

NIGERIA MARKET SENTIMENTS AND STUDY MOTIVATIONS | REPORT 2022



ABSTRACT

There is increased competition from other countries to recruit international students, and several factors contribute to make Nigeria a strong market for foreign universities. The rising unemployment rate, persistent level of underinvestment compared to global standards, University strikes, and availability of post-study work options or even permanent residency have boosted students' interest to travel for education abroad. With 4,098 respondents randomly selected nationwide, this study analyses the opinions and perceptions among Nigerian students about foreign education, and the choices that determine their universities and/or location of choice.

Amidst a pandemic that has also affected a generation unlike anything before it, the survey shows that majority of the students' choices of institutions and degrees were impacted. It reveals that more students now consider issues of security, safety, and a welcoming community as an important factor. In addition to the pandemic and the cost of living, students are giving more priority to distance learning. Interestingly, respondents rank Law, Engineering, Health Studies and Medicine, Business Management, Computer Science and Information Technology, including Media Studies & Writing and Nursing as the seven major courses they are interested in studying overseas.

Career advisors, lecturers, and mentors were identified as the most likely persons to influence their decisions, which indicates that universities can reach students more effectively through local, personalised communication. We also see a rise in media and communication studies - as opposed to the notion that Technology courses are mainly on the rise. The interest in technology is mainly focused in urban states such as Lagos and Port Harcourt, which continues to underscore the rural/urban divide in the country. But since every company is essentially a media company at its core, it is easy to understand the increased interest in media courses among students.



OBJECTIVES

This market research project collects and analyses data, capturing data about market trends in the Nigerian tertiary education sector as it relates to acquiring foreign degrees – especially qualifications from UK universities. The research project has the following objectives:

1. To discover the major career goals and degree courses that young Nigerians are interested in studying at UK universities.
2. To evaluate the various segments of young students interested in travelling abroad to further their studies.
3. To analyse the criteria that students, either undergraduates or graduates use when selecting universities to study.



SCOPE OF STUDY

The study focuses on the opinions and perceptions of Nigerian students about foreign education, and the choices that determine their universities and/or location of choice. Respondents were selected at random nationwide.

Due to the limitation of the research and the researcher's reach, a survey study design is necessary to achieve an empirical and holistic understanding of the market, and further supported with secondary data, expert analysis, phone interviews, and focus group discussions.





TARGET DEMOGRAPHICS

1. WAEC/JAMB students – prospective undergraduates
2. Young undergraduates
3. New graduates/early career professionals (18–27 years)
4. Intending (young) migrants/international university students
5. Masters' degree candidates

SAMPLING TECHNIQUE AND SAMPLE SIZE

Convenient non-probabilistic sampling was selected for this research due to the speed, cost-efficiency, and ease of accessibility, which has become important due to limited social interactions and social distancing under COVID-19 guidelines.

Four thousand and eighty-eight (4,088) respondents participated in the research (4,008 respondents; 80 interviews), with data collected through an online survey, phone interviews, and multimedia conversations.





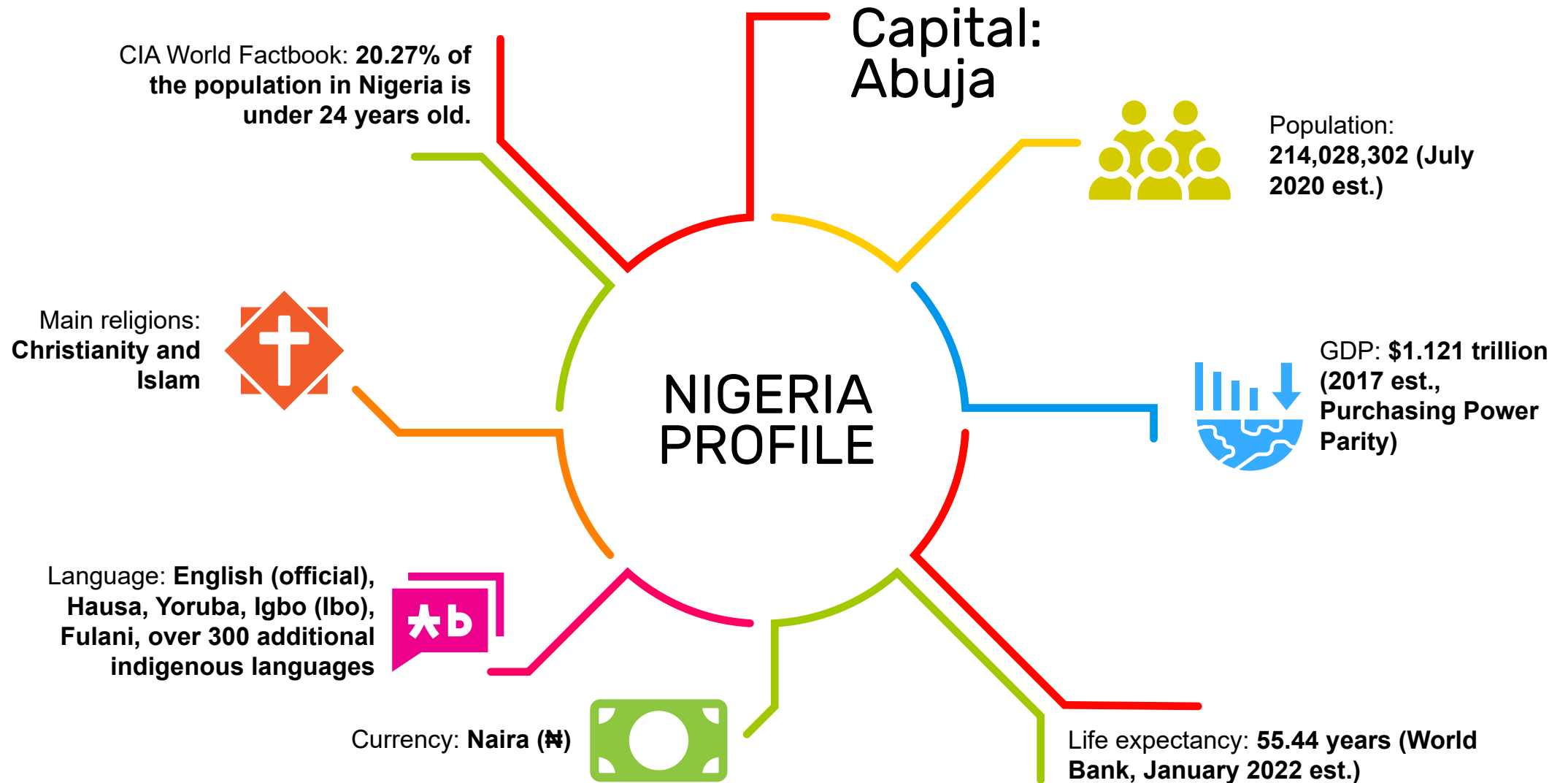
DATA COLLECTION

Our method of data collection is best suited to the project at hand. Research methods include:

1. Focus groups
2. Collection of social media data
3. Surveys via the Internet, phone, or email
4. In-person promotional
5. Secondary data (accessed through the Internet)
6. Resonance Test (expert analysis)

INTRODUCTION







OVERVIEW

Nigeria currently has an estimated population of 214,028,302 million people, with an estimated growth rate of 2.53% (July 2020). As a result, the country's population is expected to reach 392 million in 2050 – the bulk of this being youths. With the country's rapid demographic growth, it is projected to become the world's 4th most populous country – threatening the already alarming youth employment and underemployment rate of 56.1%. This position creates a larger pool of education prospects for higher educational institutions in foreign countries.

Nigeria is sub-Saharan Africa's largest economy and relies heavily on oil as its primary source of foreign exchange earnings and government revenues. Following the 2008-09 global financial crises, the banking sector was effectively recapitalized and regulation enhanced. Since then, Nigeria's economic growth has been driven by agriculture, telecommunications, and services.

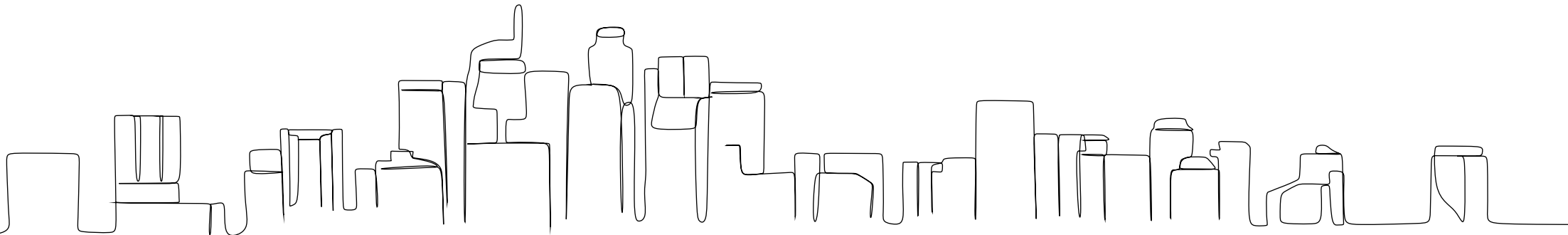
However, the government's focus on economic diversification for strong growth has not translated into a significant decline in poverty levels, with over 50% of Nigeria's population still living in extreme poverty – about 81 million Nigerians.

Moreover, the country recently exited its second economic recession in less than 5 years, which has seen more protectionist policies developed by the government, and stricter financial policies put into effect to shore up the foreign exchange reserves. Nevertheless, economists project that the country will rebound in the near future.

In January 2022, the International Monetary Fund (IMF) reaffirmed a growth rate of 2.7% for Nigeria in 2022, which is 0.1% higher than the 2.6% IMF's forecast in October 2021. An SMB Intelligence report also projects a strong GDP growth in 2022 due to rising oil price, oil production, expansion of financial services due to the MMO licences issued to telcos, and an increase in government spending due to the approaching election year.

In addition, Nigeria has one of the largest telecom markets in Africa, with most Internet connections available via mobile networks. There are currently over 184 million mobile users in Nigeria, and as of January 2021, the country has registered approximately 104 million active internet users, which corresponds to about half of the total population and creates a market for distance/virtual learning.

Even with the marginal growth in the economy in the last four years, Nigeria has seen a booming middle and elite class who value quality education, have international exposure, specific educational preferences, a higher disposable income and general affluence. But the low growth, combined with the nation's lack of transnational education, has triggered Nigerians to prefer leaving the country for greener pastures. These also drive the thirst for international education, with students having a strong focus on Science, Technology, Engineering, and Mathematics which sees many students in both the undergraduate and postgraduate categories enrolled in courses such as Engineering, Mathematics, Health professions, and more. On the other hand, Arts (Fine/Applied), Social Sciences, and other related courses remain a growing sector with less than 20% enrolment ratios.



A close-up photograph of a stack of antique books. The spines of the books are visible, showing aged leather and wood. On top of the stack lies a rolled-up parchment scroll, secured with a dark cord. A vibrant red ribbon is draped across the books, adding a touch of color to the scene. The lighting is warm, highlighting the textures of the old paper and leather.

Since he was elected president in 2015, the Muhammadu Buhari administration has allocated less than 10% of the nation's annual budgets to education, well below the benchmark recommended by the United Nations Educational, Scientific, and Cultural Organisation (UNESCO). But in July 2021, the administration promised that the country would progressively increase its annual domestic education expenditure by 50% over the next two years, and by up to 100% in 2025, which is beyond the 20% global benchmark.

According to President Buhari, this would be used in "strengthening institutions, promoting greater adoption of technology, building the capacities of our teachers and mobilising additional financial resources through legal frameworks and deliberate intervention on a sustainable basis".

NIGERIA'S TERTIARY EDUCATION FRAMEWORK

There are 45 federal government-owned universities, according to the National Universities Commission (NUC). There are also 48 and 99 state-owned and private universities respectively. Also, there are 27 federal and 49 state-owned colleges of education, according to the National Commission for Colleges of Education (NCCE). In all, the NCCE says, there are about 177 accredited institutions awarding NCE certificates in Nigeria. There are also 32 federal polytechnics in Nigeria, 51 state-owned polytechnics and 64 private polytechnics.

In spite of the funding challenges in the sector, the ninth National Assembly has 126 bills seeking the establishment of universities (some are concurrence bills seeking to approve what the Senate had passed). There are also 140 bills for the establishment of specialised colleges and 27 for the establishment of polytechnics. In most of the cases, the law-makers who proposed the establishment of the institutions want them cited in their constituencies.



There is a distinction between public (including federal and state universities) and private institutions (introduced in 1990). Both public and private institutions are accredited by the NUC. All universities are monitored by the (federal) government, and states are no longer permitted to set up their own universities – a measure intended to create uniformity among all universities. Higher technical and professional education is mainly provided by specialist schools and institutions such as Polytechnics, Institutions of Technology, Colleges of Education, and Professional Institutions. In addition, Mono-technics provide education in the field of Agriculture and Industry.

The Federal Ministry of Education and the Ministry of State for Education are responsible for secondary and higher education. The NUC, founded in 1962, is responsible for accrediting institutions, granting funding, assessing the extent to which the curricula meet the requirements of the labour market, and developing university education. The universities are managed by a Council and a Senate. Within universities, institutes and boards function more or less autonomously.

In general, federal institutions rank more highly than the original state universities in the university rankings issued by the NUC. However, measures are taken to create a uniform level among all universities. Polytechnics, Colleges of Agriculture, Mono-technics, Colleges of Health Technology and Technical Colleges are accredited by the National Board for Technical Education (NBTE). The NBTE is also responsible for developing and accrediting the curriculum used for examinations run by the National Business and Technical Examinations Board (NABTEB).



SECURING ADMISSION INTO A NIGERIAN UNIVERSITY

To be admitted into any Nigerian university, a student must have first obtained a Senior School Leaving Certificate, which can be achieved by sitting for the Senior School Certificate Examination (SSCE) governed either by the West African Examination Council (WAEC; in charge of examinations in West African Region) or the National Examination Council (NECO, a national body). After obtaining at least 6 Credits from any of the examination bodies, a student must also obtain a score not lower than 160 - depending on the course of study or region - in the Joint Admission Matriculation Board (JAMB) examination.

Students are allowed to combine two O'level results for admission - combine two sittings or combine WAEC and NECO results. This is usually not allowed for some courses such as Medicine and Surgery. Students can only use one sitting of either NECO or WAEC. Apart from JAMB, there are several other alternatives such as;

1. Direct Entry: To qualify, a student must have attended a polytechnic or college of education and graduated with an Upper Credit to gain admission into 200 level in any university of their choice.
2. Pre-Degree: They usually take between 18-24 months and it also costs a lot, but the chances of passing are not as easy as pre(-)degree. If a student passes, they automatically secure an admission into 200 Level.
3. Diploma Courses: Not all Nigerian universities offer this. They usually take between 18-24 months, also it costs a lot, but the chances of passing are not as easy as pre degree. If a student passes, they automatically secure an admission into 200 Level.



QUEST FOR OVERSEAS EDUCATION

With the flailing economy accompanied by rising inflation and coupled with insecurity across the nation, Nigerians are increasingly seeing a need to relocate out of the country in a bid to seek better standards of living. The noticeable increase in the number of people making this decision over the past few years can however be attributed to increased insecurity in Northern Nigeria – as evidenced by banditry and kidnappings on major highways and in many communities, and police brutality in Southern Nigeria – a situation which led to the violent EndSARS protests in 2020. Many young people do not believe that their safety is guaranteed in the country therefore many of them are choosing to leave so as to realise their potential.

In March 2021, the Executive Secretary of the National Universities Commission (NUC), Professor Abubakar Rasheed, confirmed that more than 2.1 million students were studying in Nigerian universities. In addition, a 2021 report by Campus France – a French agency for the promotion of higher education, international student services, and international mobility – revealed that Nigeria recorded 76,338 students travelling abroad to study in 2018. By 2020, the number was nearly 100,000 according to the International Consultants for Education and Fairs.

However, anecdotal evidence from education watchers in Nigeria would suggest that the number is considerably higher, with many students taking up places at private institutions in neighbouring countries, and Ghana reportedly being particularly attractive.



The demand for foreign university placements among Nigerian students can be described as exciting but depressing. The poor quality of education available to most – not to mention how inaccessible education is to millions of Nigerians – is so problematic that Nigerian employers complain that they have trouble finding qualified workers, which also affects the local unemployment rate among youths. Beyond problems at the tertiary education level, there are also severe issues within Nigeria's secondary school system. In 2013, only 44% of high-school-aged Nigerians were enrolled in school – 21 percentage points below the global average – which helps to explain stubbornly low levels of youth literacy in the country. Moreover, enrolment rates, particularly among girls, are low in the north of the country (where kidnappings by the notorious Boko Haram terrorist organisation have taken place).

In 2015, 89,094 Nigerian students studied abroad, which represents 1.8% of the total mobile students. The preferred destination for Nigerian students is the United Kingdom (16,072 students), followed by the United States and Malaysia. There are, however, more than 5,000 Nigerian students in Europe, mainly in Turkey, Hungary, Finland, Cyprus, Italy, Romania, France, Lithuania, Ireland, Poland, Estonia, Greece, Sweden, Netherlands, Norway and China (where the universities have persistently leveraged access to scholarships for African students as a foundational recruiting strategy). Whatever the challenges were in 2020, nearly 100,000 Nigerian students were enrolled abroad in that year. Where they chose to study – and why – is a significant question for recruiters in countries that command a significant share of the Nigerian market.

As lack of spaces in universities leave most secondary school graduates without a place in higher education, budget-conscious would-be international students are becoming more interested in alternative destinations outside of the 'Big Five' study destinations. Figures from Campus France's Chiffres Cles 2021 report reveal that 76,338 Nigerian students headed abroad to study in 2018, a drop of 11%, which the report attributed to the drop in oil prices, the depreciation of the local currency and the lack of international purchasing power among the Nigerian middle class. However, the 2020 edition of the report did suggest that this had led to some reconsideration of study destinations. For example, between 2012 and 2017, the UK saw a 27% drop in international students from Nigeria. However, just under one in four mobile Nigerian students chose another country of Sub-Saharan Africa as their study destination, including Ghana and Benin.

In 2020, ICEF Monitor reported that along with popular regional hubs, South Africa and Ghana, the top destinations were the United States, with 15,980 students in early 2019; Malaysia, with roughly 13,000 in 2019; Canada, with 11,985 in 2019; the United Kingdom, with 10,540 in 2017/18. China is fast becoming a top destination as well with over 7,000 students enrolled in 2019– 7.5% of whom were on Chinese Government scholarships.





**While UK
universities
emerge unscathed,
the market
competition is
serious**

Despite the challenges, UK higher education has emerged from the global pandemic largely unscathed. International student numbers were challenged in 2020-21, but applications and acceptance data from UCAS is hard proof that the UK in 2021 is an attractive and welcoming destination for international students. An Education International Cooperation Group survey found, for the third consecutive year, that the UK achieved favoured status – something previously held by the US. Nearly 30% of students preferred Britain, 24.5% favoured the US and 16.5% chose Australia, with Canada 15.8% coming in fourth.

For the UK, applications from India were up 13%, including a significant jump in applications from emerging markets – for example, Nigeria is up 83% and Pakistan is up 53%. It was a remarkable turnaround from 2020, when UK vice-chancellors were worried about a possible collapse in international student numbers and were warned that a sector-wide financial crisis was likely to follow. Affordability is also a major draw for Nigerian students. Along with a welcoming policy environment, it is a key reason Canada has become a remarkable competition, with more Nigerian students enrolling.

Despite the numbers, Nigeria remains a top source market for the UK. However, it is a market from which further declines could pose a significant issue for UK educators – many of which rely significantly on Nigerian postgraduate enrolments – because Nigeria is predicted to be the most critical sender of postgraduate students in the world soon. Interestingly, the British Council determined in 2015 that Nigeria's number of outbound postgraduate students will grow the fastest in the world through 2025, followed by India (with a projected annual average growth of 7.5%, Indonesia (7.2%), Pakistan (6.4%), and Saudi Arabia (5.2%).

Carnegie notes that while numerous factors affect enrolments, a noteworthy problem is that just few universities are offering scholarships to Nigerian students – unlike universities in Canada and the US (and China, where providing scholarships for African students is a major recruiting strategy). It argues that UK universities largely see Nigerian students as a revenue centre and may not be taking into account the fact that "the decrease may also be a sign that UK universities are no longer affordable for most middle-class Nigerian families. Furthermore, Carnegie highlights an exception to the broad trend in certain British universities who still attract the highest numbers of Nigerian students because they "attract more Nigerian applicants by combining scholarships with effective marketing, tailored course offerings, and competitive fees".

In addition, the Canadian government made the country even more competitive by introducing the Nigeria Student Express scheme in 2020, aimed at improving student visa processing times and introducing a specialised system for verifying the financial status of prospective applicants. Nigerian families are also attracted to Canadian universities more affordable tuition fees, including the country's less-onerous visa process and clearer pathways to postgraduate work and residency. Nigerian applicants also see Canada as a safer environment – it is perceived as less xenophobic than the US and the UK and thus a more attractive destination. For these reasons, the number of Nigerian students attending Canadian institutions increased from 2,825 in 2009 to 11,985 in 2019. Along with Canada, the US, Ireland, and Australia have seen Nigerian student numbers increase in recent years.





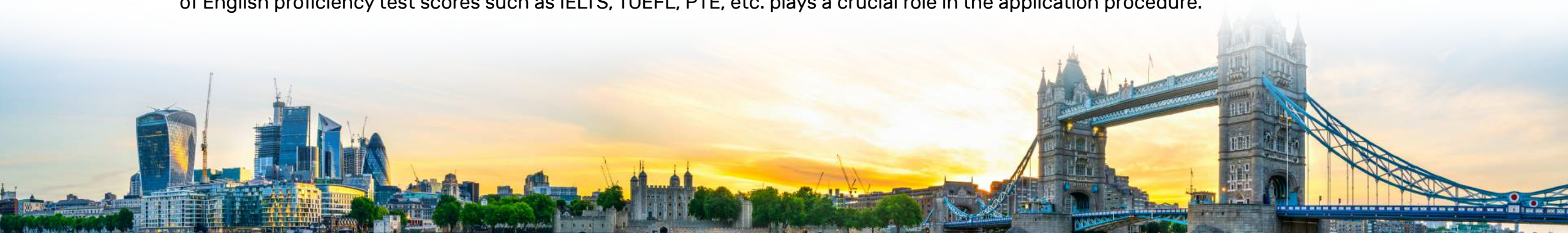
In early March 2021, the UK announced the roll-out of its Graduate route – a post-study work visa system that allows students to work or look for work for up to 2 years (3 for Doctorate students). First announced in 2019, the first eligible batches for the scheme would be graduating this year, with applications opening in July 2021. The return to 2-year visa system will be an impactful deciding factor for many international students. 77% of international students in a 2019 survey by QS said that an extension like this would make them more open to studying in the UK. The increased ease in obtaining study visas has also improved UK's appeal – as of September 2021, the UK home office had granted over 420,000 study visas, 36,783 of which were from Nigeria,

For many young Nigerians, the urge to leave the country was further intensified by the End-SARS crisis. Just like it is for other international students, Brexit can be seen to reduce competition for professional opportunities in the UK after graduation. Moreover, with the Graduate route 2- & 3-year post-study visa option and the ability to switch over to a Skilled Worker visa, the benefits of studying in Britain are only increasing for international students. The UK is providing strong pathways to promising professional opportunities for international students – and we can expect to see many more choosing to start their higher education journey here. From non-EU markets, the UK university sector posted enrolment gains in 2020, exceeding 400,000 for the first time ever in 2019/20 to reach 408,825. This represents year-over-year growth of nearly 17% in non-EU numbers and compares to essentially flat volumes of EU students (+.83% year-over-year).

With a growing number of leading destinations competing based on affordability and visa policies, and in a post-Brexit environment where EU enrolments are projected to decline, the UK's bid to increase share will be bolstered by its increasingly welcoming posture to international students. And it may well be influenced by the growing reality that international students including Nigerians – have more affordable, quality options when choosing where to study than ever before. Overall, the most recent UNESCO data show the following countries, in order, as the destination markets with the most Nigerian students enrolled: UK; US; Ghana; Malaysia; South Africa; and Canada.

For decades, the United Kingdom has been a major destination due to the language and bilateral relations between the two countries. But one of the major reasons for high interest in foreign education among young Nigerians include improved job opportunities and perceived preference of foreign degrees by employers. Many employers hardly question certificates or degrees from developed countries due to the quality of education, as against Nigeria where issues relating to poor infrastructure and instability in the education sector are commonplace. The incessant strike by both federal and state-owned tertiary institutions has made foreign education really attractive too (While working on this report, the Academic Staff Union of Universities again commenced what it called a 1-month warning strike).

Still, many students find it difficult to gain admission due to the lack of domestic capacity in Nigerian universities. Every year, there are about 1.5 million students looking for undergraduate placements alone – but there are probably about half a million places available. Recently, over 70,000 Nigerians have petitioned the United Kingdom (UK) Home Office to either remove Nigeria from the list of countries whose citizens are required to take English Proficiency tests or reduce the fees charged for the examination. Others have simply demanded for a reduction in the cost of the tests and an increase in the validity period. To study in the United Kingdom, the submission of English proficiency test scores such as IELTS, TOEFL, PTE, etc. plays a crucial role in the application procedure.



The cost ranges between N80,000 (~£141.47) and N90,000 (~£158.80), which many Nigerians have described as “extortion.” Countries like Guyana, Barbados, the Bahamas, and Belize are on the list which exempts their citizens from the IELTS. Other countries on the list are Antigua and Barbuda, Dominica, and Grenada.

Reacting to the campaign in Nigeria, the Home Office explained that for Nigeria to be included on the Majority English Speaking Country (MESC) list, it must have evidence that more than half of its citizens speak English as a first language. It will also have to consult the Foreign, Commonwealth and Development Office for additional evidence. Currently, the organisation is convinced that Nigeria does not meet that requirement. Similarly, to study in the UK, IELTS is generally needed by many academic institutions but it is also possible to study in the United Kingdom without IELTS through the following requirements: proof of over 70% in English in High School/Class XI and Class XII or transcript of a short term English course.

Some institutions also require proof of English as the medium of instruction in the school and students can participate in an online interview conducted by the university.



A person wearing a plaid shirt is looking through binoculars, with a bright, hazy sky in the background. The image is partially obscured by a white rectangular area containing text.

FINDINGS AND FORECASTS

Nigerians' interest in securing academic qualifications from foreign universities have soared. Yes, an overwhelming majority – up to 90% of eligible Nigerians – are interested in securing a degree from a university overseas. Many of those who indicated otherwise are respondents above 45 years old. English-speaking countries are the top favourite university education destinations, with the United Kingdom, Canada, United States, and Australia being four major considerations for a tertiary education overseas. Germany occupied the fourth position based mainly on its global reputation as a suitable destination for prospective students with interests in Engineering.

We expect that this situation will deepen even further this year based on certain considerations including the upcoming elections in early 2023 which contributes to the uncertainty on ground, continued rise in unemployment which encourages qualified citizens to seek greener pastures abroad, rise of Edtechs which drastically increases the demand for professionals in key sectors, and growing interest in distance learning from professionals who wish to increase their career prospects by obtaining more professionals qualifications.

Major reasons for selecting the preferred countries

Apart from scholarships, which numerous studies have emphasised as a major consideration for Nigerian students, safety and security also appears to have risen to become a major concern, especially students desiring a welcoming and friendly community. As previously stated, studying abroad introduces foreign students into an unfamiliar culture, which also brings a sense of potential safety risks.

Over the past decade, there has been an increased awareness of campus and community safety issues among parents and potential international students. According to a British Council study, campus safety is ranked fifth out of nineteen factors that determine a potential student's choice of study destination. According to the report, it was 17 of 19 factors just five years ago.

Respondents also highlighted the promise of a part-time job while in school as important. Other major considerations include low living expenses; a previous interest to live in the country; and having relatives or friends in the city. Interestingly, it is important to note that the response percentage for the options in the category was really close (a 1 or 2-point difference).

We envisage that these key factors – coupled with the relative ease of obtaining student visas to study in these countries – will continue to attract enrollment from Nigeria citizens and those of other African countries who perceive them as key incentives for deciding on study destinations.



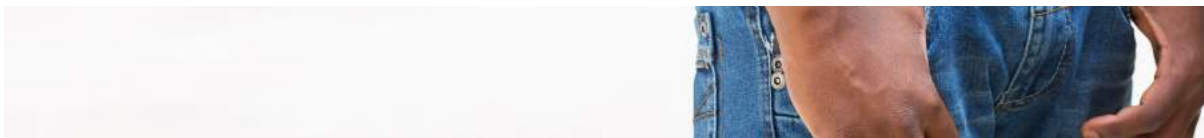


Lecturers and academic mentors are the biggest influencers in motivating students' school choices. Among over four thousand respondents, a majority (up to 70%) explained that their lecturers, career mentors, and advisors are the most effective influencers capable of determining their institution of choice. Other factors that are closely ranked include personal research by the students and an official one-on-one engagement by the institution. With this study, it has become evident that students also desire a more personal, focused relationship in order to be more motivated to attend a particular institution.

Testimonials from alumni, a marketing tactic used by many foreign universities for targeted advertising on social media platforms – Instagram and Facebook – ranked second lowest, followed by 'Others'. This is a revealing statistic as many foreign institutions tend to rely disproportionately on the use of alumni engagement as a marketing tactic to attract new students. We posit that the use of 'alumni marketing' remains important but more attention needs to be paid to faculty engagement to increase the odds of increasing enrollment numbers for schools this year.

Funding

An overwhelming majority of prospects in the study confirmed that they would prefer to leverage on paying tuition and other financial obligations in instalments. Most of them also explained that they would prefer offers of scholarships from the university, their employer, or the government. Other major considerations include personal and student loans, and sponsorship by parents and family members. Affordability and ease of payment will continue to be a major consideration for prospective students wishing to further their studies abroad. This is evident in the recent spike in the number of students choosing to study in countries such as China despite the language barrier. To maintain their appeal as favourable study destinations and institutions of choice, universities need to innovate around providing suitable tuition payment terms and scholarship opportunities especially for students of African origin whose economic status may not be as buoyant as that of students from other continents.



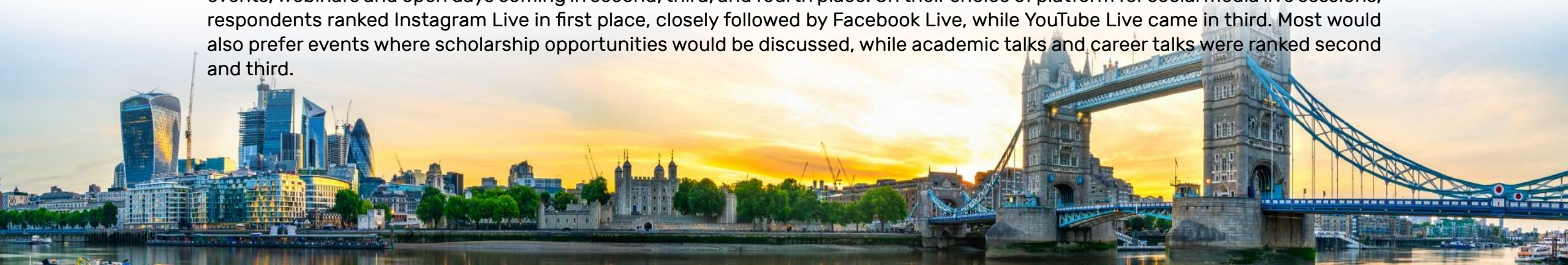
Courses most Nigerian students are interested in studying

Courses such as Law, Engineering, Health Studies and Medicine, Business Management, Computer Science and Information Technology, including Media Studies & Writing and Nursing were highly ranked by the respondents. A majority of the respondents (64.5%) confirmed that the pandemic affected their choices, which means they decided on their courses of study due to the projected effects of the global pandemic. We believe that health related courses including Nursing will witness a spike in enrolment in many countries especially the UK which has signified a demand for qualified applicants from across the world. Many Nigerians will take advantage of this considering the relatively high level of training in the country but abysmal welfare conditions and career prospects for qualified medical professionals.

How respondents choose to communicate with their university of choice

Majority of respondents prefer a more direct communication, right from the university search, to registration and post-registration engagement. Most of them rank the official university website as their most preferred platform to engage their university of choice or register for admission (rather than third-party apps or a mobile app) while seeking admission or scholarships. WhatsApp, Skype, and Facebook Messenger are ranked second, third, and fourth respectively.

At the post-registration stage, they would also prefer to engage the university through emails and WhatsApp. For emails, their best choice is a direct email with an academic on the proposed course. When asked about the engagement and recruitment activities that they are most likely to attend, respondents explained that they would prefer to join social media live sessions, with in-person events, webinars and open days coming in second, third, and fourth place. On their choice of platform for social media live sessions, respondents ranked Instagram Live in first place, closely followed by Facebook Live, while YouTube Live came in third. Most would also prefer events where scholarship opportunities would be discussed, while academic talks and career talks were ranked second and third.



The power of legacy in market retention

Majority of the students (47%) selected Western Union as their preferred MTO (Money Transfer Operator) for paying school fees, even though the Central Bank of Nigeria (CBN) has approved close to 47 operators for cross-border payments in Nigeria.

Platforms such as Flutterwave, MoneyGram, Interswitch also have a strong presence in the market. Indeed, there is no single integrated global remittance market, as multiple markets already act as networks connecting various country corridors along which global, regional, and national remittance service providers operate under different legal and regulatory frameworks. Compared to others, Western Union's charges for international transfers are quite exorbitant - about 4.6%. But Western Union's leading position, even with its many drawbacks, could be attributed to customer trust, early market presence and habit in a low-trust financial environment such as Nigeria. Indeed, many Nigerian families who rely on such remittances might be afraid to go digital with their money habits - particularly at a time when global stability is far from assured as markets reel from fluctuating exchange rates. For many students, these charges are largely seen as exploitative and they overwhelmingly prefer to pay via bank transfer and other alternative means. Western Union and Flywire are also the two main third-party payment platforms that universities offer to international students.

Another reason could be its market legacy. While Fintechs have gained massive ground in the market, Western Union has been in the market for many years and commonly used by Nigerian families in the 90s and early 2000s. In addition, there is a serious issue of monopoly which UK universities have helped create for WU that does not take into account students' preferences and convenience. Universities also fail to recognise indigenous payment solutions like Flutterwave which are used by Uber, etc. It is necessary to note that many of respondents may have cited Western Union as the main international payment platform in Nigeria since they only use platforms like Flutterwave for local/regional payments.

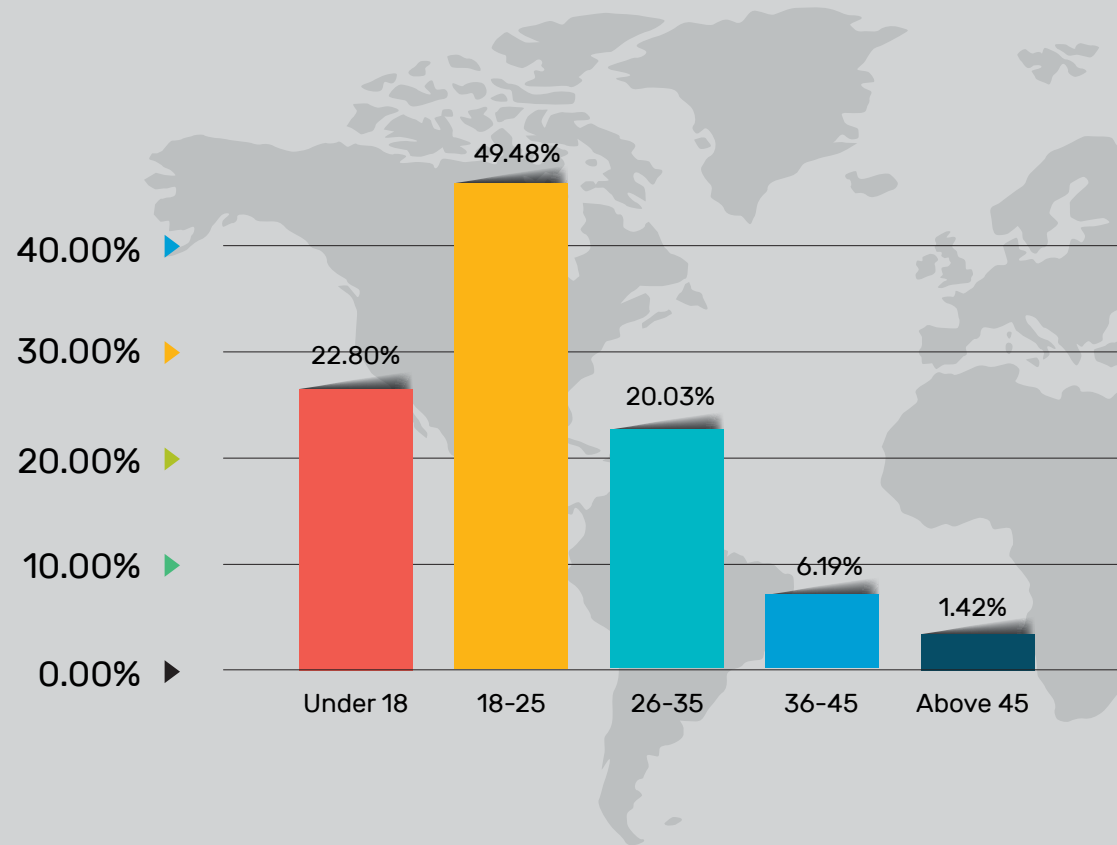




Market Survey

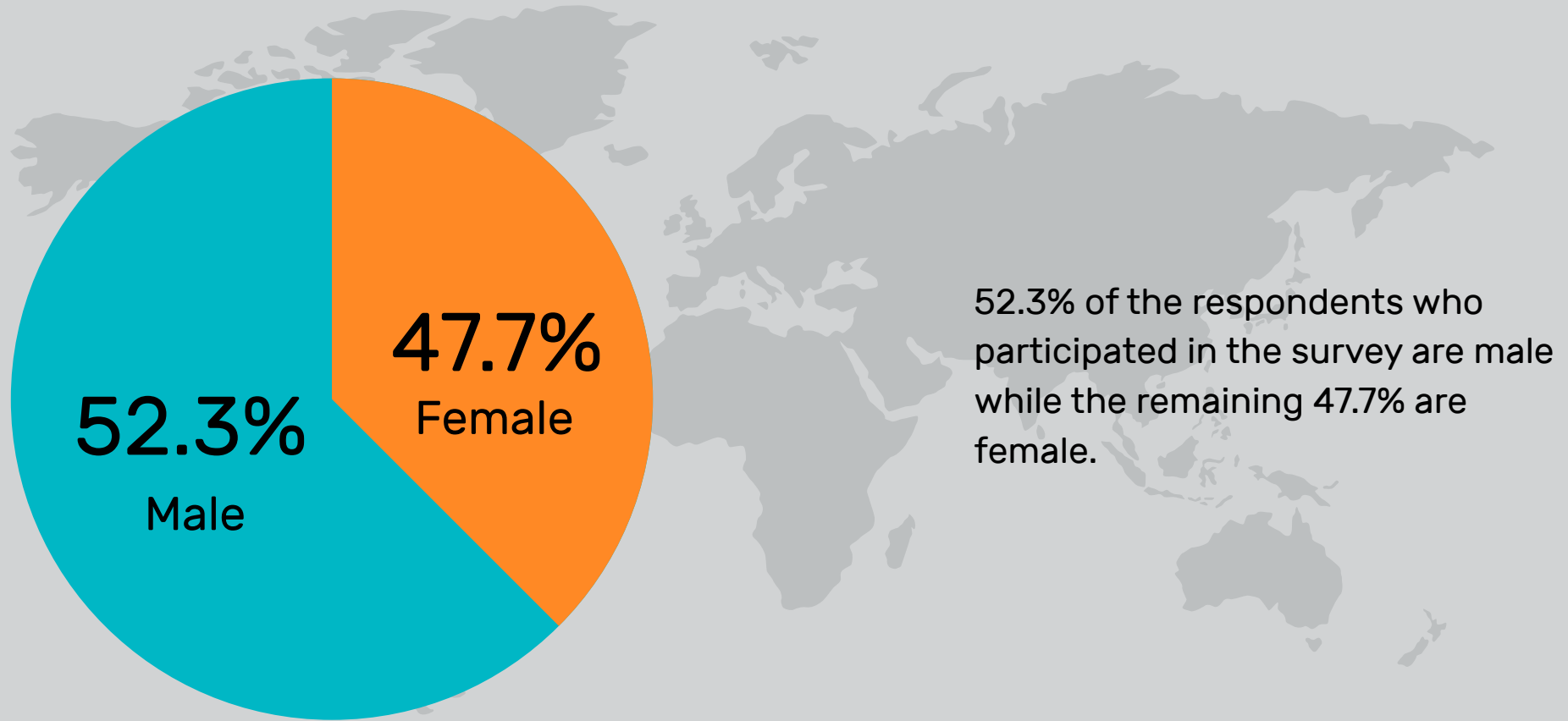


Age

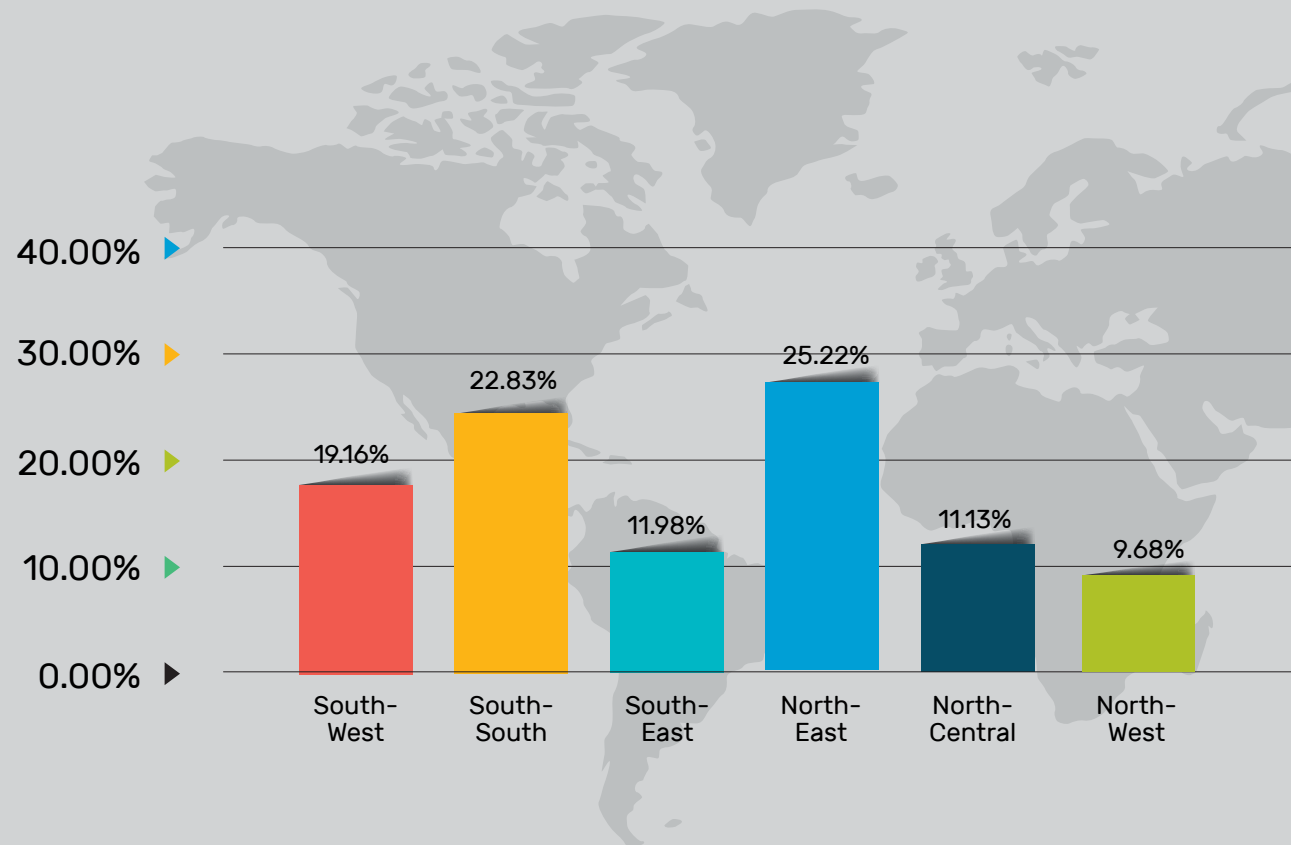


With 4,008 respondents participating in the survey, about 23% were students under 18 years, 49.8% of respondents between 18-25 years, 20% of the respondents were between 26-35 years, while the two lowest percentages were those between 36-45 years (6.19%) and above 45 years (1.42%).

Gender

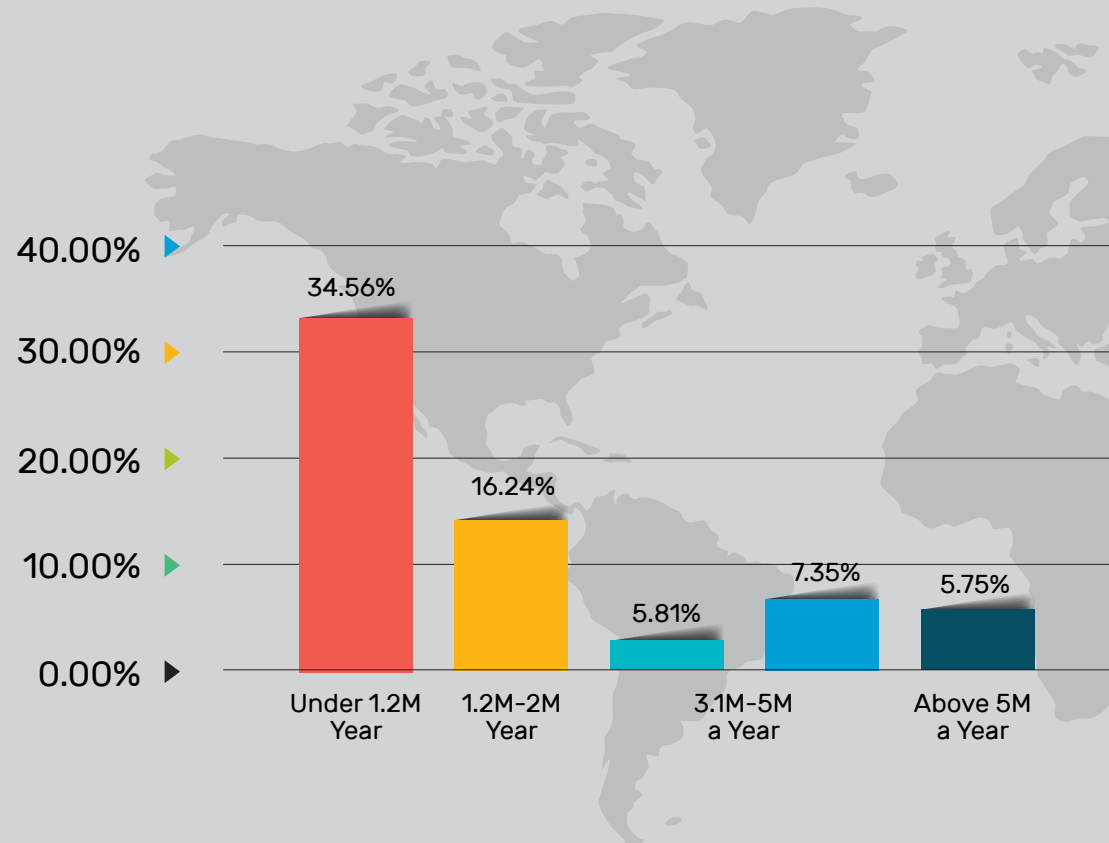


Location



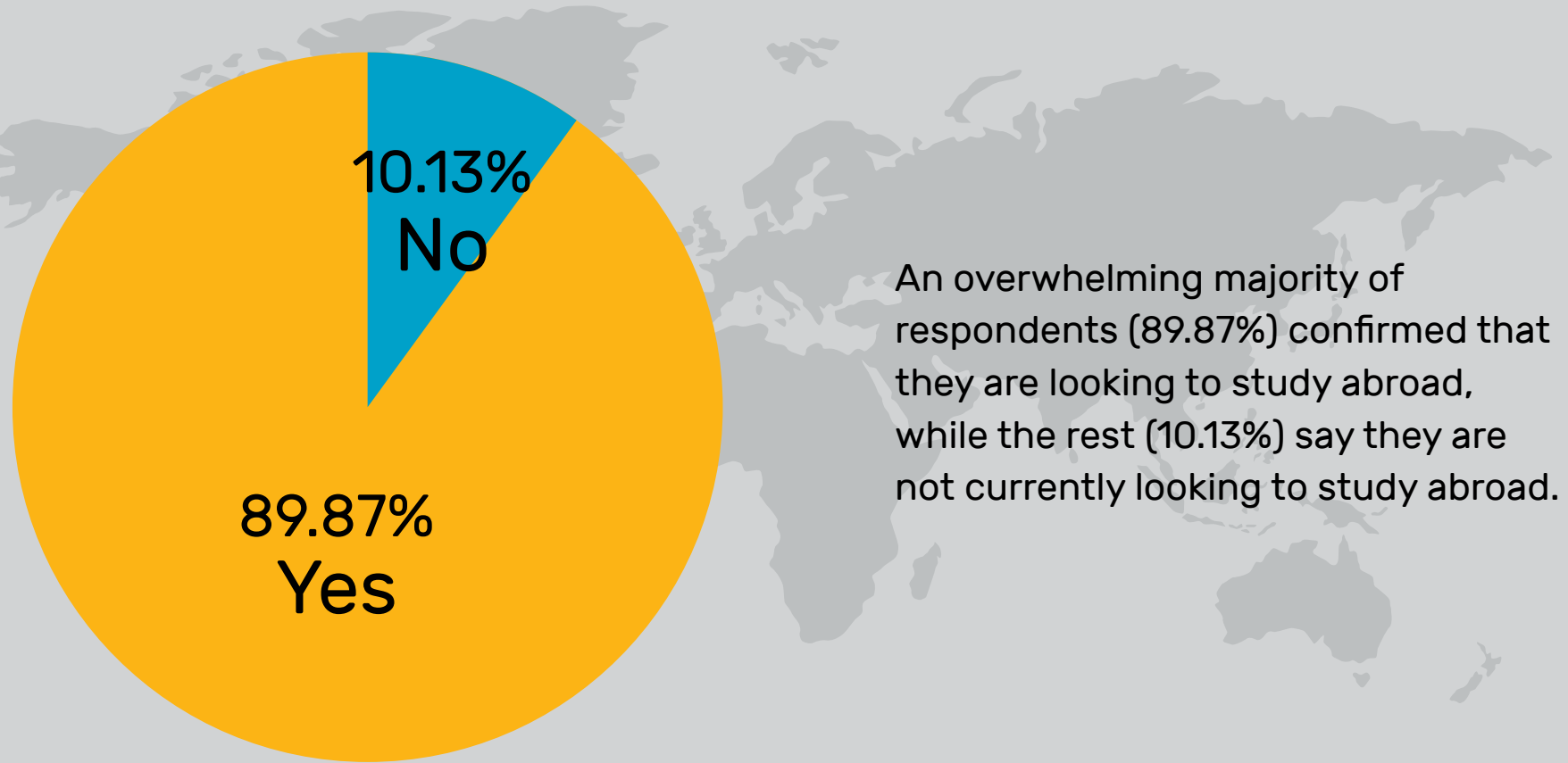
Spread across thirty states in the country, the respondents were split across these six regions: South-West (Lagos, Ogun, Ondo, Ekiti, Osun, Oyo States; 19.16%); South-South (Bayelsa, Akwa Ibom, Edo, Rivers, Cross River and Delta States; 22.83%). South-East (Enugu, Imo, Anambra, Ebonyi, Abia States; 11.98%); North-East* (Adamawa, Bauchi, Gombe States; 25.22%); North-Central* (Kogi, Plateau, Kwara States and FCT Abuja; 11.13%) and North-West* (Kaduna, Katsina, Kano, Sokoto, Zamfara; 9.68%).

Income

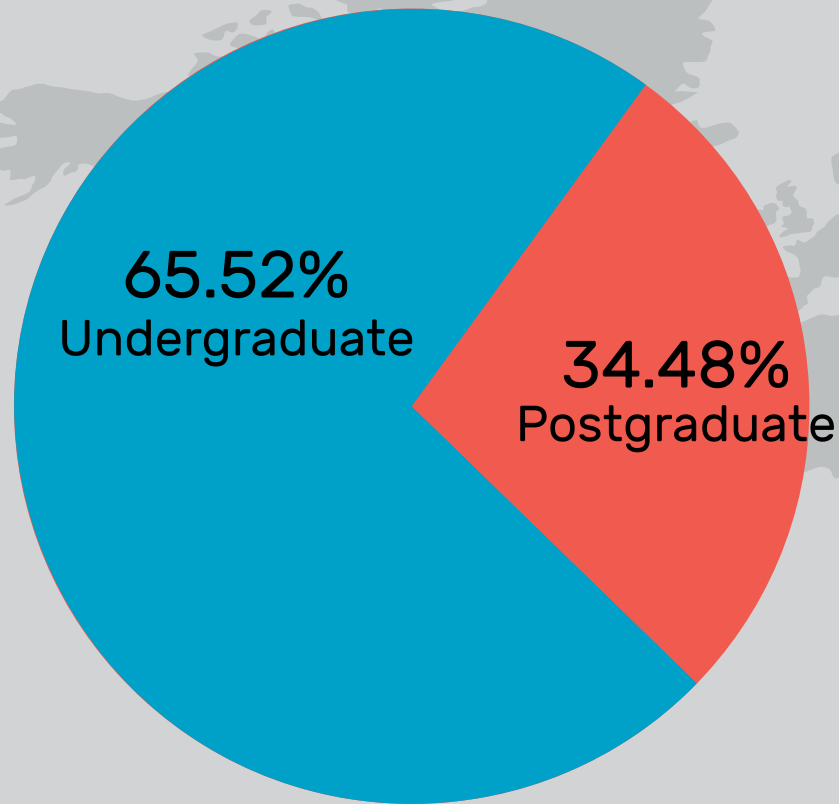


The sample size was largely dominated by those who earn an income under N1.2m annually (under £2,418; 34.96%) and those who earn no income – students, NYSC members, new graduates, and unemployed graduates (29.88%). Those who earn between N1.2m – N2m annually (£2,418 – £4,030; 16.4%) and those who earn between N2.1m – N3m (£4,232 – £6,045; 5.81%); N3.1m – N5m (£6, 247 – £10,075; 7.35%) and more than N5m a year (more than £10,075 annually; 5.76%).

Are you looking to study abroad?



What degree do you intend to study?

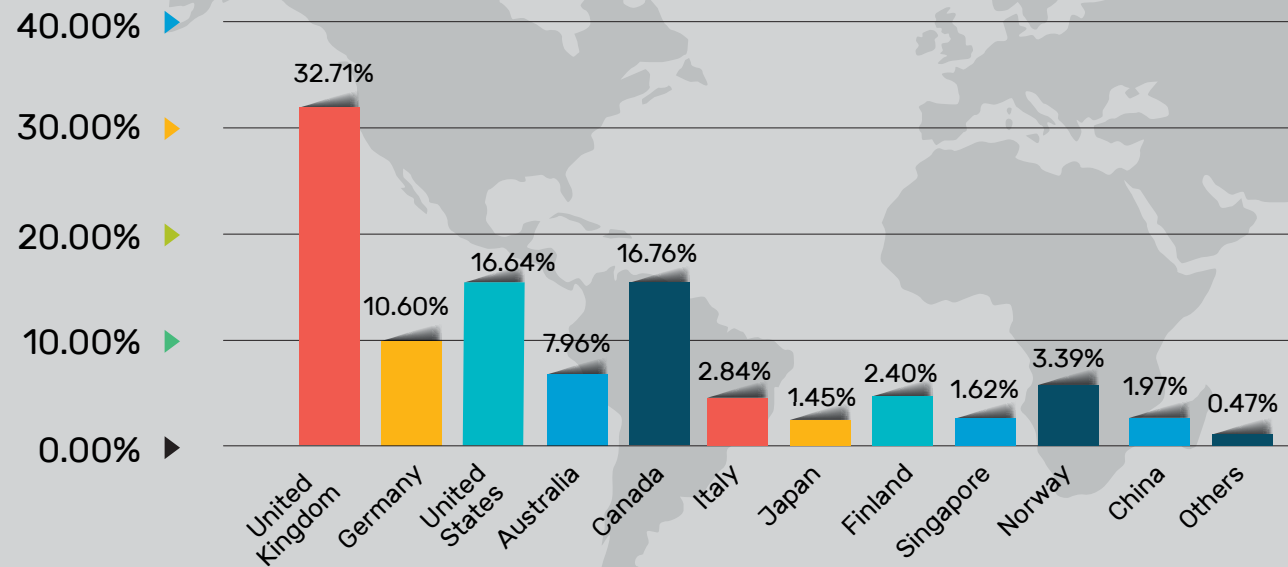


A majority of the respondents (65.52%)* say they are looking to get an undergraduate degree abroad, while others (34.48%) replied saying they are open to studying abroad for a postgraduate degree.

**It is important to add that this survey was conducted from July – 2 September 2021, with memories of an eight-month long strike by lecturers in Nigerian government-owned universities still fresh in students' minds.*

**Secondly, due to social distancing and COVID-19 regulations, the survey was largely dependent on crowdsourcing, with freelancers engaging students selected from over 53 universities, 7 NYSC orientation camps, religious student associations, and more.*

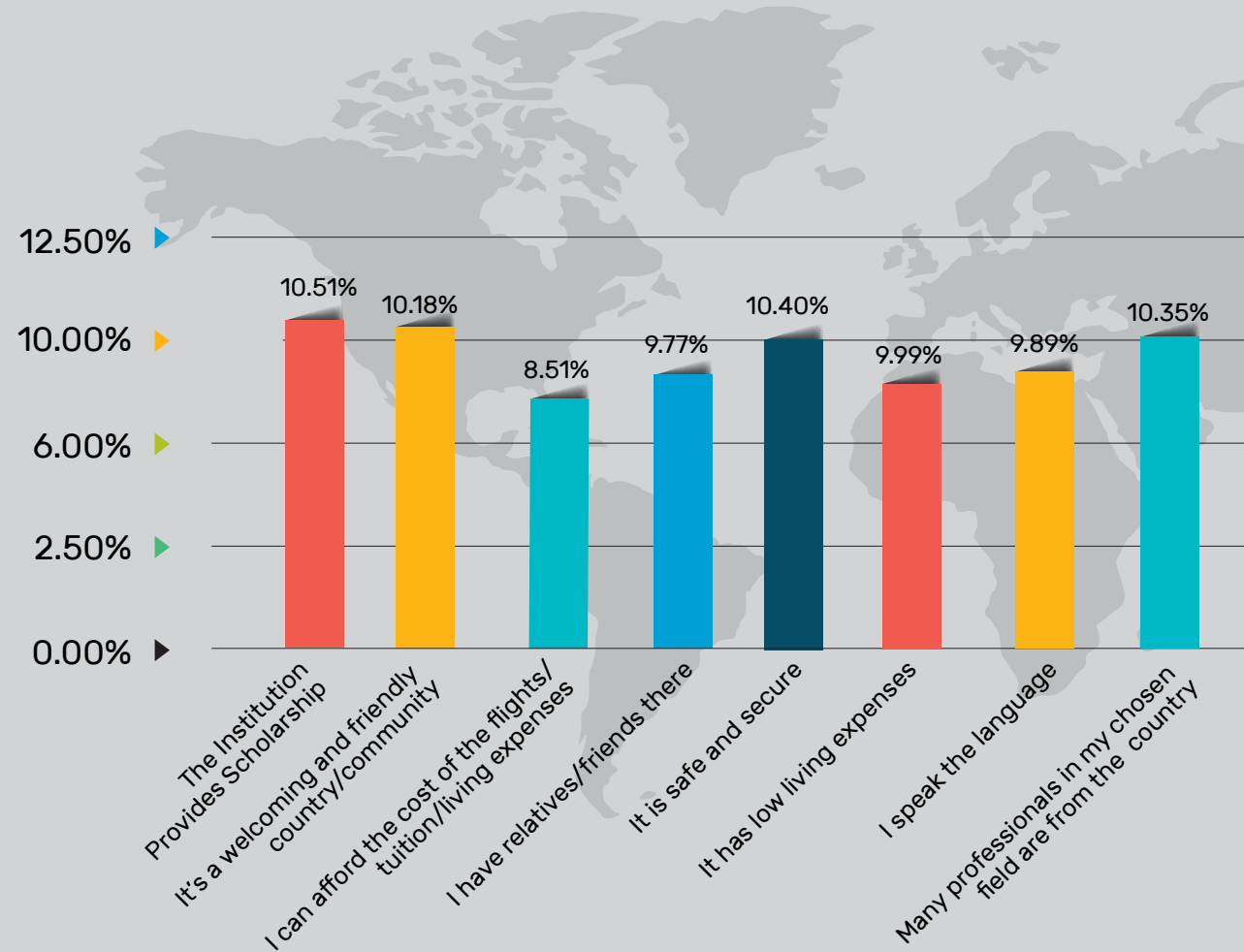
If you had the opportunity to study abroad, which country would you consider?



United Kingdom (32.71%), Canada (16.67%), United States (16.54%), Germany (10.60%) and Australia (7.96%) are the top five nations that participants selected as major considerations for tertiary education outside of Nigeria.

No African nation was indicated as an option in the survey.

What are your major reasons (kindly rank them)?



Ranking the reasons for selecting their preferred countries, scholarships (10.51% response percentage); safety and security (10.40% response percentage); Legacy – many professionals are from the chosen country (10.35% response percentage); promise of a part-time job while in school (10.23% response percentage); welcoming and friendly community (10.18% response percentage) were the five major reasons.

With in-depth interviews, some of the participants further explained their justifications

"USA and Canada are the most sought after but I am of the opinion that education is deeply rooted in the United Kingdom. I also like Europe (especially Germany) because when it comes to Engineering, they are well respected and Siemens, a company of personal interest, has their world headquarters in Germany".

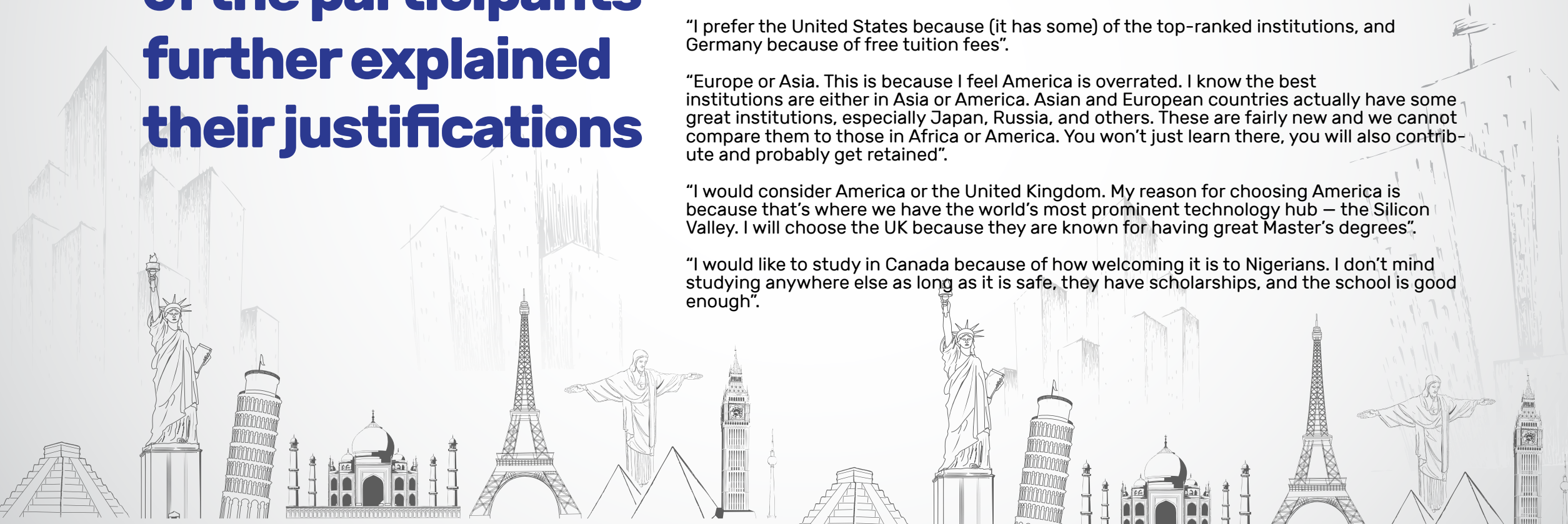
"For me, it begins with the language – assimilation is really easy when we all speak the same language. That's majorly why I would prefer UK universities. My friends have also told me that universities in the United Kingdom usually have better learning facilities and have better scholarship opportunities".

"I prefer the United States because (it has some) of the top-ranked institutions, and Germany because of free tuition fees".

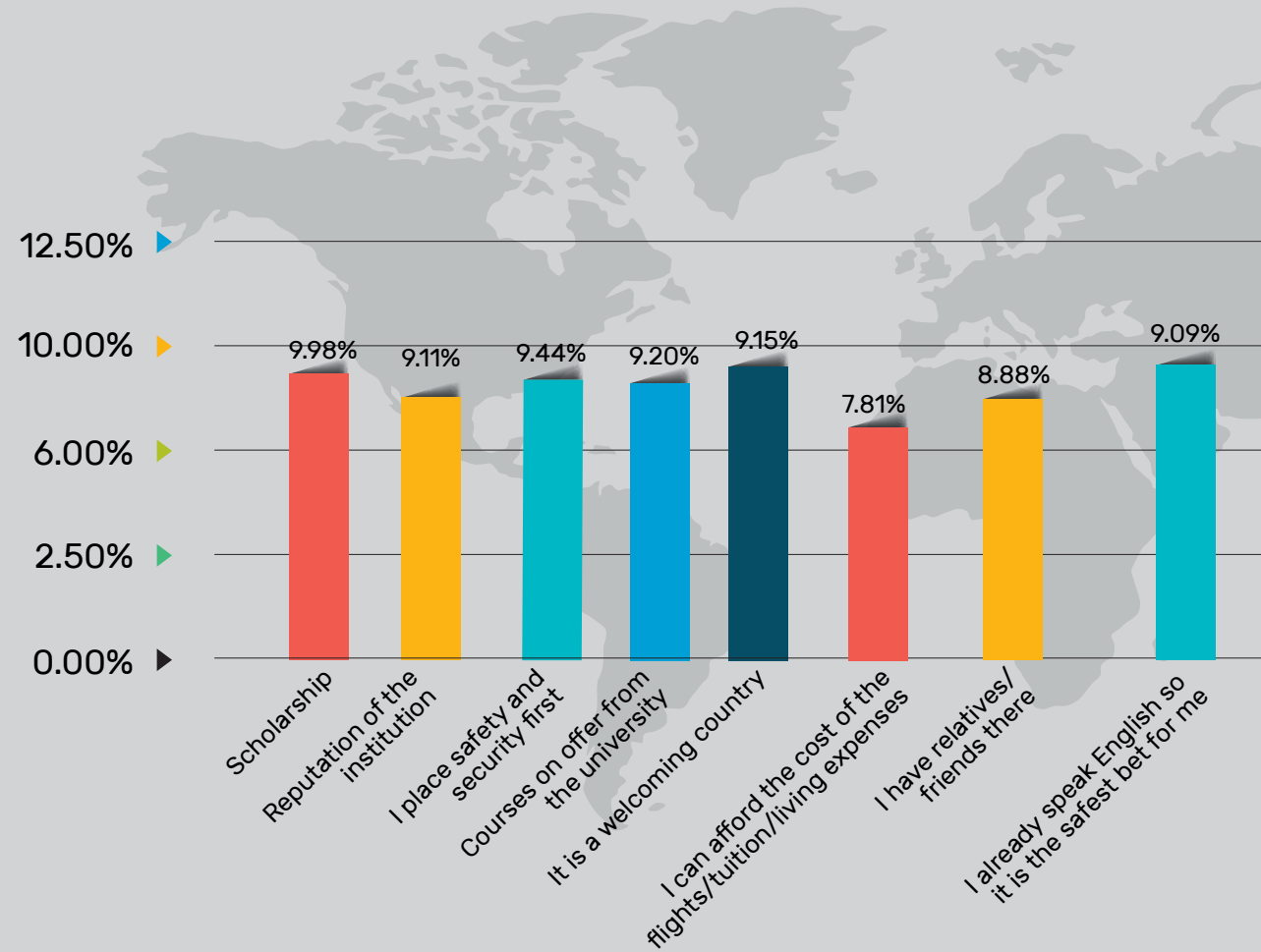
"Europe or Asia. This is because I feel America is overrated. I know the best institutions are either in Asia or America. Asian and European countries actually have some great institutions, especially Japan, Russia, and others. These are fairly new and we cannot compare them to those in Africa or America. You won't just learn there, you will also contribute and probably get retained".

"I would consider America or the United Kingdom. My reason for choosing America is because that's where we have the world's most prominent technology hub – the Silicon Valley. I will choose the UK because they are known for having great Master's degrees".

"I would like to study in Canada because of how welcoming it is to Nigerians. I don't mind studying anywhere else as long as it is safe, they have scholarships, and the school is good enough".



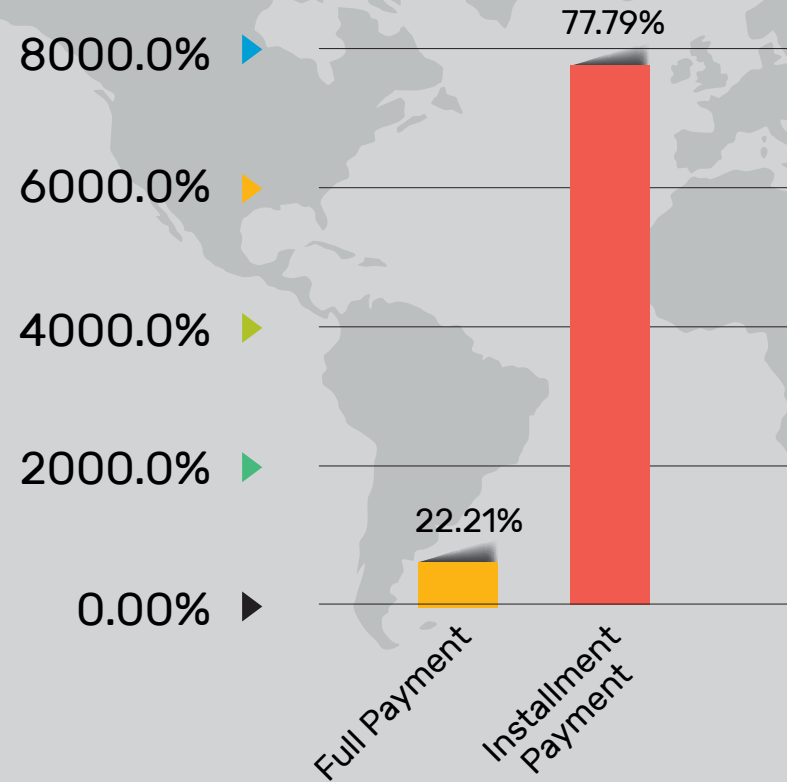
What factors would motivate you study in the United Kingdom?



More specifically, when asked why they would consider studying in the United Kingdom, scholarships, safety and security, legacy, opportunities for part-time jobs, language, and the university courses on offer ranked the highest.

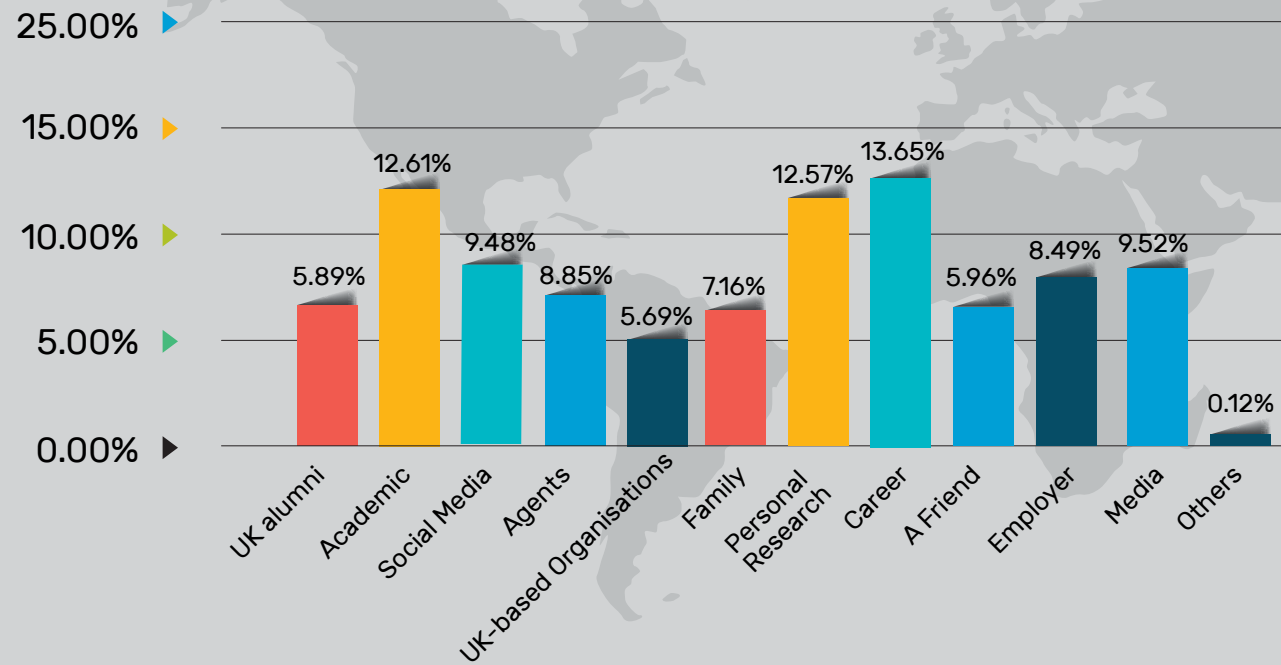
While ranking was not indicated as an option, it is interesting that respondents selected the reputation of the university as an important motivation to study in the United Kingdom.

If you could study in the United Kingdom, what form of payment would you prefer?



Majority of the respondents, about 78%, preferred to pay in instalments.

Which of these influencers are most likely to affect your decision-making?

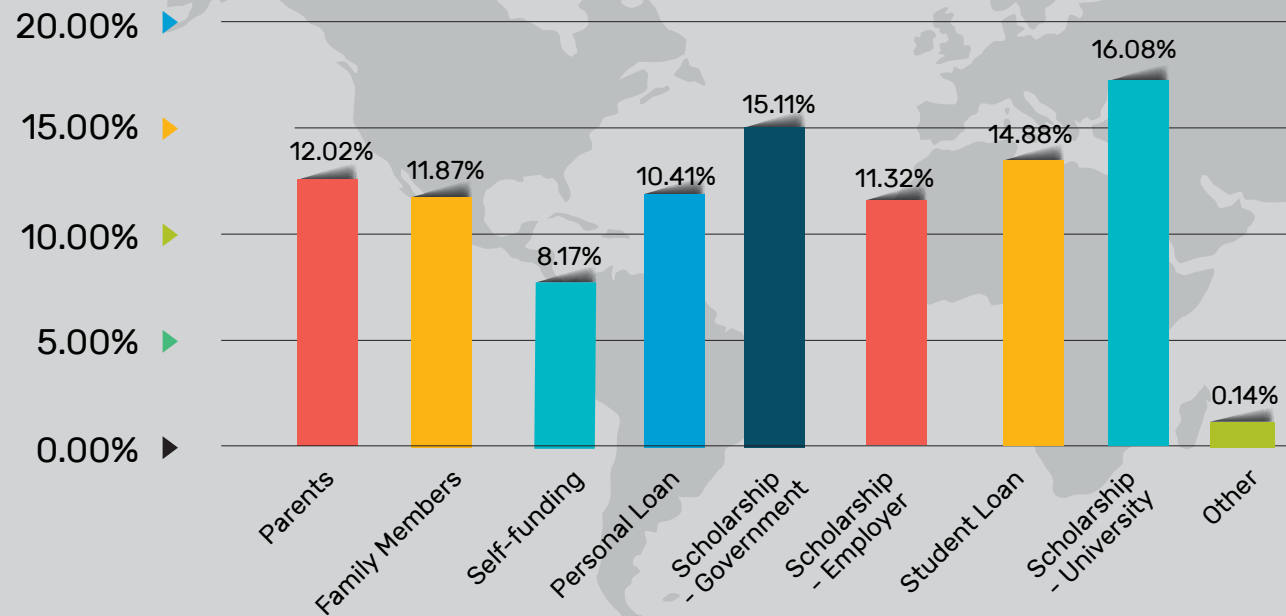


Career mentors, advisors, and lecturers ranked highest among the factors that would influence respondents' choice to study in any country or institution abroad.

This is closely followed by decisions supported through personal research, academic engagements and events, the media, social media influencers, agents, and employers.

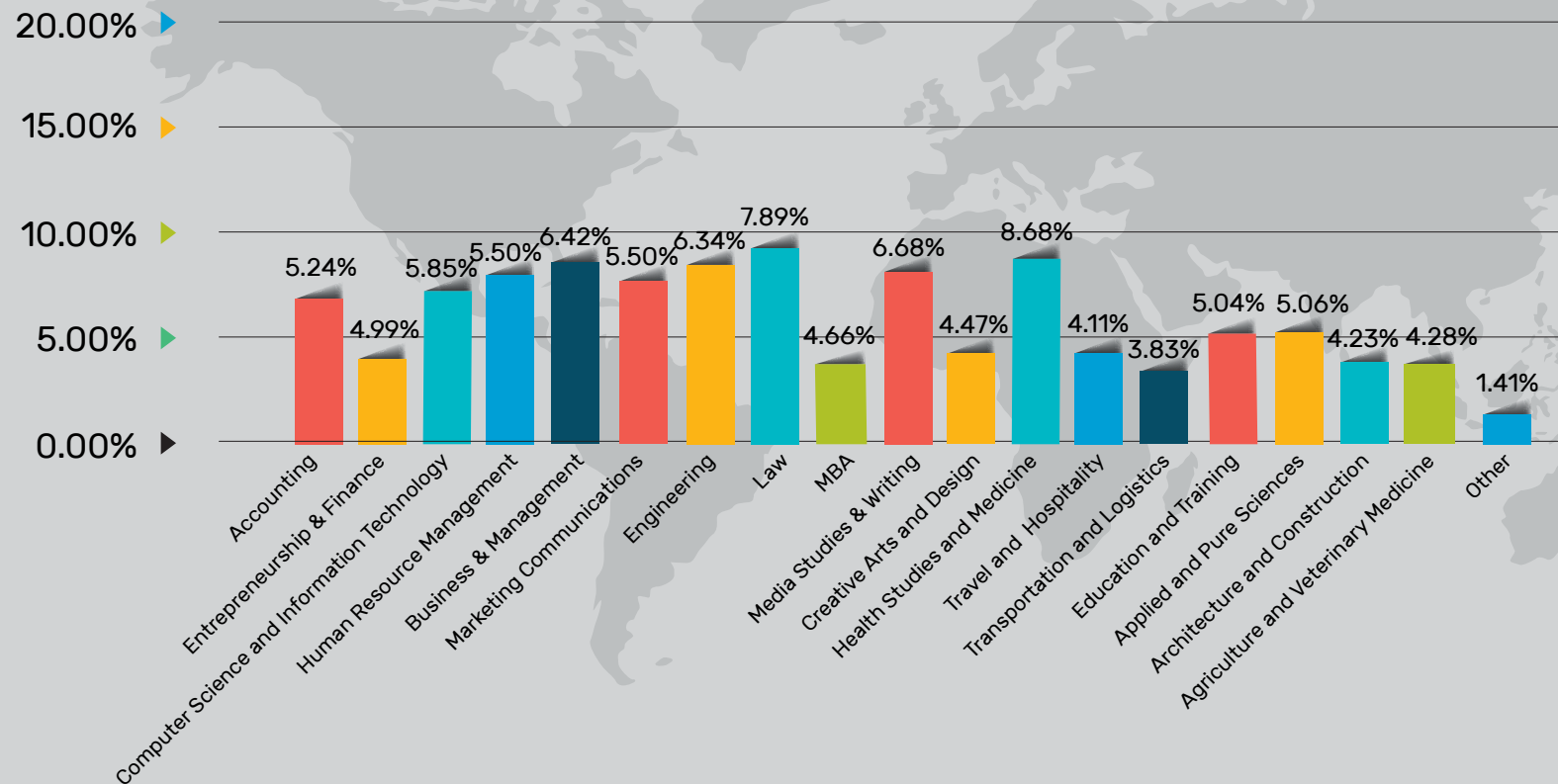
UK university alumni, friends, and the British Council rank among the lowest. It is necessary to explain with such large sample size, most of them might not have a close relationship with an alumni in a UK university.

What would be your source of funding to study in the United Kingdom?



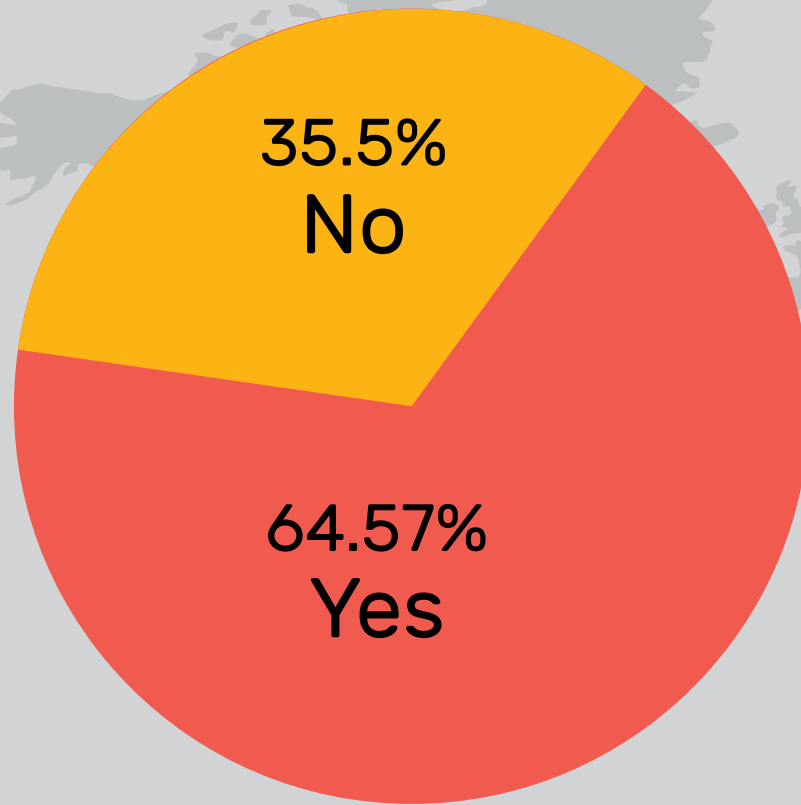
Majority of the respondents ranked scholarships (from the university – 16.08%; from the government – 15.11%) and student loan (14.9%) highest in their response to survey enquiries about their expected sources of funding. Self-funding ranks among the lowest (8.17%), indicating that most Nigerian students will require some form of support in their quest for UK education.

What course of study/career are you interested in?



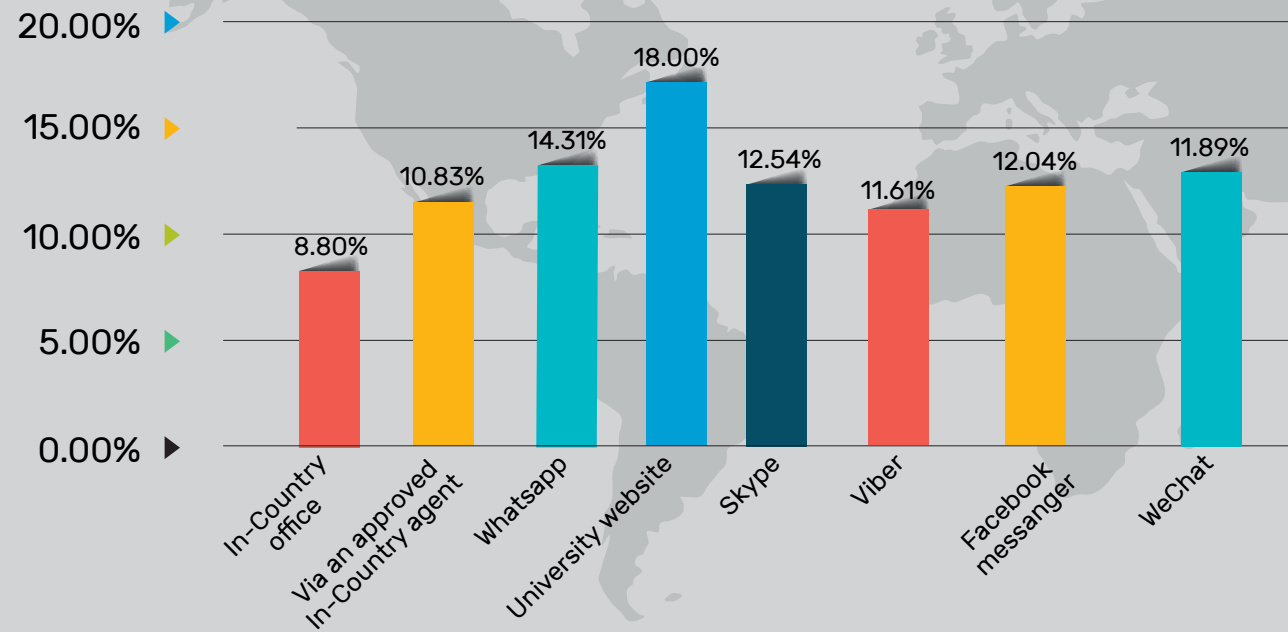
In the survey, respondents rank Law, Engineering, Health Studies and Medicine, Business Management, Computer Science and Information Technology, including Media Studies & Writing as the six major courses of interest to study outside Nigeria.

Did the pandemic have any effect on your choice of course to study?



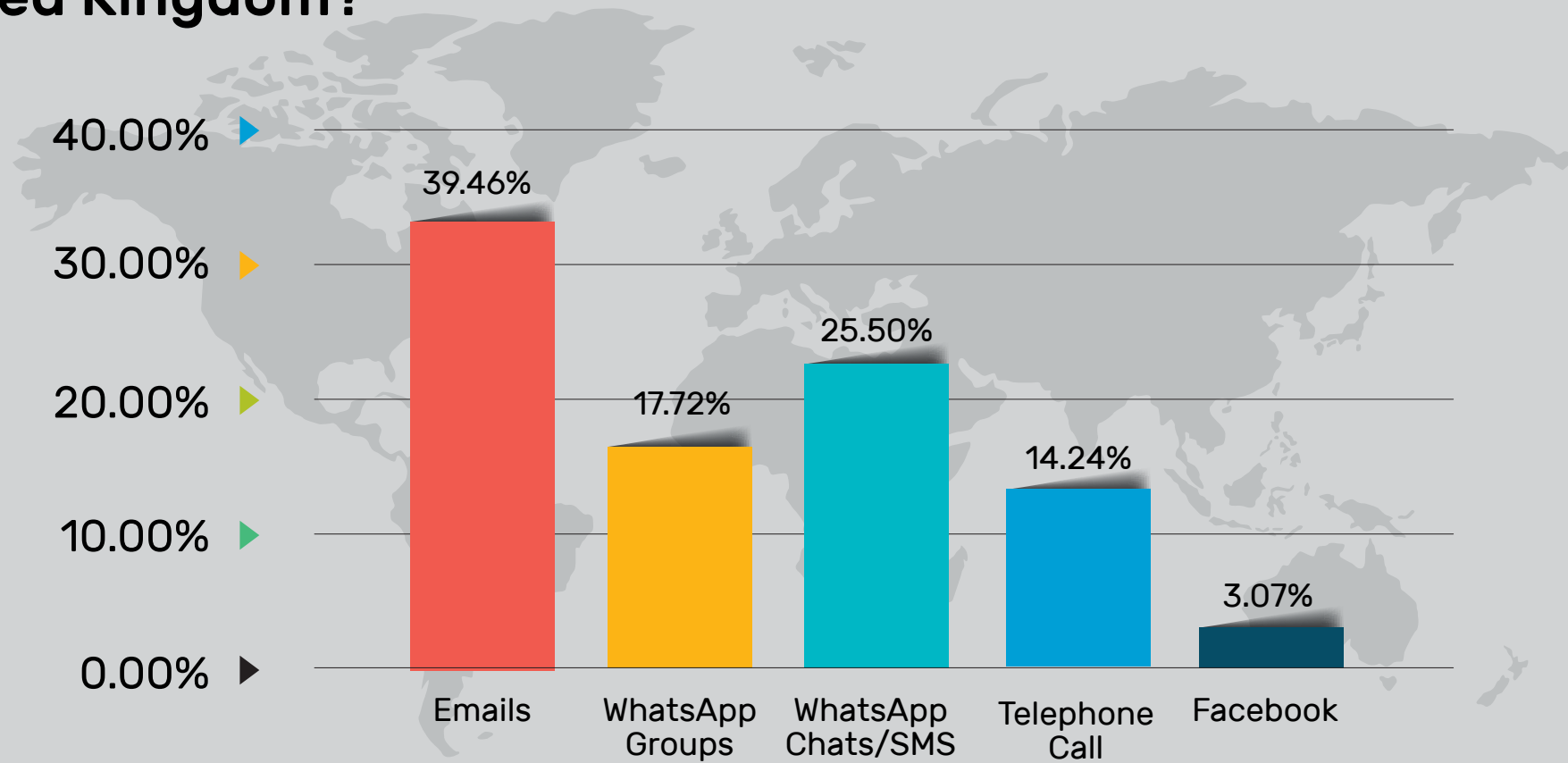
This question is intended to underline the effect of a generational event, especially a pandemic like COVID-19. Interestingly, majority of the respondents (64.5%) confirmed that the pandemic affected their choices.

How would you prefer to engage with your university of choice when seeking admission? Please select 3 major options.

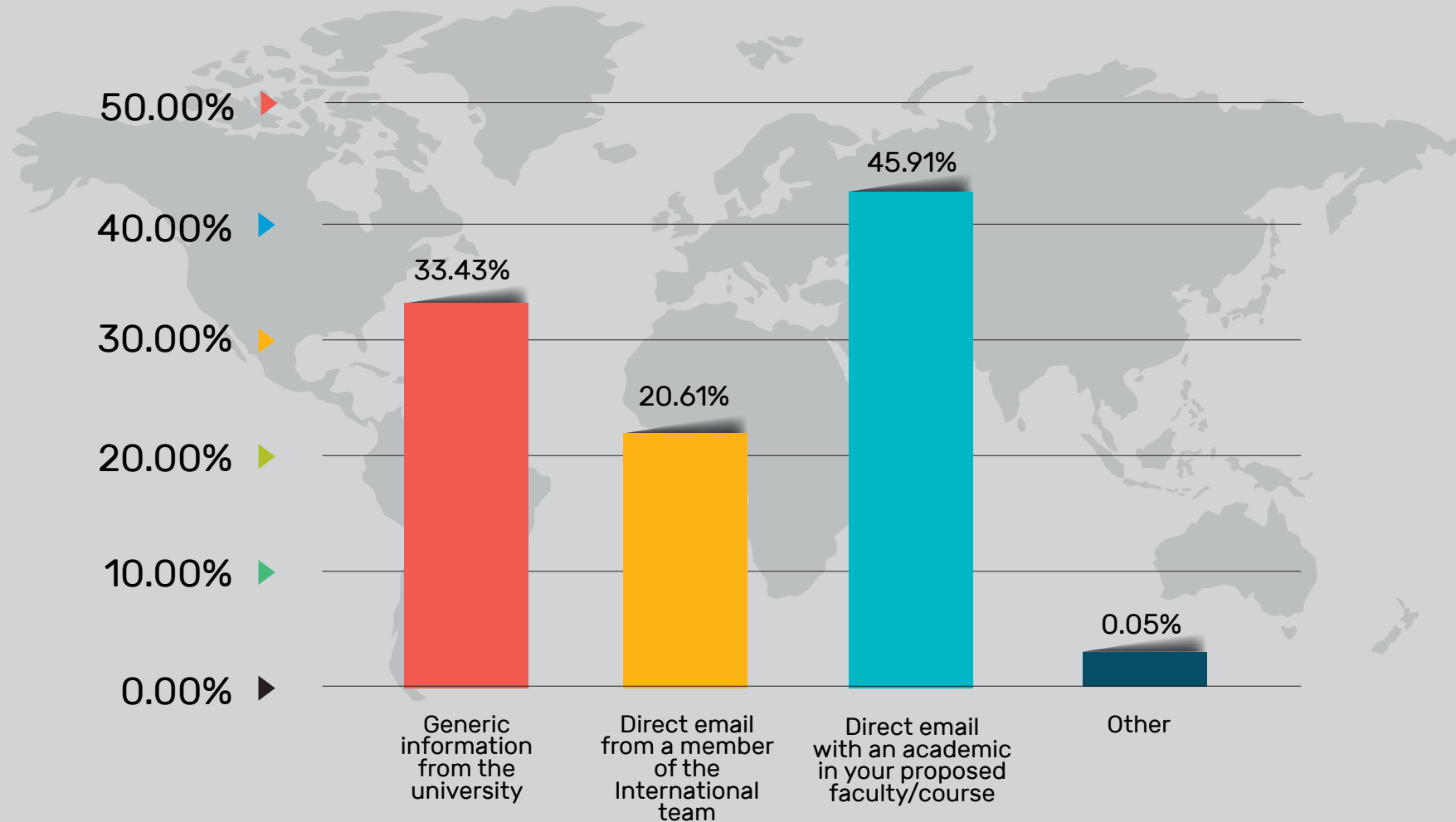


Majority of the respondents (18%) rank the official university website as their most preferred platform to engage their university of choice while seeking admission scholarships. WhatsApp, Skype, and Facebook Messenger rank second, third, and fourth.

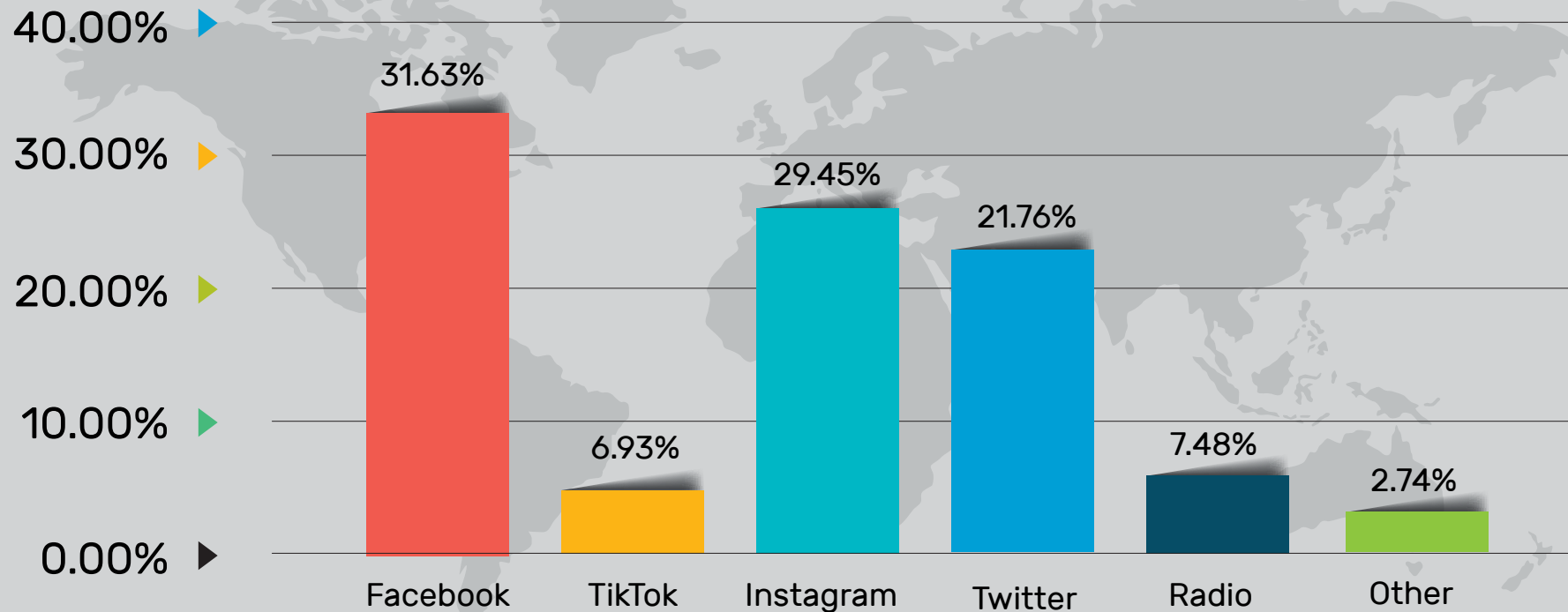
How would you prefer to communicate with universities in the United Kingdom?



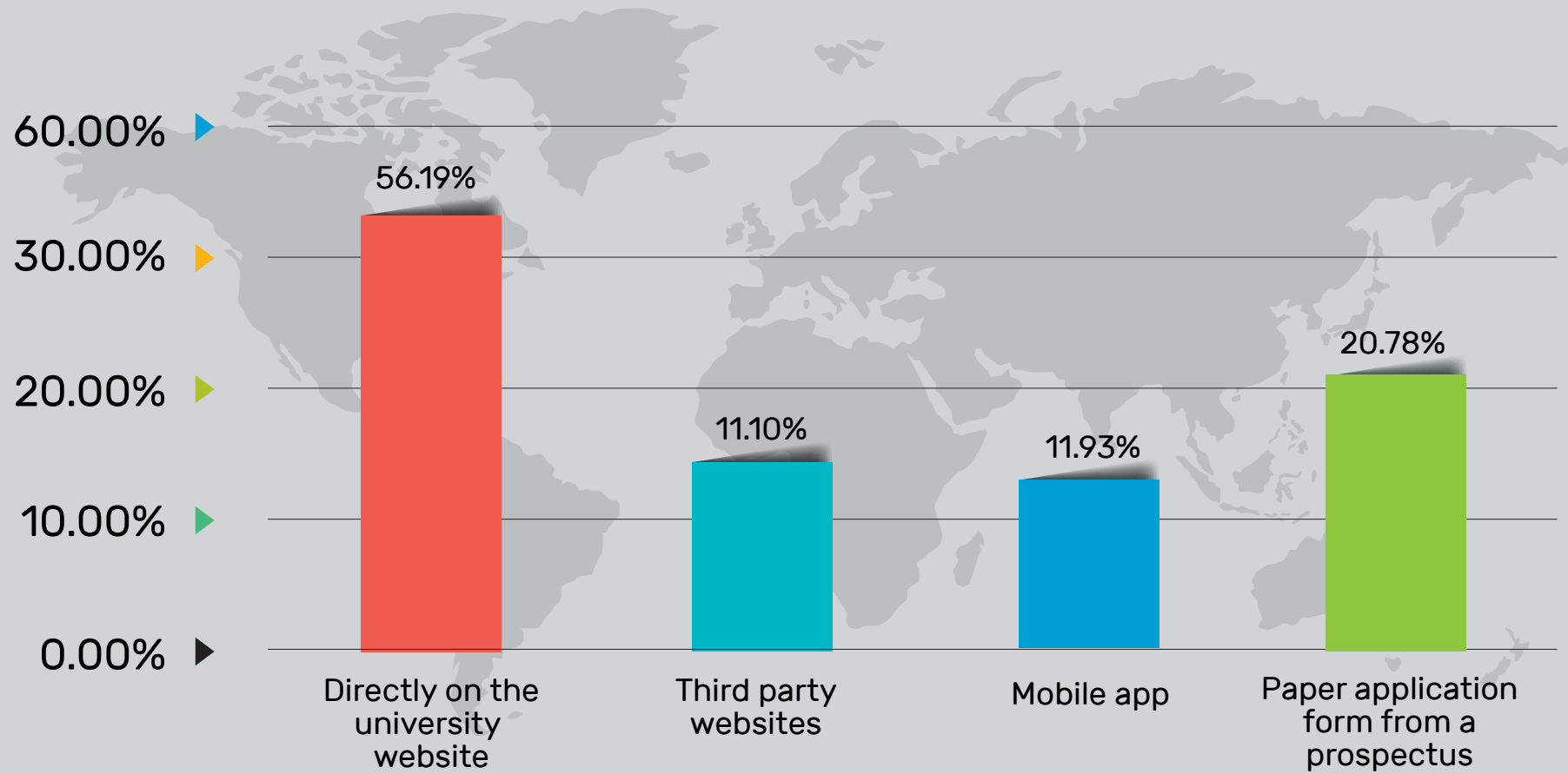
Which is your preferred form of email communication?



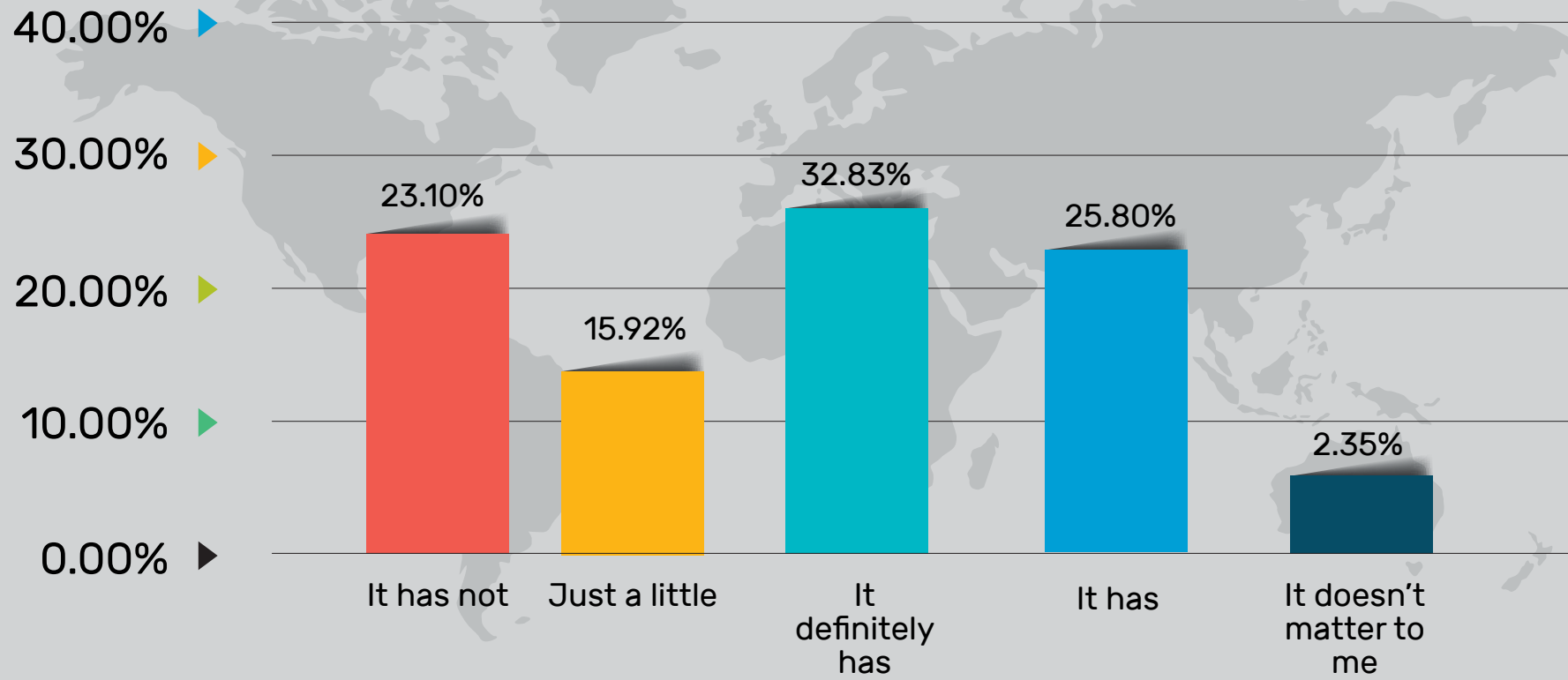
Which is your preferred platform for researching about universities?



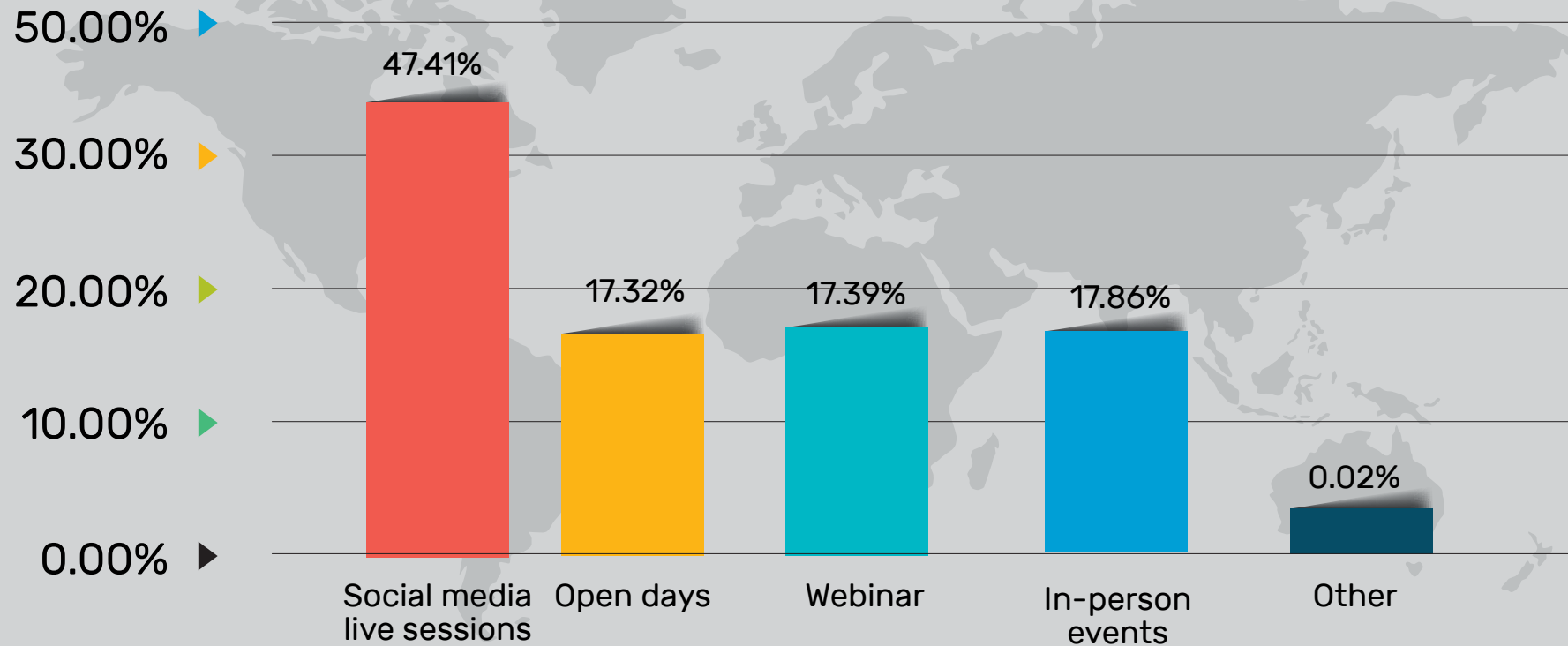
How would you prefer to apply?



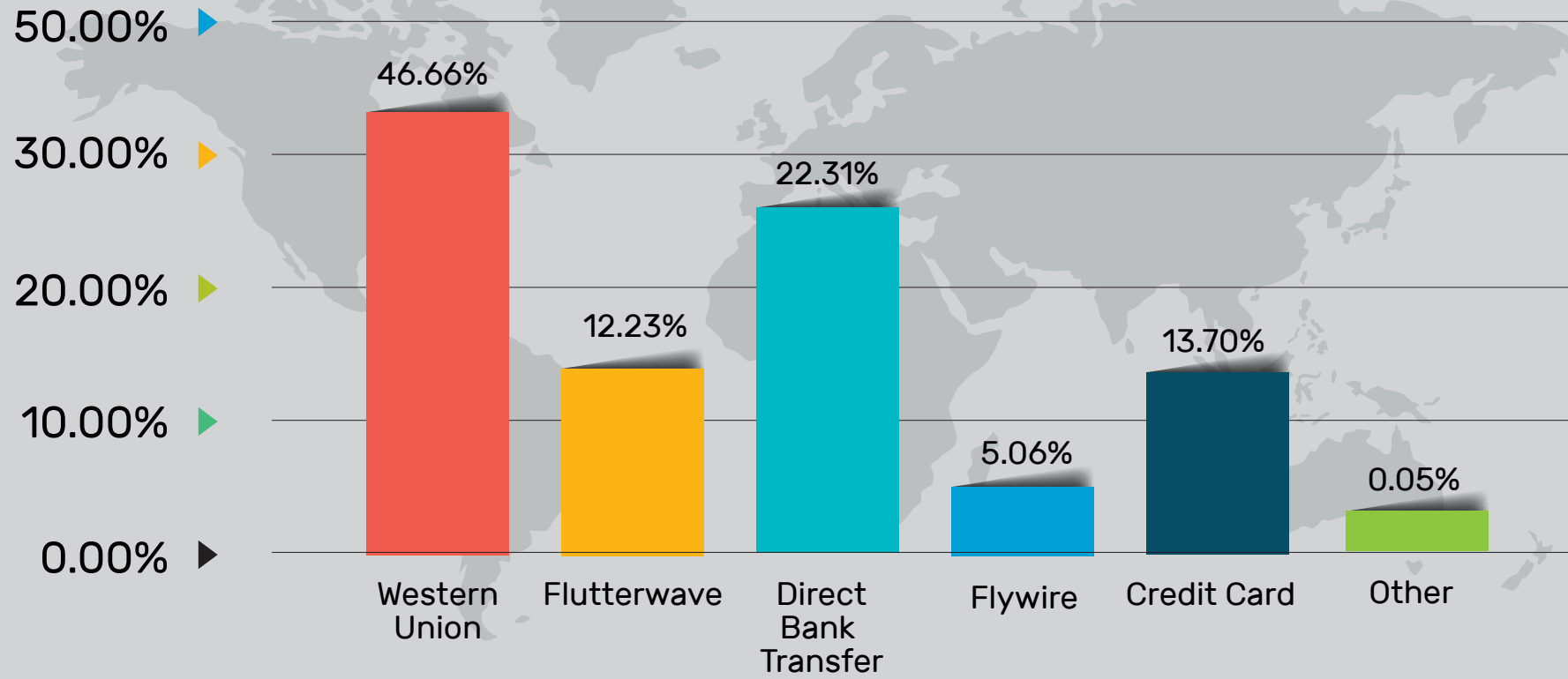
To what extent has the devaluation of the currency impacted your study plan?



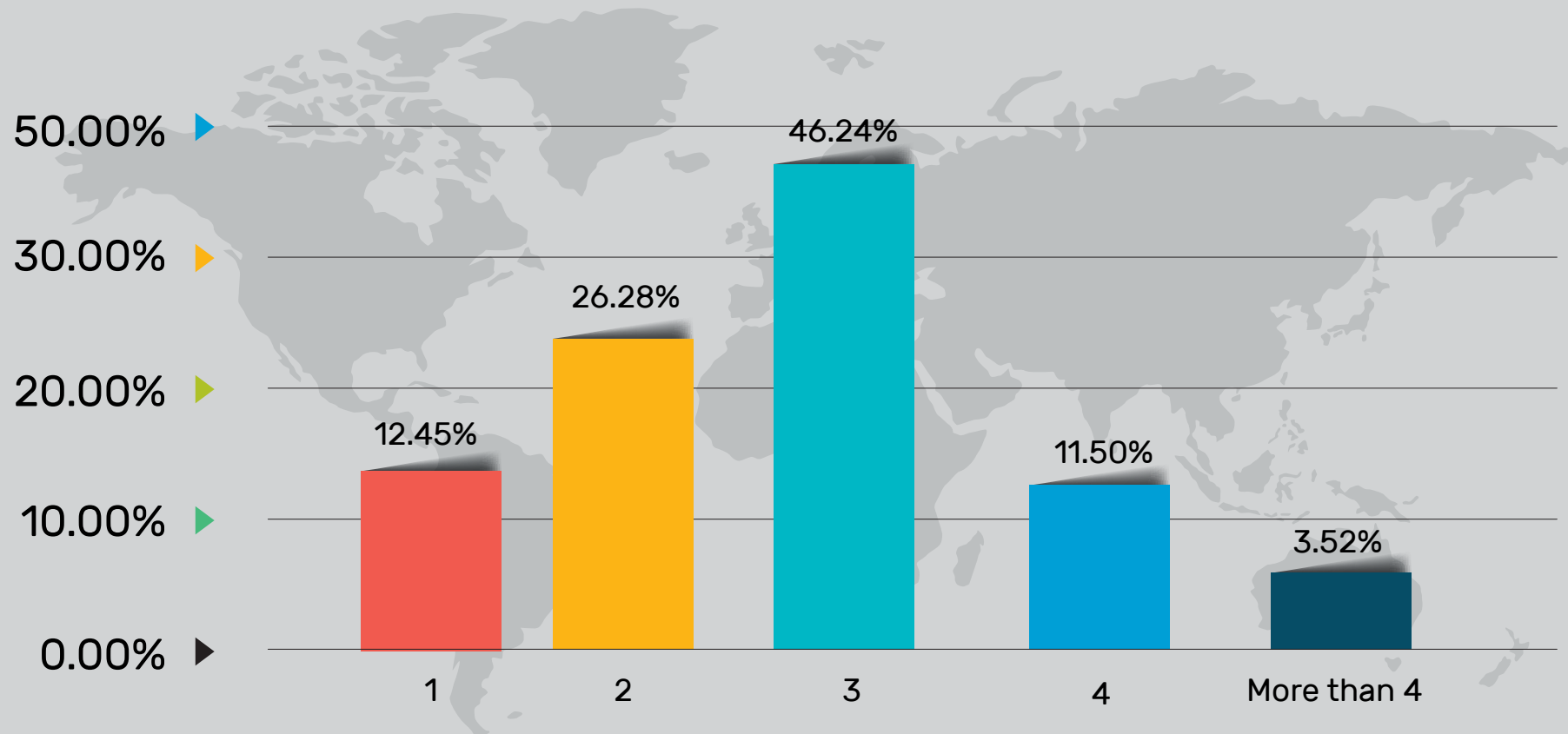
What sort of engagement and recruitment activities are you most likely to attend?



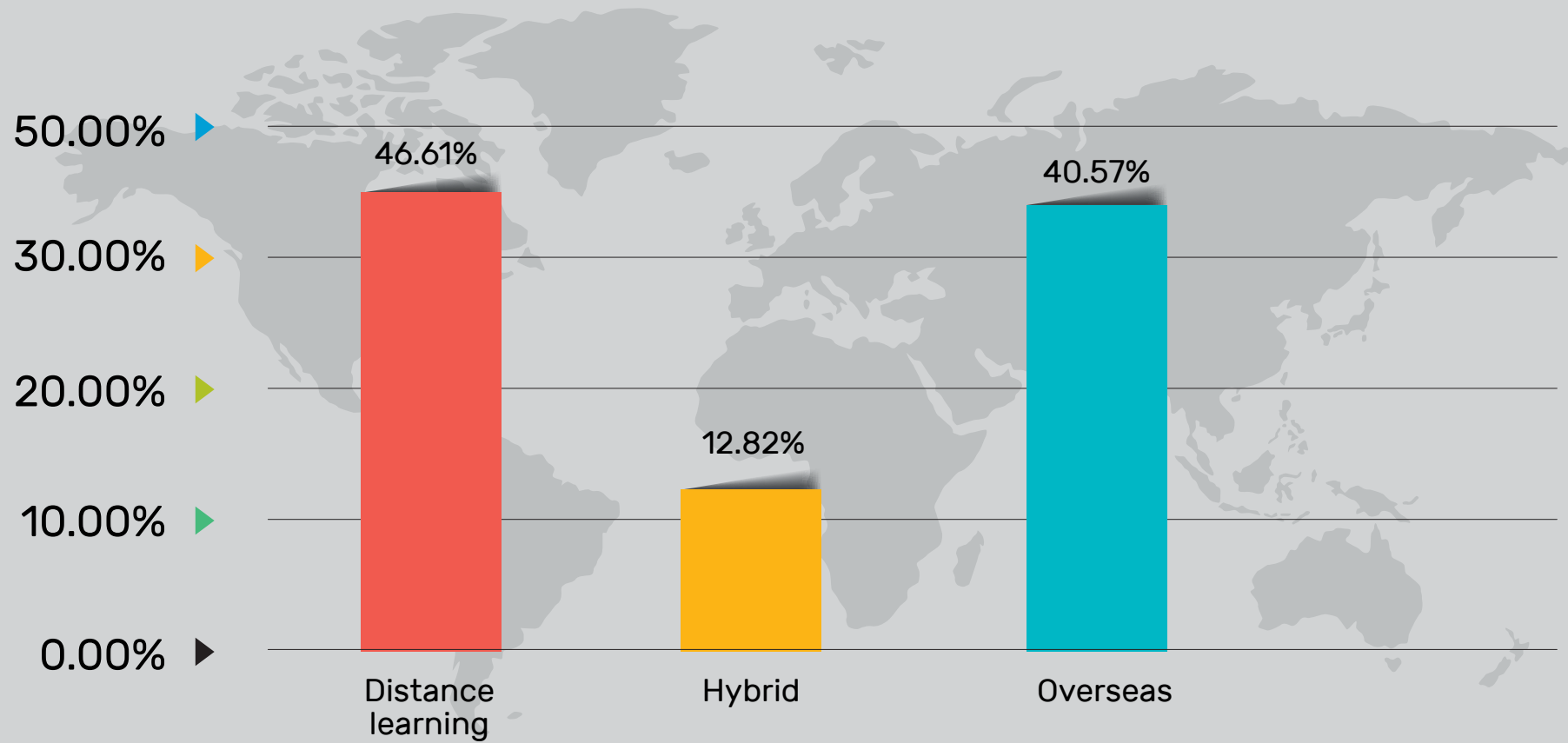
If you need to pay advance tuition deposit for your studies, what are you likely to use?



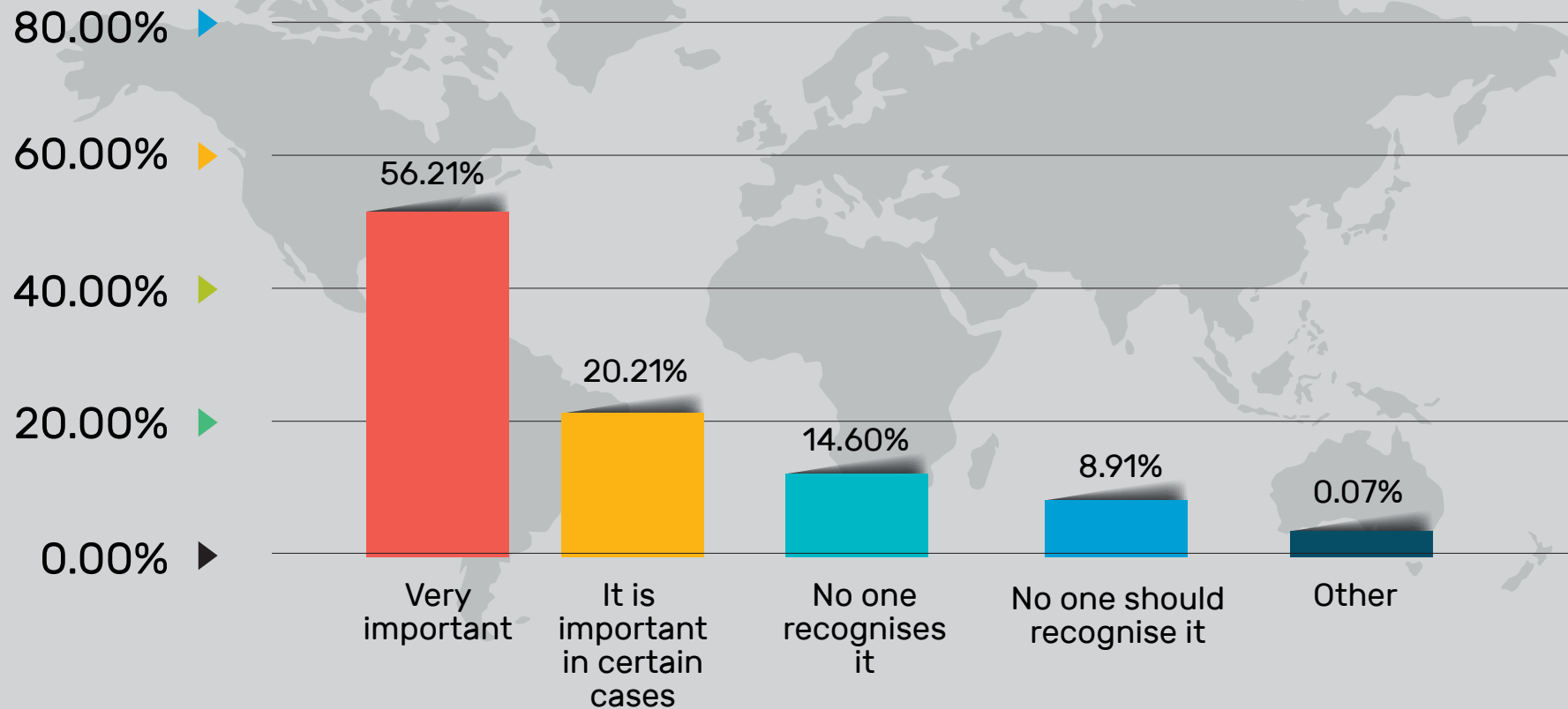
Ideally, how many universities would apply to study?



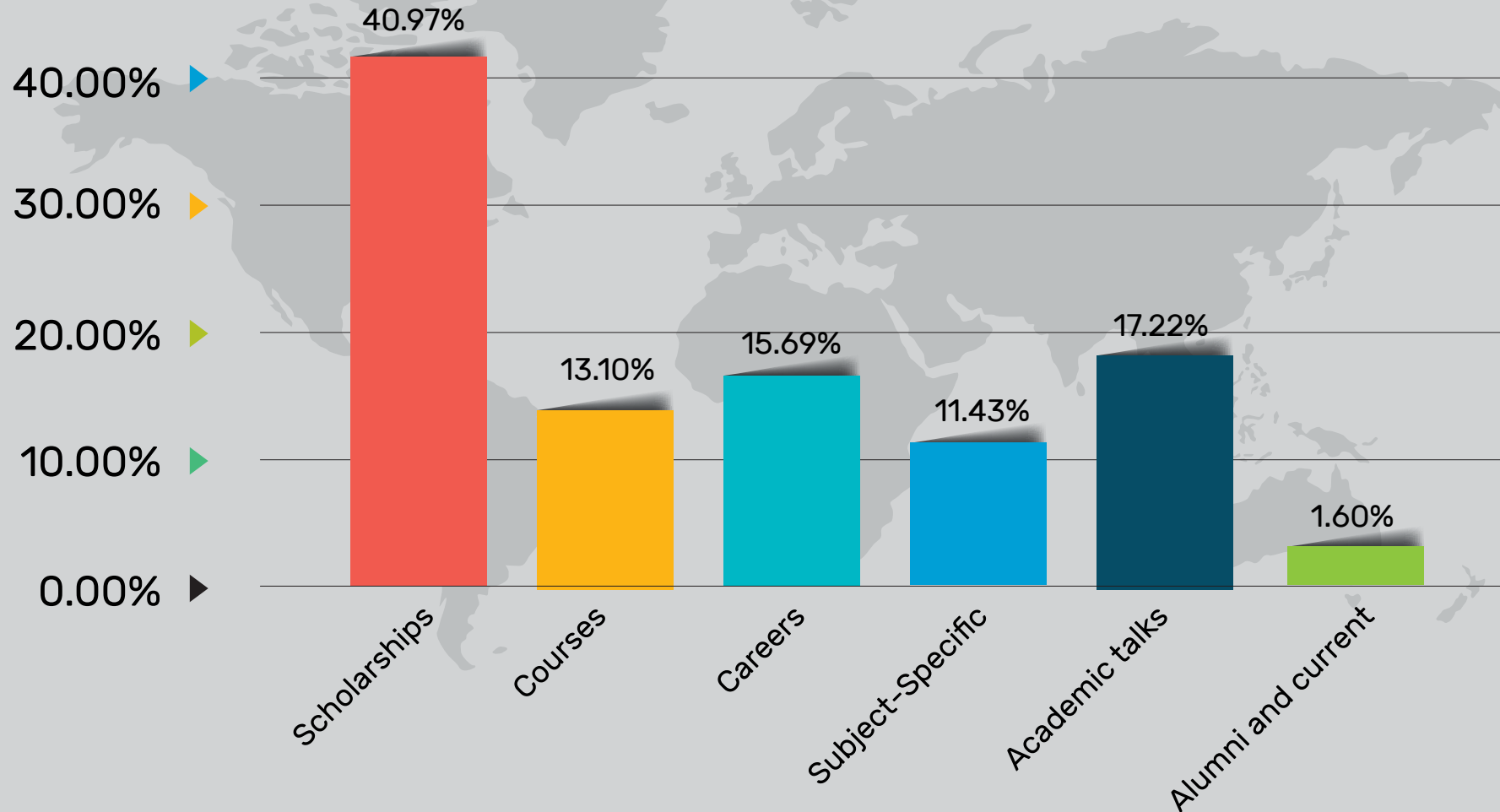
What would be your preferred mode of study post-pandemic?



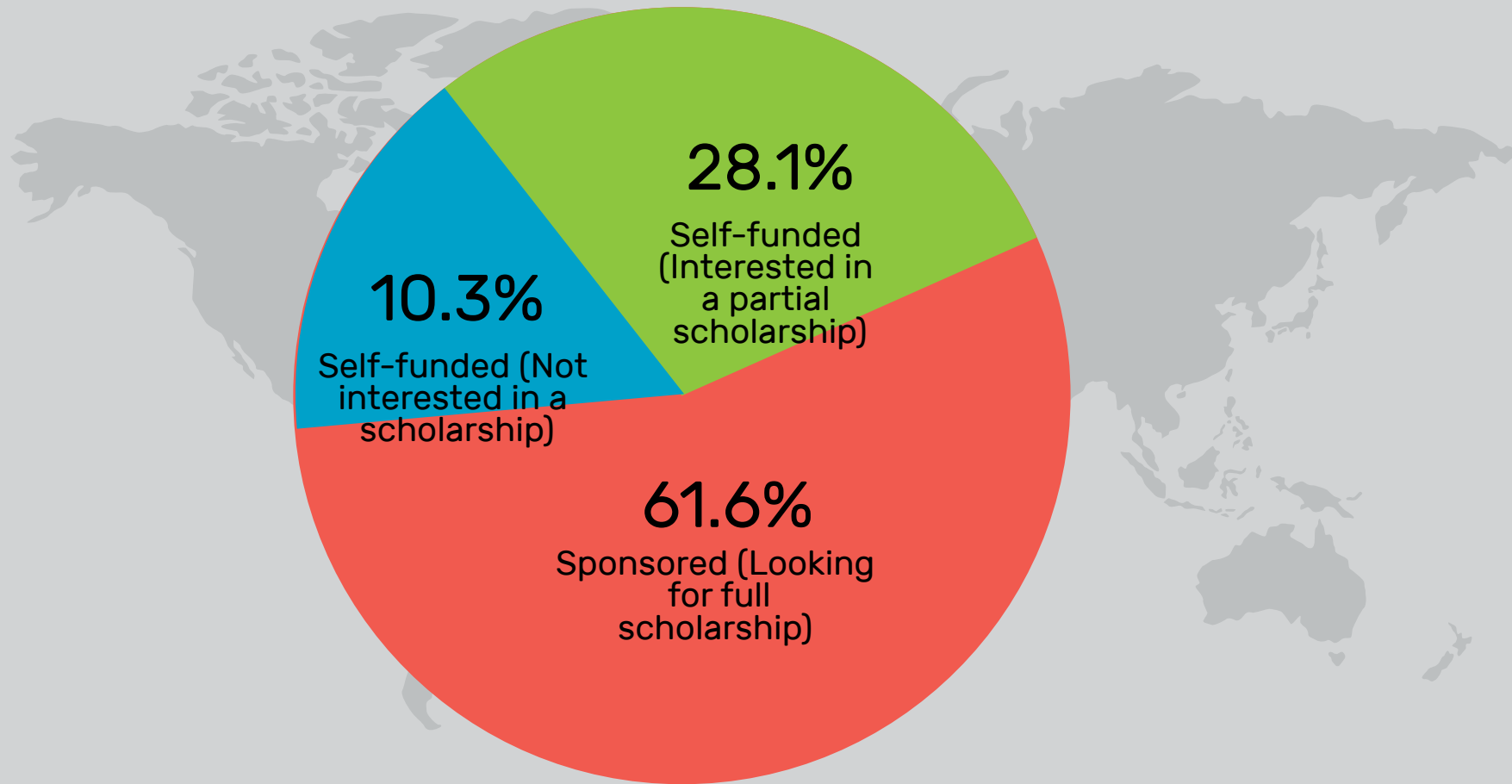
How important is the recognition of WAEC/NECO as proof of English?



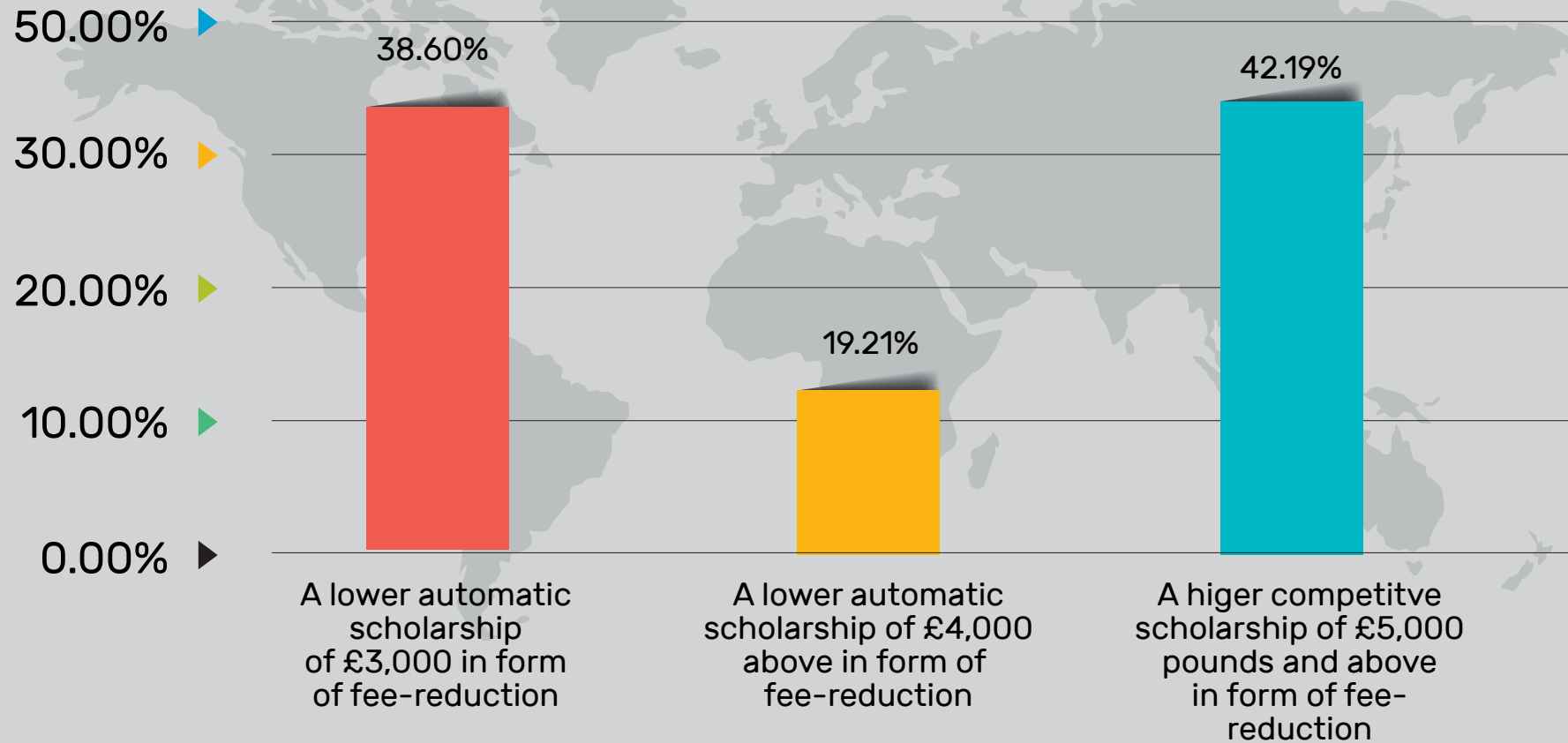
What theme of event are you most likely to attend when seeking admission?



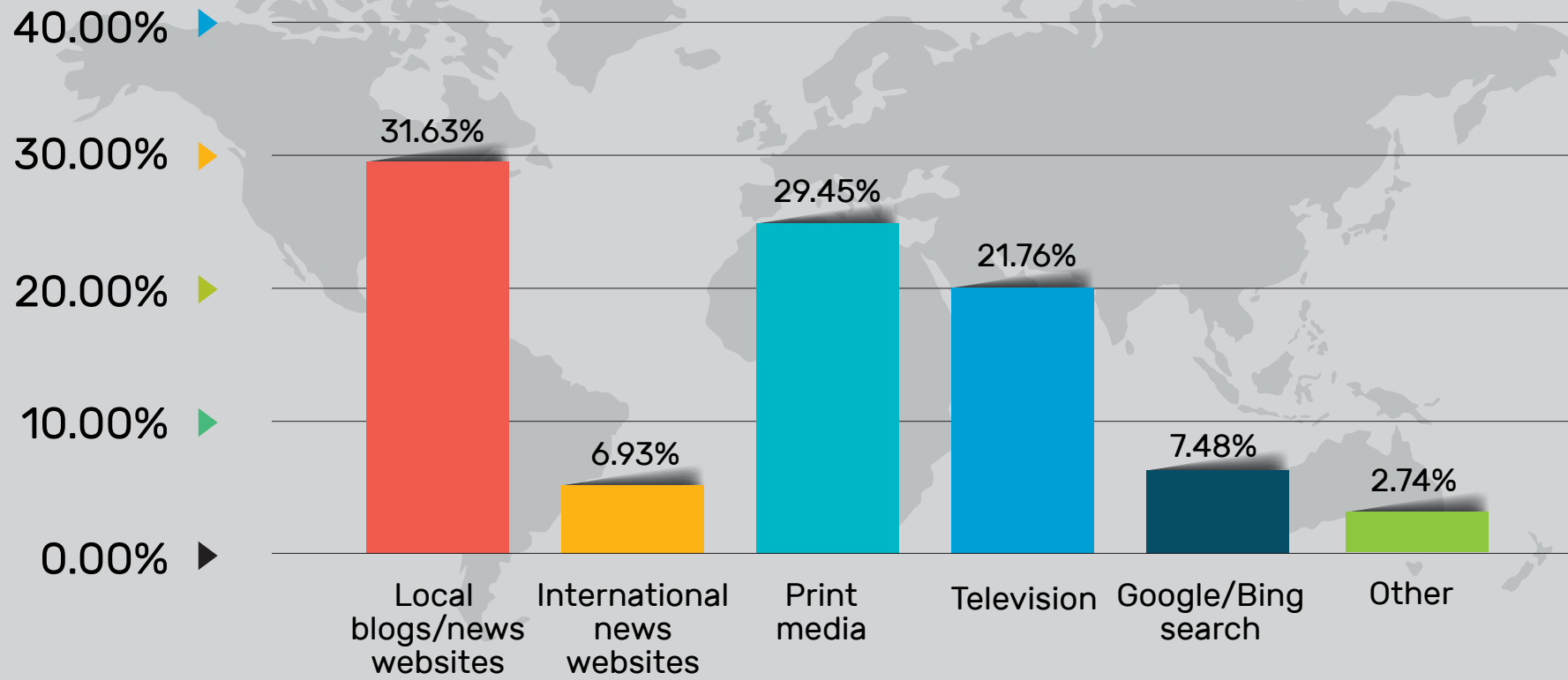
Funding your studies, how likely are you to be?



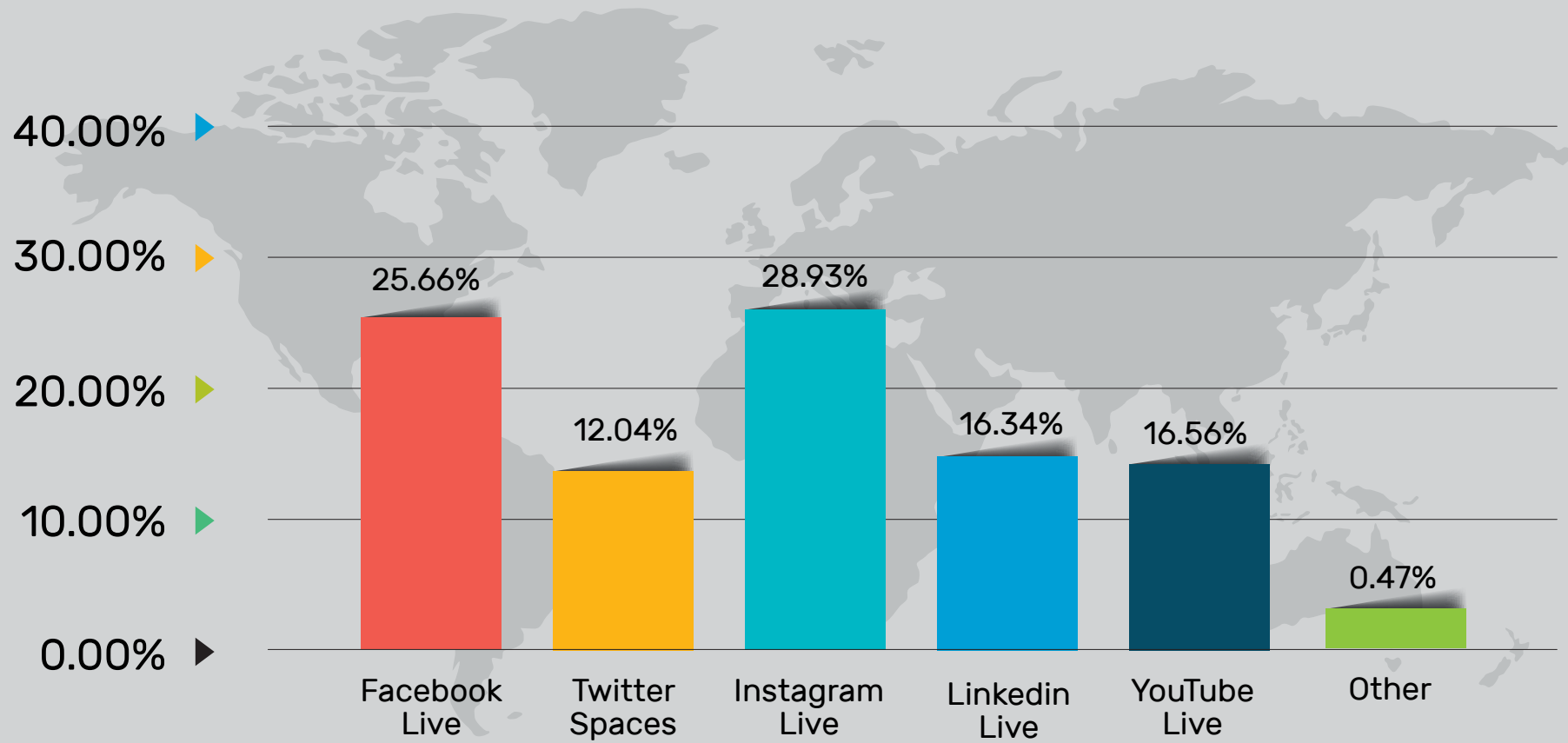
Interested in a partial scholarship, which is most likely to affect your decision-making?



Which platforms are you most likely to visit when researching universities?



Which platform are you most like to join a 'Live' session?



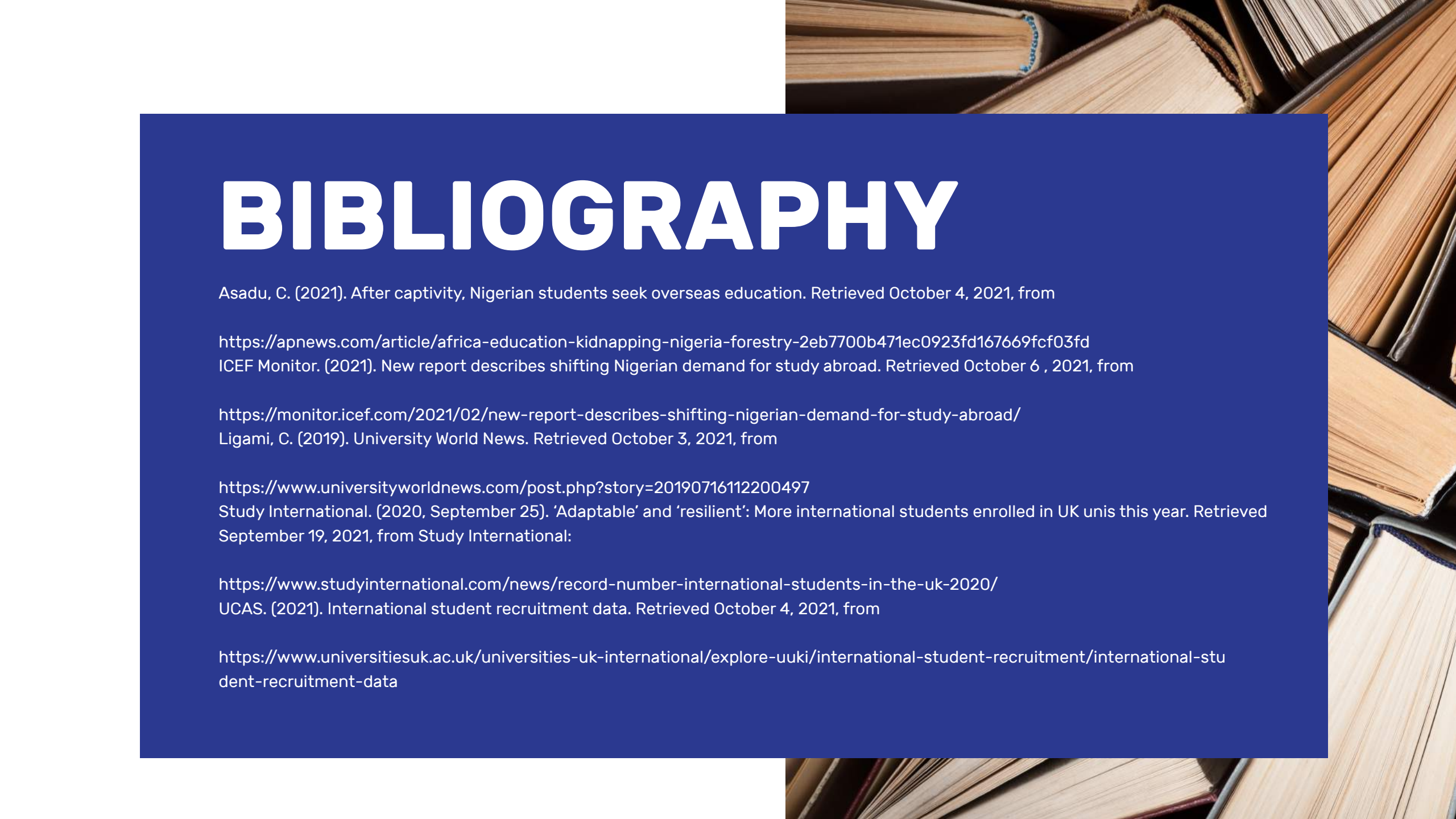
RECOMMENDATIONS

- Even with the increasing level of poverty across the country, Nigeria remains a strong market for foreign universities – which might also explain why most students arduously search for scholarship opportunities. UK universities that intend to lead the market in student intakes have to indicate their willingness to invest in their studies, either by providing full or partial scholarships or working with partners who can deliver such scholarships.
- UK universities should consider adding job prospects/ employability programs to support students looking to secure graduate level jobs after studies. Initiatives such as work placements, consultancy projects, internships, volunteering, bespoke career events for international students are some of the programs that universities should consider.



- Institutions need to invest in more personalised communication. An official event, followed by consistent communication through WhatsApp conversations or emails that provide updates and news about the university will prove to be much more effective than generic emails at the initial stage of engagement.
- A partnership with local universities or departments, where lecturers and career mentors also function as ambassadors is also recommended.
- The wide interest among the respondents to apply for loans in order to secure an education in a foreign university provides an opportunity not only for financial institutions, but also for the institutions specifically. Universities can take the lead by making the students aware of institutions where they can access such loans quickly and efficiently, thereby improving and accelerating the admission process.
- With the impact of COVID-19 clearly impacting income, inflation and the exchange rate – which has in turn affected cost of living and the value of the Naira, students will search for better opportunities – the choice of distance learning presents convenient and cheaper avenues for students to obtain their degrees in foreign universities, even as they seek to improve their lives and reposition themselves in the employment market.



The background of the slide features a close-up, slightly angled view of several thick, old books stacked on top of each other. The spines and edges of the pages are visible, showing a warm, aged brown color. The books are arranged in a way that creates a sense of depth and texture.

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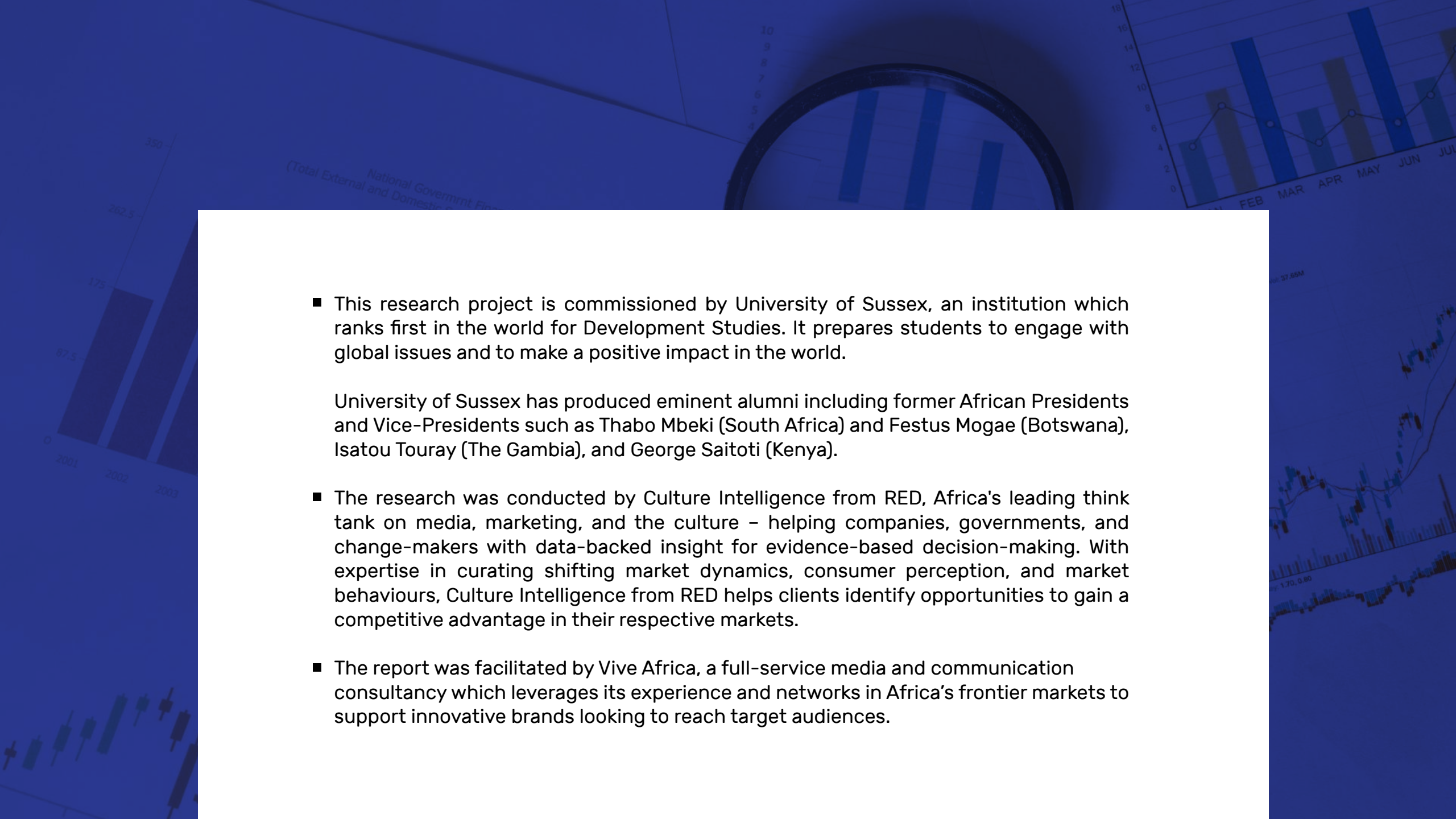
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- This research project is commissioned by University of Sussex, an institution which ranks first in the world for Development Studies. It prepares students to engage with global issues and to make a positive impact in the world.

University of Sussex has produced eminent alumni including former African Presidents and Vice-Presidents such as Thabo Mbeki (South Africa) and Festus Mogae (Botswana), Isatou Touray (The Gambia), and George Saitoti (Kenya).

- The research was conducted by Culture Intelligence from RED, Africa's leading think tank on media, marketing, and the culture – helping companies, governments, and change-makers with data-backed insight for evidence-based decision-making. With expertise in curating shifting market dynamics, consumer perception, and market behaviours, Culture Intelligence from RED helps clients identify opportunities to gain a competitive advantage in their respective markets.
- The report was facilitated by Vive Africa, a full-service media and communication consultancy which leverages its experience and networks in Africa's frontier markets to support innovative brands looking to reach target audiences.

