PREFACE

Last year we released our first ever Indian Secondary Schools Survey (ISSS) – a one-of-its-kind study that tracked preferences for international education in India. We gathered first-hand information from schools about what – and how intensively – their students (and parents) are exploring higher education options abroad.

The ISSS 2017 is the second edition of the annual survey that MM Advisory Services has undertaken to bring the latest trends and information about the Indian international education market. We believe this analysis will provide valuable insights for students and their parents to make the best, most informed choices for pursuing studies abroad.

Based on various parameters – school size, curriculum, geography, academic credentials - we shortlisted the Top 100+ schools across India, and reached out to school principals and counselors with our survey.

What they have had to share – just as the first edition of the survey did – shows continuing shifts in preferences in the market, suggesting a new narrative is unfolding in India today.

For one, our assumption about engineering as the top choice of students needs a rethink.

Two, choice of destination countries is a much more nuanced question than what is generally assumed.

And, as in other aspects, India is not a homogenous market. We continued our approach of analyzing responses for geographical correlations, and found some new patterns this year too.

In the subsequent pages, you will find survey responses and its analysis about these changes, and a lot more.

We are really grateful to all the principals and counselors who graciously accepted to be a part of this survey, and spent time sharing valuable data and insights. Without their cooperation, we would not have been able to undertake this comprehensive exercise.

We hope you find the report useful – and I keenly look forward to your feedback.

Happy reading!

Maria Mathai
Director
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INTRODUCTION

Popular perceptions often lag behind actual ground reality. We said this the last time, and we will do well to reiterate that here.

**Perception #1:** Engineering has always been the top choice for Indian students
Realty: Business and commerce edged engineering out as the top choice this year.

**Perception #2:** UK is not a preferred destination country now
Realty: UK numbers may be declining each year, but it still is the #2 choice, after US, for most Indian students.

**Perception #3:** Scholarships are a critical factor in deciding to go abroad.
Realty: Not for 35% of the respondents, who said their students will self-fund their education abroad.

These are a sample of findings that may not be as well aligned with popular perception as we would like them to be.

The biggest survey finding was the displacement of engineering as the top course choice. 40% of the respondents indicated business and commerce subjects as the top choice, while 28% opted for engineering. If this trend holds true the next year also, it is perhaps the single biggest shift in the Indian international education market.

The survey analysis extends to studying patterns among residential and non-residential schools, and also Indian curriculum versus international curriculum schools. The insights we gathered only goes to strengthen our view that the international education market in India is not homogenous.

The second edition of the Indian Schools Survey 2015 brings together many such nuanced insights about the changing international education market.

We reached out to principals and counselors in the Top 100+ schools across India. These schools were chosen for the survey based on size, reputation, academic excellence, and most importantly, the higher propensity among their students to consider international education options.

Our research team quizzed them on 20 parameters including likely number of students to apply, course and program preferences and top destination countries.

In our report, we have continued with High Intent group analysis we introduced last year. Schools where more than 50 students in Class 11th and 12th are likely to apply abroad were classified as the High Intent Group in our analysis. And we studied their preferences more deeply as leading indicators for the rest of the market.

This High Intent Group analysis helped us validate the patterns and findings we saw among the aggregate analysis, thus strengthening the confidence in the survey results.

We hope you find the ISSS 2017 a valuable reference point in your quest for seeking the best opportunities for international education.
Our Methodology

1. What’s said and talked about in secondary schools plays a huge role in what students and their parents think, and ultimately decide upon. This survey was conducted among influencers in schools – principals and counselors.

2. We identified an initial shortlist of 500+ schools on the basis of the following factors: academic reputation, history of sending students abroad and international partnerships and exchanges.

3. We then shortlisted the participant list – 101 schools – to ensure the survey sample adequately represented all the geographical regions of the country (north, south, east, west), Indian and international curriculum, and day schools and residential schools.

Sample distribution: Region-wise

Sample distribution: By School-type
4. We also focused on schools with higher student populations. More than 45% of schools surveyed had student strength more than 2000, and another 27% was accounted by schools with student strength of between 1000-2000 students.

5. Applying these carefully chosen filters, we shortlisted a list 101 schools to whom we then sent out the survey. Approximately 20% of the schools who participated in the survey did not want their names to be revealed as survey participants.

6. The survey included a list of 20 questions, asking for information on student numbers in Class 11th and Class 12th, likely number of applicants for international education, preference for countries (from a list of 8), preference for courses (from a list of 9), and more.

7. The survey was sent out on email, with an online link (Google Form) and a Document copy in email. Participants opened the online form, and submitted their responses online or completed the document and mailed it to us.

8. For our survey analysis, we analyzed for aggregate trends, based on results from all responses.

9. We also analyzed responses from schools where more than 50 students are likely to apply for international education. We called this Cohort Analysis among the High Intent group, and within this group, we studied for preferences in courses, countries, programs.

10. We also used this High Intent Group to study for variances based on geography, curriculum and day vs. residential schools.

11. Based on this analysis, the report has been divided into three sections: Aggregate Trends, Geographical Trends and High Intent Group Analysis.

Let’s go through the findings of the report.
AGGREGATE TRENDS

PART A
Business and commerce beats engineering as the primary course preference

This is perhaps the biggest change compared to our first Indian Secondary Schools Survey 2015. Engineering got overtaken by Business and Commerce as the top course preference for students seeking international education opportunities.

40% of the respondents indicated business and commerce subjects as the top choice. There could be several factors at play here, including macro trends such as the growing Indian economy with fast-growing, new business opportunities. That’s probably naturally feeding into the aspirations of students, seeking the most promising options for their future.

Keep in mind the survey was conducted among schools, so these preferences indicated choices for Bachelors’ courses for the most part.

The big question however is: where does this leave the most popular course now?
Engineering is by no means a write-off

Engineering was the first course choice for 28%, with Computer Science and IT coming third at 16%. That engineering got displaced from the top spot is a big shift in the Indian market, given the predominance the course has enjoyed always.

We looked at second-option and third-option preferences to better understand what’s really changing with engineering preferences. A higher percentage of respondents, 34%, indicated that engineering is second option among students. And another 32% voted for computer science and IT as the third-option.

That’s saying that these two courses are stronger second and third options, and more students are evaluating business courses as their first option.

Given these surprising shifts in course preferences, we decided to dig deeper into the courses related results to see if there are any other interesting new trends emerging.
Biotech, animation and hospitality are the emerging new choices

Ok, so what’s not changed from the previous year is that Biology, Biotech and Life Sciences are still among the emerging new options. 8%, or 1 in over 12 respondents, put this as their first option course.

Hospitality and tourism, and animation & graphics design are also two other strong alternative options we saw in the results this year. Again, the rising attractiveness of these two streams seems to tie in nicely with the growing service economy, with media and entertainment as one of the faster growing industries.

#2 Course Choices

Students should look for institutions with stronger credentials in these emerging disciplines to land up the best options for themselves.

Let’s now see how the preferences have changed (or not) in terms of countries students want to go to most.
UK is still a strong second choice

75% of the respondents ranked US as the first choice among countries, and that comes as no surprise whatsoever.

At some level, we still get surprised by the country that clearly ranks as the #2 option: United Kingdom. The actual number of students that are going to UK from India has been declining rapidly for the past 4 years, but the country scores high on the aspiration list of students.

We asked respondents to also ascribe the reasons for their country preference, and that provides the answer to this persistent trend regarding UK. More than 51% of respondents who chose UK as their second choice chose “Reputation of institutions in education & research” as the reason why they prefer the country.

And that makes very good sense. Foreign education is an expensive proposition for most Indian students, but the reason they seek education opportunities abroad is related to higher quality of education in those countries.

US is the overwhelming choice as #1 destination because of two factors: Overall reputation of the country, and the reputation of its educational and research institutions. (How the first factor influences student traffic to US in 2017 would be interesting to see, given the changing socio-cultural environment in the country now).
This is also just as surprising, and that’s what we found in the previous year’s survey also. Australia ends up with the second-highest volume of students from India, but in the aspirations list, it isn’t displacing any country soon.

In fact, this year, Australia has reported a record surge in student admissions from India (15%). But the preference scores in our survey also consistently tell a different story. Be it first choice, second choice or third choice, Australia figures as a distant third preference, with UK and Canada scoring higher.

Australia gets the numbers, but not quite a favorite still

Reputation of institutions seems to be determining country choices more than any other factor, and that applies to the country that is growing stronger as a preferred choice among Indians.
Work opportunities the biggest reason for Canada

Second-choice responses provides this insight (first-choice is overwhelming for US). While UK was first in this list (45%), Canada comes in second with 27% respondents voting for the country.

What’s interesting about it is this: Among these respondents who chose Canada, nearly 45% ascribed “Opportunities to work and stay on during and after education” as the reason why Canada is their favorite.

Canada Popularity Reasons

So for a large segment of applicants Canada seems to score higher not so much for the country or institutions’ reputation but as an attractive destination for work and emigration opportunities. Of course, those factors are important in Canada’s attractiveness.

But just as UK was a popular destination for these same reasons earlier, with the tightening visa norms in UK, the focus of a certain segment of Indian students has now shifted to Canada. We thought this was a significant insight about the country’s growing attraction in India.
Among survey respondents, almost 35% indicated they will be self-funding their education. Of course, international curriculum schools have always had more students who self-fund. That was seen among our respondents, where a higher, 43%, of international curriculum respondents said they aren’t necessarily relying on scholarship for their international education.

This fits in well with the emergence of the High Fliers segment in the Indian market in the past few years. These are students who will have marks between 70%-85%, and are looking for international education options, without necessarily relying on scholarships as a pre-requisite.

Until recently, the largest segment of international education students from India came from the High Achievers segment, who have relied on scholarships to be able to pursue education in international universities. They continue to be a large segment, but it’s the High Fliers segment with the financial wherewithal that is the fastest growing segment in the market.
North India gives up on UK, finally

We mean this in one specific sense. UK figured as a #1 choice with at least some respondents in our 2015 survey. Not so this time. US was the #1 choice for 67% of the schools in North India.

And as we pointed out in our Aggregate Analysis section, Canada is the replacement country that has emerged for UK. More than 33% ranked Canada as their first choice. There is no UK in the chart below.

North India #1 preference

If we compare the percentage preferences for pan-India, Canada was first choice for a lower, 18% of the respondents. North India’s skew can be understood better through one province, Punjab, where predominant percentage of applicants seek higher education opportunities as means to work and emigrate abroad.
As a second choice option, Australia and Canada are equally preferred as options in North India. Nearly 30% of respondents voted for Canada and Australia each.

But here’s the kicker: UK is the top second-choice country still in the North. Old affinities die hard – that’s probably why nearly 40% of the respondents still voted UK as their second option.

This is not inconsistent with our previous finding. UK has dropped out as the #1 choice in the North, but it is a strong #2 choice.

So Canada and Australia have their work cut out – build stronger perceptions among the UK loyalists.
Canada is making big inroads in Southern and Western India

More than 35% of respondents in this part of the country indicated Canada as their second-choice option, which is higher than the pan-India preference for Canada at 27%.

South + West India #2 preference

This is a significant trend in more than one ways. US is almost the unanimous first choice country in Southern and Western India. But 1 in 3 are now looking at Canada as second choice, which is a big change from the past.

This shift is underscored by the fact that a mere 5% indicated Australia as their second-choice country in this part of India. So if US drops its numbers from India next year, which is fairly likely, then Canada is most likely to make the maximum out of that opportunity.
We wanted to validate the above findings in another manner: are the preferences among the high-intent group roughly along similar lines? And do they offer some additional insights?

We defined the high-intent group as schools which are likely to send more than 50 students among their Class 11 and 12th populations for studying abroad. Respondents provided this information – their estimates about how many students from their school are likely to apply abroad this year.

We chose 50-75 students and 75+ students group as the high-intent group for our analysis. That segment comprised 40% of the total respondent schools. This proportion by itself is a significant – it shows that a fairly large percentage of schools have rising percentage of students seeking international education. Here’s what this group revealed as more granular insights.
Business and commerce is indeed top choice

What has been the biggest finding of the survey is indeed corroborated by the high-intent group. 53% of the respondents in this group indicated business and commerce as their #1 choice. Engineering came second, with 23% respondents indicating it is their top choice.

High Intent Group: Course Preference

So schools which are likely to have more than 50 students planning to go abroad are leading the trend about engineering falling from its top choice position in all these years. Whether it is just a blip, or a longer-term shift in trend, we will only know over the next few years. But what is indisputable is that students are exploring a wider set of options now.
Students increasing from Indian curriculum schools

International curriculum schools have been the big catchment areas for students looking international education opportunities. They still constitute the biggest contributing segment. But the cohort analysis did reveal a new trend.

Schools with Indian curriculum accounted for 32% of respondents that have more than 50 students who are likely to go abroad for college education.

High Intent Group: Curriculum

- International + Indian: 67%
- Indian only: 33%
Summary

1. There is evidently a shift in preference away from Engineering as a top choice towards Business and Commerce programs. If this trend indeed holds for the next year or so, it would probably be the biggest change in the international education market in India.

2. US continues to be the strong top choice among destination countries. Australia and Canada are second and third destination countries by numbers. But in terms of preferences, UK actually is the preferred #2 choice.

3. Canada is beginning to make strong inroads in western and southern India. These have traditionally been strong US markets but we theorize that the changed political climate in US is nudging up Canada as a preferred choice.

4. Self-funding is on the rise, as the High Flier segment continues to expand, growing faster than any other segment.

5. Our cohorts analysis – the group of schools that are likely to send 50+ students abroad for higher education – validates the key findings above. So the highest-intent segment is corroborating the trends we discern among our entire set of respondents.
KEY RECOMMENDATIONS FOR INDIA MARKET

1. Give higher priority to quality of institution rather than the choice of courses. This especially is relevant for students who aren’t quite sure about what course to pursue and are seeking engineering more as risk mitigation for employment options than anything else. An increasing number of students are no longer thinking in this fashion.

2. For those who are not keen on either business or engineering, look at biotech, animation and hospitality options. While biotech makes sense for the research-inclined students, animation and hospitality are great options for students who see themselves in the booming services economy – be it in India or abroad.

3. US will continue to be the top destination choice for most students still, and that’s driven by students going for their Masters abroad. For those seeking undergraduate options abroad, and those who can self-finance to a larger extent, Canada is a top second choice. Why? Because cost of education in Canada is at least 40% lower than the US – which makes a big difference if you are self-funded.

4. UK should still be your first or second choice if you have top academic credentials and you have the money to spend. UK is more expensive than the US also, but quality of education among the top universities is as good as in the US.

Write to us at advisory@mdotm.in if you are seeking counseling for your international education plans for Canada.
Appendix

LIST OF EDUCATORS

Abhinav Bharadwaz Gogoi
Ajay Tayade
Ambika Jyothi
Amrita Singh
Anamika Sethi
Anjali Kaushik Chadha
Anjali Razdan
Ankita Gadhi
Anubha Goyal
Arurima Sengupta
Asma Ansari
Avnita Bir
Benjamin Newton
Bindu Nair
Capt. Rohit Bajaj
Chetna Sabharwal
Christopher Hanvey
D P Guleria
Dheeraj Sharma
Dr Oli Tooher-Hancock
Dr. (Mrs.) Jyoti Bose
Dr. Deepak Raj Singh Bisht
Dr. Ernest Charles J. Samuel
Dr. Paramjit Kaur
Dr. Sonia Soni
Dr. Vandna Shahi
Dr. Tarulata
Ganesh Kempaiah
Geeta Jayanth
Gouri Basu
Harmeet Kaur Waraich
Jyoti Gupta
KY Sudha
Kavita C Das
Lamiya Shums
Madhuilika Sen
Manan Choksi
Meenu Arora
Monita Dash
Narendra Kumar Ojha
Nayantara Handa
Neena Virmani
Neeta Bali
Nirmala Reddy Chava
Nitin Jain
Ormana Thomas
Pragati Pandey
Priya Anand
Priya Gupta
Prof. John K Zachariah
Purna Nehru
Purnima Khanna
Rajiv Kumar Sharma
Rashmi Malik
Reena Dargan
Renu Chaturvedi
Rupkatha Sarkar
Sangeeta Singh
Sangeetha George
Sanjay Tiwari
Santanu Das
Saroo P Bhumra
Seema Sapru
Shalini Advani
Shilpa Gupta
Sunita Ghandy Mehta
Sr. Christo
Sr. Janet
Sreedevi Gundapaneni
Stanley Vinod Kumar
Sudarshana P Shukla
Sudha Goyal
Sunita Chowdhary
Suresh Thangarajan
Tamara Ann Coelho
Theophane D’Souza
Tulika Bindra
Ulika Advrekar
Vandana Murjani
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Vanita Sehgal
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