

**2014 Global Survey of Students**



Submitted to:

Matthew Yale, Laureate International Universities

Submitted by:

**Zogby Analytics**

Jonathan Zogby, CEO  
John Zogby, Sr. Analyst

June 2014

© 2014 Zogby Analytics

---

*“The Zogby Analytics Difference: we bring four decades of experience in measuring attitudinal behaviors among a wide array of sectors, target audiences and geographic locations all over the world in order to establish meaning and context for your research needs.”*

## Executive Analysis

### Introduction

It is an amazing period to be alive. Familiar institutions which have provided stability, security, and opportunity for a millennium are withering amidst rapid technological change. It is an era the world has not seen since the end of the Middle Ages and the rise of the Renaissance, the New World and the Enlightenment. New institutions, driven by the needs of the actual prosumers, are changing the landscape of politics, nongovernmental organizations, economies and finance, and education.

Numerous authors and scholars point to a deep crisis facing universities and their stakeholders, and countless summits have been held both in the United States and worldwide on how best to deal with unsustainable models of higher education, too much debt for both institutions and consumers; outdated courses and programs, and an overabundance of administration. Yet throughout this process, there has not been any consistent effort to understand from students how they believe that the higher education experience will change, and how they believe that it should change.

Laureate Education, Inc., the world’s largest higher education company with more than 850,000 students worldwide in 29 countries and online, has been a leader adopting innovations to try to address the challenges facing higher education. To make sure its educational model is and will remain relevant to the students who attend its network of more than 75 institutions worldwide, Laureate commissioned Zogby Analytics to survey students in 21 countries who presently attend post-secondary institutions who are part of the Laureate network.

Zogby Analytics was selected because it has a tradition of four decades of providing excellence in data collection and actionable direction to a wide variety of clients. The challenge associated with polling hundreds of thousands of students in as many as ten languages who hail from a wide variety of countries, institutions, and courses of study required the kind of strategies and implementation that define the Zogby brand.

Based on survey results, Laureate students have a positive vision for the university of the future – it is accessible, flexible, innovative, and job-focused.

**Accessible** A plurality (43%) of Laureate students believe that the university of the future will provide content online for free for most courses and more than half believe that students will utilize social media platforms to learn and in turn to teach other students (59%). In addition, nearly seven in ten (68%) believe that future universities will maintain free online libraries where students can access course materials and books and other reference tools.

**Flexible** A majority of students believe that most courses will be offered at all times of the day or night (52%) and a plurality believe that most courses will be offered without fixed schedules (44%) to accommodate students who work or just prefer learning at different times. Just over two in five (41%) students believe university students in the future will be able to earn specialized certificates throughout their academic career allowing them to take courses at their own pace instead of concentrating academic careers into 2- or 4-year spans culminating in a degree.

**Innovative** More than half (54%) expect that the university of the future will provide courses that are a collaboration between students with an emphasis on group projects. Additionally, 43% believe that students will be able to access personalized instruction or tutoring online perhaps rendering the traditional classroom experience less important.

**Job-Focused** The day of the Medieval Studies student may soon be over. Laureate students see a university of the future as one clearly focused on producing students who are prepared to excel in jobs that are needed by industry and society. Sixty-one percent believe that most courses offered by future universities will be designed by industry experts and 64% expect that courses will be offered in multiple languages to facilitate employability. Finally, more than seven in ten think that career-oriented skills (not just subject matter) will be taught in future universities.

## The University of the Future Student Survey

The objectives of the survey project were to:

- Determine opinions towards topics and issues relating to advanced higher education models; and
- Explore student attitudes about what their university will and should look like, fifteen years in the future.

The topics that the University of the Future Student Survey polled students on include:

- course design (including the increased role of industry experts and entrepreneurs);
- course schedules, method of delivery and pedagogic techniques (like the incorporation of social media platforms and other tech friendly models);

- types of professionals teaching courses;
- job preparation and placement, apprenticeships;
- the ability to take classes, degrees and certificates anytime and anywhere; and
- lifetime education and other innovative approaches to new educational models for the twenty first century.

The Laureate Education/Zogby Analytics poll of 20,876 students in 21 countries provides a treasure trove of data that points in the direction of the future shape and conduct of higher education – as the students actually envision it.

Zogby Analytics received a list of 378,653 student emails from Laureate institutions. Additionally, Zogby Analytics created portal pages for three of the schools that could not provide lists of emails. In total, 37 schools participated from 21 countries. Over a period of two weeks, invitations (in students' native languages) were sent to these emails that briefly explained what the survey was about and asked the student to participate. Each invitation contained a link that was equipped with a unique identifier so that only one survey per email could be completed. Clicking on the link embedded in the email would take the student to a survey in the student's native language (except India and South Africa where the email invitation and survey were offered in English). Once the survey was completed, the unique link expired and could no longer be used. Two weeks after the first email was sent out, reminder emails were sent to those students who had not responded during the initial email blast. The survey was live in the field for four weeks.

Following, we will highlight the results and meaning of this unprecedented survey on the future of higher education and will make observations based on the findings of the survey overall, among those students in developing countries, and among those who are 18-24 years of age.

## The Student of the Future (Survey Respondents)

The past twenty years is the story of an unprecedented growth in the middle class worldwide – particularly the emergence from poverty of a C Class (or lower middle class) in developing countries. The university of the future therefore must be able to respond to this increased demand by making higher education more accessible to the C Class. This is exactly the direction in which the Laureate Education network is heading – according to the data collected, one in three respondents of the Laureate Education network worldwide are the first ones in their family to experience post-secondary education. Even more noteworthy is that about four in five are either paying for their education themselves or through their family (90% in the developing countries surveyed). Education for these students is very much a personal investment, not an entitlement. In addition, because one in three of the student respondents are actually the first in their families to attend a post-secondary school there is a heightened awareness of the value of their schooling. Most of these respondents regardless of geography are representatives of the Millennial generation, thus they are tech-savvy, more global in their outlook, and have high expectations for the future. They are already, particularly in the developing countries, the beneficiaries of significant growth in higher education participation rates, and are hopeful that their education will lead to productive roles in growing economies

At the same time that such a huge number of students are attending colleges, there is a considerable level of angst over the value of their investment in a limited job market. As Princeton economist Alan Blinder has pointed out, students in the West have clearly entered a “gig economy” where young people (or older people facing layoffs) are not settling into careers but are moving from one short-term project to another. Blinder projects that today’s 20-somethings will have had four gigs by the age of thirty, ten by the age of forty. As a result, being “educated” is itself taking on a new meaning. Instead of the goal of obtaining a degree, a mindset needs to be created that emphasizes lifelong learning: refresher courses, certificate programs, online mentoring and coaching, learning new skills. These kinds of programs must be available in real time to meet students’ schedules, not the institutions’. Businesses and entrepreneurs will also need to be more in the drivers’ seats as they are (and will be) more and more the job creators and enablers. The results of the survey suggest that this is what they see in the near future.

## Student Responses

*In the analysis that follows, we refer to the expectation of **most** or **majority** instances as instances which refer to anywhere from 61%-100% of the time. This has been done to avoid any confusion with too many percentages.*

***Transformation by Technology.*** Students’ vision of the university of the future reflects a universally held belief in the transformative power of technology on higher education. Students are internet savvy and they want the best that the technologies can offer. Free materials,

MOOCS, courses that are offered to everyone and at convenient times, teachers who are available on-screen to tutor, mentor, and encourage. In each instance, at least one third and as much as one half, expect the university of the future (identified in the “next fifteen years”) to be dominated by tech-friendly models.

- More than two in five overall (43%) expect that a majority of “their courses will include free content on the internet to unlimited numbers of students”. This includes 45% of students in the 18-24 year age bracket (higher than any other age cohort) and 44% of those in developing countries. One in three feel that a majority of classes “will be taught online instead of in traditional classrooms”, a view shared by 43% of Chinese students and nearly a third of Latin American students (ranging from 26% in Brazil to 36% in Honduras). A huge 59% (including 60% of students 18-24 and 60% in developing countries) say that students “will utilize social media to learn and teach skills to other students”.
- This age cohort of students are not only the most technology savvy, they are not accustomed to paying for things that can (and perhaps should) be free. Better than two-thirds (68%) expect that there will be “free books and materials”. (Three in four – 74% -- say this will make things better for them personally).
- These students are not a “9 to 5” age cohort – they are actually “7 and 24”. 52% say that “a majority of classes will be provided all day and night”. They do not expect that a majority of courses will adhere to a fixed schedule throughout the year and that courses will be offered more frequently to accommodate more students” (44%).
- Overall, 46% of all students surveyed – including 47% of 18-24 year olds, 47% of those in developing countries, 58% of Chinese and 40% of Latin American students – say they will be better off because of these technology enhancements, while half as many say they will be worse off (21% of 18-24 year olds, 22% of those in developing countries, 31% of those in Latin America and only 5% of those in China).
- More than any other regional group, Asian students believe that, in the future, learning will be dominated by online content. They are also most likely to see that as a good thing. In particular, 55% of Asian students think that changes to how students will take classes in the future will benefit students, while only 8% think that they will make things worse. In contrast, this differential is only +9% in Latin America.

***Value Driven Education.*** Students want an education that is better suited for a meaningful return on investment, that is more practical and immediate in its return, and is very much a

joint venture between themselves and those in the best position to help them. This vision of the university of the future is consistent with the Laureate network of institutions and programs worldwide. They see a greater role for entrepreneurs, for company representatives designing courses and mentoring students -- and ultimately placing them into work

- The Laureate students are pretty clear on the value of their education. About seven in ten of the students polled (71%) understand that the majority of courses in the future will “teach students career-oriented skills”. Almost two in three (64%) also see that courses will have to be taught simultaneously in multiple languages to facilitate a mobile age cohort.
- More said that they expect a majority of courses to be designed by “industrial experts to prepare students for jobs with their companies” (60%) and by “entrepreneurs paid by participants” (45%) than by “scholars or government experts” (40%). Only 26% foresee that courses will be designed by “students by other students”. Two in five (44%) assume that most of the instructors in the future will be “part-time industry experts instead of full-time instructors”. This includes 44% of the 18-24 year olds and 44% of students in the developing countries. Overall, 43% say that most students in the future “will get personalized tutoring and instruction by professors online, not in person”.
- Students recognize that a “degree” is temporary and static and, instead, seem to recognize that in a gig economy that their education will involve more certification and recertification -- something they want their institutions to reflect. Instead of the current emphasis on “taking courses all at once in traditional degree programs”, 41% of those polled overall believe “students will earn specialized certificates throughout their careers”.
- Students in the future will be the beneficiaries of “career development, job opportunities, and mentoring ... provided directly by employers online and in real-time”, according to 58% of those polled. Seven in ten (69%) say that students will be better off by this direction, while only 6% say they will be worse off. However, students do not eschew the value of scholars or of government experts, they actually want to be sure that their skill development comes from those who have the latest and most up-to-date knowledge, as well as from those who are in the best position to represent the most relevant information and the most direct connections to direct employment. Scholars have their place as experienced tutors, and fellow students are needed to enhance team-building skills.

***Emphasis on Cooperation.*** Contrary to some well-worn stereotypes, Asian students are least likely to think that future businesses will put a premium on academic performance on individual courses (28% versus, for example, 48% for their counterparts in Latin America). At the same

time, Latin American students are less likely (48% vs 62% in Asia) to think that courses in the future will be dominated by collaborative courses and group projects nonetheless, this percentage is a plurality of responses.

- The students in the survey note that grades in the future will be based much more on a “combination of contribution to teams and academic performance” (64%) than simply on academic performance” (21%), as things now stand. This is even more pronounced among the youngest students polled – 66%. More than half (54%) say that most courses offered in the future will be “more collaborative between students with a greater emphasis on group projects”. Importantly, students expect that businesses will place a higher value on internships (55%), teamwork (53%), and certificates of mastered skills (48%) than the current model which emphasizes academic performance (39%).

***A Global Mindset.*** While answers to some questions demonstrated significant differences among regions, as well as among different countries, answers to many questions showed remarkable consistency, especially among developing countries.

- 72% of all students in developing countries believe that the potential changes to what kinds of courses will be taught in the future will be better for students, while only 5% think that they will be worse for students. This positive sentiment is almost equally shared among students from all 12 developing countries that participated in our survey.
- The same can be said for the potential changes to how students will receive materials and assistance. 69% of all students in developing countries believe that they will be beneficial to students, while only 6% think that they will have negative impact. These numbers are very similar for all 12 developing countries. This similarity in answers is especially remarkable when one takes into account that some countries have considerably different student makeup.
- When it comes to developing countries and how students will take classes in the future, the enthusiasm for changes is almost evenly spread across Asia (strongest in China). The skepticism in Latin America is very strong in Brazil and Mexico (+5% and +3% better/worse differential, respectively) but not so much in Panama (+19%) and Peru (+24%).



## Conclusion

Today, huge numbers of college students are enrolled worldwide, particularly in the developing countries, and they increasingly want and expect to be enabled by both technologies that are available and with which they have special facility. The results of this survey demand that Laureate Education continue its mission of meeting the aspirations of today's students for an education that is more direct, personal, practical, convenient, affordable, and more attuned to a lifetime of changes. While the results of the survey reveal differences in degrees of agreement on the vision of the future, these are really only nuances. Actually, a clear picture of the student vision of the university of the future emerges. These results provide both a mandate for Laureate to continue its mission of relevance, change, and excellence – and, at the same time, offer a blueprint of the shape of the change to come.