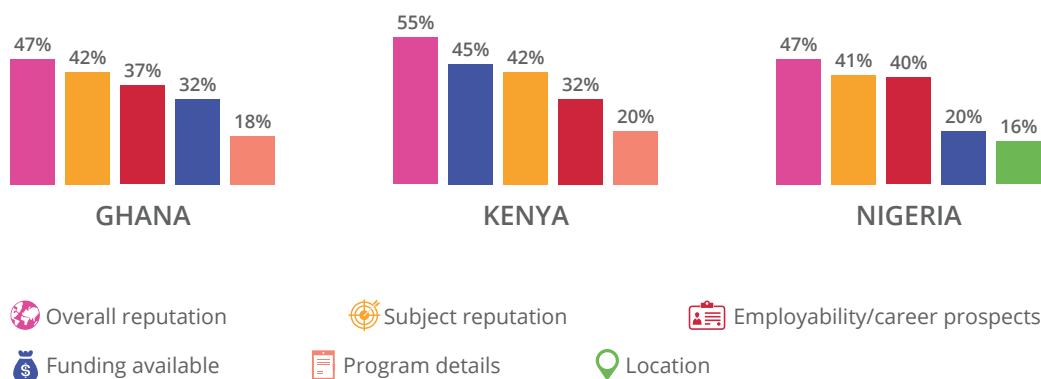


Fig.16

Overall institutional reputation appears to be particularly important for applicants in Kenya, selected by 55% at master's level and 64% at PhD level, and the same is true of funding (45% at master's level, 55% PhD). Funding is comparatively less of a priority for Nigerian master's applicants, though almost a third of Nigerian PhD candidates selected this option.

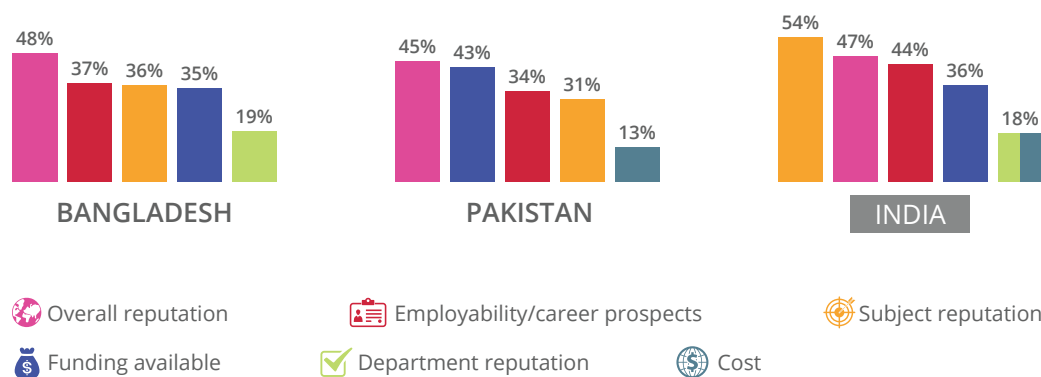


Fig.17

Applicants in Bangladesh and Pakistan are less likely to prioritize subject-specific reputation when choosing an institution, compared to the other profiled markets. This is in striking contrast with neighboring India, where this option tops the list, selected by 54% of master's applicants. Funding is a notably high priority for Pakistani applicants, selected by 43% at both master's and PhD level.

PRIORITIES WHEN CHOOSING AN INSTITUTION

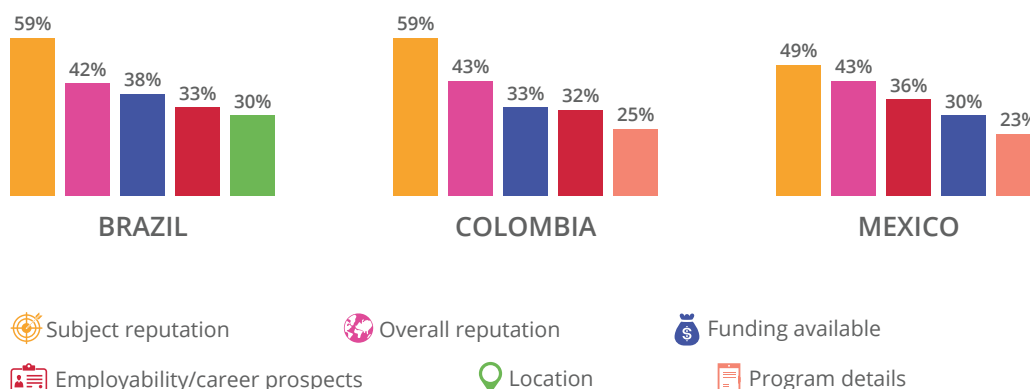


Fig.18

A very similar pattern is seen across these three Latin American countries, with subject-specific reputation topping the list. This is also true among PhD applicants; at this level, 74% of Brazilians, 52% of Colombians and 50% of Mexicans cite subject reputation as a key concern. Compared to the other markets profiled, respondents in this region are slightly more likely to mention location as a deciding factor; at master's level, 30% of Brazilians, 21% of Colombians and 22% of Mexicans selected this factor – percentages matched only by Turkey.

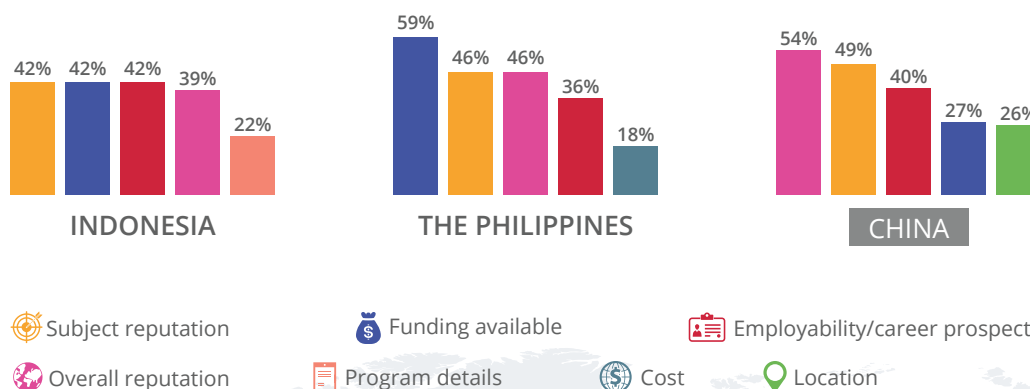


Fig.19

Just as students in the Philippines are particularly likely to emphasize scholarships and financial aid when choosing a study destination, they are also especially likely to focus on funding when choosing an institution. Indonesian students exhibit a more closely packed cluster of priorities, with a notably high proportion focusing on employability, but both of these South East Asian groups are significantly more likely to prioritize funding availability than their peers in China. In both cases, the picture is very similar at master's and PhD level, except for a greater emphasis on overall reputation among Indonesian PhD candidates, half of whom selected this option.

PRIORITIES WHEN CHOOSING AN INSTITUTION

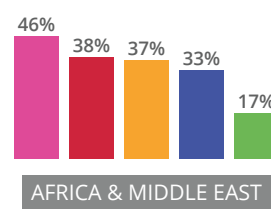
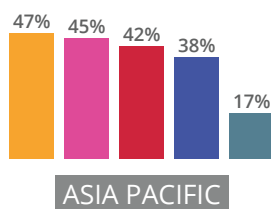
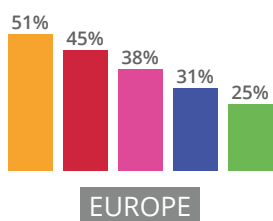
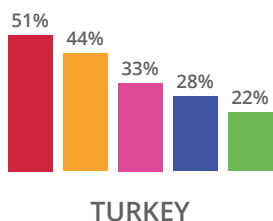
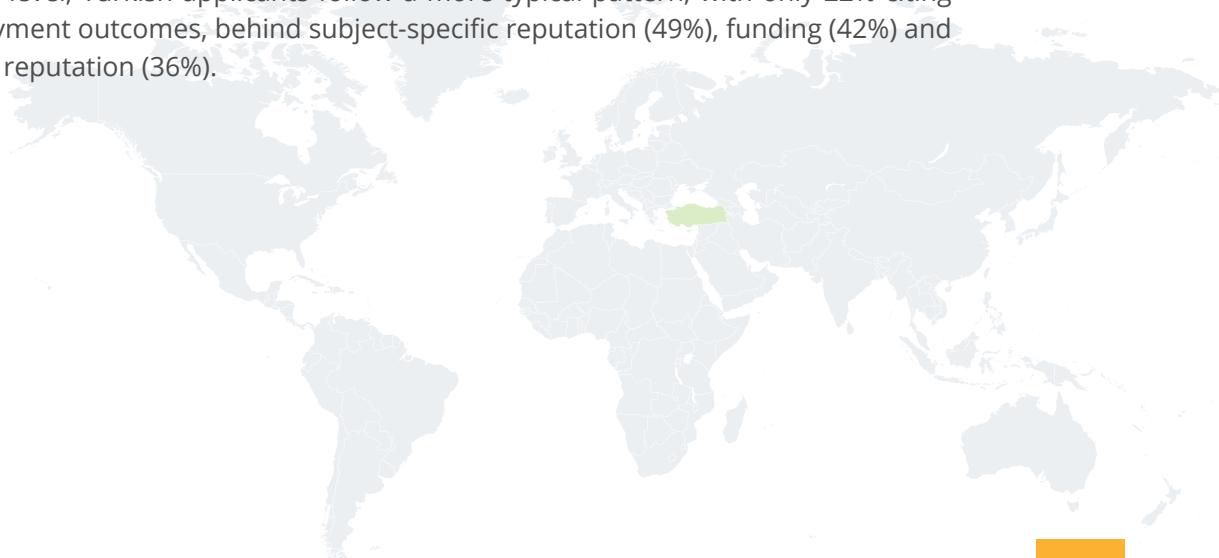


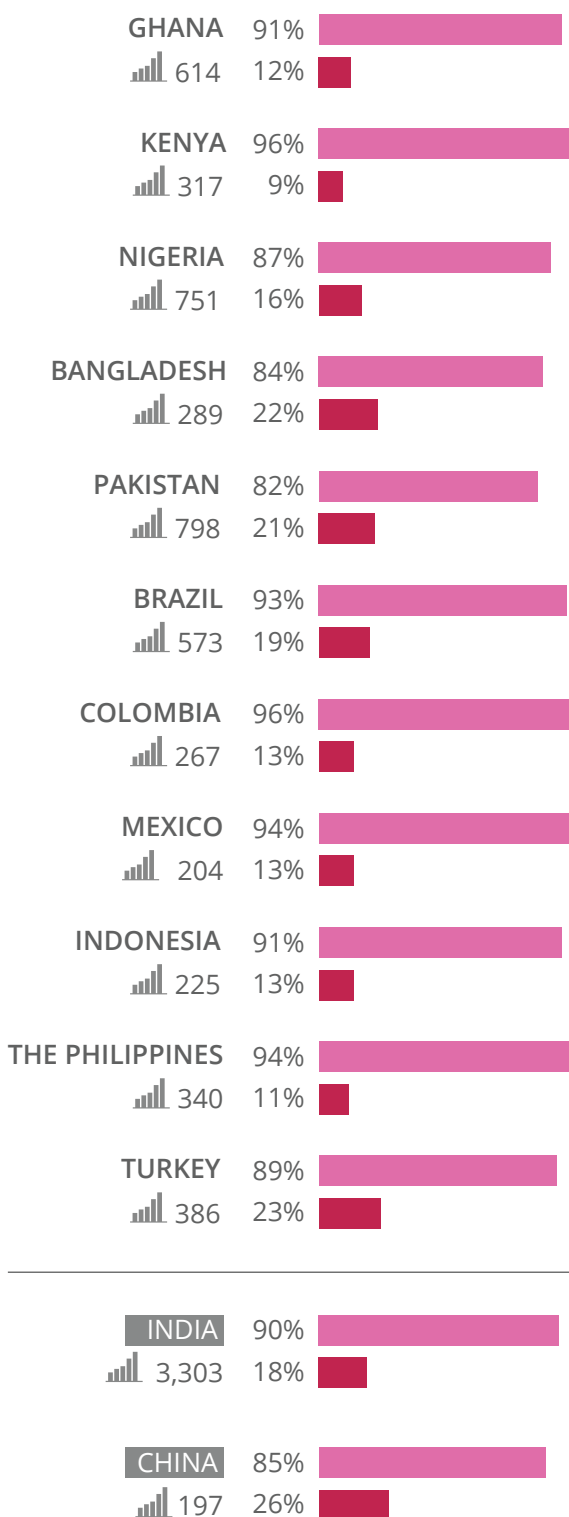
Fig.20

Turkish master's applicants stand out from the other profiled emerging markets in being particularly likely to prioritize employability when choosing an institution. As the regional comparisons show, this time Turkish applicants are closer to the European trend than to the other two regions with which Turkey intersects geographically. At PhD level, Turkish applicants follow a more typical pattern, with only 22% citing employment outcomes, behind subject-specific reputation (49%), funding (42%) and overall reputation (36%).



SURVEY DEMOGRAPHICS

Response rates and desired study level



Between June 2014 and June 2016, the QS World Grad School Tour Applicant Survey received a total of 15,746 responses from prospective postgraduates worldwide. Of these, over 2,000 are from the 11 profiled emerging markets.

Respondents were asked whether they were interested in studying a master's, a PhD, or both. Overall, 88% of participants are interested in a master's degree and 20% in a PhD (8% expressed an interest in both).

As shown in figure 21, Turkish respondents are most likely to be applying at PhD level, while Kenyans and Colombians are most likely to be preparing for master's programs. Respondents in Brazil and Turkey are most likely to express a desire of pursuing both levels of study.

Fig.21
 Responses Master's PhD

SURVEY DEMOGRAPHICS

Gender

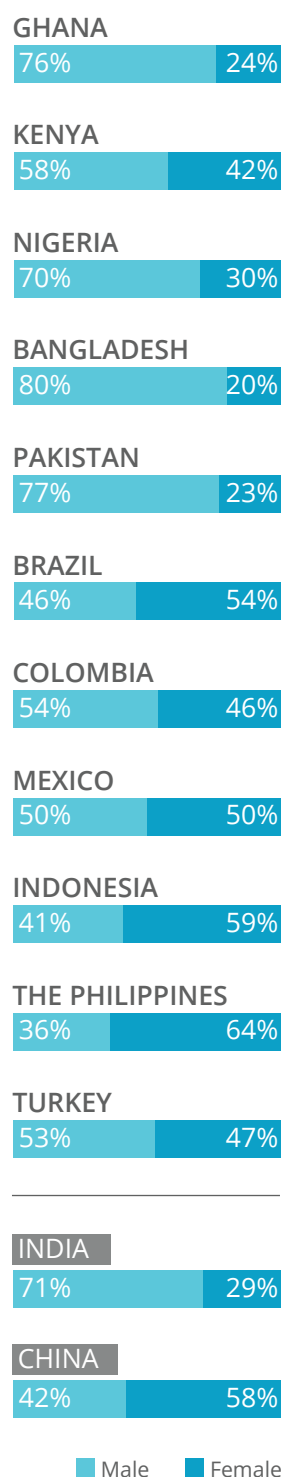


Fig.22

Among survey respondents overall, 59% are male and 41% female. As figure 22 shows, this higher proportion of male respondents is found in most of the profiled emerging markets. The highest concentrations of male respondents are in Bangladesh and Pakistan, closely followed by Ghana – all with female respondents below a quarter of the total. In Nigeria and India as well, more than two-thirds of survey respondents are male.

At the other end of the spectrum, the Philippines has the highest proportion of female respondents, followed by Indonesia. Brazilian and Chinese respondents are also more likely to be female, while Mexico has a perfect 50-50 split.

These different gender profiles are indicative of varied cultural norms and expectations in these emerging markets. While women appear to be leading the way as prospective international postgraduates in the two profiled South East Asian nations, elsewhere in the world they seem far less likely than their male peers to be pursuing this route.

SURVEY DEMOGRAPHICS

Age

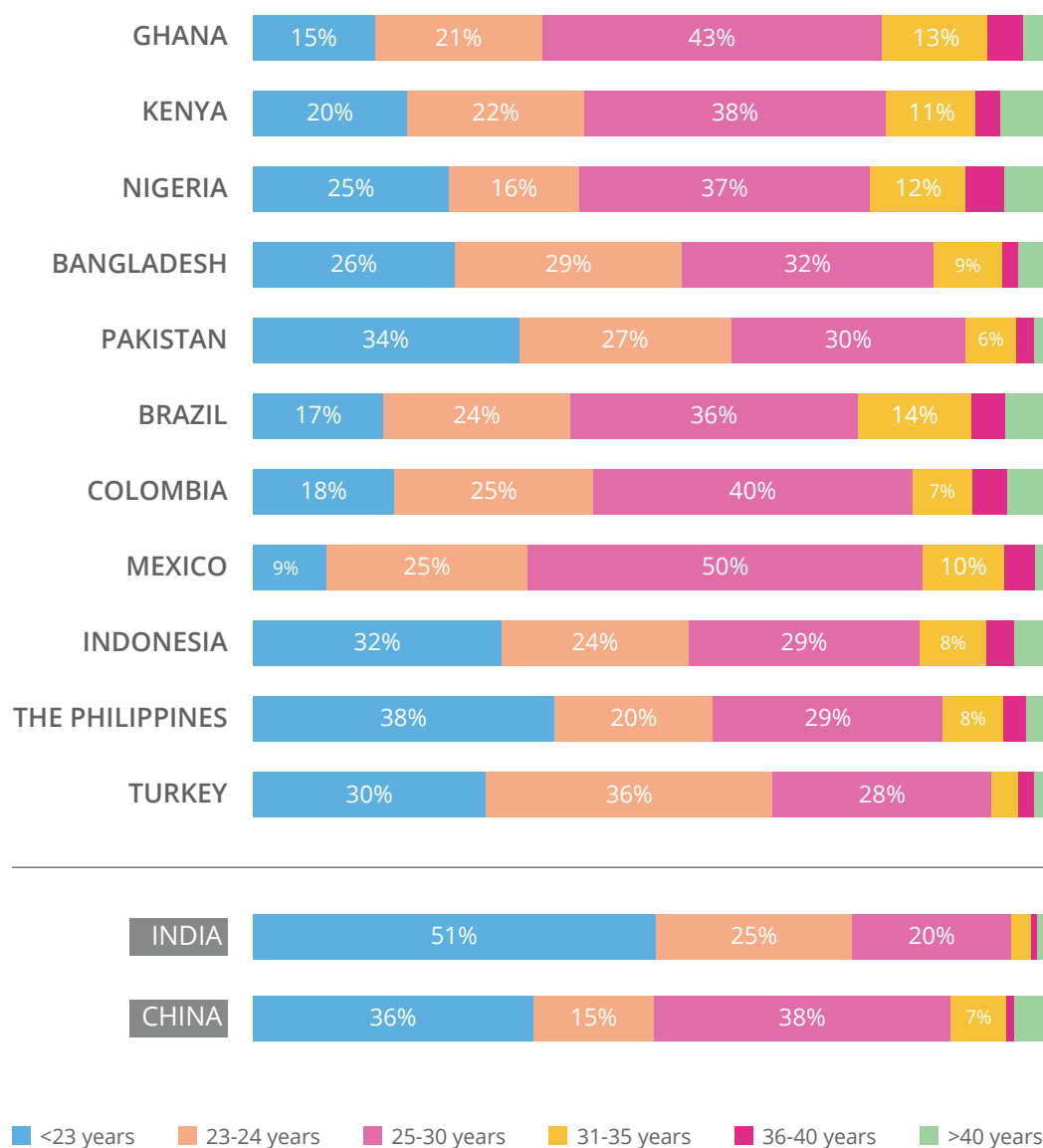


Fig.23

The average age of survey respondents overall is 26, and the vast majority of responses in all profiled markets are from applicants under 30 years old. Among the featured nations, Turkish applicants have the lowest average age, with 96% of Turkish respondents under 30. Brazilian respondents have the highest average age, with almost a quarter over 30 years old and a lower concentration of under-23-year-olds.

SURVEY DEMOGRAPHICS

Current employment status

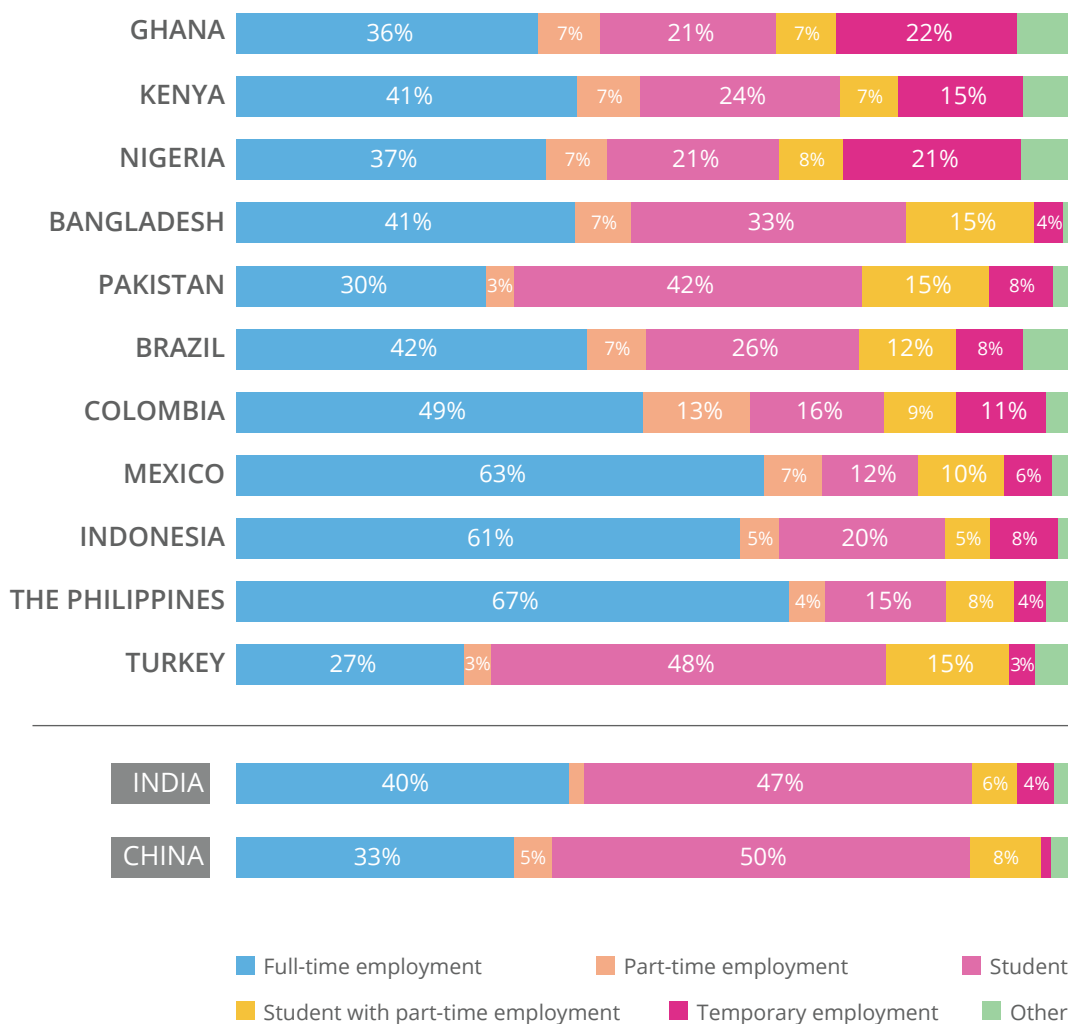


Fig.24

Overall, 44% of respondents reported being in full-time or part-time work (and not studying) at the time of the survey, while 43% were students (with or without part-time employment). Temporary employment is relatively low across the board (averaging at 7%), but reported at significantly higher levels in the three profiled African nations.

Respondents in Indonesia, the Philippines and Mexico are all significantly more likely to be full-time workers, while those in Turkey and Pakistan are most likely to be currently studying. The diversity here reflects different norms as to when a postgraduate degree is taken up – either as a direct continuation of undergraduate study, or at a later stage after gaining professional experience.

SURVEY DEMOGRAPHICS

Fields of study

Respondents were asked which subjects they intended to study, with the option of choosing multiple fields of interest. Business and management is the most popular field in all of the profiled countries, with other FAME subjects (finance, accounting, management and economics) also in high demand. Computing and IT is another popular choice, particularly in Pakistan and Bangladesh, where engineering subjects are also high on the list – much as in India. International relations, meanwhile, is among the top five fields for applicants in the profiled Latin American and South East Asian countries, as well as Turkey.

The following charts show the top five subject areas for each country.

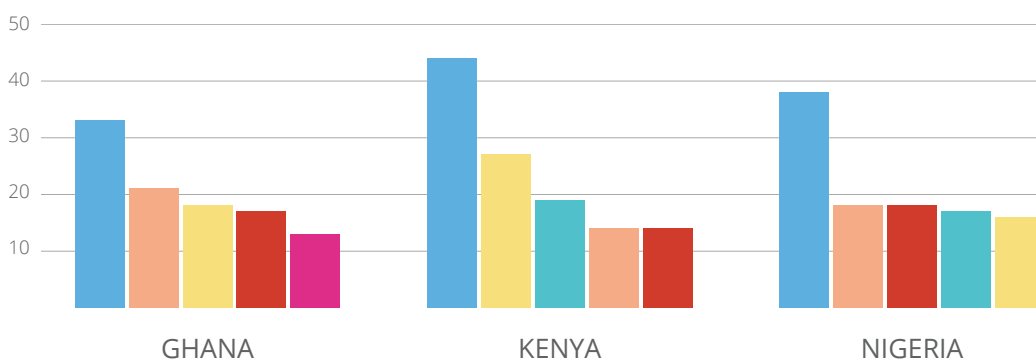


Fig.25

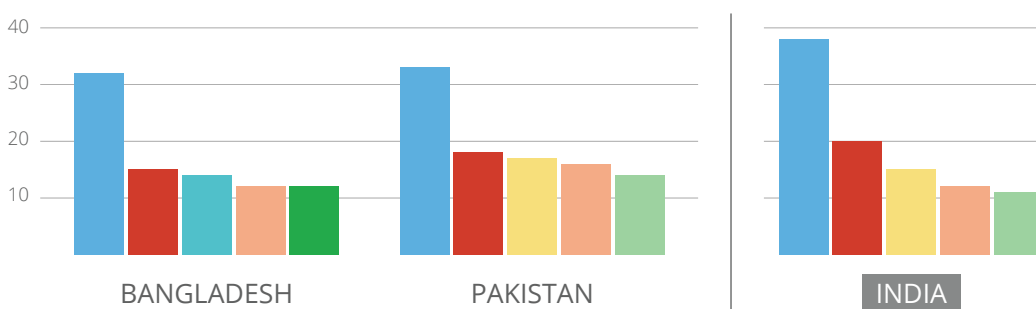


Fig.26

■ Business/management
 ■ Administration
 ■ Finance/accounting
 ■ Computing/IT
■ International relations
 ■ Economics
 ■ General engineering
 ■ Electronic engineering

SURVEY DEMOGRAPHICS

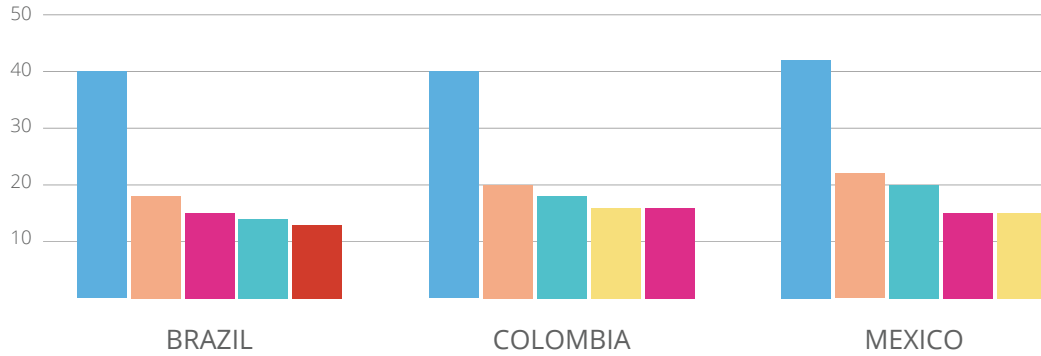


Fig.27

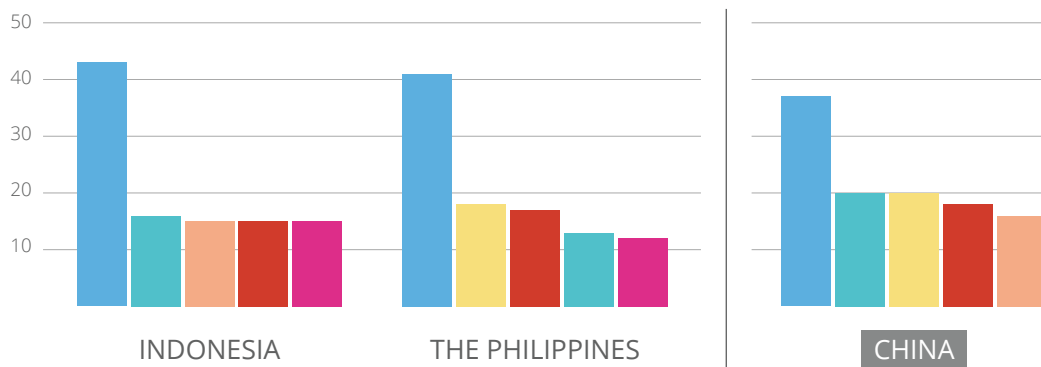


Fig.28

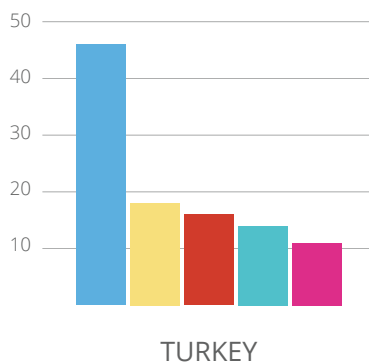


Fig.29



SURVEY DEMOGRAPHICS

Career goals

Respondents were asked what type of role they hoped to have reached in 10 years' time. Overall, the most popular future position is 'running my own business', followed by 'CEO of a large company', and 'director in a large/public company' – reflecting respondents' high levels of interest in business and management qualifications, as well as the strong supply of ambition and entrepreneurship among prospective postgraduates worldwide. Unsurprisingly, among PhD applicants, 'senior academic' is the most common career target.

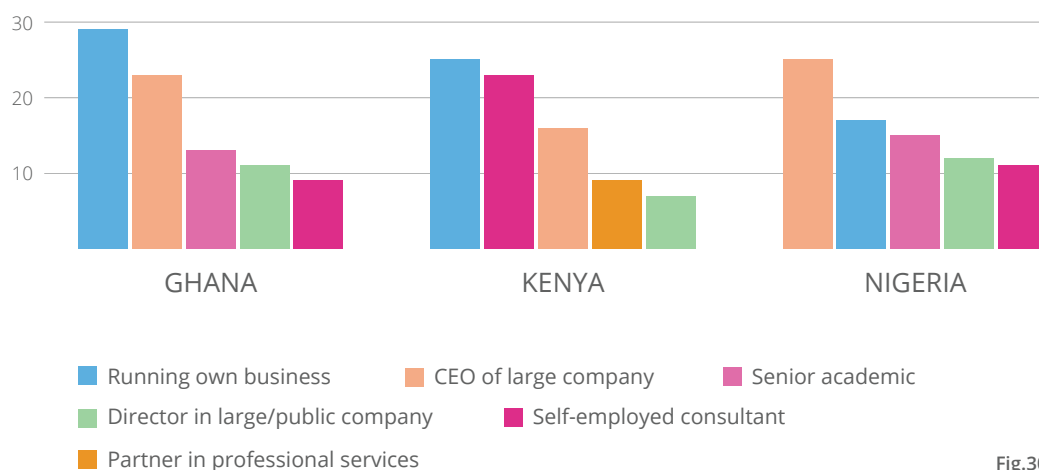


Fig.30

Among the African nations considered, respondents from Ghana are most interested in running their own business, closely followed by Kenya, while Nigerian participants are more interested in becoming the CEO of a large company. Of the three groups, Nigerians are most interested in becoming senior academics, while a notably high proportion of Kenyans are aspiring to become self-employed consultants.



SURVEY DEMOGRAPHICS

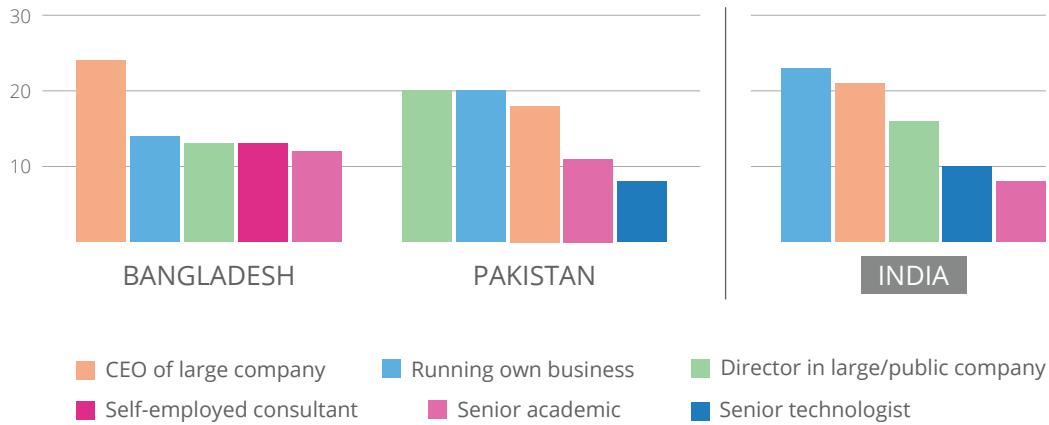


Fig.31

Many survey respondents from Bangladesh, Pakistan and India are interested in running their own business or achieving a commanding role in an existing business. Reflecting India's strong focus on technical disciplines, here the position of senior technologist is more popular than that of senior academic.

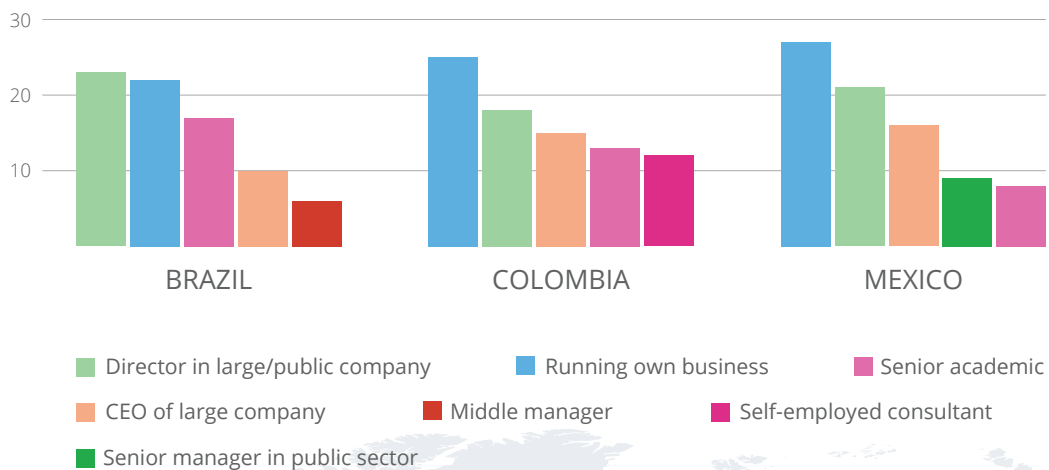


Fig.32

Appetite for careers within academia varies across these Latin American nations, though all are keen on becoming a director in a large company or running their own business. Brazil is the only profiled country to feature 'middle manager' within the top five desired 10-year career outcomes. Considering that Brazilian respondents also have the highest average age, this could reflect a more realistic approach to future progression.

SURVEY DEMOGRAPHICS

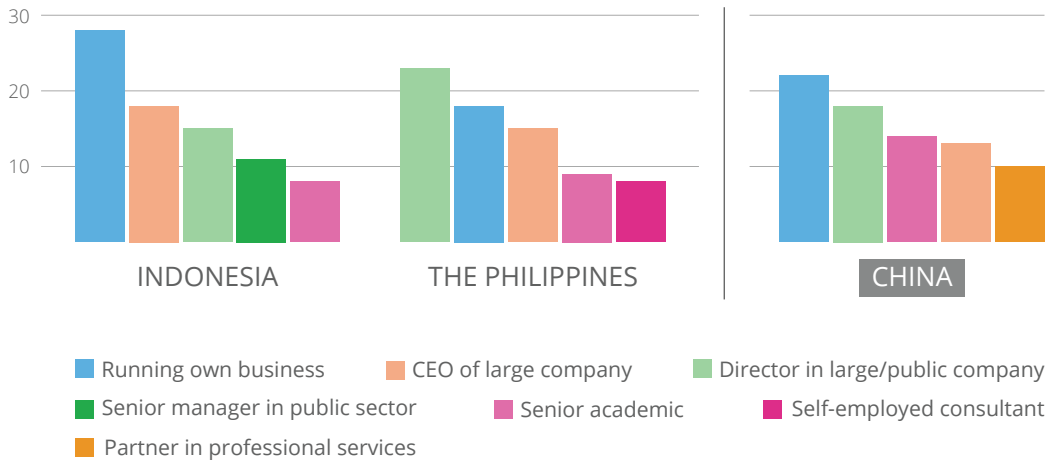


Fig.33

Indonesian respondents are among the most likely to want to run their own business (beaten only by Ghanaians), while those in the Philippines are amongst the least likely to select this option. Interestingly, there is a relatively high level of interest in Indonesia for reaching a senior managerial role in the public sector. Compared to Chinese applicants, those in both South East Asian countries are less likely to be aiming at senior academic roles.

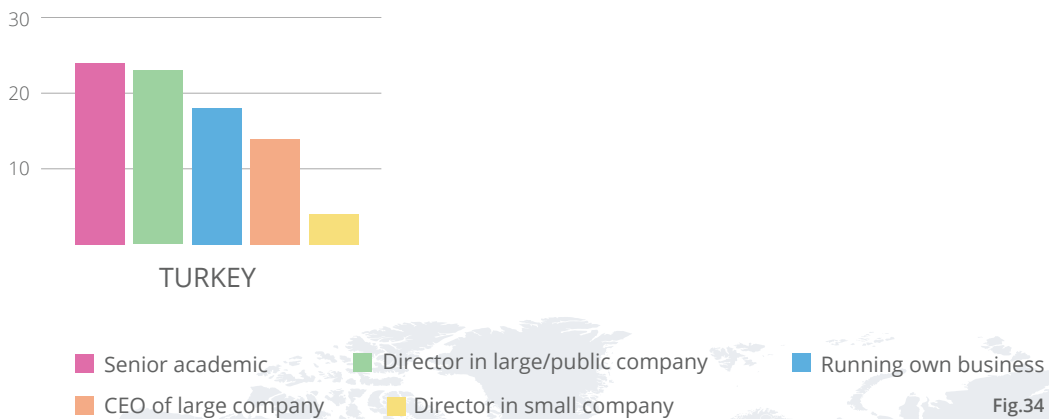


Fig.34

Becoming a senior academic is the most popular future for Turkish respondents, with almost a quarter selecting this option. This may be partly explained by their high levels of interest in pursuing a PhD, but nonetheless they stand out – both from the other profiled markets, and most other groups worldwide – in their focus on academic career paths. The goal of becoming a director in a large/public company comes close behind, and as in the other featured countries, a significant proportion also have entrepreneurial aspirations.

FINAL THOUGHTS

For universities seeking to recruit from emerging markets, the QS World Grad School Tour Applicant Survey results suggest several key questions to consider when compiling regional communications and marketing messages.

Should you present your master's programs as a stepping stone towards further study and research, or as a qualification designed to fast-track career progression? The survey results suggest that while the latter approach is likely to have the widest appeal in most markets, it may be more effective to present master's degrees as part of an academic track if targeting applicants in Pakistan and Bangladesh.

Next, should you emphasize the overall prestige and reputation of your institution, or focus on expertise and acclaim in particular subjects? While both types of reputation are important, focusing on specialized strengths is likely to yield stronger results if seeking to increase postgraduate applications from Brazil, Colombia, Mexico, Indonesia and Turkey.

While post-study work opportunities are considered by a significant proportion of applicants in all profiled markets, this appears to have a particularly strong impact on the destination choices of those in the Philippines, Brazil and Turkey, while carrying less weight for those in Bangladesh, Pakistan or Indonesia.

Similarly, lifestyle and cultural environment are prominent considerations for applicants in all locations, but a focus on these aspects is particularly important if communicating with prospective postgraduates in the profiled Latin American markets, as well as the Philippines and Turkey.

Opportunities for language development should be incorporated into communications with applicants in emerging Latin American and South East Asian markets, as well as Turkey, while information about networking opportunities is particularly likely to appeal to those in Indonesia, Brazil and Kenya.

Finally, while information about scholarships and funding options is in high demand across the board, this appears to be less of a deciding factor for applicants in the three Latin American nations or in Turkey.

CONTRIBUTORS

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Laura Bridgestock is the editor of TopUniversities.com, the student-focused platform on which the QS World University Rankings® is published. Attracting just under 30 million unique visitors in 2015, the site is one of the world's most-visited resources for prospective students. As well as overseeing QS's student publications, Laura also contributes to the company's work in providing insights for the higher education sector, including a recent series of reports and webinars based on focus groups with prospective students in key markets across the world.

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