

GENERAL OVERVIEW

Without a doubt, Turkey is one of the world's best performing emerging markets. Despite a series of geo-political tensions, GDP growth averaged nearly 7% over 2010-17* and Turkey ranks 17th of the largest global economies. Although the Turkish Lira had a challenging time through much of 2018, it began showing signs of greater stability at the end of 2018.

Turkey forms a natural bridge between the continents of Europe and Asia. It still has the youngest population in Europe. There is a large market for a skilled, educated, and globally-minded workforce for both the present and the future. This translates into a strong need for education, and recently, families and prospective students are looking outside of Turkey for viable study options to plan for the future. In October 2018, IEFT organized the 34th Education Fairs of Turkey, hosting 175 exhibitors from 25 countries, and 18,000 visitors in total.

**OECD Economic Surveys Turkey – July 2018 - <http://www.oecd.org/eco/surveys/Turkey-2018-OECD-economic-survey-overview.pdf>.*

Exhibitor Breakdown	
Total Exhibitors	175
Higher Education	110
Language	30
Secondary Education	12
Educational Group	10
Agent	10
Other	3

Exhibitor Numbers Per City	
Istanbul European side	175
Ankara	72
Izmir	70
Istanbul Asian side	85

General Summary	
Participants	380
Cities Visited	3
Countries Represented	27
Seminars	120

Visitor Attendance		
Ankara	<i>Sunday, October 22</i>	3400
Izmir	<i>Tuesday, October 24</i>	2700
Istanbul Asian side	<i>Thursday, October 26</i>	2100
Istanbul European side	<i>Saturday – Sunday, October 28-29</i>	9800
TOTAL		18,000

IEFT FALL 2018 FAIR SURVEY

The 34th IEFT Fair Survey has revealed the study abroad choices and preferences of Turkish students and their parents.

The following statistics were gathered through approximately **25,000 online pre-registration forms** from our visitors as well as through face to face interviews with around **850 students and parents**. As the sample group is composed of people who desire to study abroad and who attended the fair with this purpose in mind, it contains important and informative data. Most of the students form a niche population of people who work and are searching for international education opportunities. Survey results correspond to the target audience of the educational institutions.

We combined the survey data and as we evaluated it, we found the following results:

VISITOR PROFILE

The visitors include potential students between 12-30 years of age, parents, supervisors, teachers, and counselors. The prospective students are final year pre-bachelor and pre-university students, young professionals, and recent graduates. IEFT organizes the marketing of each IEFT event very carefully, and targets a specific audience, creating an innovative marketing plan for each event and each concept.

According to our survey and fair stats, the majority of IEFT visitors are between 13 and 24 years of age. The students mostly attend the fairs with their families, so visitor numbers in the 35 + age group have also increased..

Visitor Age Groups	
12 and under	2%
13-17	↑ 17%
18-24	↑ 47%
25-34	16%
35+	↑ 18%

EDUCATION PROFILE

There is a remarkable increase in the number of high school students attending the fairs with their parents as well as the number of young professionals who seek new and better opportunities. Our survey also shows that many are interested in improving their language skills or are looking for an opportunity to study for a higher degree. Accordingly, this is a clear sign of the increased demand for graduate programs among those who attend The IEFT fairs.

Visitor Education Profile	
High School Students	30%
University Students	↑ 29%
University Graduates (Employed)	↑ 17%

University Graduates (Unemployed)	8%
Associate Degree Students	5%
Master Students	5%
Primary School Students	3%
Doctorate Students	2%
Other	1%

Significant Role of Foreign Language Skills

More Turkish Students than ever before are studying and learning English because they recognize that it has become the international language of education and business. Although Turkey is ranked low in the English proficiency index (stated in 2018), our survey and fair stats show that more than 60% of IEFT visitors' English level is Intermediate or above.

Level of English	
Beginner	4%
Elementary	8%
Pre-Intermediate	25%
Intermediate	 27%
Upper intermediate	24%
Advanced	13%

This indicates that the English level of fair visitors is above the average and that the fair welcomes a well-educated, high quality target audience for international educators.

Master's Degree Obtained Abroad Considered a Step towards Ensuring the Future

The students were asked about the type of program they would like to study abroad. The answers indicate that 31.4% of the students are interested in master's programs abroad while 21.2% are seeking bachelor's programs. Of the remainder, 17.5% are interested in language study, 16.8% in Work & Travel, 3.9% in doctoral programs, 3.6% in summer schools, 2.2% in certificate, and 1.9% in high school programs.

Visitor Programs of Interest*	
Graduate Programs	↑ 31%
Undergraduate Programs	↑ 28%
Language Programs	27%
Language Summer Camps	15%
High School Education	14%
Work and Travel, Work and Study	10%
University Preparation	8%
University Summer Schools	7%
Internship	↑ 7%
Certificate Programs	3%
Online Education	2%

**Please note that there is overlap of visitor areas of interest, programs and countries due to the multiple selection option in the data forms.*

Survey results demonstrate that students in Turkey largely associate studying abroad with obtaining a master's degree. A student enrolled in a bachelor's degree program in Turkey is faced with stiff competition in professional life following graduation. Realizing the intensity of that competition, students are looking for various ways through which they can make themselves stand out.

Impetus for Studying Abroad: Concern for Career and Future

When the students were asked about the key factors that lead them to study abroad, their main answer was concern for their careers and the future, with a rate of 37.9%. These concerns were followed by the problems within the Turkish educational system (24.1%), inadequacy of EFL teaching (20.3%), and the issues within the examination system (13.1%). These answers reveal that young people living in Turkey are concerned about their future in general.

KEY MOTIVATIONS	
Quality of Education	29%
Improving Language Skills	27%
Opportunity of Living Abroad	23%
Career Goals	21 %

DISINCENTIVES	
Future Anxiety	37,9%
Lack of Trust in Turkish Education System	24,1%
Insufficiency of EFL teaching	20,3%
Lack of Trust in Turkish Examination System	13,1%

Most Important for Parents: Quality Education Opportunities

When asked about the positive factors that encourage them to send their children to study abroad, 38.4% of parents indicated that quality and diverse education opportunities are the main factors. Parents' responses coincided with the students': 23.5% of parents would like their children to obtain language education abroad, 22.1% would like them to embrace a different vision and culture, while 13.7% place importance on getting to know another culture and country.

Destination Choice of Students Vs Parents

Within the scope of the survey, the students were asked about the country in which they prefer to study. The answers given by Turkish students coincided with educational preferences around the world. 22.1% of students indicated that they would prefer the USA, 19.5% of them prefer Canada, while 18.3% of them would choose the UK. When compared to last year's results, we could add to our comments that Canada has been on the rise as a preferred destination.

Among the European countries, Germany is the country that is most preferred by Turkish students, with a rate of 9.3%. Italy, which 5.1% of respondents preferred, was among the

interesting survey results. It is expected that Canada, the UK, and the USA are the countries that will attract the most attention. However, Canada's performance this year is worth examining. Canada has been in the forefront because of the higher exchange rates between USD/GBP and TRY, last year's visa problem between the USA and Turkey, the perception with regard to the costly living standards in the UK, and the security concerns of families. The interest towards Canada has been on the rise due to the fact that it is one of the safest countries in the world, that there is no fear or risk of terrorism there, that the CAD/TRY exchange rate is still affordable, that Canadians are friendly and non-nationalistic, and that it is more possible to build a future in Canada when compared to other countries.

China and Russia are apparently on the rise when compared to previous years. Russia's preferability has been increasing thanks to Turkey's improved relationship with the country, and that there are trade opportunities with Russia. China is preferred as it has become the center of trade. The fact that China has been preferred despite the language barrier proves that young people are willing to take risks in facing the challenges when considering their future.

Much more preferred by Turkish students, South Korea participated in this year's IEFT International Education Fairs with many institutions. Turkish students' interest in South Korea has been the result of the increasing popularity of the country worldwide, the environment of tolerance in the country, the affordability of tuition fees, scholarship opportunities provided to foreign students by the country, and the country's recent investments to attract international students. This interest is expected to rise in the coming years.

TOP STUDY DESTINATIONS	STUDENTS	PARENTS
USA	62 %	56 %
CANADA	55 %	70 %
UK	52 %	55 %
Germany	26 %	39 %
Italy	14 %	13 %
Switzerland	13 %	12 %
Australia	12 %	19 %
France	8,5 %	10 %

**Please note that there is overlap of visitor areas of interest, programs and countries due to the multiple selection option in the survey forms. [Significant differences are highlighted.]*

*** Please note that these two figures above only reflect the interview results.*

Educational Quality is the Most Important Factor for Turkish Students

Turkish Students Do Not Want to Leave the Competition

There are many educational institutions to choose from when considering studying abroad . You may ask which criteria shape the students' preferences at this point. While searching for schools, 32% of students stated that they place importance on the educational quality, 30.1% on the amount of tuition fees, 16.4% on student and campus life, 12.3% on the school's location, and 8.6% on campus facilities.

When survey results are analyzed, it can be seen that education quality is a major factor for students in Turkey. The students have been concerned due to the uncertainty in the local education system in recent years, and the decreasing quality of education. Students believe that they do not receive the education they desire. High-level and successful students who are able to compare the education they receive in Turkey with the ones their peers receive abroad do not want to sink below the global proficiency level. The education provided in Turkey is not adequate for the student who is aware of concepts such as the collective mind, global knowledge, and global competition. Successful students who are aware that business manners in the globalized world should be similar to one another, and who aim to adapt to the competitive environment, decide that the education they receive in their home country is inadequate and that they should study abroad.

KEY FACTORS FOR CHOOSING THE SCHOOL	
Quality of Education	32 %
Tuition Fees	30 %
Student Life	16 %
School's Location	12 %
On Campus Facilities	9 %
Other	1 %

Students Want to Continue Living Abroad Following their Studies

The next question provides a clue about the dreams of Turkish students while planning their future. When asked whether they would like to come back to Turkey after their education, 72.8% of the students indicated that they would like to stay abroad. Only 26.6% of students expressed their desire to come back to Turkey on completion of their education.

PLANNING TIME

Parents were asked when they would like to send their children to study abroad. 38.1% of them indicated that they would like to send them in the next 6 to 12 months, which means that most parents desire to send their children abroad for education within a short period of time. In addition, 48.3% of them aim at making their decision in 1 to 2 years, while 13.1% will decide within 6 months.

In light of these data, we reach the conclusion that more than **52% of parents would send their children to study abroad in 2019.**

Parents would like to send their children abroad	
In 6 Months	14 %
Between 6-12 Months	38 %
Between 12 -18 Months	48 %

Financing the Students

As education costs are one of the main considerations for parents, we asked them what the affordable cost of education would be for them. More than 55 % of parents stated their budget is more than \$ 10,000

Ready to Invest	
\$ 5,000 - \$ 10,000	45 %
\$ 10,000- \$ 20,000	23 %

\$ 20,000 - \$ 30,000	11 %
More than \$ 30,000	21 %

When it comes to budgets, we also asked parents whether they have been saving up in order to send their children abroad for education. **68.4% of parents indicated that they have**, whereas 27.6% stated that they have not been able to.

Parents are saving up, planning to send their children to study abroad as soon as possible, and participating in the fair with them. **These factors indicate only one thing - most of the families in the fair are really serious and conscientious about their visit to the fair. Parents try to save up for their children's future even during the difficult economic conditions Turkey has been under. We are well aware that education is very important for Turkish families.** However, it has to be noted that current political and economic conditions have led to increased interest in studying abroad, as both the students and their parents see overseas study as a way of ensuring their future.

Parents Support Their Children in Working While Studying

Parents were asked whether they would approve of their children working while studying. 90.3% of them indicated that they would support their children if they prefer to work while studying. Therefore, 90.3% of parents responded "yes" when asked whether they would prefer co-op programs abroad.

VISITOR AREAS OF INTEREST

Students Cannot Do Without Engineering and Business

When asked about the department in which they would like to study, the students mostly preferred engineering, business, architecture, psychology, health sciences, medicine and law.

The results were no different among the students who would like to obtain their master's degree abroad - the prominent departments were engineering and architecture, as well as

management, MBA, and software. The graphs provide detailed information.

Visitor Areas of Interest*	
Engineering and Other Technical Fields	23%
Business and Management	22%
Architecture, Interior Architecture and Urban Planning	19%
Computer Science and Information Technology	15%
Medicine and Other Medical Fields	11%
Media and Communications	11%
Law	10%
Social Sciences and Humanities	9%
Creative Arts and Design	8%
Natural and Psychological Sciences	9%
3D Technologies and Game Design	3%

SUMMARY AND FORECASTS FOR 2019

An overwhelming majority of Turkish students and parents would definitely consider study overseas programs as a future plan. Studies conducted worldwide reveal that young people believe that they would find employment faster and with better conditions after they complete their studies abroad and come back home. This is also valid for Turkish students. Studying abroad means, for students, providing a better future for themselves after coming back to their home country. This is both a source of motivation, and a driving power for them. The increasing interest shown by Turkish students towards studying abroad should be addressed in this respect in order to reach clearer conclusions.

When it comes to studying abroad, parents and students tend to think differently - while parents prefer their children to obtain their bachelor's degree abroad, the students prefer to obtain their master's degree abroad. The underlying reasons for this difference should be investigated further. One can suggest at this point that parents tend to take earlier steps for the future due to their experience and knowledge. As parents are aware that the earlier people start preparing for life, the better results they could get, they tend to start planning earlier than their children

do.

The top three destinations for Turkish students are unchanged: Canada, the UK, and the USA. However, especially recently, Canada has apparently won parents' hearts as it has become increasingly popular among them even though it is very far away from Turkey. Also, South Korea is closely monitored by Turkish students. Turkish students' interest in South Korea is the result of the increasing popularity of the country worldwide, the environment of tolerance in the country, the affordability of tuition fees, scholarship opportunities provided to foreign students by the country, and the country's recent investments to attract international students. This interest is expected to rise in the coming years.

While in the past, the most popular study areas were on graduate programs, there is a remarkable growth in undergraduate programs and high school programs. Awareness of and popularity of international programs at all levels has increased recent years.

Our surveys show that 2019 will be also a great year for international education. We expect the numbers will continue to grow. It is definitely the right time for any international institution to invest in the Turkish student market.