

**Perceptions of European Higher Education in Third Countries**

**Project 2004 – 3924 / 001 – 001 MUN-MUNA31**

# **FINAL REPORT**



# Table of contents

<b>EXECUTIVE SUMMARY</b>	<b>7</b>
<b>I INTRODUCTION</b>	<b>16</b>
<b>II METHODOLOGY OF THE STUDY</b>	<b>20</b>
<b>Set-up and approach</b>	<b>20</b>
General set-up of the study	20
Overall approach	21
Target groups of surveys and interviews	24
Methods employed	25
<b>Survey implementation and participation rates</b>	<b>27</b>
Paper based surveys	27
Global online survey	29
Survey of international students in the US	29
Interviews with parents and other stakeholders	30
<b>Status of surveys and target groups</b>	<b>31</b>
The major source of information: students from the target countries	31
Widening the perspective: experts, triangulation and comparison Groups	31
Representativeness and Validity of Results	32
<b>Description of the Samples</b>	<b>34</b>
Students from the six target countries	34
Students from other countries and regions	40
International students in the US	46
Education staff from the six target countries	48

<b>III</b>	<b>BACKGROUND INFORMATION</b>	<b>51</b>
<b>1</b>	<b>Foreign Students in Europe: the most favourite destination?</b>	<b>51</b>
1.1.	The global picture	52
1.2.	Foreign students in Europe	54
1.3.	Conclusion	56
<b>2</b>	<b>Branding and marketing activities: different ways to attract the brightest or the most</b>	<b>57</b>
2.1.	National attractiveness agendas and their executors	57
2.2.	Marketing activities: from half-hearted attempts to aggressive recruitment	71
2.3.	One step further: joint European initiatives	74
2.4.	National brands: footprints in the sea of global education	75
2.5.	Outlook	82
<b>IV</b>	<b>SURVEY RESULTS</b>	<b>85</b>
<b>1</b>	<b>Perceptions of Europe and its higher education</b>	<b>85</b>
1.1	The European Union: A coherent entity or a set of individual countries?	85
1.2	Which Europe is being perceived, i.e. which member states are international students and staff members familiar with?	91
1.3	Strengths and weaknesses of Europe and its higher education: Europe's standing in comparison with its competitors	96
1.4	European "myths": real strengths and weaknesses in the perception of international students?	153
1.5	What are Europe's attributes?	158
1.6	What type of measures could enhance Europe's attractiveness as a study destination?	163
<b>2</b>	<b>The destination choice</b>	<b>168</b>
2.1	How is studying abroad valued by different actors in the target countries?	168
2.2	Factors determining international students' destination choice	169
2.3	Ideal destination and alternative destination	195
2.4	Choice of destination and field of study	198
<b>3</b>	<b>Information on Europe and its study opportunities</b>	<b>199</b>
3.1	Information sources and flows	199
3.2	What type of information on study opportunities in Europe is needed?	211

<b>V</b>	<b>Interpretation of Results</b>	<b>214</b>
<b>1</b>	<b>How they see us</b>	<b>215</b>
1.1.	Does “Europe” exist in the perception of international students?	217
1.2.	Flexing muscles or struggling to survive? Europe’s standing in the global education market	217
1.3.	European myths and the reality	220
1.4.	Europe’s attributes	222
1.5.	Will Bologna and Erasmus Mundus help to enhance Europe’s attractiveness?	223
<b>2</b>	<b>How they choose</b>	<b>224</b>
2.1.	Factors driving international students’ destination choice...	224
2.2.	...and the reality	227
<b>3</b>	<b>How they know</b>	<b>229</b>
3.1.	Main information channels	229
3.2.	European what...? The big information gap	230
<b>VI</b>	<b>Recommendations for a European brand</b>	<b>231</b>
<b>1</b>	<b>The brand</b>	<b>231</b>
1.1.	Will it be possible to devise one brand for the whole of Europe?	232
1.2.	What are Europe’s “unique selling points”?	233
1.3.	Can one and the same brand and strategy be used worldwide and for all target groups?	243
<b>2</b>	<b>The sender</b>	<b>244</b>
<b>3</b>	<b>The context</b>	<b>246</b>



## **Executive Summary**

The present study investigates the perception of European higher education in third (non-European) countries. It sets out the results of a project conducted between November 2004 and December 2005 by the Academic Cooperation Association (ACA) in response to a call for tender issued by the European Commission's Directorate for Education and Culture. Though financed by the Commission, the study reflects the views of the authors, which do not necessarily correspond to the official position of the Commission on the matters discussed.

### ***Introduction (Chapter I)***

The ultimate aim of the project was to develop recommendations for a European brand on the basis of the "perceptions of European higher education" of a wide range of stakeholders outside of Europe, the core group of which were present and future students in higher education. In other words, the study pursued two overriding aims.

- First, it sought to acquire an in-depth understanding of the current perception of European higher education "in third countries" (i.e. outside of the EU), by identifying the expectations of foreign students, the strengths and weaknesses they perceive in European higher education, as well as by finding out about Europe's relative standing in comparison with its competitors. This also entailed an investigation into the degree and the sources of information on European higher education which potential international students have.
- Second, it was intended to advise and make recommendations to the European Commission regarding a European higher education brand, on the key features which such a brand should build on (message), and also on certain aspects of its delivery (sender, instruments and mechanisms).

This report presents the results of the work ACA carried out over the period of one year, with regard to the above issues.

### ***Methodology (Chapter II)***

Franziska Muche of the Academic Cooperation Association acted as the overall project coordinator, supported by Bernd Wächter. Friedhelm Maiworm, the Director of the Gesellschaft für Empirische Studien (GES, in Kassel, Germany) was in charge of all matters pertaining to statistical analysis. Four member organisations of ACA, the British Council, EduFrance, the German Academic Exchange Service (DAAD) and the Netherlands Organization for International Cooperation in Higher Education (NUFFIC) conducted 'fieldwork' by acting as "country coordinators" for information gathering activities in Brazil, China, India, Mexico, Russia and Thailand. The Institute of International Education (IIE) in New York City, an associate member of ACA, played a similar role for activities in the United States of America.

In terms of the methods employed, the study is based on large-scale surveys, as well as on interviews (with individuals and groups) and on desk research. The main instruments used in the course of the present study were standardised, closed questionnaires. Three questionnaires were used, focused on different target groups:

- a questionnaire for students intending to study abroad (main instrument; distributed in hard copy to selected students in six “target countries” and available online to students worldwide);
- a questionnaire for international students enrolled at US higher education institutions (distributed by e-mail);
- a questionnaire for lecturers and international relations officers at higher education institutions and for school teachers (distributed in hard copy).

Next to questionnaires, interviews were used to collect information. In an early project phase, group interviews were conducted as part of explorative workshops in the six target countries, which informed the design of the questionnaires. Individual interviews were conducted with parents, higher education experts and university rectors. For the individual interviews, a set of guidelines were developed.

The study focused on six target countries: China, India, Mexico, Brazil, Russia, and Thailand. For comparative purposes and as a “control group”, it also included international students in the United States of America in the in-depth investigation. For a similar reason, the online questionnaire was made available to students worldwide.

Participation in the surveys was remarkable:

- Altogether, 11471 students from the target countries filled in the paper questionnaires distributed at schools and higher education institutions in the six target countries;
- 1235 staff members filled in the paper questionnaires distributed at the same institutions;
- Almost 9000 students filled in the online questionnaire. Among the 8939 valid online questionnaires, a slight majority came from the six target countries, the rest was spread over different countries around the world;
- Over 400 international students in the United States participated in the US survey.



### ***Background information: foreign students and existing marketing activities (Chapter III)***

The knowledge of the way European higher education is perceived in major target countries is a necessary condition for the creation of a European brand, but it is obviously not the only one. In order to put the findings and recommendations of the surveys into perspective, the study provides information on

- the current number of foreign students in Europe and Europe's share in comparison with that of its major competitors: the US and Australia;
- ongoing international higher education marketing by European countries, and successful brands and campaigns from the major English-speaking destinations.

#### *Foreign students in Europe: the most favourite destination?*

With regard to foreign students in Europe, there are three major findings:

First, while Europe's share of non-European foreign students is not bad, the United States are still leading as a destination for foreign students. This is also, and much more so, the case with Australia.

Second, Europe's relative disadvantage with regard to its competitors is predominantly with Asian students. While growth rates in recent years have been impressive, the participation of Asian students is still Europe's weakness.

Third, foreign students in Europe are far from evenly spread. The United Kingdom, Germany and France host the lion share of foreign students in Europe. As a consequence, other countries, particularly the new member states and Southern Europe, are underserved.

#### *Existing branding and marketing activities*

Even if a European brand will be a novelty, it needs to be developed in the light of already ongoing marketing efforts of individual European countries, to which European-level activities must be complementary. Different types of actors can be implementing marketing strategies: organisations mainly focused on marketing higher education opportunities; organisations with a wide range of activities linked to the internationalisation in education and training or to foreign cultural policy; and, less frequently, specialised units within education ministries.

With the exception of a worldwide network of educational advisors providing information on US study opportunities, the United States has so far no coordinated international education policy and no national action to attract and recruit foreign students. Australia has a clear national policy for the internationalisation of education and training, and is surely the country which is investing the most heavily in international marketing. Within Europe, the most active countries are the United Kingdom, France, Germany, the Netherlands and increasingly Ireland, although the Nordic countries are quickly catching up. A consortium composed of DAAD, Nuffic, EduFrance

and recently also British Council has joined forces for the organisation of European education fairs.

Marketing activities range from presenting a study destination at international fairs and conferences to active counselling and recruitment via a dense network of local offices spread all over the globe. The watershed between the big shots and the newcomers is usually the existence of a network of local offices worldwide and the individual organisation of student fairs. Most of the bigger providers have carried out intensive market research and asked a specialised company to design a brand that clearly identifies the countries' unique selling points (USPs). Countries with a limited engagement in marketing activities focus more on the supply of information, linked to some promotional actions. They frequently do implicit branding by advertising a range of reasons why students should study in this country.

National marketing and branding experiences reveal the conditions that have to be met if a national education brand shall be successful in the long term: first, generic marketing requires recurrent funding, second, a brand needs to be embraced by the sector and taken care of and third, barriers on the supply side (visa difficulties, housing problems, etc.) need to be addressed.

### ***The main results of the study (Chapters IV and V)***

In order to investigate the “perception of European higher education in third countries”, this study addressed three main topics:

- the characteristics attributed to European higher education and the perception of Europe's relative position with regard to major competitors over international students, pre-dominantly the United States of America and Australia.
- the way the decisions are taken to study abroad (instead of in their own country) and the motivations at play in the formation of such decisions,
- the sources of information used in making these decisions.

While Chapter IV presents - in considerable detail - the results of the various large-scale surveys and, to a lesser degree, the interviews on which this study is based, Chapter V is an integrated evaluation and interpretation of these many findings, which precedes the actual recommendations.

### ***The perception of Europe and its higher education***

Is there anything such as “Europe” on the mental map of non-European students? Overall, Europe is not perceived as a union as regards higher education. There is a perception of Europe as an “entity” in general terms and as an economic union. However, when it comes to cultural aspects and higher education, most students rather saw Europe as a range of very different countries. An important share of Chinese and Indian respondents and of staff members perceived large differences between the quality of education provided in individual EU member

states. Beyond this, respondents saw the most substantial discrepancies regarding cost-related issues (both tuition fees and living costs) and student support.

Furthermore, respondents perceived only “a reduced Europe”: almost half of them only had considerable knowledge on the UK, Germany and France. Knowledge about the UK and the US was above any other destination. The number of students who were well informed about other countries was negligible. Especially knowledge of higher education opportunities in the new member states was extremely limited. The interviews confirm that there is literally no interest in cooperating with or going to the new member states or less “prominent” countries. The Nordic countries and the Netherlands may be an exception to this rule.

What were the main characteristics of Europe and its higher education, and what was Europe’s standing in comparison with its competitors? Generally, students were convinced of the qualities of their chosen “destination region” and mostly ranked it above other destinations. Due to the focus and theme of the survey, there was a large share of students aiming to study in a European country. These students had an overall positive perception of Europe and positioned it high in comparison to its competitor countries. An analogous pattern applied to respondents aiming to study in the US and, to a lesser extent, to those aiming to go to Australia.

Wherever responses differ from this “own-destination-wins” effect, a perception can be considered as truly solid:

- Regardless of the students’ destination, all students ranked the US first for issues linked to innovation, competition and dynamism (most dynamic universities and most competitive society) and Europe for the most traditional universities.
- Europe was clearly perceived as the destination with the most interesting tradition and cultural heritage and with the most attractive arts, music and cultural offer.

Although respondents mostly rank their own destination first, the results reveal a clear regional pattern: Europe has a better standing in Russia and Latin America, while the US and Australia are at the top in the Asian target countries (which represent a considerably bigger share of the total international student population worldwide).

Survey participants from the Asian countries rank the US above Europe in most academic and labour-market related issues: For a considerable number, the US had the best quality laboratories, libraries and other facilities, the best quality of education and the most prestigious universities and was offering the degrees with the best reputation. Furthermore, especially students from Asia ranked the US well above the EU for the chances of getting a job and staying on after graduation as well as for work opportunities during their studies.

Overall, Europe and Australia were perceived as safe destinations, but not the US. Europe and Australia were also regarded as more accessible than the US, at least as far as visas are concerned: The survey results clearly place Australia and Europe before the US for the “best chances of obtaining a visa”.

Survey participants were asked if they agreed to a set of statements covering common ideas about studying and living in the European Union, amongst others diversity of cultures and languages, value for money and low or no tuition fees. Again, responses revealed a clear regional pattern: classic European assets like diversity of cultures and languages, a cooperative mentality or free tuition were more attractive to Brazilian, Mexican and Russian respondents than to students from the Asian target countries.

- Free tuition was regarded as an asset, but Europe was not perceived as particularly affordable. This applied both to living costs and tuition fees. Overall, Europe was perceived as more affordable than the US, but as less affordable than Australia. On the other hand, especially Asian students thought that it was easier to obtain a scholarship in the United States.
- Diversity of cultures and languages was mainly seen as attractive, but their “abundance” was regarded as a problem by a significant group of Asians. Especially in Latin America, all diversity issues were perceived as enriching and partly even as Europe’s main strength, whereas in all Asian target countries, substantially more respondents perceived diversity of languages as a barrier to communication and diversity of cultures as confusing.
- Europe’s single major disadvantage in Asia is that English is not the mother tongue. Not only linguistic diversity was seen as a barrier by an important share of Asian respondents. In their view, (continental) Europe’s single major disadvantage is that English is not the mother tongue. Furthermore, the interviews showed that information about English-taught programmes in non-English speaking countries was not widespread.

What attributes are associated with Europe? Attributes found under the top five in most target countries were elegant, clean, organised and modern. On the other hand, Europe lacks innovation, tolerance and joie de vivre in the view of respondents, reinforcing the picture of a “traditional” Europe that lacks dynamism.

What could be done to make Europe and its higher education more attractive? In the view of survey participants, Bologna measures are a good but not the best way to enhance Europe’s attractiveness. An information portal, Europe-wide rankings and financial support for non-European students are more essential. Overall, students from all target countries also had a rather positive view of Bologna measures (Bachelor-Master system, a credit system that facilitates recognition, Diploma Supplement, quality assurance, etc.) and of Erasmus Mundus-type models (a joint Master programme in two different European countries). However, these were less important than the above mentioned measures.

### *Factors driving international students’ destination choice*

What drives students to study abroad? The most important reasons to go abroad are career-oriented, but also aspects related to personal and professional growth play a major role: the most frequent motivations to pursue an international education were to experience new ways of

thinking and acting in the field of study, to improve chances for an international career or a career in the home country, to improve foreign language skills and to get the opportunity for personal development. Socio-cultural motivations and cultural and lifestyle-related criteria were of minor importance for the biggest student cohorts.

Regarding the most important criteria in the decision for a destination country and university, prestige, quality of education and the reputation of degrees play the most important role. Other important criteria were the suitability of programmes on offer, affordability of living and tuition, modernity of teaching methods, accessibility (acceptance of home qualification, student support, transparent admission structures) and safety. Overall, students were predominantly looking for a specific and high-quality offer in their area of specialisation, at an up-to-date and well-managed institution of high standing which they can afford.

What type of studies (degree, short-term mobility, etc.) do most students want to pursue? The biggest group of respondents was aiming to study a Master's degree. In China and India, for example, the undergraduate offer at prestigious institutions was considered of equivalent or even better quality to what students could find abroad, while the offer at Master and Doctoral level was still seen as limited. Overall, it was also considered a better option to do the first degree at home in order to ensure recognition by employers and academia, and in order to be able to build up a network of professional contacts at home. Further, the target countries can clearly be divided into two groups: while studying a Master's degree was most attractive for Asians and Mexicans, in Brazil and Russia short-term mobility was the most popular option.

Does the "world region" where a country or university is situated play a role at all in the students' destination choice? Most students did not seem to care about the world region where they were going to study. The majority of respondents stated to choose either the country and then the university or even first the university and then the country. US universities seem to have a higher visibility: students aiming to study in the US more frequently chose their university first.

What can hamper the students' plans to study in another country? Obstacles encountered by the students were often situated outside European higher education and concerned finances, immigration policy and language preparation. A high number of students going to the US had difficulties with obtaining a visa. For Asian students, visa procedures represented the second most important problem. Other significant obstacles were limited language proficiency and a lack of work opportunities during and after studies in Europe.

These obstacles can result in an "alternative choice" of destination. About one quarter of the students who responded to the survey finally preferred a country that had not been their original first choice. For about half of the students who were planning to study in one of the Nordic countries or in the Netherlands, their destination was only their third or second choice.

### *Sources of information*

Workshop participants, interviewees and survey respondents agreed upon one major message: information on Europe and its higher education is missing or hard to access.

The Internet and websites of individual universities in particular were quoted as the most widely used source of information. It was followed by the offices/websites of different national internationalisation agencies. Although web-based channels are clearly most important, the significance of the network of offices of different internationalisation agencies, of personal contact and of commercial agents should not be underestimated.

Interviewees, especially from the Asian target countries, deplored a lack of information on study opportunities in Europe and of a “clear sender”. Many interviewees were unsure about whom to turn to in order to obtain information on study opportunities in Europe. They found that information on Europe and its higher education was missing or hard to access. Principally, respondents to the survey had difficulties in finding information on scholarship opportunities from different sources, living costs and tuition fees. Next to financial issues, they underlined a lack of university rankings and of information on suitable programmes.

### ***Recommendations for a European brand (Chapter VI)***

The mandate of this study was to devise recommendations to the European Commission with regard to a future European brand: the study should develop a clear idea of what a European higher education brand should look like and which should be its core elements, and it should determine who its sender should be in a worldwide campaign. The study resulted in the following conclusions and recommendations:

**There is a clear potential for a European brand. The challenge is to create a perception of the entire Europe. A European brand can only cover elements which are common to all European countries.**

The three main selling points for European education should be its quality education, its tradition and the offer of internationally compatible degrees. Other attributes – safety, accessibility, etc. - should be used in the context of specific campaigns.

Using one and the same brand worldwide is necessary in order to create a clear European identity. Under this common European umbrella brand, tailor-made campaigns may be run for different target countries, regions and target groups.

**A clearly identifiable European “sender” is essential in order to reinforce Europe’s identity on the global education market and coordinate campaigns carried out under the European umbrella.**

All country reports underlined the lack of or the confusing information policy regarding study opportunities in Europe, and emphasized the importance of having a concise information campaign with a clear sender and message. The following “set-up” would be most appropriate to resolve this problem:

- (1) A widely promoted and carefully administered Internet portal;
- (2) A European office with coordinating functions that looks after the brand and runs the Internet portal;
- (3) Cooperation with member states in the implementation of marketing campaigns.

**To create and promote a European brand is a necessary but not sufficient condition to enhance the attractiveness of European higher education.**

First, European higher education needs to be of sound quality if it is to be successfully promoted: above all, providing higher education institutions with the necessary autonomy to select their students, to offer institutional scholarships to highly qualified international applicants, to access alternative sources of funding and to recruit quality teaching and research staff is essential to reach and ensure quality in higher education. Second, it is vital to implement flexible immigration and visa policies allowing international students to stay on and work after graduation and to provide them with work opportunities. Third, English is the key: especially in the less popular destination countries, English-taught programmes are the only way to attract non-European students. Finally, the long-term success of a European marketing strategy will not only depend on the overall quality of European higher education, but also on its capacity to diversify. While the overall aim should be to achieve solid quality across the board, European countries and higher education institutions should attempt to find their niche and invest into their specific strengths.

## I Introduction

Over two million students are enrolled in higher education institutions outside of their country of citizenship. These numbers are expected to rapidly rise in the future, according to some forecasts to as many as 7.6 million in the year 2025<sup>1</sup> Until a decade or so ago, these students did not command very much attention, and certainly not from policy-makers, with the exception of a number of organisations and individuals specialised on international cooperation in higher education. This is very different today. International students are much sought after, in some countries at any rate. An, at times, fierce international competition over them has set in. Many higher education institutions, and many governments, have developed attraction policies. They are marketing themselves, and many are conducting recruitment campaigns. In order to position themselves in what has become a global market for international students, they have analysed their strengths and weaknesses, they have identified their unique selling points, and they have developed a 'brand', which is to present themselves as unique vis-à-vis their competitors.

Some observers regard the heightened attention devoted to international students, and the manifold attractiveness-enhancing activities this attention has resulted in, as an indication that globalisation has reached education too, and that education has become a globally tradable service like so many others. Globalisation, understood in this way, is certainly the driver of attraction policies in many countries, where higher education is regarded in corporate terms, and where the aim of higher education institutions, and their governments, is growth and an increase in 'market share'. Obviously, such approaches thrive only in countries where higher education is at least partly privately financed, and which charge substantial tuition fees. But the outright corporate approach is only one possibility. A second, and mixed approach, is to be found in countries where higher education is seen in less corporate terms, but where, nevertheless, income from international students is deemed as desirable to cross-subsidise the education of domestic students, as well as research and services. A third type of motivation is closely linked to a strengthening of the domestic knowledge society and economy. Under this rationale, it is in the institutional and national interest to attract 'brains' from outside of the country, be that for the period of study only, after which international students will return to their country of origin as 'ambassadors' of the host country, or, increasingly, stay for good. Rationales of this kind put attraction policies for international students into the wider context of policies and measures to further the immigration of highly skilled persons. Student attraction measures thus form part of a wider human-capital-gain strategy.

Europe, its individual countries, and its higher education institutions have for a long time not been, with rare exceptions, at the forefront of measures to attract foreign students and other highly skilled. Measures of this sort have long been a taboo and stigmatised as unfair practices promoting 'brain drain' elsewhere. This has recently changed. An increasing number of

---

<sup>1</sup> Cf. A. Böhm et al., Global Student Mobility 2025: Analysis of Global Competition and Market Share, IDP : Sydney 2003.



individual universities and colleges actively market themselves and their programmes worldwide. National governments, though admittedly only those of countries north of the Alps, have created 'brands' for the entirety of their higher education systems, and are promoting them in the form of major campaigns around the world. In most cases, these efforts are driven by motives to attract the highly skilled described above, and, to some degree, by the cross-subsidy strategy.

The recent policies of the European Union also attribute a high importance to the attraction of 'brains'. The Lisbon Agenda of 2000 accords a high priority to education, research and innovation in general, and it advocates, even though in very careful language, brain gain strategies. At the latest, this became clear two years after the Lisbon Council, when European heads of state and government demanded in Stockholm that the Union should become "the most favoured destination of students, scholars and researchers from other world regions". The global attractiveness of European universities and other tertiary institutions is also one of the three focal points of the recent Commission Communication *Mobilising the brainpower of Europe: enabling universities to make their full contribution to the Lisbon Strategy*. The (intergovernmental) Bologna Process aims, amongst other objectives, to increase the global attractiveness of Europe's universities and colleges, and Ministers asked for the development of a strategy for the Process's external dimension in Bergen in May 2005.

Despite of this clear policy orientation, there is to date no European-level higher education brand, let alone the implementation tools and mechanisms to deliver it. One of the possible reasons for this state of affairs, if there is a rational explanation at all, is the perceived or real difficulty to find common 'images' for a European higher education landscape marked by considerable diversity. At the same time, much seems to speak for the usefulness of European-level marketing efforts, to underpin similar initiatives at the national and institutional end. Would not some countries in the Union – especially the smaller and globally less well-known ones – have better chances of being perceived if they "sailed under the European flag", and would not all countries – among them the larger ones – benefit additionally from a European identity? The fact that a number of national brands and campaigns use the "in Europe" addendum to enhance their visibility seems to speak for exactly this.

It was with such considerations in mind that the European Commission launched, in the first part of the year 2004, a public open tender for a study to explore the feasibility of creating a European higher education brand. It specified that this study was to develop its recommendations as to a European brand on the basis of the "perceptions of European higher education" of a wide range of stakeholders outside of Europe, the core group of which were to be present and future students in higher education. It was therefore central to the task of the successful tenderer to identify these "perceptions". The Academic Cooperation Association (ACA) submitted an offer under the call for tenders, and was awarded the contract.

In line with the terms of reference mentioned above, and its offer based on the latter, the study pursued two overriding aims.

- First, it sought to acquire an in-depth understanding of the current perception of European higher education “in third countries” (i.e. outside of the EU), by identifying the expectations of foreign students, the strengths and weaknesses they perceive in European higher education, as well as by finding out about European higher education’s relative standing in comparison with its competitors. This also entailed an investigation into the degree and the sources of information on European higher education which potential international students have.
- Second, it was intended to advise and make recommendations to the European Commission as to the feasibility of creating a European higher education brand, on the key features which such a brand should build on (message), and also on certain aspects of its delivery (sender, instruments and mechanisms).

This report presents the results of the work ACA carried out over the period of one year, with regard to the above issues.

*Chapter II*, which follows on this short introduction, lays out in detail the methodology adopted in preparing the study. It describes the methods (surveys, desk research) and instruments employed (closed standardised questionnaires, interviews), the target groups (present and future students, parents, teachers, and the various categories of staff in higher education), as well as the geographical scope of the study (worldwide in principle, with a focus on six “target countries”). This chapter also sets out the methodological problems encountered, and the solutions found.

*Chapter III* provides background information essential for the contextualisation of the results of the various surveys carried out. The chapter concentrates on two issues. One, it presents, in highly condensed form, the present knowledge about the distribution and movements of international students worldwide, and particularly in Europe. Two, it provides an overview of the branding and marketing activities undertaken by individual European countries.

*Chapter IV*, the by far longest part of the report, presents – in considerable detail – the results of the various large-scale surveys and, to a lesser degree, the interviews on which this study is based. It is this part which depicts the views which students (and other stakeholders) hold of European higher education. Next to a detailed presentation of the characteristics attributed to European higher education, this chapter includes information on the way the decisions are taken to study abroad (instead of at home) and on the motivations at play in the formation of such decisions, on the sources of information used in making these decisions, and on the perception of European higher education’s relative position with regard to major competitors over international students, predominantly the United States of America and Australia.

*Chapter V* is an integrated evaluation and interpretation of the many findings contained in chapters IV, which precedes the actual recommendations. Addressing the same questions as chapter IV, it highlights the main findings of the study, and puts them into perspective.

*Chapter VI* contains the recommendations which the study makes as to the key features of a European higher education brand, inclusive of the most important features of its delivery.

Franziska Muche, Bernd Wächter

Brussels

10 December 2005

## **II Methodology of the Study**

### **1 Set-up and approach**

#### ***1.1. General set-up of the study***

The present study pursues two related aims. It seeks to identify the perceptions of European higher education in countries outside of the European Union, and, based on this, it tries to define the main elements of a European higher education brand.

The study was conducted in the period from November 2004 to December 2005. It had been commissioned to the Academic Cooperation Association (ACA) by the Directorate General for Education and Culture of the European Commission, following an open tender procedure.

#### *Roles and responsibilities*

Franziska Muche of the Academic Cooperation Association acted as the overall project coordinator, supported by Bernd Wächter. Friedhelm Maiworm, the Director of the Gesellschaft für Empirische Studien (GES, in Kassel, Germany) was in charge of all matters pertaining to statistical analysis. Four member organisations of ACA, the British Council, EduFrance, the German Academic Exchange Service (DAAD) and the Netherlands Organization for International Cooperation in Higher Education (NUFFIC) conducted ‘fieldwork’ by acting as “country coordinators” for information gathering activities in Brazil, China, India, Mexico, Russia and Thailand. The Institute of International Education (IIE) in New York City, an associate member of ACA, played a similar role for activities in the United States of America.

#### *Methods*

In terms of the methods employed, the study is based on large-scale surveys, as well as on interviews (with individuals and groups) and on desk research. Both the surveys and the interviews were used to identify the views held by a wide range of target groups (see below) on key aspects of European higher education. Desk research was used to access and analyse important contextual information, on national brands and campaigns to promote their countries’ higher education, and on the international migration of tertiary students, respectively.

#### *Instruments*

The main instruments used in the course of the present study were standardised, closed questionnaires. Three questionnaires were used, focused on different target groups:

- A questionnaire for students intending to study abroad (main instrument; distributed in hard copy to selected students in six “target countries” and available online to students worldwide);
- A questionnaire for lecturers and international relations officers at higher education institutions and for school teachers (distributed in hard copy);
- A questionnaire for international students enrolled at US higher education institutions (distributed by e-mail).

Next to questionnaires, interviews were used to collect information. In an early project phase, group interviews were conducted as part of exploratory workshops in the six target countries, which informed the design of the questionnaires. Individual interviews were conducted with parents, higher education experts and university rectors. For the individual interviews, a set of guidelines were developed.

As should be apparent from the above, the surveys and interviews targeted the following groups:

- Present tertiary students (Bachelor, Master, PhD) and future tertiary students (school pupils), which together formed the most important target group;
- Parents and family members of present and future tertiary students;
- Teachers at secondary schools;
- Faculty (professors, other academic personnel), administrators (international relations staff) and leaders (rectors and vice-rectors) at higher education institutions;
- Representatives of public authorities (ministries, for example) and higher education associations (rectors' conferences, amongst others).

#### *Geographical scope*

The ACA study focused on six target countries: China, India, Mexico, Brazil, Russia, and Thailand, where all forms of surveys used in the study were conducted and all interviews held. For comparative purposes and as a "control group", it also included international students in the United States of America in the in-depth investigation. For a similar purpose, the online questionnaire was made available to students worldwide.

### **1.2. Overall approach**

The main aim of the present study was to acquire a deeper understanding of the current perception of European higher education in third countries and to advise the European Commission with regard to key features of a future European brand. To study the perception of and design a brand for the entirety of Europe's universities and colleges is a challenge in a number of ways.

First, in order to devise a brand for Europe and its higher education, it is not enough to find out how Europe is perceived by potential students. The perception of possible destinations in Europe, of the United States or Australia is only one aspect in a complex process in which students decide to study in another country, inform themselves about the possibilities they have and choose a destination based on a number of criteria.

Second, Europe is not one single and homogeneous entity but a union of individual countries with different qualities and, in spite of initiatives like the Bologna Process, a wide variety of education systems and opportunities. The exploratory workshops held in the target countries prior to the survey design confirmed that European education was hardly perceived as a whole. Most students would rather think about one individual country when considering an education

abroad. If at all, Europe was regarded as a whole when compared to other “global actors” like the US.

To meet this challenge, the project team opted for a three-fold approach:

- (1) to find out about the general motivation of students to study abroad and about the way in which they choose where to study;
- (2) to explore the students’ views on their preferred destination country;
- (3) to look into the students’ views on European higher education, especially compared to the United States.

This way, at the stage of analysis, it was possible to

- (1) learn why students study abroad and how they choose their destination, and hence determine what elements should be addressed in a campaign;
- (2) aggregate the students views on different European countries and this way find out about their perception of European higher education. As there were also students with a preference for the US, Australia or other non-European countries, this approach allowed comparing the perception of Europe with the perception of other destinations;
- (3) find out about perceptions and stereotypes of “Europe” as a destination for foreign students, about its strengths and weaknesses, as well as about potential strategies which could improve the perception of European higher education.

The following paragraphs explain in detail how the above issues were addressed in the survey.

### **1.2.1 The choice of a study destination**

The following factors can play a role in the students’ decision for a destination country:

- (1) *Origin and cultural background of the students*: the students’ cultural and social context partly determines chances and limitations in the students’ academic and professional career, and it affects the dreams and goals they may have for their future.
- (2) *Educational background and preference structures*: the educational background of the students, their reasons for seeking education abroad, language proficiency and the importance of various criteria in the choice of a destination country and university are crucial to understand why students decide in favour of a European destination or opt for one of Europe’s competitors, e.g. the US, Australia, etc.
- (3) *Level and sources of information*: the students’ perception of study destinations greatly depends on the information available. Therefore, the study explored the students’ sources of information, the level of knowledge about European higher education and the need of information on specific aspects.

- (4) *Characteristics of destination countries and their perception*: in the context of this study it was of prime importance to explore the attractiveness of various characteristics - quality of education, cost, employment opportunities, safety, etc. - of European and competitor countries in the perception of students and other stakeholders.
- (5) *Barriers*: marketing will not be successful as long as students are facing insurmountable obstacles in their home or destination countries. Typical barriers are deficient language preparation, the lack of financial resources or visa difficulties.
- (6) *Selection of the destination country*: all of the above factors play a role in the decision for a destination country. If personal ambitions and the perception of a specific destination match, students have found their *ideal destination*. Perceived or real obstacles like visa difficulties, the lack of financial resources etc. may lead the student to opt for an *alternative destination*.

### 1.2.2 The perception of a union of countries

How is Europe and its higher education viewed by international students? Does a set of common images relating to European higher education exist on the “mental map” of students, parents and other relevant stakeholders in countries outside Europe? The study had to serve different aims in this context: first, it had to find out if there was a concept of European higher education at all, or if only individual European countries and their educational offers were being perceived as study destinations. Second, it had to explore the perceived strengths and weaknesses of European higher education – as a whole, or as a sum of different European destinations – in order to identify aspects that should be addressed by a European brand. A combination of different approaches was used to meet this challenge:

- (1) *Calculation of European averages*: based on results of exploratory workshops held in the target countries during the initial phase of the project, it became clear that most students would rather think of one individual country when considering an education in Europe than about the European Union as a whole. In order to avoid confusion on the side of participants and to be able to collect reliable and valid data, it was decided to focus part of the questions on the country where the students had decided or were aiming to study (*selected or preferred destination country*) rather than on Europe as a whole. By aggregating the responses of students aiming to study in different European countries, a European average could be calculated and used for the statistical comparison with destination countries outside Europe. This way, it was also possible to identify those aspects where perceptions highly varied between different European destinations.
- (2) *Students were asked to rank Europe in comparison with other major destinations*: if at all, Europe was regarded as a coherent entity when compared to other “global actors” like the US. This result of the exploratory workshops held in the target countries suggested asking students and education staff for a comparison between Europe and its main competitors, i.e. the United States and Australia, for the quality of higher education, affordability of living and

studying, employment prospects etc. Although it cannot be excluded that students had their destination country (and not the whole of Europe) in mind when answering this question, the results provide an indication of Europe's standing in comparison with its competitors.

- (3) *Europe's diversity was a special topic in surveys and interviews*: students, educational staff, parents and other stakeholders were asked if they saw Europe as an entity or as a range of individual countries, and if they perceived differences between individual European countries with regard to the quality of higher education, the cost of living, tuition fees, awarded degrees, visa procedures etc.
- (4) *Common stereotypes*: furthermore, the consistency and connotations of common "European myths" were looked into: Europe's diversity of cultures and languages as an asset or an obstacle, free education as a selling point or an indicator for low quality, etc. These issues had been mentioned by participants in the exploratory workshops in the target countries. The results were used to complete the picture of Europe's strengths and weaknesses gained from the rankings.
- (5) *Possible means to enhance Europe's attractiveness*: last but not least, students were asked about the potential of a range of means - mainly "translations" of Bologna measures or the Erasmus Mundus model but also information portals, rankings, etc. – to improve the attractiveness of European higher education.

The questionnaires and interview guidelines designed for this survey took all of the above factors into account (see annex).

### **1.3. Target groups of surveys and interviews**

The main target group of the study were present and future tertiary students from the selected target countries (whom European higher education institutions ultimately want to attract). However, these students are not always independent. Various other groups impact their choice or (e.g. parents) even make the choice on their behalf, which is why they were included as further target groups. They were

- parents and families of present and future tertiary students;
- secondary schools and secondary school teachers;
- faculty (professors, teachers) and administrators (rectors and vice-rectors, international relations staff) at higher education institutions;
- public authorities (education ministries, for example) and
- private and public higher education organisations (rectors' conferences, etc.).

All relevant target groups were addressed either with the help of questionnaires or in face to face interviews by country coordinators or institutional facilitators in the target countries.



Furthermore, students from non-target countries and regions as well as international students in the United States were invited to take part in the survey. While the first comparison group helped to situate the results in a global context, the purpose of including the second group was to compare the answers of students planning their stay with those who had already made up their mind and decided against studying in Europe.

#### **1.4. *Methods employed***

The complexity of the study required the use of a wide range of methods of data and information gathering. Highly standardised questionnaire-based large-scale surveys were necessary to provide a sufficient body of data about the perceived strengths and weaknesses of European higher education and to allow the use of statistical methods to determine the major factors which influence the perception and choice of a given destination country. In order to understand and be able to contextualise the findings of these surveys, qualitative approaches, such as face-to-face interviews and exploratory workshops ("focus groups") were necessary.

One of the main activities conducted in the first project phase were the exploratory workshops organised in the six principal target countries Russia, China, Mexico, Brazil, India and Thailand. In each of the six countries, a one- to two-day workshop was held, involving mainly students intending to study abroad, but also other actors, like teaching and international relations staff at higher education institutions, school teachers or educational agents.

The aim of these workshops was to become more familiar with the range of views about living and studying in the European Union, and to widen the list of possible issues to be covered by the large scale surveys and the interviews. The workshops were a necessary step, as neither the perceptions of European higher education, nor the exact role which perceptions and other factors play in the rationale and process of host country selection, could be identified in a sufficiently comprehensive and satisfactory way from available documents and previous research studies only. The workshops were therefore intended as brainstorming sessions, so that not too many "assumptions" on the perception of European higher education from the project team could come into the game.

In every country, the workshops were organised by the local office of the ACA member organisation acting as "country coordinator". The workshops were chaired by members of the Europe-based team of the study.

Based on desk research and on the results of the workshops in the target countries questionnaires and interview guidelines were developed, which formed the basis of surveys and interviews carried out between March and July 2005:

- Paper based surveys of students in the six principal target countries Russia, Brazil, China, India, Mexico and Thailand;
- A global online survey of students intending to study abroad;

- An email-based survey of international students studying in the US;
- Paper based surveys of school teachers, professors, international relation officers and education agents in the target countries;
- Interviews with parents, higher education experts and rectors (vice-rectors or directors of international relations).

In a first step, the main instrument, the *student questionnaire*, was developed. This questionnaire was then adapted to the different target groups:

- For the *staff questionnaire*, emphasis was put on the staff's role as "advisers" to students who were thinking about studying abroad. The questionnaire also included questions on institutional structures and cultures related to internationalisation. As a result of the exploratory workshops in India, China and Thailand, the questionnaire was designed to address staff at schools and higher education institutions as well as education agents, for their vital role in the students' decision process.
- For the elaboration of the questionnaire for *international students studying in the United States*, the focus of the general student questionnaire had to be changed: for these students, studying abroad was not any more an option but a reality. The questions addressed their decision process: why and how did they decide to study in the US? What were the main factors that influenced their decision? Had they ever thought of studying in Europe, and if so, why did they not pursue this plan?

Finally, interview guidelines were developed for the country coordinators in the six main target countries. These interview guidelines were also based on the main lines of the general student questionnaire. However, the guidelines aim to go beyond the mostly closed questions of the questionnaire, and obtain context information, for instance on the role of parents and higher education staff in the decision process. All questionnaires and guidelines are annexed to this report.

## **2 Survey implementation and participation rates**

### **2.1. Paper based surveys**

#### **2.1.1 Target groups of paper based surveys**

Two different “categories” of target groups were identified for the paper based surveys in the six target countries:

- The main target group of the study were present and future tertiary students, i.e. school students in their final year and tertiary students at different levels. After all, it is these students that European higher education institutions finally want to attract.
- The second target group were the main influencers of the students’ choice with a professional knowledge about study opportunities in other countries: secondary school teachers, faculty (professors, teachers), international relations staff at higher education institutions and, in some countries, education agents.

The purpose of the paper based surveys was to gather first-hand information about major criteria for the selection of destination countries; information sources used by students and education staff, strength and weaknesses of Europe and its competitor countries, etc., and to generate the necessary data for statistical analysis.

#### **2.1.2 Drawing of samples of survey participants**

The most important work carried out in the target countries was the establishment of a network of institutional facilitators to carry out the paper based surveys in schools and higher education institutions. For this purpose, country coordinators identified up to five schools and ten higher education institutions of different types and from various parts of the country (see country reports in the annex for lists and characteristics of the selected schools and higher education institutions). After that, they contacted the potential institutional facilitators at the selected institutions; instructed them about the project, etc., and sent the questionnaires to the institutional facilitators for distribution.

For practical but also for methodological reasons it was decided to create stratified samples rather than to draw random samples. The main advantage of a stratified sample in comparison to a random sample is the possibility to influence the size of sub-groups of participants, e.g. students at a given level of study and in a specific subject area, and thus, to consolidate the statistical analysis at the level of these sub-groups. The following principles for the selection of survey participants were established beforehand and communicated to country coordinators and institutional facilitators:

### *Student survey*

- *Size of the sample:* The overall size of the student sample was prescribed at about 1 000 per target country. Depending on the size of the selected schools and universities institutional facilitators were requested to distribute between 50 and 100 questionnaires per institution.
- *Level of study:* about 20 percent school students, about 60 percent undergraduate students and about 20 percent postgraduate students.
- *Subject area:* 30 percent social sciences (law, economics, sociology, etc.); 40 percent natural sciences, engineering and medicine; 30 percent humanities (linguistics, literature, history, etc.)
- *Interest in international education:* institutional facilitators were asked to include a considerable number of undergraduate and postgraduate students with a clear interest in studying abroad (as these students are the major target group of a possible marketing campaign). In contrast, all school students in the final year of the selected secondary schools were included in the survey in order to have a sufficient critical mass at this level, but also to find out about their motivations against pursuing an international education.

### *Questionnaire-based survey on education staff*

- *Size of the sample:* The overall size of the sample in every target country was set at 200 education staff members and agents. Institutional facilitators were asked to address ten to 15 secondary school teachers, 20 to 30 university lecturers and staff from international offices and if applicable, a small number of education agents.
- *Level of study and subject area:* It was aimed to achieve a balanced spread over staff active in different subject areas and at different levels of study. Preference was given to staff members who, formally or informally, were promoting international cooperation and exchange at their institution.

The completed paper questionnaires were sent back to the country coordinators between May and July 2005, and subsequently transferred to GES in Germany for data processing and statistical analysis.

### *Participation in the surveys*

Altogether, 11 471 students from the target countries filled in the paper questionnaires. Thus, the final number of respondents was twice as high as expected at the outset of the project. However, there were some differences in the number of participants from the different target countries: with about 2 500 respondents each China and Thailand were clearly at the top, while between 1 500 and 1 700 completed questionnaires were sent back from Brazil, Mexico, Russia and India.

The number of staff members taking part in the surveys was 1 235, close to the original proposal which was based on samples sizes of 200 experts per country. However, participation varied between the different target countries: education staff from Brazil and India made up about 10 percent of the overall sample, staff members from Mexico and Russia 15 percent, from China one fifth and from Thailand one third of the overall sample.

## **2.2. Global online survey**

The online questionnaire could be accessed between 25 March 2005 and 1 August 2005 at <http://www.aca-studentsurvey.org>. The survey was available in six languages: English, Spanish, Chinese, Russian, Portuguese and Thai.

Based on a draft flyer sent by the ACA Secretariat, the country coordinators produced the material to promote the survey. This happened for example at major education fairs taking place before and during the implementation of the survey (especially in China, Russia and Brazil, important fairs already took place in late February/early March).

Links to the survey were placed on the websites of the country coordinators' organisations. ACA also got in touch with the contact persons in charge of information and communication at all ACA members, and asked them to place the link to the online survey on their websites. Furthermore, ACA members were asked to involve their offices abroad and ask them to promote the survey, especially if these had a well-developed infrastructure, own website, etc. For the six target countries, local offices of ACA members (other than the respective country coordinator's office) were contacted.

Overall 19 144 students visited the online survey via Internet and established a users' account. However, only about half of the visitors filled in the online survey to an extent sufficient to include their responses in the analysis. Among the 8 939 valid online questionnaires, a slight majority came from the six target countries (20% from Brazil, 12% from Mexico, 7% from China, 5% from Russia, 5% from Thailand and 4% from India), followed by respondents from Europe (18%), other Asian countries (8%), other Latin American countries (6%), Sub-Saharan Africa (6%), North Africa and the Middle East (3%), North America (3%) and Australia (1%). As the study focused on the perception of European higher education in third countries, respondents from European countries were not included in the analysis.

## **2.3. Survey of international students in the US**

The survey of international students in the US differed from the surveys carried out in the six main target countries: while the latter targeted students at different levels interested in studying abroad, the US survey targeted international students of different origin who were already studying in under- and postgraduate programmes at US universities. In order to reach this different target group, the project team opted for a specific approach: rather than identifying

institutions, it was decided to launch a call for interested “campus coordinators”, international office staff willing to forward the survey to students studying at their institution.

To implement this methodology, the project team was able to use the network of its members. The US country coordinator based at the International Institute of Education (IIE) used the “IIE network”, a US-based network of international educators, to launch a call for campus coordinators or institutional facilitators. The campus coordinators, in turn, sent out the questionnaires by email to the international students at their institution. Students sent the questionnaires back to a central email address which was set up for this purpose.

Altogether 423 international students in the US participated in the survey. Slightly less than half were from Asia (13% from India, 12% from China and 21% from other Asian countries), 27 percent from Europe, 13 percent from Latin America, 13 percent from Africa and 2 percent from other regions.

#### ***2.4. Interviews with parents and other stakeholders***

Country coordinators were asked to carry out interviews with 20 to 30 parents at education fairs, and to either carry out personally or coordinate (i.e. provide support, identify interviewees / interviewers, etc.) interviews with about five rectors, about five international staff and three to five higher education experts or representatives of public and private organisations and authorities active in the field of higher education. Interview guidelines were provided by GES and ACA. Based on the interviews, country coordinators produced a country report detailing the interview results and providing context information (see annex).

The details of the interview process in every target country are provided in the country reports. Overall, country coordinators were able to respect the preset number of interviews. Due to differences in the academic calendar and in the resulting availability of interviewees, numbers slightly varied between the target countries: country coordinators interviewed between 13 (Brazil) and 31 parents (China), between three (China, Mexico) and six (Thailand) higher education experts and between seven (Brazil) and eleven (Thailand) rectors and international relations officers<sup>2</sup>.

---

<sup>2</sup> Only in India this figure is lower, as the interview period coincided with the Indian summer break, resulting in a reduced availability of rectors and international relations officers.

### **3 Status of surveys and target groups**

#### ***3.1. The major source of information: students from the target countries***

The most important target group of the study were students from the six target countries, as they would also be the target of a marketing campaign. Students from the target countries took part in the study either by filling in a paper questionnaire or by responding to the online survey. Data from both sources were put together in order to create a common data pool for the statistical analysis.

It is noteworthy that a substantial proportion of online-respondents had completed a Bachelor or Master degree and was already employed at the time the study was carried out. This group of potential future mobile students could only be reached with the help of the online survey and would have been "lost" if only paper based surveys had been carried out in secondary schools and universities. Pooling together the respondents to both surveys therefore led to a broader representation of relevant target groups.

#### ***3.2. Widening the perspective: experts, triangulation and comparison groups***

Including groups other than students from the target countries served several purposes:

- (1) *Broadening the range of questions:* Questions to which a valid answer could not be expected from the students, e.g. general views of internationalisation of higher education, student mobility and its role in education policy in the target countries, etc. were included in the interviews with representatives of public authorities and rectors of universities;
- (2) *Triangulation:* Addressing different stakeholders enabled the project team to compare the students' responses with the views of other important actors, e.g. parents or lecturers. The method of comparing the views of different groups on similar issues is known as "triangulation" in social sciences. It is used to increase the validity of results and conclusions. Information was gathered with the help of interviews (parents, rectors, etc.) and standardised questionnaires in the case of education staff;
- (3) *Global context:* Responses to the global online survey allowed to situate the results from the target countries in a global context, and to address students from other world regions, e.g. Africa or North America, not covered by the target countries;
- (4) *Comparison with students who had decided against Europe:* How do the views and perceptions of students in the stage of planning to study abroad compare with those of students already studying abroad, namely in the US? Why have these students decided against studying in Europe? International students in the US were used as a comparison group to students from the target countries and respondents to the global online survey.

The results presented in chapter IV of this report were based on both, responses of students from the target countries and information provided by parents, experts or students from other countries and regions.

### **3.3. Representativeness and validity of results**

For various reasons the students participating in the surveys do not fully match the (hypothetical) total target population of the study, i.e. all students from the target countries with a minimum interest in studying abroad. Major reasons for discrepancies are:

- (1) *The creation of stratified samples for the paper based surveys in the target countries:* the introduction of quota criteria (type of institution, geographical spread of institutions, level of study and field of study) was seen as the only way to ensure the participation of a broad range of students with different socio-economic and educational backgrounds and, at the same time, obtain sub-groups of participants with similar characteristics of sufficient size to allow for the application of multivariate statistical methods. These methods were necessary to identify the decisive factors influencing the students' reasons to study abroad, the criteria for selecting the destination country, the perception of European higher education etc.
- (2) *Distribution of paper questionnaires through the channels of European scholarship organisations:* The network of local offices of ACA members made it possible to reach a considerable number of students interested in European higher education or in pursuing an international education in general. However, the use of this network is likely to have resulted in an overall trend favouring European destinations in the study, i.e. non-European destination countries (including the US) were underrepresented. In addition, for every target country, the coordinating organisation's country was overrepresented, i.e. Germany for Mexico and Brazil, the UK for India and Thailand, the Netherlands for China.
- (3) *Access to the global online survey via the websites of European scholarship organisations:* Placing a link to the survey on the websites of ACA member institutions allowed bringing the survey to the attention of an important proportion of students seeking information on education opportunities abroad. Yet, the use of these channels probably also resulted in a large proportion of scholarship seekers among online respondents. Most online respondents were at an advanced level of study or already employed. Furthermore, more respondents to the online survey than to the paper based surveys favoured European destinations.

Hence, the samples of respondents are on the one hand highly representative for the student population of every target country: they cover students from different parts of the country and from different types of institutions, levels and fields of study. On the other hand, the relative weight of sub-groups of respondents with distinct profiles (field or level of study, destination, etc.) does not exactly match the relative weight of these sub-groups in the total target population (of potential international students).



How do the differences between the samples and the total target population impact on the validity of responses? In order to assess to which extent the results of the study are biased by the composition of samples or can be considered as robust and valid, two types of analyses were used:

(1) *Identification of major factors explaining the variation of responses*: Multivariate statistical methods were used to identify the impact of major factors on the variance in responses to individual questions and items (variance analysis). In addition to possibly biased criteria, i.e. level of study, field of study and destination country, the country of origin of students was included in the analysis.

The multivariate analysis clearly showed that the students' country of origin explained most of the variance in responses to questions concerning motivations to pursue an international education, criteria for the selection of a destination country, importance of different sources of information, means to enhance the attractiveness of European higher education and differences between the member states of the European Union. Thus, the possible bias of the samples with respect to other criteria could not substantially impact on the results deriving from these questions.

Some of the questions and items were strongly correlated with the selected or preferred destination country of students, e.g. characteristics of the destination country or the ranking of major destination countries for a range of aspects. In order to control the possible destination country bias, the statistical analysis was done separately for students aiming to study in Europe and students aiming to study in the US, and presented in different tables.

The level or field of study of respondents influenced to some extent the students' motivations to study abroad and the selection of universities. However, the respective correlations were limited to a small number of aspects only. These are described in the report but they did not require special analysis techniques.

(2) *Measuring of composition effects on totals*: The composition of samples (determined by quota criteria like the country of origin, the type of institution and level and field of study, or by factors like the students' preferred destination country) could impact on the averages calculated on the basis of all responses to individual items. The stronger the correlation between different criteria and the item in question, the more the totals could be influenced by the composition of a sample and the higher the risk that it did not correspond to the "real" average in the total target population. In order to assess the impact of the composition of samples on the totals, respondents were weighed in a series of tests:

- balancing the proportions of respondents within the sub-groups defined by the combinations of quota criteria and destination country;
- adjustment of the proportions of sub-groups of respondents for every target country to the relative weight of these sub-groups in the overall sample;

- adjustment of respondents from individual target countries to the relative size of the total population of the country and to their relative importance within the total international student population, i.e. respondents from China and India got a much higher weight than students from other target countries.

By and large, the experimental variation of the composition of samples only showed a very limited impact on the totals for individual items or questions, resulting in variations ranging between zero and three percent. Furthermore, for most questions, there were no or only slight changes in the rank order of importance of items/responses. Only for questions strongly correlated with the destination country the impact was stronger, and special measures had to be introduced to control the “destination bias” (see above).

Overall, it can be concluded that the survey results described in this report are carefully analysed and only presented if the authors were convinced that they were valid and could be generalised for potentially mobile students from the target countries.

## 4 Description of the Samples

### 4.1. Students from the six target countries

Altogether more than 16 000 students from the six main target countries of the study participated in the survey either by filling in a paper questionnaire (70%) distributed by institutional facilitators at schools or higher education institutions in the target countries or by using the online interface (30%). With a share of about one fifth each Brazilians (21%), Chinese (20%) and Thais (18%) made up a bigger share of the sample than students from Mexico (16%), Russia (13%) and India (12%).

As Table 4.1 shows, the share of online respondents was highest in Latin America: 54 percent in the case of Brazil and 42 percent in Mexico. In all other countries, proportions were considerably lower and ranged between 15 percent in Thailand and 22 percent in Russia.

**Table 4.1**  
**Survey method used for participation in the study - by country of origin (percentages)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Paper	46	80	83	58	78	85	70
Online	54	20	17	42	22	15	30
Total	100	100	100	100	100	100	100
Count (n)	(3387)	(3186)	(2017)	(2580)	(2177)	(2932)	(16279)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Sample: Students responding to paper based surveys and respondents to the online survey

#### 4.1.1 Personal background

Slightly more than half of the participants from the six target countries were female. However, large differences by gender could be observed between individual countries. While more than two thirds of Russians and more than 60 percent of Thais were female, the respective share was only about one third in the case of India and less than half in Mexico.

At the time when the study was conducted the majority of participants were students on undergraduate programmes (60%). A further fifth were students from secondary schools and about a tenth were enrolled in a postgraduate programme. Respondents with a different status, e.g. doctoral students (2%) or employees (6%), were rather an exception and mostly found among respondents to the online survey.

By and large the composition of respondents from individual target countries by current status was similar, due to the fact that the survey design included set quotas for the distribution of paper questionnaires in the target countries. Yet, proportions of secondary school students are somewhat lower in Latin American countries and Russia, and the proportion of postgraduate students is lowest in Thailand.

**Table 4.2**  
**Current status / main activity - by country of origin (percentages)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Pupil at secondary school	16	22	19	13	16	19	18
Student on an undergraduate course programme	56	57	55	60	57	72	60
Student on a postgraduate course programme	11	7	18	10	13	2	9
PhD student	3	1	1	1	3	0	2
Employed	8	3	5	10	9	5	6
Unemployed/seeking employment	1	0	1	2	1	1	1
Other current status	4	10	1	4	2	1	4
Total	100	100	100	100	100	100	100
Count (n)	(2675)	(2900)	(1847)	(2095)	(1962)	(2743)	(14222)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 7: What is your current status / main activity?

Sample: Students responding to paper based surveys and respondents to the online survey

The age of respondents at the time the surveys were carried out is strongly correlated with their level of study: School students were on average 18 years old, undergraduate students 21 years, postgraduate students 25 years and doctoral students 27 years old. Differences in the average

age of participants from individual target countries as shown in Table 4.3 are caused by differences in the composition by level of study.

**Table 4.3**  
**Age of the students in 2005 - by country of origin (percentages)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Up to 20	38	50	51	21	53	34	41
21 - 25	38	44	42	54	39	61	47
26 - 30	15	5	6	17	5	4	8
31 - 35	4	1	1	5	1	1	2
36 and older	5	0	1	3	1	0	1
Total	100	100	100	100	100	100	100
Count (n)	(1807)	(3065)	(1954)	(2403)	(2035)	(2577)	(13841)
Average age	23,0	21,0	20,7	23,7	20,8	21,1	21,7

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 1: Year of birth

Sample: Students responding to paper based surveys and respondents to the online survey

#### 4.1.2 Features of the planned stay abroad

To obtain an academic degree abroad was the primary goal for most of the students participating in the survey: nearly three quarters of respondents planned to earn an academic qualification (see table 4.4), most often a Master degree (40%), followed by a Doctorate/PhD (19%) and a Bachelor degree (12%). Fewer students intended to go abroad either for a limited period of study (14%) or to attend a language (8%) or a summer course (3%).

**Table 4.4**  
**Primary goal of the stay abroad - by country of origin (percentages)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Obtain a Bachelor degree or similar	12	16	12	15	11	7	12
Obtain a Master degree or similar	26	45	51	43	22	53	40
Obtain a Doctorate/PhD	24	22	17	19	11	16	19
Other qualification	3	1	1	2	1	1	2
Study abroad for a limited period of time	20	10	13	13	27	3	14
Attendance of a language course	10	1	1	4	16	15	8
Attendance of a summer course	3	1	2	2	7	3	3
Other purpose	3	3	2	2	3	2	3
Total	100	100	100	100	100	100	100
Count (n)	(3203)	(2572)	(1601)	(2457)	(1777)	(2498)	(14108)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
Question 12: What is the primary goal of your study abroad period?  
Sample: Students responding to paper based surveys and respondents to the online survey

There were large differences between the individual target countries. While three quarters and more students from Asian countries and at least two thirds from Latin America wanted to obtain a degree, this is the case of less than half of the Russians. Chinese and Indian respondents most frequently stated the intention to obtain a degree:

- 84 percent of *Chinese* students (16% a Bachelor, 45% a Master and 22% a PhD);
- 81 percent of *Indians* (12% a Bachelor, 51% a Master and 17% a PhD);
- 79 percent of *Mexicans* (15% a Bachelor, 43% a Master and 19% a PhD);
- 77 percent of *Thais* (7% a Bachelor, 53% a Master and 16% a PhD);
- 62 percent *Brazilians* (12% a Bachelor, 26% a Master and 24% a PhD);
- 44 percent of *Russians* (11% a Bachelor, 22% a Master and 11% a PhD);

Studying in another country for a limited period of time was comparatively often the goal of Russians (27%) and Brazilians (20%) while the attendance of language courses was mentioned most often by Russians (16%) and Thais (15%).

One of the quota criteria for the selection of participants in the paper-based survey was the students' field of study. Overall, the quotations set in the methodology of the study, i.e. 30 percent humanities, 40 percent natural sciences and engineering and 30 percent social sciences, were exactly reached (see Table 4.5). It is noteworthy that the distribution of respondents to the online survey by subject area groups does not differ much from participants in the paper-based survey. Some differences in the composition of students by field of study in comparison to the set quotas could be observed in individual target countries:

- *India*: the proportion of students in humanities is low (13%) while it is high in natural and technical sciences (57%),
- *China*: the proportion of students in social sciences is higher than expected (37%) and in natural sciences it is lower (34%),
- *Brazil and Mexico*: the proportion of students in social sciences is comparatively low (21% and 24%),
- *Russia*: the proportion of students in humanities is higher than expected (36%) and in natural sciences it is lower (30%),
- *Thailand*: the proportion of students in natural sciences is lower than expected (33%).

**Table 4.5**  
**Subject area groups of respondents - by country of origin (percentages, multiple response possible)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Humanities or related	31	26	13	28	36	32	28
Natural, technical sciences	43	34	57	45	30	33	40
Social sciences or related	21	37	27	24	30	28	27
Multi/Other	4	3	3	3	5	6	4
Total	100	100	100	100	100	100	100
Count (n)	(3209)	(2587)	(1640)	(2469)	(1799)	(2502)	(14206)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 13: What is the main area or field of your intended study abroad?

Sample: Students responding to paper based surveys and respondents to the online survey

A more detailed breakdown of fields of intended study abroad is shown in Table 4.6. A country-by-country comparison shows that:

- students from Brazil comparatively often intended to study cultural sciences (29%) and law (10%) in another country,
- Chinese more often than students from other countries were from the field of management and business studies (26%),
- Indians most often wanted to enrol in engineering and computer sciences (40%),
- Mexican students were also comparatively often from the field of engineering and information technologies (28%),
- Russians were most often interested in humanities and cultural sciences (31%),
- Thai students are close to the average with respect to most subject areas but mentioned art and architecture more often than others (13%).

**Table 4.6**  
**Field of intended study abroad - by country of origin (percentages, multiple response possible)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Agriculture	2	2	1	1	0	1	1
Art, Architecture	5	10	3	8	8	13	8
Engineering, ICT	21	15	40	28	16	19	22
Cultural Sciences (Humanities etc.)	29	21	11	23	31	23	23
Management	6	26	22	13	16	17	16
Mathematics, Natural sciences	12	9	7	8	6	4	8
Medicine	6	4	9	5	4	5	6
Social sciences	6	7	3	8	9	6	7
Law	10	4	1	2	5	5	5
Other/ Multidisciplinary	4	3	3	3	5	6	4
Total	100	100	100	100	100	100	100
Count (n)	(3209)	(2587)	(1640)	(2469)	(1799)	(2502)	(14206)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 13: What is the main area or field of your intended study abroad?  
 Sample: Students responding to paper based surveys and respondents to the online survey

About three quarters of students from the target countries had not finally decided if and where they wanted to study abroad at the time when the survey was carried out. Their ambitions and plans indicate that a high proportion of respondents aiming to study in a European country (69%) took part in the survey, followed by respondents aiming to go to the United States (18%), Australia (6%) and Canada (3%). As Table 4.7 shows, most survey participants intending to study in Europe were aiming to go to the United Kingdom (22%), Germany (18%), France (12%) and Spain (5%).

Differences between the selected or preferred destinations of students from different countries of origin are at least partly determined by a similar language in home and destination country. Thus, Mexican students stated Spain much more often than students from other countries (19% as compared to 5%). Asian students were mainly focused on the English speaking destination countries, i.e. United Kingdom, United States and Australia.

In addition, for every target country, the coordinating organisation's country is over-represented, i.e. Germany for Mexico and Brazil, the UK for India and Thailand, the Netherlands for China.

**Table 4.7**  
**Selected or preferred destination country - by country of origin (percentages)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
AT	0	0	1	0	0	0	0
CH	1	1	0	1	1	1	1
DE	35	10	10	28	14	4	18
DK	1	1	1	0	1	0	1
ES	7	0	0	19	1	0	5
FI	0	1	0	0	1	0	0
FR	12	17	3	14	25	4	12
IT	6	1	1	5	2	2	3
NL	1	8	1	1	1	1	2
PT	4	0	0	0	0	0	1
SE	1	1	2	1	2	2	1
UK	15	19	27	12	36	30	22
New EU member	0	0	0	0	2	0	0
Other Europe	1	1	1	1	2	0	1
AU	3	8	15	1	1	11	6
CA	3	4	3	7	1	2	3
NZ	0	1	1	0	0	3	1
US	10	23	31	6	9	30	17
JP	0	2	0	1	1	6	2
Other	1	2	1	2	1	3	2
Total	100	100	100	100	100	100	100
Count (n)	(3155)	(2508)	(1507)	(2424)	(1759)	(2460)	(13813)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 19: Have you already decided in which country you will finally study abroad?  
 Sample: Students responding to paper based surveys and respondents to the online survey

## **4.2. Students from other countries and regions**

### **4.2.1 Personal background**

Students from non-target countries could access the study online. After excluding participants from European countries, 2 536 respondents formed the pool for statistical analysis. Among them 30 percent were from Asian countries (other than the target countries), followed by Latin America (23%), Sub-Saharan Africa (22%), North Africa and the Middle East (12%), North America (11%) and Australia (4%).

About two thirds of the respondents from non-target countries were male (see table 4.8). The composition by gender strongly differed by region of origin. Eight out of ten of the participants from Sub-Saharan Africa, three quarters from North Africa and the Middle East and two thirds of



respondents from Asia were male. In contrast, male students made up only slightly more than half of the respondents from Latin America and slightly less than half from North America and Australia.

**Table 4.8**  
**Gender - by region of origin (percentages)**

	Region of origin						Total
	Other Asia	Other Latin America	Africa Sub-Sahara	North Africa and Middle East	North America	Australia, Oceania	
Male	61	58	80	75	44	44	63
Female	39	42	20	25	56	56	37
Total	100	100	100	100	100	100	100
Count (n)	(691)	(533)	(458)	(276)	(255)	(89)	(2302)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
Question 2: Gender  
Sample: Students responding to the online survey

In contrast to the target countries, the majority of respondents from non-target countries were postgraduate students or already employed at the time the survey was carried out. This can be due to the fact that most of them were "scholarship-seekers", who found out about the study by visiting the websites of scholarship providing organisations. A comparison by region of origin shows a relatively high proportion of school students and undergraduate students for North America (56%), and low proportions in the case of Asia (32%) and Africa (30%).

**Table 4.9**  
**Current status / main activity - by region of origin (percentages)**

	Region of origin						Total
	Other Asia	Other Latin America	Africa Sub-Sahara	North Africa and Middle East	North America	Australia, Oceania	
Pupil at secondary school	7	16	3	7	13	6	8
Student on an undergraduate course programme	25	27	27	23	43	35	28
Student on a postgraduate course programme	15	8	14	20	13	12	13
PhD student	3	4	3	7	2	4	4
Employed	37	28	31	25	21	24	30
Unemployed/seeking employment	5	5	9	5	4	16	6
Other current status	8	12	14	13	4	4	10
Total	100	100	100	100	100	100	100
Count (n)	(475)	(323)	(339)	(175)	(153)	(51)	(1516)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
Question 7: What is your current status / main activity?  
Sample: Students responding to the online survey

Generally, respondents to the online survey were at a higher level of studies than respondents to the paper based survey. Accordingly, online respondents were on average four years older. Differences in the average age of participants from non-target countries were related to variations in the respondents' level of study.

**Table 4.10**  
**Age of the students in 2005 - by region of origin (percentages)**

	Region of origin						Total
	Other Asia	Other Latin America	Africa Sub-Sahara	North Africa and Middle East	North America	Australia, Oceania	
Up to 20	14	14	9	15	23	23	14
21 - 25	43	34	30	42	44	47	38
26 - 30	28	33	37	26	20	15	29
31 - 35	10	13	16	12	5	7	12
36 and older	5	6	9	5	9	7	6
Total	100	100	100	100	100	100	100
Count (n)	(637)	(487)	(436)	(241)	(210)	(81)	(2092)
Average age	25,6	26,1	27,6	25,7	25,0	24,8	26,0

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
Question 1: Year of birth  
Sample: Students responding to the online survey

#### 4.2.2 Features of the intended stay abroad

The primary goal of more than three quarters of respondents from non-target countries was to obtain an academic degree abroad. Most of them planned to earn a Master degree (39%), followed by a Doctorate/PhD (24%) and a Bachelor (14%).

There were some differences by region of origin: while more than eight out of ten participants from Asia, Latin America and Africa wanted to obtain an academic degree abroad, this share is lower in case of the North Americans and Australians (61% and 58%). The latter are significantly more often interested in temporary stays abroad than respondents from other regions (see table 4.11). To obtain a Master degree was most often the goal of Sub-Saharan Africans (45%), while a majority of North Africans wanted to obtain a Doctorate/PhD (38%).

**Table 4.11**  
**Primary goal of the study abroad period - by region of origin (percentages)**

	Region of origin						Total
	Other Asia	Other Latin America	Africa Sub-Sahara	North Africa and Middle East	North America	Australia, Oceania	
Obtain a Bachelor degree or similar	13	14	15	10	12	20	14
Obtain a Master degree or similar	42	40	45	32	32	26	39
Obtain a Doctorate/PhD	25	29	19	38	15	10	24
Other qualification	2	3	2	3	2	2	2
Study abroad for a limited period of time	9	7	11	9	21	29	11
Attendance of a language course	3	3	2	3	7	7	4
Attendance of a summer course	1	1	1	1	2	1	1
Other purpose	4	3	4	4	8	5	4
Total	100	100	100	100	100	100	100
Count (n)	(735)	(554)	(524)	(288)	(253)	(91)	(2445)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
Question 12: What is the primary goal of your study abroad period?  
Sample: Students responding to the online survey

Regarding the main areas of study, half of the participants were in fields related to natural and technical sciences, 28 percent in fields related to social sciences and one fifth in humanities or related fields (see table 4.12).

**Table 4.12**  
**Main area / field of intended study abroad - by country of origin (percentages, multiple response possible)**

	Region of origin						Total
	Other Asia	Other Latin America	Africa Sub-Sahara	North Africa and Middle East	North America	Australia, Oceania	
Humanities or related	18	21	12	13	37	30	19
Natural, technical sciences	47	50	55	69	27	33	50
Social sciences or related	32	25	30	16	31	32	28
Multi/Other	2	4	3	2	5	5	3
Total	100	100	100	100	100	100	100
Count (n)	(738)	(554)	(528)	(287)	(255)	(91)	(2453)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 13: What is the main area or field of your intended study abroad?

Sample: Students responding to paper based surveys and respondents to the online survey

As shown in table 4.13, one third of the participants from Asia, Africa and Latin America intended to study engineering, while the biggest group of North Americans (32%) and Australians (25%) preferred cultural sciences. In addition,

- Asian participants more often intended to study management (16%) than respondents from other regions;
- Latin Americans were close to the average with respect to all subject areas;
- Sub-Saharan Africans most often wanted to study medicine (10%);
- North Africans were more often than other respondents interested in engineering (37%) as well as mathematics and natural sciences (17%);
- North Americans were high above average in case of social sciences (20%).

**Table 4.13**  
**Main area / field of intended study abroad - by country of origin (percentages, multiple response possible)**

	Region of origin						Total
	Other Asia	Other Latin America	Africa Sub-Sahara	North Africa and Middle East	North America	Australia, Oceania	
Agriculture	3	1	3	3	0	1	2
Art, Architecture	4	8	2	5	9	9	6
Engineering, ICT	30	30	30	37	8	10	28
Cultural Sciences (Humanities etc.)	16	16	11	11	32	25	16
Management	16	13	15	8	7	12	13
Mathematics, Natural sciences	7	11	11	17	11	13	11
Medicine	5	6	10	9	4	4	7
Social sciences	14	8	12	6	20	13	12
Law	2	4	4	2	4	7	3
Other/ Multidisciplinary	2	4	3	2	5	5	3
Total	100	100	100	100	100	100	100
Count (n)	(738)	(554)	(528)	(287)	(255)	(91)	(2453)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 13: What is the main area or field of your intended study abroad?

Sample: Students responding to paper based surveys and respondents to the online survey

It is likely that most of the respondents from non-target countries were seeking information on study opportunities and scholarships in a specific European country when they found out about the survey. Hence, it is not surprising that about nine out of ten preferred or had already selected a study destination in Europe.

**Table 4.14**  
**Selected or preferred destination country - by country of origin (percentages)**

	Region of origin						Total
	Other Asia	Other Latin America	Africa Sub-Sahara	North Africa and Middle East	North America	Australia, Oceania	
EU/ EFTA	89	92	89	91	95	98	91
US	6	3	5	4	2	0	4
CA	2	2	4	3	1	0	2
Other	3	3	2	2	3	2	3
Total	100	100	100	100	100	100	100
Count (n)	(706)	(534)	(499)	(266)	(239)	(84)	(2328)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 19: Have you already decided in which country you will finally study abroad?

Sample: Students responding to paper based surveys and respondents to the online survey

### 4.3. International students in the US

Students participating in the US survey were spread over different regions of the world and reflected the diversity (and, quite accurately, the composition) of the international student population in the United States. Forty-six percent of the survey participants were from Asia, followed by 26 percent from Europe, and 13 percent from Latin America (Table 4.15).

**Table 4.15**  
**Region of origin (percentages)**

Europe	26
Latin America	13
Africa Sub-Sahara	7
North Africa and Middle East	6
East Asia	19
South Asia	15
South East Asia	12
Other (Canada, Australia, Oceania)	2
Total	100
Count (n)	(423)

Source: Survey on international students in the United States  
Question 3: What is your home country (country were you lived prior to studying in the United States)?

Forty-five percent of the survey participants indicated that they were female, with the following variations:

- seventy-two percent of survey participants from South Asia were male;
- slightly more than the average of survey participants from Africa was female (56%);
- at graduate level, 59 percent of participants were male, whereas this share was only 44 percent at undergraduate level.

The mean age of survey participants was 27 years (Table 4.16).

**Table 4.16**  
**Mean age of the students in 2005 - by level of study**

	Level of study				Total
	Bachelor student	Master student	Doctoral student	Not specified	
Age	23,0	27,4	29,6	24,3	26,7
Count (n)	(120)	(130)	(146)	(23)	(419)

Source: Survey on international students in the United States  
Question 1: Year of birth

Thirty-four percent of the survey participants held a Master's or similar degree at the time of the survey; 32 percent held a Bachelor's Degree. Nearly 40 percent of students enrolled at the Master's level were already holding another Master's degree, most likely from their home country. (Table 4.17)

**Table 4.17**  
**Highest educational/ academic degree - by level of study (percentages)**

	Level of study				Total
	Bachelor student	Master student	Doctoral student	Not specified	
Completion of secondary school	74	8	7	48	28
Bachelor degree or similar	18	50	25	48	32
Master degree or similar	2	39	59	5	34
Doctorate/PhD	0	1	8	0	3
Other degree	6	2	1	0	3
Total	100	100	100	100	100
Count (n)	(119)	(131)	(151)	(21)	(422)

Source: Survey on international students in the United States  
Question 7: What is the highest educational/academic degree you hold?

Fifty-one percent of the participants indicated that they had been a student at undergraduate, graduate or postgraduate level prior to studying in the United States. Eighteen percent had been secondary school students and 26 percent had been employed. (Table 4.18)

**Table 4.18**  
**Status / main activity prior to studying in the U.S. - by level of study (percentages)**

	Level of study				Total
	Bachelor student	Master student	Doctoral student	Not specified	
Pupil at secondary school	50	5	5	10	18
Student on an undergraduate course programme	35	29	21	67	30
Student on a postgraduate course programme	3	19	20	10	15
PhD student	0	0	18	0	6
Employed	6	42	30	10	26
Unemployed/seeking employment	0	2	3	0	2
Other status	6	2	3	5	4
Total	100	100	100	100	100
Count (n)	(119)	(129)	(149)	(21)	(418)

Source: Survey on international students in the United States  
Question 6: What was your status / main activity prior to studying in the United States?

The most popular fields of study were Management, Business and Finance (21%), Computer Science, Engineering, Technology (19%) and Information Technology (13%). Other fields of study included Social Sciences (12%), Natural Sciences (11%) and Medical Sciences (6%).

#### 4.4. Education staff from the six target countries

Two thirds of the education staff from the target countries were professors or lecturers at universities, a further fifth were teachers at secondary schools. The sample was completed by international relation officers (7%) and educational agents (6%).

**Table 4.19**  
**Current status / main activity - by home country (percentages)**

	Home country						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Teacher at secondary school	7	20	28	17	17	18	18
Professor / lecturer	60	57	58	58	72	77	66
International relation officer	20	7	2	18	6	0	7
Education agent	2	16	9	4	4	2	6
Other	11	0	3	2	1	3	3
Total	100	100	100	100	100	100	100
Count (n)	(101)	(252)	(126)	(178)	(179)	(369)	(1205)

Source: Survey on teaching staff, international officers and educational agents  
Question 3: What is your current status / main activity?

There were differences in the composition of education staff by main activity between the individual target countries. The proportion of professors and lecturers was low among Latin American, Chinese and Indian experts, while it was high in case of Russia and Thailand. In addition,

- the proportion of Brazilian international relations officers was highest of all target countries (20%), whereas the share of secondary school teachers was lowest (7%);
- a comparatively large proportion of education agents was found among Chinese education staff (16%);
- slightly more than a quarter of Indian education staff were secondary school teachers compared to an average of 18 percent. The proportion of education agents was also relatively high (9%);
- the proportion of international relations officers among Mexican staff was far above the average (18%);



- Russians were relatively close to the average with the exception of the proportion of professors and lecturers (72%);
- international relations officers were under-represented among Thai respondents.

Similar proportions of teaching staff among the respondents were from humanities or related fields of study (39%) and from natural or technical sciences (38%). The background of 17 percent was social sciences or related subject areas (see table 4.20).

About two thirds of lecturers and secondary school teachers from Russia were from the field of humanities. Their share was also comparatively high in the case of Brazil and China. Indians and Mexicans were mainly from natural and technical sciences while the composition of Thais by subject area groups was more balanced.

**Table 4.20**  
**Main subject area - by home country (percentages, multiple response possible)**

	Home country						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Humanities or related	44	44	15	30	62	37	39
Natural, technical sciences	43	35	58	48	30	33	38
Social sciences or related	11	15	25	18	8	21	17
Multi-disciplinary / other	2	6	2	4	1	10	5
Total	100	100	100	100	100	100	100
Count (n)	(82)	(228)	(122)	(153)	(173)	(356)	(1114)

Source: Survey on teaching staff, international officers and educational agents  
Question 4: If you are a professor / lecturer / teacher, what is your main subject area?

A more detailed breakdown of subjects is shown in table 4.21:

- the most important subject areas of *Brazilians* were languages and philological sciences (29%), engineering and technology (23%) and humanities (17%);
- *Chinese* teaching staff came mainly from languages and philological sciences (20%), computer science and information technology (14%) and international relations / cultural studies (12%);
- *Indians* were most often from natural sciences (18%), management, finance and business (17%), social sciences (16%) and mathematical and physical sciences (15%);
- most *Mexicans* were from engineering and technology (18%), followed by humanities (13%), natural sciences, mathematical and physical sciences, management, finance, and business as well as social sciences (10% each);
- *Russians* most often had a disciplinary background in languages and philological sciences (44%), followed by education and teacher training (23%);

- the most frequent subjects of *Thais* were languages and philological sciences (20%) and art and design, music (10%);

**Table 4.21**  
**Main subject area - by home country (percentages, multiple response possible)**

	Home country						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Agricultural Sciences, Forestry, Fishery	2	4	1	3	0	4	3
Architecture, Urban and Regional planning	0	7	1	1	1	4	3
Art and Design, Music	2	6	1	6	1	10	5
Communication and Journalism	1	10	2	4	2	3	4
Computer Science and Information Technology	5	14	12	4	5	6	8
Education, Teacher Training	6	9	5	8	23	4	9
Engineering, Technology	23	8	13	18	9	9	12
Humanities	17	11	7	13	9	6	9
International Relations / Cultural Studies	10	12	2	8	6	2	6
Languages and Philological Sciences	29	20	8	8	44	20	22
Law	5	5	0	3	6	6	5
Management, Finance, and Business	4	7	17	10	3	8	8
Mathematical and Physical Sciences	7	5	15	10	10	7	8
Medical Sciences	2	0	2	8	3	3	3
Natural Sciences	6	7	18	10	5	3	7
Social Sciences	6	8	16	10	3	8	8
Tourism, Hospitality Management	2	2	0	1	2	1	2
Other area of study	1	4	3	5	2	9	5
<b>Total</b>	<b>130</b>	<b>138</b>	<b>124</b>	<b>131</b>	<b>133</b>	<b>114</b>	<b>127</b>
<b>Count (n)</b>	<b>(82)</b>	<b>(228)</b>	<b>(122)</b>	<b>(153)</b>	<b>(173)</b>	<b>(356)</b>	<b>(1114)</b>

Source: Survey on teaching staff, international officers and educational agents  
Question 4: If you are a professor / lecturer / teacher, what is your main subject area?

## **IV Background Information**

The knowledge of the way European higher education is perceived in major target countries is a necessary condition for the creation of a European brand, but it is obviously not the only one.

In order to put the findings of the surveys into perspective, this chapter provides contextual information on foreign students in Europe. It will help identify the extent to which European higher education offers are successful (or not) in the “world market of higher education”, and compare Europe’s share with that of its major competitors US and Australia.

The decision on how to advertise European higher education must also take into account already ongoing marketing efforts of individual European countries and institutions, to which European-level activities must be complementary, as well as the activities of Europe’s major competitors. The second part of this chapter provides an analytical overview of ongoing international higher education marketing by EU countries and institutions, and of successful brands and campaigns from the major English-speaking destinations.

### **1 Foreign Students<sup>3</sup> in Europe: the most favourite destination?**

This section provides some basic information on foreign students in Europe, and on the relative success of Europe with regard to its competitors Australia and the US with regard to attracting foreign students. It is intended to contextualise the information obtained from the various surveys carried out as part of the present study, and to provide some indications for the formulation of recommendations concerning European-level higher education marketing.

Most of the data presented have been taken from the EURODATA report<sup>4</sup>, which ACA concluded in parallel to the present study, and which provides comprehensive data on foreign students and on student mobility in 32 European countries. These countries are the 25 member states of the European Union, the four countries belonging to the European Free Trade Association, as well as Bulgaria, Romania and Turkey.

---

<sup>3</sup> Foreign students are used in this section as a proxy for mobile students. As is well-known to data specialists, the criterion of nationality (foreign) is, at any rate in Europe, a dubious one for measuring genuine mobility. However, most countries, and especially those outside of Europe, do provide data on mobility as such.

<sup>4</sup> Maria Kelo, Ulrich Teichler, Bernd Wächter (eds.), EURODATA. Student mobility in European higher education. Bonn: Lemmens 2005.

## 1.1. The global picture

In the year 2002/03, from which the below data are taken, the overwhelming majority of the over two million students studying outside of the country of their nationality studied in Europe, the US and Australia. How are these students distributed across the three regions/countries?

**Table 1.1: Foreign Tertiary Students and Total Enrolment by Host Region – 2002/03**

	<b>EURODATA Region</b>	<b>United States</b>	<b>Australia</b>
<b>Total Enrolment</b>	19 430 382	12 853 627	1 012 210
<b>Total Foreign Students</b>	1 117 735	583 323	179 619
<b>% Foreign of all Students</b>	5.8	4.6	17.7

Sources: UNESCO/EUROSTAT/EURODATA

The above table reveals that Europe is the leading destination of foreign students studying outside their own country. The number of foreign students in the 32 EURODATA countries is almost double as high as that of the US, which are often quoted as the chief destination of foreign students worldwide. Even when deducting the foreign students in the seven non-EU countries, the figure falls only marginally, to just over a million (1 039 428). The EURODATA region also leads the US in terms of the percentage of foreign students of all students enrolled. It can, however, not compete with Australia, and its impressive share of nearly 18%.

However, the above data are no serious indicator for the relative attractiveness of Europe as a study destination. Two factors lead to a distorted view.

First, in order to be able to seriously compare European numbers with those in the US and Australia, one needs to deduct the mobility *between* EURODATA countries from the EURODATA total of foreign students. Some 42% of the above total is made up of students from EURODATA countries, 54% are from other countries, and the origin of a further 4% is unknown. This almost halves the number of students that Europe (the EURODATA region) attracts from outside, to about 600 000.

Second, a substantial share of foreign students in EURODATA countries has not been mobile in order to become a student in their country of study. They are foreign nationals who were born and raised in the country of study. Although reliable data are hard to get at, it is fairly clear that the share of such students is higher in Europe than elsewhere. However, most of the students in question are nationals of other EURODATA countries, and thus already included in the above reduction.

**Table 1.2: Foreign Tertiary Students and Total Enrolment by Host Region (non-EURODATA Origins only) – 2002/03**

	<b>EURODATA Region</b>	<b>United States</b>	<b>Australia</b>
<b>Total Enrolment</b>	18 916 234	12 853 627	1 012 210
<b>Total Foreign Students</b>	600 634	583 323	179 619
<b>% Foreign of all Students</b>	3.2	4.6	17.7

Sources: UNESCO/IIE (Open Doors)/EURODATA

Based on the 54% share of non-EURODATA students, the picture looks remarkably different, as Table 1.2 shows. The number of foreign students in the EURODATA region is now more or less on par with that in the US. The share of foreign students of all students in the EURODATA region is now only about 70% of that in the US. And even this value does not reflect Europe's relative attractiveness adequately, since participation of the relevant age group in higher education in the US is higher than in Europe, which artificially lowers the percentage of foreign students in the US. In terms of the percentage of foreign students of all students, Australia remains an unchallenged leader.

**Table 1.3: Distribution of Foreign Tertiary Students by Region of Origin in Percent (non-EURODATA Origins only) – 2002/03**

	<b>EURODATA Region</b>	<b>United States</b>	<b>Australia</b>
Africa	31	7	4
North America	6	5	7
South America	8	12	1
Asia (inclusive of Mid-East and Oceania)	40	57	77
Europe	n.a.	13	11
Non-EURODATA Europe	15	n.a.	n.a.

Source: UNESCO/IIE (Open Doors)/EURODATA

Table 1.3 gives an insight into the regional origin of foreign students in the EURODATA region, in the US and in Australia. The data for the EURODATA region include only students from outside of the 32 EURODATA countries. Asian students are the single largest group in all three cases, although their percentage in Australia is almost double as high as in the EURODATA region. However, since Australia's total number of foreign students is only about a third of that in the US and in the EURODATA countries, the highest absolute number of Asian students studies in the US. African students play only a minor role in the US and Australia, but they make up

almost one third of all foreign students in the EURODATA countries (although they are concentrated in a few countries only). Latin American students are only a small share in all three regions/countries, although their relative importance is much higher in the US than elsewhere.

## **1.2. Foreign students in Europe**

As stated above, in the academic year 2002/03, there were 1 117 735 foreign students in all EURODATA countries, and 1 039 428 in the EU-25. How were these students distributed?

As table 1.4 displays, foreign students in Europe are by no means equally spread across countries. Of the total of 1 117 735 foreign students in all 32 EURODATA countries, 1 039 428 (or 93%) study in the 25 European Union countries. The share of the seven remaining countries is thus small.

Of the total of foreign students in the EURODATA zone (from inside and outside this area), almost two thirds (64% or 717 419) study in the United Kingdom, Germany and France. This concentration is remarkable by any standard. The three countries' share of all students in the EURODATA zone, is, for example, only 34%, indicating that the UK, France and Germany attract double as many foreign students compared to the home student population than the EURODATA zone average. This distribution concerns all foreign students in the EURODATA zone (i.e. inclusive of students of EURODATA origins). It is near-identical with the distribution of students with non-EURODATA origins.

The ten new member states of the Union attract very few foreign students. Their total number in 2002/03 was a very modest 42 655, which corresponds to a share of slightly under 4% of all foreign students in the EURODATA zone. The picture is not much better for Southern Europe. Italy, Spain, Portugal and Greece together host 117 715 foreign students, or 10%, whereas their share of all students enrolled in the EURODATA zone is almost one quarter. Again, the distribution mentioned concerns all foreign students, but the distribution of non-EURODATA foreign students does not fundamentally differ from this pattern.

Moreover, there are very different patterns regarding the countries and regions of origin of foreign students in the 32 EURODATA countries. Geographical proximity and historical ties do influence student flows –between EURODATA countries, but also into the EURODATA zone from elsewhere in the world. Students from Eastern European non-EURODATA countries (Russian Federation, Ukraine, Belarus, etc) have a strong presence in most new member states and in Austria and Germany, whereas they play no major role elsewhere. Two thirds of all students from Africa in all EURODATA countries study in Belgium and France, which have a colonial history on this continent.

**Table 1.4: Foreign tertiary students in EURODATA countries 2002/2003**

EURODATA countries	All tertiary students	All foreign students	Proportion of foreign among all students %	Female %	Countries of foreign nationality <sup>1)</sup>			10 most frequent nationalities of foreign students %
					EURODATA countries %	Other European countries %	Non-European countries %	
AT Austria	229 802	31 101	13.5	51.9	74.6	13.3	11.7	97.1
BE Belgium	374 532	41 856	11.2	*	53.2	1.7	27.0	60.0
BG Bulgaria	230 513	8 025	3.5	41.6	38.2	51.4	10.4	90.3
CH Switzerland	185 965	32 847	17.7	44.8	69.8	10.0	20.1	61.6
CY Cyprus	18 272	5 282	28.9	22.6	9.5	6.6	82.7	88.6
CZ Czech Republic	287 001	10 338	3.6	48.6	77.0	8.9	12.3	82.0
DE Germany	2 242 397	240 619	10.7	49.3	48.1	13.1	38.0	49.0
DK Denmark	201 746	18 120	9.0	54.1	36.9	6.3	19.9	38.3
EE Estonia	63 625	1 090	1.7	*	75.1	11.2	13.7	94.8
ES Spain	1 840 607	53 639	2.9	56.0	56.2	2.1	41.7	63.8
FI Finland	291 664	7 361	2.5	46.5	38.4	17.3	42.4	58.5
FR France	2 119 149	221 567	10.5	48.7	21.5	2.7	69.1	47.9
GB United Kingdom	2 287 833	255 233	11.2	48.3	40.8	1.5	57.4	55.5
GR Greece	561 457	12 456	2.2	*	84.9	8.3	6.3	92.5
HU Hungary	390 453	12 226	3.1	47.8	63.7	20.9	15.5	84.6
IE Ireland	181 557	10 201	5.6	50.3	42.1	1.7	56.2	72.7
IS Iceland	13 347	580	4.3	65.3	74.3	6.9	18.4	64.5
IT Italy	1 913 352	36 137	1.9	56.3	41.9	30.0	27.7	61.7
LI Liechtenstein	440	346	78.6	*	*	*	*	*
LT Lithuania	167 606	689	0.4	33.8	32.9	12.9	54.1	76.3
LU Luxembourg	3 077	*	*	*	*	*	*	*
LV Latvia	118 944	2 390	2.0	*	29.4	15.4	55.2	93.2
MT Malta	8 946	409	4.6	57.7	28.6	26.2	45.2	59.7
NL The Netherlands	526 767	20 531	3.9	53.9	57.8	3.5	38.0	70.0
NO Norway	212 395	11 060	5.2	56.9	40.4	9.6	24.6	43.2
PL Poland	1 983 360	7 617	0.4	54.0	29.1	45.2	25.5	74.1
PT Portugal	400 831	15 483	3.9	50.1	17.7	0.5	80.1	82.7
RO Romania	643 911	9 730	1.5	47.5	19.4	56.8	23.6	81.8
SE Sweden	414 657	32 469	7.8	56.6	53.7	4.6	20.0	44.9
SI Slovenia	101 458	963	0.9	48.9	11.2	83.8	3.1	92.9
SK Slovakia	158 089	1 651	1.0	46.0	39.4	25.0	35.6	72.0
TR Turkey	1 256 629	15 719	1.3	30.7	15.9	17.0	48.0	55.3
<b>Total</b>	<b>19 430 382</b>	<b>1 117 735</b>	<b>5.8</b>	<b>46.4</b>	<b>42.1</b>	<b>8.0</b>	<b>45.6</b>	<b>56.8</b>

<sup>1)</sup> Only students with known nationalities

Source: EURODATA

Unfortunately, the statistical base for an analysis of the disciplinary distribution of foreign students is quite weak. Based on data from those countries which provide data by field of study, about half of all students in the EURODATA region are from the fields of Social and Behavioural Sciences, Law and the Humanities. Engineering and science students, in which the European Union should have a particular interest given the European Commission's forecast of a severe future shortage of researchers in these fields in Europe, on average make up about one third of all foreign students in those countries where data are available. According to an analysis by Wilen<sup>5</sup>, the share of students in Engineering and Science among foreign students is lower than their share of the total student population. Exceptions to this relative under-representation are found in Germany and Finland.

Another weakness of European student statistics is that they do not differentiate between the Bachelor and the Master level. It is therefore everybody's best guess if the majority of foreign students study in first degrees, or in the second cycle. In the US, where more differentiated data are available, 46% of all foreign students are enrolled in Master and PhD programmes. This corresponds to a share of Master and PhD students of the total student population of only 16%. In other words, the proportion of foreign research-near students is especially high in the US.

### **1.3. Conclusion**

Three main conclusions can be drawn from the above patterns.

First, and looking only at those foreign students with a non-EU (or non-EURODATA) nationality, it becomes clear that the United States are still leading Europe as a destination of foreign students. This is also, and much more so, the case with Australia. In the latter case, however, very different policies of attracting foreign students are at play (growth of the higher education industry, mass approach), which Europe does probably not want to follow.

Second, Europe's relative disadvantage with regard to its competitors is predominantly with Asian students. While growth rates in recent years have been impressive, the participation of Asian students is still Europe's weakness.

Third, foreign students in the EURODATA region are far from evenly spread. The United Kingdom, Germany and France host three out of five foreign students in the EURODATA zone. As a consequence, other countries, particularly the new member states and Southern Europe, are underserved.

---

<sup>5</sup> Cf. Håkan Wilen, "Increasing numbers of foreign students in the EU, decreasing job-to-job mobility of HRST", Statistics in Focus. Science and Technology 1/2005, European Communities: 2005



## 2 Branding and marketing activities: different ways to attract the brightest or the most

Building a brand for European higher education and promoting it at global level is an inexperienced challenge and yesterday's news at the same time. Several European countries are already marketing their higher education worldwide. Some have been taking part in the global competition over the best brains for decades, some are newcomers – but overall, awareness of the need to attract talent and promote higher education opportunities is certainly increasing across Europe. However, some joint initiatives apart, there is still no genuine European marketing.

Hence, even if a European brand will be a novelty, it needs to be developed in the light of already ongoing marketing efforts of individual European countries, to which European-level activities must be complementary. It also must take into account the activities of Europe's major competitors.

The following chapter will provide an overview of the most important actors and ongoing national level marketing activities implemented by European countries and by the major non-European English speaking destinations.<sup>6</sup>

### 2.1. *National attractiveness agendas and their executors*

National policy initiatives aiming to attract foreign students are driven by a variety of factors. The most important rationale behind the different national attractiveness agendas is the competition over the best brains, and the need to build an international quality profile. Most countries depend on international students in order to ensure their research base and to make the move towards a knowledge society. Other reasons range from the grand aim to educate future “ambassadors” and contribute to foreign policy to solving the problem of a chronically underfunded higher education sector by generating fee income from international students. The latter is an open or hidden motivation in most countries – even where no fees are being charged at present, the introduction of tuition fees at least for international students is being discussed.

Not all study destinations engaged in marketing their higher education opportunities count with national initiatives to increase their attractiveness for international students. However, a **national attractiveness agenda** is usually either being discussed, or it has reached the level of a “declaration of political will”. In some countries, government initiatives have materialised into

---

<sup>6</sup> ACA wishes to thank the British Council, EduFrance, the DAAD, Nuffic, the Swedish Institute, CIMO, CIRIUS and the ÖAD for their contributions to the present chapter. In addition to the general overview provided in this chapter, the country reports in the annex provide information on marketing activities in the six target countries included in the study.

investment and have provided funding for a range of activities: the support of existing and the creation of new scholarship programmes, the revision of immigration regulations for international students and, last but not least, the creation of a national brand and marketing strategy. The lack of a national initiative does not necessarily mean that a country is not or not yet a player on the global education market: in the US, for example, higher education institutions have so far been the main actors in marketing education opportunities, while the federal level only has a limited role.

Overall, different **types of actors** can be implementing marketing strategies. A non-governmental organisation is in charge of marketing activities in most countries. With some exceptions, most of them closely collaborate with and are supported by their government. A few organisations are mainly focused on marketing higher education opportunities (e.g. EduFrance, the International Education Board Ireland or the Australian IDP). For most of them, however, marketing higher education opportunities is only part of a wide range of activities linked to the internationalisation in education and training (e.g. the Dutch Nuffic, the Finnish CIMO, the German DAAD, Cirus Danmark, the Norwegian SIU or the Austrian Exchange Service ÖAD) or, more generally, to foreign cultural policy (e.g. The British Council or the Swedish Institute).

In some countries, the government directly implements marketing activities or runs a network of educational advisers. Australian Education International (AEI) and EducationUSA are examples for national-level governmental initiatives. In countries with a federal system, there are frequently education consortia or marketing initiatives at state-level, for example in the US (e.g. Destination Indiana or Study Washington), in Canada (e.g. British Columbia) or in Germany (e.g. Baden-Württemberg).

The following paragraphs will provide an overview of the main actors engaged in international education marketing in a range of countries. The list does not attempt to be complete, but aims to provide examples of how different destinations implement marketing activities in higher education.<sup>7</sup>

---

<sup>7</sup> Another publication providing such an overview is the Competitor Analysis published by AEI, which is updated on a yearly basis. The publication and the respective updates can be downloaded from AEI's website at <http://aei.dest.gov.au>.

### 2.1.1 The main non-European English speaking destinations

With its historically decentralised and competitive higher education sector, the **United States** is the best example of a country with no coordinated international education policy and no national action to attract and recruit foreign students. However, recent concern over declining international enrolments has encouraged US campuses, Congress and several US government agencies and educational not-for-profit organisations to take pro-active steps to attract new and increasing numbers of students from abroad: although still the number one destination, the US performs significantly weaker than Australia, the UK and other countries, given the numbers of international students relative to GDP or size of the respective higher education sectors.

Since 1999 and even more intensely after 9/11, stakeholders in international education have repeatedly called upon the Federal Government to take steps to promote international education and to work towards a national policy on international education. In July 2005, the US House of Representatives finally approved legislation to authorise spending levels for educational and cultural exchanges and requested the Secretary of State, in consultation with the Secretaries of Homeland Security, Education and Commerce, to develop a “comprehensive strategy to attract foreign students to study in the United States”. Further, there has been an expansion of public diplomacy efforts by US authorities and educational advising offices underlining the importance of international students, assuring that America’s doors are still wide open to qualified students from around the world.<sup>8</sup>

There are a number of examples of coordinated marketing approaches at the state or regional government level, and there are signs that governmental, non-governmental and academic institutions are cooperating more closely with the goal to develop a national strategy that will ensure that the US remains competitive in the global market of higher education. While there is no federal agency to fund or regulate the recruitment of foreign students, the US government supports communications and advising resources for foreign students, working with the colleges and universities in a decentralised way through its EducationUSA network. EducationUSA is a global network of approximately 450 advising and information centres in 170 countries supported by the Bureau of Educational and Cultural Affairs at the US Department of State. These centres are usually housed within US embassies, Fulbright commissions, non-governmental educational organisations or even universities and give free of charge information about educational opportunities in the United States. Almost 25 million prospective international students come to the advising centres each year to seek information and guidance on educational opportunities in the United States, on scholarships and grants, on the visa application process, and on general information about the US higher education system. EducationUSA also runs a web portal providing information on studying in the US, as well as contact details of educational advising centres (<http://educationusa.state.gov/>).

---

<sup>8</sup> Cf. Daniel Obst and Joanne Forster, Country report US

The International Institute of Education (IIE), an independent not-for-profit organisation, is another important actor in international education. Based in New York, IIE has a network of 18 offices worldwide. A few of them host the above mentioned educational advising centres. The IIE offices in Asia sponsor annual US University Fairs. Beyond this, IIE's focus lies rather on the general promotion of internationalisation and exchange (by scholarships like Fulbright and other means) than on marketing US education.

In addition to the national-level activities, some higher education institutions enter into consortia or use resources from state or regional government or trade organisations. One example of a coordinated approach is "Destination Indiana", which was initiated in 2001 by the International Trade Division of the Indiana Department of Commerce and the Indiana Consortium for International Programs (ICIP). Destination Indiana is a consortium of public and private, small and large colleges and universities in the state of Indiana ([www.destinationindiana.org](http://www.destinationindiana.org)), aiming to increase the number of international students who study in the state of Indiana and to increase the name and recognition of the state as a study destination for international students. Similar initiatives exist in California, Illinois, Iowa, Oregon and Washington.<sup>9</sup>

**Australia** has a clear national policy for the internationalisation of education and training, and it is surely the country which is investing the most heavily in international marketing both at the national and individual university level. Further, Australia is probably the clearest case where an economic rationale has overtaken (though not fully replaced) other motivations behind international student recruitment. Revenue from international students is one of the country's largest exports and their presence in Australia is also encouraged as a pathway to promote skilled migration.

The generic marketing of Australia is the responsibility of Australian Education International (AEI), which is part of the Ministry of Education. The announced budget for 2003 to 2007 was AUS\$ 113 million (ca. 70.5 million Euro) to cover international education initiatives, out of which over a third are to finance additional promotion of Australia as a destination and the development of offices in some key countries. Through the AEI investment an Australian Brand has been developed and marketed (see 1.3). Linked to this financial boost, the Australian government issued a statement on the internationalisation of Australian education and training, *Engaging the World through Education*. Amongst other issues, the document confirms the government's aim to raise "the international profile of Australia as a world leader in many scientific, educational and cultural areas" and to protect "the reputation of Australia's capacity to provide quality education".<sup>10</sup>

---

<sup>9</sup> Cf. The Education Training & Export Consortium (ETEC)/Destination Southern California, [www.educationsocal.com](http://www.educationsocal.com); Study Illinois International Education Consortium, [www.studyillinois.org](http://www.studyillinois.org); Study Iowa, [www.studyiowa.org](http://www.studyiowa.org); Study Oregon, [www.studyoregon.com](http://www.studyoregon.com); Study Washington, [www.studywashington.org](http://www.studywashington.org).

<sup>10</sup> Cf. <http://aei.dest.gov.au/AEI/AboutAEI/PoliciesAndPriorities/default.htm>

AEI has 22 offices in 15 countries, and it is supported by the Australian Trade Commission (Austrade) in a range of European, Latin American and Middle East countries where it does not have a presence. AEI and Austrade work together in a strategic partnership, governed by a memorandum of agreement signed in July 2004. They aim to promote the “export” of Australian education and participate jointly at a wide range of education fairs worldwide.<sup>11</sup>

Another organisation promoting Australian education abroad is IDP Education Australia, a not-for-profit organisation that is wholly owned by all Australian universities. IDP’s main mission is to market Australian HE internationally and to counsel and recruit international students for Australian educational institutions, including universities, vocational education and training institutes, English language colleges and schools. The organisation has a network of 62 offices in 27 countries and it receives a commission payment for every student it directly recruits. Further, IDP provides services in credential evaluation and assessment. IDP is also a pioneer in market research on future student demand.<sup>12</sup>

AEI, Austrade and IDP all run web portals which promote Australian education opportunities (<http://www.studyinaustralia.gov.au>, <http://www.austrade.gov.au/overseas/> and [www.idp.com/students](http://www.idp.com/students)). In addition to providing comprehensive information on Australian education opportunities in several languages, the IDP website also offers the possibility to apply online.

There is no doubt that Australia has been the most successful country in terms of increasing international student numbers over the last decade. Australia’s very positive approach combined with significant investment by the Australian authorities into marketing the study destination has all helped. However what should not be underestimated are the activities of the institution’s themselves. They have been forced to act very entrepreneurially and internationally to respond to cuts in their budgets imposed by government.

**New Zealand** is increasingly taking a similar approach as its neighbour Australia. The New Zealand government invests very considerable sums (70 million NZ\$ or 40.9 million Euro over five years) in marketing NZ as an education destination – particularly given its size. They see this as extremely important for international influence, revenue generation and migration purposes. “This progressive expansion of government’s investment in international education underpins our commitment to increasing and strengthening education as a key part of New Zealand’s strategic relationships with the rest of the world. It also reflects our desire to help the industry diversify across more markets.”<sup>13</sup>

---

<sup>11</sup> Cf. AEI Report to the Industry 2004-05, [http://aei.dest.gov.au/AEI/MIP/ItemsOfInterest/05Interest74\\_pdf.pdf](http://aei.dest.gov.au/AEI/MIP/ItemsOfInterest/05Interest74_pdf.pdf)

<sup>12</sup> Cf. [www.idp.com](http://www.idp.com)

<sup>13</sup> Cf. <http://www.beehive.govt.nz/ViewDocument.aspx?DocumentID=22760>

New Zealand has developed a national brand and marketing strategy. For this purpose, the New Zealand International Marketing Network (NZIEMN), a partnership of stakeholders from the public and private sector (including the Ministries of Education, Tourism, Trade and Education New Zealand) was established in 1999. The NZIEMN worked from 1999 to 2004 to elaborate an international marketing strategy and tools to promote New Zealand as a study destination.<sup>14</sup> In 2004, Education New Zealand, a not-for-profit trust, took over the brand and all marketing tools from NZIEMN, and it launched a sector-wide strategy aiming to maintain and improve New Zealand's image as a high quality study destination and to further increase the number of incoming students. The NZIEMN Advisory Committee continues its work as a Promotions and PR Reference Group, which supervises the *Educated in New Zealand* brand.<sup>15</sup>

Similar to the neighbouring US, **Canada** is another example for a country without a national-level policy. There is no federal education department and no national level international education policy in Canada (education is the responsibility of each province or territory). Nevertheless, Canada has extended its global outreach through investing in higher education marketing. A national level marketing campaign is run by the Canadian Education Centre (CEC) Network.

The CEC Network is a private independent not-for-profit company. It has been engaged in marketing Canada as a study destination for international students since 1995. The CEC Network runs 17 Canadian Education Centres in different countries around the globe (including the main sending countries and all target countries covered by the present study). The centres provide interested students with information on study opportunities in Canada, they host Canadian Education Fairs, do market research and maintain contact with agents. The CEC Network also runs [www.studyCanada.ca](http://www.studyCanada.ca), an information portal that promotes study opportunities in Canada, as well as hard copy study guides and it operates Canadian Cultural and Language Institutes in key markets.<sup>16</sup>

Like in the US, individual states are actively marketing themselves as a study destination. The British Columbia Centre for International Education (BCCIE) for example provides information about educational opportunities in British Columbia and runs a comprehensive web portal at <http://www.studyinbc.com>.

---

<sup>14</sup> Cf. <http://industry.newzealandeducated.com/indexNew.cfm?contentNodeID=2>

<sup>15</sup> Cf. Competitor Analysis..., 2004 and 2005 updates, op. cit., <http://industry.newzealandeducated.com>; <http://www.educationnz.org.nz/>

<sup>16</sup> see <http://www.cecnetwork.ca/>. Another organisation, the Canadian Education Trade Alliance (CETA), which was "conceived" at the Canadian Education Industry Summit held in October 2004. CETA aims at improving Canada's competitiveness on the global education market and engages in student recruitment, teaching, curriculum development, etc, but has not shown major signs of life since it was funded. Cf. <http://www.ceis.ca/ceta.html>; Cf. Competitor Analysis. Australia's Competitors in International Education for the USA, UK, Canada and New Zealand. Update, AIE, July 2004 and Australia's Competitors in International Education: July 2005 Update, AEI, July 2005, both <http://aei.dest.gov.au>

### 2.1.2 European actors

There are governmental initiatives for promoting the country's attractiveness as a study destination in several continental European countries. The most active countries are clearly the United Kingdom, France, Germany, the Netherlands and increasingly Ireland, although the Northern European countries are quickly catching up.

A good example of a government initiative backing higher education marketing is the *Prime Minister's Initiative* (PMI) in the **United Kingdom**. In 1999, Prime Minister Tony Blair had announced the start of a worldwide campaign to promote British universities and colleges overseas, and to attract more international students to the UK. The British Government funded the campaign. Since its launch in 1999, approximately £11 million (16.3 million Euro) have been invested, coming from different ministries. A number of key activities were taken forward and funded, including:

- Designing and establishing an Education UK Brand (see 1.3);
- Developing a global marketing campaign to deliver the Brand;
- Making immigration procedures more user-friendly;
- Establishing the right of international students to work whilst studying in the UK;
- Setting targets for international student recruitment and prioritising country markets;
- Developing high level cooperative arrangements between UK Government, its agencies and UK education institutions;
- Developing greater outreach and impact in each country, including to work in a constructive way with local education agents;
- Developing an Education UK Website ([www.educationuk.org](http://www.educationuk.org)) to provide comprehensive access and information relating to all quality assured programmes.

The PMI came to an end in March 2005 (although the same objectives continue to be valid in 2005/06). According to the British Council, the targets set in terms of increasing international student numbers were reached during the lifespan of the PMI. A consultation carried out in early 2004 showed that there was broad support for a follow-up national strategy. At the time of writing, a future Education UK Global Strategy "which will build on the success of the PMI and ensure that the UK is positioned to respond to the growing competitive threat and changing market" is under discussion.<sup>17</sup>

The British Council is the key actor in a five-year global marketing campaign of UK higher education which started in January 2000 around the world as part of the PMI. Within the British

---

<sup>17</sup> Cf. [http://educationuk.britishcouncil.org/global\\_strategy/index.htm](http://educationuk.britishcouncil.org/global_strategy/index.htm); <http://educationuk.britishcouncil.org/pmi/>

Council, the Educational Counselling Service (ECS) is in charge of the campaign. ECS is a membership organisation with over 300 member institutions from UK higher and further education, private schools and colleges, professional and examination bodies, and associate organisations. The ECS works within the British Council's network - counting with offices in 110 countries - to increase the UK's share of the international education and training market. Through a comprehensive range of promotional activity and support services, ECS assists member institutions to recruit suitably qualified international students.

Central to the marketing campaign was the development of the *Education UK Brand*, created after extensive market research and consultation. The Brand was developed with a private sector marketing and communications company. It is available for use by all quality assured UK education and training institutions and is repeated in all government and official bodies' promotion and related materials employed internationally (see 1.5 for the brand's main features). The Brand was launched in the UK's 25 priority countries in high profile and innovative marketing campaigns.

The British Council also hosts two marketing websites: The Education UK website ([www.EducationUK.org/](http://www.EducationUK.org/)) is the gateway to UK education and provides education information for international students. It now comprises a course database covering over 500 000 programmes available at UK public and private education and training institutions (not just higher education). In addition to the central website there are over 20 country sites tailored to the needs of the students in that country and presented in the local languages. The Education UK website now attracts almost five million visitors per year. GETIS (Global Education and Training Information Service, [www.britishcouncil.org/promotion/getis/gethome.htm](http://www.britishcouncil.org/promotion/getis/gethome.htm)) is the British Council's web and e-mail-based market information service for anyone involved in the overseas marketing of UK education and training services.

The British Council is also doing research in international education and student demand. In 2004, it carried out a joint research project with Universities UK and IDP Education Australia on the future demand for higher education throughout the world by international students. The report contains a detailed analysis of demand for places in the English-speaking destination countries from 144 countries and was launched in April 2004 under the title *Vision 2020: Forecasting International Student Mobility*.

In the **Netherlands**, higher education marketing has gone hand in hand with the shift towards English-taught Master programmes: over 900 programmes are taught in English, and the aim of marketing efforts is mainly to recruit students for these programmes. Although some Dutch higher education institutions prefer promoting themselves individually, most believe that national-level promotion should precede and later complement their own activities.



Marketing of Dutch higher education on international markets has been a priority in the Netherlands since 1999. Based on the policy paper *Kennis: geven en nemen* (Knowledge: to give and to take) issued in September 1999, the Ministry of Education, Culture and Science is providing basic funding for generic promotion of the Netherlands and for a network of “Netherlands Education Support Offices” (NESOs) abroad, and it created a sizeable scholarship programme for the students forming the main target group. Other parts of the government are involved in promoting specific sectors of higher education (Agriculture) or in the organisation of education fairs (Trade).

The marketing of Dutch higher education is part of the core business of Nuffic, the Netherlands Organisation for International Cooperation in Higher Education. Nuffic sees itself as a facilitator, which implements government policy and supports the activities of higher education institutions. It has developed a marketing strategy for the Netherlands, and now promotes foreign participation in Dutch higher education and helps Dutch educational institutions to compete on the world education market. It provides up-to-date information about Dutch higher education, which it disseminates abroad, especially in countries where demand for international higher education is high.

Within its Department for Communication, Nuffic has set up the “Project Office for the International Marketing of Dutch Higher Education”. Important tasks of this unit are to promote the common interests of the Dutch academic community and to build a brand for Dutch higher education. The department is also responsible for international marketing activities, consultancy in the area of marketing and communication and provision of information, including publications, e.g. the web-portal and catalogue *Study in the Netherlands* ([www.studyin.nl](http://www.studyin.nl)).

One, if not the main element of the Dutch marketing initiative are the “Netherlands Education Support Offices” (NESOs), which are also managed by Nuffic. NESOs exist in China, Taiwan, Indonesia and Hong Kong. These local offices are in charge of the generic promotion of Dutch higher education and the recruitment of students for higher education offered in English. Another task of the NESOs is the provision of services for member institutions, like the provision of market information and advice, networking on behalf of the institutions or the general promotion of programmes. Member institutions are charged an annual fee for these services; additional tailor-made services are available for a fee. A new NESO office has been set up in Vietnam in November 2005, and there are plans to further expand the NESO network and set up offices in India, Mexico, Russia, Malaysia, Brazil and Thailand. The programme runs till 2009 and will be evaluated in 2007-2008.

Nuffic has also carried out market research on foreign students’ perceptions of the Netherlands as a study destination, and it is currently working on a brand for international Dutch higher education. Three possible scenario’s will be tested online in six countries in three continents. Subsequently a choice will be made by the Ministry of Education, Culture and Science.

In **Germany**, the DAAD (German Academic Exchange Service) operates an “international marketing office to promote study, research and training in Germany”. The office inside the DAAD was set up in 2001 to coordinate two related initiatives: the higher education consortium *GATE Germany* (Guide to Academic Training and Education in Germany, [www.gate-germany.de](http://www.gate-germany.de)) and the *Joint Initiative for the Promotion of Education and Research in Germany*. Both aim at marketing German higher education abroad and are backed by a German government decision.

The *Joint Initiative* is the initiator of a national marketing campaign, composed of 35 members, namely the federal government and the states, the Rectors’ Conference and DAAD, leading research and science institutions, representatives of labour and industry, etc. Part of the *Joint Initiative*, *GATE-Germany* is a consortium of over 100 German higher education institutions that was jointly established by the DAAD and the German Rectors’ Conference. Its mission is to position its member universities’ study and research programmes on the international market.

In marketing German higher education abroad, DAAD can rely on a physical presence worldwide, through its 14 branch offices and about 45 regional study and information centres. Further, the organisation funds research and teaching stays of about 450 lecturers (“Lektoren”) all over the world, and thus has a ‘local presence’ in virtually every major university in the world.

Through the two initiatives, DAAD coordinates an image campaign to promote study and research in Germany. The image campaign is the underlying awareness-raising PR activity at international education fairs and German promotion tours in selected target countries, in co-operation with *GATE-Germany*. Its three main components are the brand name and slogan *Hi! Potentials - International Careers made in Germany*, a testimonial campaign with outstanding representatives from target countries reporting on their experience in Germany, and the web-portal, [www.campus-germany.de](http://www.campus-germany.de), created by DAAD and the *Deutsche Welle*. The website now counts approximately two million visitors per year.

Services provided by *GATE Germany* include not only marketing initiatives (exhibition stands, information and promotional tours, media campaigns, etc.) abroad but also training seminars for those responsible for marketing at universities in Germany, the development and production of special publications (print, CD-ROMs, websites), as well as information and intelligence on educational markets, systems and institutions. Beyond *GATE Germany*, other departments of the DAAD publish brochures and catalogues with information on studying in Germany.

In the view of the DAAD, the recently agreed initiative for excellence, which aims at and provides funding for the establishment of “centres of excellence” in Germany, as well as increasingly common German university rankings are considered important tools for the promotion of Germany as a quality destination. Further, since the Supreme Court’s decision earlier this year,

it is clear that (modest) tuition fees for all students will be introduced by most German “Länder” during the next two years. This move will surely affect international higher education marketing.

A challenge for international education marketing at national level is Germany’s federal structure, as some federal states may prefer to create their own education brand. Some German “Länder” are already particularly active in marketing their higher education opportunities. The state of Baden Württemberg, for example, runs its own English language website, <http://www.study-guide-bw.com/>, and representatives of the Land take part in international student fairs to promote their universities.

After international student numbers had fallen in **France** in the 1990s, the French government took action to reverse this trend and enhance the attractiveness of France as a study destination. The 1998 “Chévènement law” eased entry and visa regulations for international students, and in the same year the French Ministries of National Education, Research and Technology and of Foreign Affairs established the agency EduFrance.<sup>18</sup> Its mission is to promote French higher education worldwide, to offer foreign students an overall reception and accommodation service in France and to coordinate the French offer of educational methods. The key element of this is the implementation of a global communication and marketing strategy through a network of local offices and partnerships.

EduFrance is a membership organisation comprised of about 180 public and private French higher education institutions. The agency has built up a network of close to 80 local offices worldwide. Some of these offices are independent; others are hosted by the Alliance Française or the French embassies. The tasks of the local offices include information and counselling services to potential students, liaison with local institutional partners and the promotion of French education on local markets. EduFrance can further rely on a wide network of French “lecteurs” (teachers of French language and culture) in universities across the world.

EduFrance has created a catalogue and web-portal containing more than 450 French study programmes with a special international orientation grouped by discipline, duration, target group and objective (see [www.edufrance.fr](http://www.edufrance.fr)). The main EduFrance website alone counts about one million visitors every year. In addition to the main website, EduFrance has developed websites in 21 countries in 14 local languages. This enables students to access information that specifically concerns them in their native language.

EduFrance is active in a wide range of fields, similar to the activities mentioned for the above organisations (see also 1.2). A special aspect of EduFrance’s marketing actions are its field-

---

<sup>18</sup> The board of directors of EduFrance includes representatives from the ministries of education, foreign affairs, culture, and industry and from public and private higher education institutions. EduFrance relies on the services of an advisory committee composed of individuals and organisations well positioned to provide advice and counsel concerning the agency’s strategy and activities. The committee includes French leaders in international education, science and business, as well as representatives of government and the non-profit sector.

specific initiatives. The most established one is n+i, a network of French Engineering schools and faculties in charge of marketing and recruitment for French postgraduate Engineering studies, which is managed under the umbrella of EduFrance. Next to online applications, n+i also provides a comprehensive transition programme and student support offer. Building on the successful experience with n+i, EduFrance has now created EduDroit, a similar initiative in law studies, and EduArt, based on a consortium of 40 art schools and faculties. Marketing actions for the new online portals include for example an extensive programme of visits to universities in a number of countries, and the dissemination of information on the new programme in various languages and via different channels.

**Ireland** is also investing considerably in promoting its higher education. The International Education Board Ireland (IEBI) was established for this purpose by the Irish government in 1993. All relevant sectors of Irish education, namely universities, institutes of technology, independent colleges and language schools, as well as different government departments and agencies are represented on IEBI. Amongst other issues, IEBI aims to promote Ireland as a “quality destination for students and trainees” and to support the Irish education institutions in their international activities. It sees itself as the national contact point and as a link between Irish education providers and the international education market. The IEBI replies to enquiries from foreign students interested in studying in Ireland, and it promotes Irish education abroad via advertising and disseminating information and by participating at education fairs, seminars and workshops.

Next to IEBI, Enterprise Ireland (EI), Fáilte Ireland and the Department of Foreign Affairs are also involved in marketing Irish education.

The Irish government has recently approved the establishment of a new statutory agency called "Education Ireland", incorporating IEBI. The role of the new agency will include strategic planning for the internationalisation of the Irish education sector, promoting the Education Ireland Brand and developing a quality mark for Irish institutions promoting their services internationally.<sup>19</sup>

Although the Nordic countries do not run marketing campaigns of a comparable scope, they are also increasingly promoting their higher education opportunities.

In **Sweden**, the Svenska Institutet (Swedish Institute, SI) is in charge of educational marketing. It is a public government-funded agency which is responsible for providing information about Sweden and its culture, language, education and research abroad. Since the late 1980s, and

---

<sup>19</sup> See [www.educationireland.ie](http://www.educationireland.ie); The PDF of the official policy document on the internationalisation of educational services in Ireland can be found at [http://www.education.ie/servlet/blobServlet/des\\_irish\\_ed\\_services.pdf?language=EN](http://www.education.ie/servlet/blobServlet/des_irish_ed_services.pdf?language=EN).

especially since the introduction of more and more English-taught programmes in the 1990s, SI has had the task of disseminating information on higher education to foreign students.

A government bill issued in 2001, which encouraged higher education institutions to attract more foreign students, gave the SI the task to set up a website on Swedish higher education and to coordinate discussions on national marketing. The bill however stopped short of proposing a national campaign or any substantial increase of funding. Although a comprehensive campaign has been proposed and discussed repeatedly since, the lack of funding has so far been an impediment. This may however change once tuition fees for international students will be introduced: while in 2001, the government had ruled out tuition fees for foreign students, it revised its position in 2005 and is now investigating how tuition fees for non-European students could be implemented. The results of an inquiry currently underway will be presented early in 2006, and the fee system is likely to be in place from 2008 onwards. In the context of the inquiry, the need for increased resources aimed at recruiting foreign students - both to market Sweden as place of study and for more extensive scholarship programmes – has repeatedly been emphasized.

SI currently has an annual budget of approximately 100 000 Euros for disseminating information on Swedish higher education and for some limited marketing efforts. In addition to publishing the website [www.studyinsweden.se](http://www.studyinsweden.se), SI publishes a range of information brochures and a compilation of English-taught programmes in print. SI also participates every year in a number of student fairs and higher education exhibitions.

CIMO, the Centre for International Mobility, markets **Finnish** study and training opportunities abroad. Established in 1991, CIMO is a government agency that aims at enhancing the internationalisation of higher education and training, youth and culture in Finland. Marketing Finnish education is only one of the organisation's activities. Similar to its neighbour Sweden, a comprehensive national marketing campaign has so far not been implemented because the government is not willing to provide the necessary funds.

Like in Sweden and in the Netherlands, promoting higher education in Finland has gone hand in hand with the introduction of English-taught programmes. Today, CIMO publishes a catalogue of English-taught Master's and doctoral programmes in Finland. The catalogue is part of the "Why Finland" series, including brochures dealing with living and studying in Finland, the higher education system and the different types of institutions, and reasons to choose Finland as a study destination (based on research carried out among international students). Next to its publications CIMO runs a web portal with information on Finland and its study opportunities (<http://finland.cimo.fi>), provides training and advisory services and is present at a number of higher education fairs outside Europe.

In Finland, tuition fees for non-European students will be introduced as from 2007/2008: in 2005, the Finnish Ministry of Education set up a working group to explore the possibility to impose tuition fees on students from outside of the European Union and the European Economic Area. The working group recommended introducing fees between 3 500 and 12 000 Euro per academic year. Talented and financially needy students would be supported through a new scholarship scheme to be administered by CIMO. The government is due to introduce the bill to the parliament by the end of the year. According to the working group, the new fee policy aims to strengthen the competitiveness of Finnish higher education institutions, as well as improve the quality of instruction and services. This may, in the future, also result in more intensive national marketing.

General information on studying in **Denmark** is provided mainly by CIRIUS, a national agency for Internationalisation of education and training which operates under the Ministry of Education. Although CIRIUS has been quite active in promoting Denmark as a study destination, there is so far no national strategy for marketing Danish higher education abroad. Like in the other Nordic countries, two developments have accompanied the discussions on a national marketing strategy: the establishment of English-taught programmes and the introduction of tuition fees for non-European students (as from 2006).

In 2003, CIRIUS set up a working group of higher education experts with the task to analyse the development of the international education market, with a view to implications for Denmark, and to develop specific strategies to market Danish higher education abroad.<sup>20</sup> In April 2004 the government released a policy report stating that Denmark should become more active on the international market for higher education. A pilot project on international marketing within technical subject areas is being carried out in 2005 and 2006. The results from the pilot project may feed into the development a national strategy. Further, the Danish Prime Minister has appointed a committee which investigates, among other issues, Denmark possibilities on the global education market. The committee should come up with recommendations in early 2006.

CIRIUS runs a web portal with information on Danish study opportunities, [www.studyindenmark.dk](http://www.studyindenmark.dk), which includes a database on full programmes taught in English at Danish institutions, participates in international education fairs abroad on behalf of the Danish higher education institutions, runs training seminars and provides advisory services.

Other European countries are engaged in limited marketing initiatives: **Norway**, for instance, is starting to promote its higher education opportunities worldwide: “profiling Norwegian higher education abroad” is a task laid down in the articles of association of SIU, the Norwegian Centre for International Cooperation in Higher Education. Based on the Centre for International University Cooperation, SIU was “re-established” as a public agency under the auspices of the

---

<sup>20</sup> The results of the analysis were published in the report *The International Education Market – Danish Perspectives*, available at [www.ciriusonline.dk](http://www.ciriusonline.dk).

Ministry of Education and Research in 2004. Since then, the agency has developed a “profile” for Norwegian higher education, in cooperation with Norwegian higher education institutions. Like in the other Nordic countries, marketing activities focus on English-taught programmes. There are however no plans to introduce tuition fees for international (or Norwegian) students. SIU now operates a website at [www.studyinnorway.no](http://www.studyinnorway.no) which provides information about Norway as a study destination. It also publishes brochures and catalogues describing English-taught programmes offered in Norway and it participates in fairs and higher education conferences.

Since 2002, the Austrian Exchange Service (ÖAD) is marketing **Austrian** tertiary education on behalf of the Federal Ministry of Education, Science and Culture (BMBWK). ÖAD runs a working group on marketing Austrian higher education which involves representatives of all Austrian higher education institutions, the concerned ministries and rector’s conferences. The working group defines priorities for ÖAD’s marketing activities. Overall, the main focus lies on increasing the number of exchange students rather than free movers. ÖAD provides a number of information and counselling instruments, such as an interactive grants and projects databases. It also produces brochures and organises information sessions at higher education conferences.

Last but not least, some of the new EU member states are starting to market themselves as a study destination. The **Hungarian** Ministry of Education, for example, established “Campus Hungary” in early 2004, with the purpose to promote Hungarian higher education abroad and attract students from non-EU countries. Campus Hungary is an association of over 40 Hungarian higher education institutions offering English-taught programmes. An administrative unit, the Campus Hungary Information Office, is hosted by the Office of the Hungarian Scholarship Board (HSB). It is responsible for running the association’s web portal, [www.campushungary.hu](http://www.campushungary.hu), which provides foreign students with information on studying and living in Hungary.

## ***2.2. Marketing activities: from half-hearted attempts to aggressive recruitment***

A wide range of activities is being implemented in order to promote higher education opportunities and attract foreign students. Depending on the size and the budget of the organisation in charge and of the importance accorded to marketing higher education in a given national context, actions range from presenting a study destination at international fairs and conferences to active counselling and recruitment via a dense network of local offices spread all over the globe.

Overall, the following actions can be part of national level marketing and branding exercises:

- Run an information and guidance portal on study opportunities in the country;
- Produce information and promotion materials and media on different supports and in different languages;

- Have a strong local presence in different countries, through a network of offices, and through a multitude of professors and language teachers at all major universities which are funded through scholarships in these countries;
- Organise promotion tours that provide opportunities for higher education institutions and/or project/programme coordinators, so that they can promote their programmes directly to a large number of potential students and establish networks. This can be done in the context of general or specifically organised student fairs, or as individual promotion tours with a selected number of presenters;
- Organise specific promotion campaigns for limited target groups, for example pupils of foreign or international secondary schools in the sending countries or students in a specific subject area;
- Run media campaigns in the main sending countries; organise visits by national journalists to the fairs and by foreign journalists to the destination country;
- Collaborate with agents in the main sending countries;
- Provide support for individual promotional activities carried out by or on behalf of higher education institutions and provide a range of services on demand of higher education institutions (mostly paying);
- Provide higher education institutions with information and intelligence on educational markets, systems and institutions;
- Run a helpdesk for higher education institutions;
- Conduct marketing-related research, for example on global student flows or on the perception of their respective national education systems in other parts of the world;
- Organise training seminars for the staff in charge of marketing and recruitment at higher education institutions;
- Cooperate with partner organisations in other countries;
- Organise networking or “matchmaking” conferences, for example to allow university representatives to liaise with foreign university staff or to promote national research. These conferences are partly organised in parallel to the fairs.

Those countries with a fully-fledged national marketing strategy engage in most of the above activities. The Australian organisation IDP goes even further: it offers an online application service for foreign students, and it recruits students at fairs on behalf of the Australian institutions.

The watershed between the big shots and the newcomers is usually the existence of a network of local offices worldwide. As explained in the previous section, the British Council, EduFrance,



Nuffic, the DAAD, IDP and IIE all have a network of local offices around the globe. On top, most of them run or are establishing centres for cultural and language studies at universities in the main sending countries. They also work with an (even broader) network of lecturers in language and cultural studies. The DAAD, for example, has about 45 information centres that are run by lecturers all over the globe, in addition to the network of DAAD offices. The centres provide information and advice, assist in organising events, initiate and maintain contacts with the media and with DAAD-alumni. Smaller destination countries like Sweden also increasingly rely on a network of lecturers abroad.

Another activity which is exclusively carried out by bigger providers is the individual organisation of student fairs. EduFrance, for example, often dissatisfied in the past with the nature of the public present at existing fairs, now organises its own targeted events more and more frequently. For these events EduFrance manages a communications campaign using local media (radio, press, television, advertisements in public transport systems, etc.) and may organise a press conference at the start of the event. It also develops websites for individual events in order to access the maximum amount of potential visitors and to enable them to pre-register online. The databases created from the registration information are used later on for direct marketing activities. Every year, two or three events stand out as “key events”, and are used to showcase French higher education. EduFrance, Nuffic, the DAAD and now also the British Council have also engaged in the organisation of joint European fairs (see below).

Countries with a limited engagement in marketing activities usually focus more on the supply of information, linked to some promotional actions. The Northern European organisations, for example, all run a comprehensive web-portal with information in study opportunities. The portal also gives information on the country and provides the students with a list of reasons to choose this destination. Beyond the web-portal, print information material is made available. The promotional activities are usually limited to presence at major conferences (NAFSA, EAIE, etc.) and fairs, for example the European fairs organised in Latin America and Southeast Asia (see below). Especially Sweden is increasingly active in a wider range of fields, and is for example organising promotion tours/journeys with senior staff from Swedish universities.

The US, although a major destination, also focuses on the supply of information. Concrete marketing and recruitment activities are so far the responsibility of higher education institutions or, at the utmost consortia. However, the sheer size of the network of educational advisers - 450 centres in 170 countries - results in an increased presence of the US as a study destination.

Some destinations, notably Germany and France, aim to link educational marketing with the promotion of their country as a research destination, through close cooperation with research and funding organisations (Germany), as well as through conferences abroad (France).

Last but not least, most national-level organisations active in the promotion of higher education opportunities also lobby their governments on related issues, and contribute with suggestions regarding special visa regulations for highly qualified international students or the right to work for foreign students and graduates.

### **2.3. One step further: joint European initiatives**

A first step towards a European marketing initiative has already been made: the first European education fairs are taking place. EduFrance, the DAAD and Nuffic have organised several European higher education fairs in Asia and Latin America. In Latin America the partners have created a brand, *Europosgrados*, which is used for all joint European higher education fairs. The collaboration between the three agencies led to the creation of a consortium, the PEER Consortium (Promoting European Education and Research).

Following up on past joint presentations on fairs in several Asian countries and in Latin America, the PEER consortium organised a fully-fledged European Higher Education Fair in Bangkok in November 2004. The fair was co-financed by the European Union's Asia-Link Programme aiming at the promotion of European Higher Education in a number of Asian countries. The fair provided a platform for representatives of EU member states and higher education institutions to inform the Asian visitors about higher education opportunities in their respective countries. About 90 universities and colleges presented their educational programmes and provided information on language requirements, living conditions and other related issues. The fair's programme also included seminars on study opportunities in Europe.

Building on this and other joint initiatives, a consortium led by EduFrance and composed of DAAD, Nuffic and British Council was awarded a service contract by the European Commission in September 2005 following a call for tender. The three-year project is also funded under the Asia-Link programme and consists of organising seven European Higher Education Fairs and Asia-Link Forums in Asia: China, India, Indonesia, Malaysia, the Philippines, Thailand and Vietnam. The tender aims to increase the attractiveness of Europe as a study destination and to strengthen cooperation in the field of higher education between the European Union and South and South-East Asia and China.

Higher education institutions from all 25 EU Member States will be invited to participate in the fairs, which aim to attract potential students and their study advisors. Presentations on studying in the different EU countries will also be made. The first day of each event will be dedicated to the Asia Link programme and will provide a forum for networking, matchmaking, information and experience-sharing for representatives from European and Asian higher education institutions and other Asia-Link stakeholders. The events are provisionally planned to take place between October 2006 and September 2008.

## **2.4. National brands: footprints in the sea of global education**

A study carried out by the British Council and published in 2004 showed that the following factors were decisive in international students' choice of a destination country:

- Quality;
- Employability;
- Accessibility;
- Affordability;
- Safety;
- Lifestyle.<sup>21</sup>

In different combinations, these aspects are also the main “ingredients” of most national education brands or are used in diverse lists of top reasons to study in a given country (cf. Table 3.1).

When does a country have a “brand”, and when does it simply provide information on study opportunities? Boundaries are blurred, and most countries engaged in national-level education marketing at least have an implicit brand. Some destinations, for example the UK or Australia, have carried out intensive market research and asked a specialised company to design a campaign, a logo, a slogan and a brand that clearly identified the countries' unique selling points (USPs), i.e. the distinctive advantages of studying there (compared to other destinations). Australian research, for example found that Australia stood for freedom, status and challenge. UK research identified quality, welcoming, accessible and affordable as the country's USPs, based on which the slogan “the best you can be” was designed.<sup>22</sup> Similar exercises were or are being carried out in major continental European destinations, mainly in France, Germany and the Netherlands. Other countries are providing information and counselling to students, but very often do implicit branding by advertising a range of reasons why students should study in this country.

What are the most frequent, what the most distinctive features used in existing national brands/reasons? Literally all countries claim to provide quality education, or even to stand for “excellence” or “world class”. Other frequent aspects are value for money and a wide choice of programmes and study opportunities. Further, many countries promise a warm welcome to foreign students. A comparison of different brands shows:

---

<sup>21</sup> The attractiveness factors have been taken from Böhm et. al.: Vision 2020: Forecasting International Student Mobility. A UK perspective, British Council 2004.

<sup>22</sup> The USPs do not always represent recognised strengths of a destination, but frequently also take up perceptions of weaknesses or misperceptions that shall be counterbalanced.

- Germany, France, the Netherlands, Denmark, Ireland, Hungary and the UK use their location in Europe as a selling point, as a gateway to Europe or at least advertising their location as a perfect base for tourism (UK);
- The Northern European countries, the Netherlands and Germany advertise the possibility to study in English, ranging from “English is spoken by all” (Sweden) to the possibility to start studying in English and earn an extra qualification by learning the local language (Germany);
- The Netherlands and Germany also use an international orientation (the Netherlands) and a future international career (Germany); Australia advertises the number of international students in the country;
- Germany and the Nordic countries praise themselves as “safe and modern” destinations;
- Most countries use lifestyle as one argument: the French *savoir vivre* or the Danish *hygge*<sup>23</sup> are put forward to attract foreign students. Especially Canada and New Zealand (hence the less prominent English speaking destinations) emphasize lifestyle, using a high standard of living, fascinating nature and recreation possibilities;
- Canada promotes itself as a “country of diversity like no other”, emphasizing diversity in life, society, nature, language and academic offer;
- Some countries, in a hidden or open way, make clear that they are good alternatives to traditional major destinations: New Zealand, for example, compares itself to the UK, advertising a “British-based education system. The CIMO website openly describes studying in Finland as “a safe though quite exotic way to acquire academic and professional experience”, and Norway encourages students to “study off the beaten track”.

The following table provides an overview of brands or lists of “good reasons” to study in a given destination country. This list is not exhaustive – but aims to provide an overview of some of the most important national initiatives.

---

<sup>23</sup> uncomplicated, informal, have a good time

## Why study in...?

An overview of the major English speaking and continental European destinations<sup>24</sup>

	Slogan used on Web-portal	Unique Selling Points / Why study in...	Web-portal
<b>Non-European destinations</b>			
<b>US</b>	Your guide to US higher education	<ul style="list-style-type: none"> <li>- Quality</li> <li>- Choice</li> <li>- Value for Money</li> <li>- Flexibility</li> </ul> <p><i>(not on Website but in brochures)</i></p>	<a href="http://www.educationusa.state.gov/">www.educationusa.state.gov/</a>
<b>Australia</b>	Study in Australia	<ul style="list-style-type: none"> <li>- attractive combination of freedom, status and challenge as Australia's unique global identity</li> </ul> <p><i><a href="http://aei.dest.gov.au/AEI/OffshoreSupport/StudyInAustraliaBrand/BrandResearch/default.htm">http://aei.dest.gov.au/AEI/OffshoreSupport/StudyInAustraliaBrand/BrandResearch/default.htm</a></i></p> <ul style="list-style-type: none"> <li>- Excellence</li> <li>- Quality</li> <li>- Multicultural</li> <li>- Value</li> <li>- English</li> <li>- Recognition</li> <li>- Support</li> <li>- Flexibility</li> <li>- Protection</li> <li>- Lifestyle</li> <li>- Work/travel</li> </ul> <p><i><a href="http://www.studyinaustralia.gov.au">http://www.studyinaustralia.gov.au</a></i></p>	<a href="http://www.students.idp.com">www.students.idp.com</a> <a href="http://www.study-in-australia.org">www.study-in-australia.org</a> <a href="http://www.studyinaustralia.gov.au">www.studyinaustralia.gov.au</a> <a href="http://www.austrade.gov.au/overseas/">www.austrade.gov.au/overseas/</a>

<sup>24</sup> With the exception of Germany, the reasons why foreign students should use a destination are taken from the quoted web portals. An overview of the web-based promotion that is run by Australia, the US and Canada (Nuffic, December 2004) was taken as a starting point for this table.

		<p><a href="http://www.austrade.gov.au/overseas/">http://www.austrade.gov.au/overseas/</a></p> <ul style="list-style-type: none"> <li>- number of international students</li> <li>- we offer a more dynamic, exciting study environment.</li> <li>- worldwide acceptance and respect for Australian degrees and qualifications, which can be your passport to a well-paid career and a secure future.</li> <li>- a range of different climates, excellent study options, part time work and travel opportunities.</li> </ul> <p><a href="http://www.students.idp.com">www.students.idp.com</a></p>	
<b>Canada</b>	<p>Study in Canada</p> <p>A country of diversity like no other  <a href="http://www.destinededucation.ca/">http://www.destinededucation.ca/</a></p>	<ul style="list-style-type: none"> <li>- A first rate education System with high standards</li> <li>- One of the best places in the world to live</li> <li>- High Standard of Living</li> <li>- Welcoming Environment</li> <li>- Beautiful Environment</li> <li>- A Safe Place to Study</li> <li>- A High Tech Country</li> <li>- A Bilingual Nation</li> </ul> <p><a href="http://www.studyincanada.ca">www.studyincanada.ca</a>)</p> <ul style="list-style-type: none"> <li>- The United Nations ranked Canada as the best place in the world to live!</li> <li>- Canada's education system is excellent and ranks among the best in the world.</li> <li>- Internationally recognised degrees.</li> <li>- Possibility to work in Canada after graduation.</li> <li>- A safe, stable country.</li> <li>- Excellent health care.</li> <li>- Learn or improve another language!</li> <li>- A multicultural country.</li> <li>- Nature and four distinct seasons.</li> <li>- We're waiting for you!</li> </ul> <p><a href="http://www.destinededucation.ca/">www.destinededucation.ca/</a></p>	<p><a href="http://www.studyincanada.ca/">www.studyincanada.ca/</a>  <a href="http://www.studyincanada.com">www.studyincanada.com</a>  <a href="http://www.educationcanada.cmec.ca/">www.educationcanada.cmec.ca/</a>  <a href="http://www.destinededucation.ca/">www.destinededucation.ca/</a></p>

<b>New Zealand</b>	<p>Educated in New Zealand</p> <p>New Zealand. Your place to grow.</p> <p>New World Thinking.</p>	<ul style="list-style-type: none"> <li>- British based education system</li> <li>- World leading programmes and degrees</li> <li>- World class educators</li> <li>- Recreation in paradise</li> <li>- Warm and welcoming environment</li> <li>- High quality living conditions</li> </ul>	<a href="http://www.newzealandeducated.com/">www.newzealandeducated.com/</a>
<b>European destinations</b>			
<b>UK</b>	<p>The best you can be</p>	<ul style="list-style-type: none"> <li>- You'll get a world-class qualification</li> <li>- You will get the skills you'll need for the modern environment</li> <li>- Whatever your educational needs, the UK can meet them</li> <li>- It has an exciting, fun culture</li> <li>- It's an ideal base for your travels</li> <li>- It's an affordable option</li> <li>- You'll get a warm welcome</li> <li>- Quality education wherever you study in the UK</li> </ul>	<a href="http://www.educationuk.org">www.educationuk.org</a>
<b>The Netherlands</b>	<p>Study in Holland</p>	<ul style="list-style-type: none"> <li>- International programmes in English</li> <li>- High academic standard</li> <li>- Internationally oriented</li> <li>- Located in the heart of Europe</li> <li>- Value for money</li> </ul>	<a href="http://www.studyin.nl">www.studyin.nl</a>
<b>Germany</b>	<p>Hi!Potentials – International Careers made in Germany</p> <p>Campus Germany – Study and Research in</p>	<ul style="list-style-type: none"> <li>- Quality built on tradition: Germany's universities combine age-old traditions with modern technologies</li> <li>- If you are demanding with yourself, choose to study at highest academic level</li> <li>- Education in Germany is a starting point for an international career</li> <li>- Value for money</li> <li>- Germany – a core part of Europe, a highly advanced</li> </ul>	<a href="http://www.campus-germany.de">www.campus-germany.de</a> <a href="http://www.daad.de">www.daad.de</a>

	Germany  Germany has Loads to Offer	<p>economy and an open society</p> <ul style="list-style-type: none"> <li>- Attractive cultural life and leisure offer wherever you study</li> <li>- You'll be able to build up networks for an international career and acquire intercultural skills</li> <li>- You can begin your studies in English and earn an extra qualification with the German language</li> <li>- Safety and hospitality</li> <li>- Getting into German higher education is easier than you think: open to anyone who fulfills the prerequisites</li> </ul>	
<b>France</b>	EduFrance.fr - Your path to French higher education!	<ul style="list-style-type: none"> <li>- Quality and accessibility of its education system</li> <li>- You will benefit from the depth and breadth of its higher education system</li> <li>- You'll enjoy the quality of France's cultural, economic and social life</li> <li>- You'll study in the heart of Europe</li> </ul>	<a href="http://www.edufrance.fr">www.edufrance.fr</a>
<b>Ireland</b>	Education Ireland - promoting Ireland as a centre of excellence for education	<ul style="list-style-type: none"> <li>- Ireland's long and honourable tradition in educational excellence is recognised the world over</li> <li>- Strong economic growth and development</li> <li>- Ireland offers the perfect opportunity to enjoy a novel mix of high education standards combined with an exciting cultural experience</li> <li>- Gateway to Europe</li> <li>- Modern, English speaking country,</li> <li>- Vibrant Celtic origin</li> </ul>	<a href="http://www.educationireland.ie/">www.educationireland.ie/</a>
<b>Finland</b>	Discover Finland  Finland – add a new dimension to your studies and life	<ul style="list-style-type: none"> <li>- Quality – high standard of education</li> <li>- A good alternative</li> <li>- Advanced and unusual</li> <li>- A safe though quite exotic way to acquire academic and professional experience</li> <li>- Untouched nature</li> </ul>	<a href="http://finland.cimo.fi/studying.html">http://finland.cimo.fi/studying.html</a>



<b>Sweden</b>	Space for minds	<ul style="list-style-type: none"> <li>- Innovation and creativity run deep / safe and modern</li> <li>- Standards are high</li> <li>- Choice</li> <li>- Foreign students are welcome</li> <li>- Education is free</li> <li>- English is spoken by all</li> </ul>	<a href="http://www.studyinsweden.se">www.studyinsweden.se</a>
<b>Denmark</b>	Study in Denmark Studindenmark.dk, your pathway to Danish higher education	<ul style="list-style-type: none"> <li>- Excellence and creativity</li> <li>- English – no problem</li> <li>- Safe and modern society</li> <li>- <i>Hygge</i> – a unique Danish feature (<i>uncomplicated, informal, have a good time</i>)</li> <li>- A gateway to Europe</li> </ul>	<a href="http://www.studyindenmark.dk/">www.studyindenmark.dk/</a>
<b>Norway</b>	Norway. A unique student experience.	<ul style="list-style-type: none"> <li>- Norway offers you a unique student experience and Norwegian institutions of higher education welcome applications sent by qualified students from all over the world.</li> <li>- Quality Education</li> <li>- Study off the beaten track</li> <li>- A wide range of high quality courses and great flexibility</li> <li>- Informal atmosphere at Norwegian universities and university colleges</li> <li>- Possibilities for unique nature experiences</li> </ul>	<a href="http://www.studyinnorway.no/">www.studyinnorway.no/</a>
<b>Austria</b>	Study in Austria	<ul style="list-style-type: none"> <li>- Combines a long tradition in higher education with most recent academic research</li> </ul>	<a href="http://www.oead.ac.at/_english/austria/">www.oead.ac.at/_english/austria/</a>
<b>Hungary</b>	Study and Research in Hungary	<ul style="list-style-type: none"> <li>- Small country with a great history in the middle of Europe</li> <li>- Culture and lifestyle</li> <li>- Higher education with a long history / modern education system</li> <li>- 13 Nobel prize winners educated in Hungary</li> </ul>	<a href="http://www.campushungary.hu">www.campushungary.hu</a>

## 2.5. Outlook

This chapter has attempted to provide an overview of national-level marketing activities in a range of European and in the most important English speaking destination countries. It would however not be complete without addressing three final questions:

- (1) Does marketing higher education work?
- (2) If it works, what to do to make its success sustainable?
- (3) What if it is all too late?

The first question has no straight answer – it is difficult to estimate what factors have been responsible for a change in international student numbers in a given country. However, a range **of developments following the implementation of a generic marketing campaign indicate their success:**

- In France, the downwards trend in international student numbers in the 1990s has been reversed since the creation of EduFrance and the start of a national marketing campaign in 1998.
- In Germany, the increase in student numbers has been even steeper since GATE Germany was established in 2001, and with 12% market share the country is now the second most popular OECD destination, together with the UK and after the US.
- Although the market share of the UK has been falling, international student numbers increased by ca. 75 000 (both higher and further education) over the lifespan of the PMI, translating into an additional 1.5 billion Euro per year for the UK economy.

While these changes may depend at least partly on other factors, it can be assumed that the campaigns played a role.

What needs to be done to make this success sustainable? First, **generic marketing requires recurrent funding**. Start-up funding is a problem in the Northern European countries: although the need to increase the country's attractiveness and invest in a national marketing strategy has been discussed for several years, governments have so far been unwilling to provide increased funding for a national marketing strategy; in Finland and Denmark, the situation is similar. The issue is linked to the discussion over the introduction of tuition fees in these countries. It is feared that the fees will put off international students, and hence claimed that more substantial national-level marketing should counteract this risk.

Also in countries with a well-established national marketing strategy, funding is an issue. Whilst there was initial investment from the UK government, for example, maintaining this has proved difficult and there is now a reluctance to continue governmental funding, especially as – in the government's view - higher education institutions benefit directly and have increased revenue.

Second, a **brand needs to be embraced by the sector and taken care of**. A brand needs to be 'refreshed' frequently to keep pace with the changing needs of international students. This requires further investment and innovation. The perception of a country can, for example, change with the dynamics of international education: in Australia and (less) in the UK, for example, there has been a strong focus on the economic value of international students. To counterbalance this perception, recent Australian initiatives have focused on nurturing Australia's quality image.

Linked to this is the acceptance of a brand by the sector. In the countries that do not (yet) have a brand and generic marketing strategy, reluctance of the higher education sector is often one of the major obstacles. In Austria, for example, using factors like lifestyle is rejected as "tourist promotion" by higher education institutions. Some high-level UK institutions see the Education UK brand as representing the "lowest common denominator". They have not fully embraced the use of the Brand internationally. This is again similar in Australia (and one reason behind the creation of the Group of Eight), and also in some continental European countries. The German TU9, for example, prefer to go their own way; the same is the case for some French *Grandes Ecoles*.

Third, **barriers on the supply side** can make marketing efforts obsolete, for example housing, problems with visa procedures and residence permits, missing work opportunities, lack of institutional capacity and funding, a lack of scholarships or other funding opportunities for non-European students and problems related to language. These need to be addressed in the same context.

Last but not least, what if it is all too late? The best answer to this is probably "better late than never". The present chapter has concentrated on marketing efforts by the major English speaking destinations and by European countries. However, especially **Asian countries are quickly catching up**. Their activities and their likely impact on the international education market and on student flows should not be underestimated:

- Japan has been a destination for foreign students for quite some time: in 2004, 117 302 foreigners were studying in Japan. The government runs a website in several languages promoting Japanese higher education.<sup>25</sup>
- China, Singapore and Malaysia have been increasingly active in marketing their higher education opportunities abroad, and India and Jordan are starting to engage in higher education marketing, too. China is a good example of how the profile of a traditional "sending country" can evolve: in 2004, about 100 000 foreign students were studying in China, up from 70 000 in 2003. The Chinese government aims to attract 125 000 international students by 2007. Government-related organisations provide scholarships and information on studying in

---

<sup>25</sup> Cf. <http://www.studyjapan.go.jp/jp/index.html>

China.<sup>26</sup> At the same time, the country is expanding its own higher education capacities: the number of students enrolled in higher education more than tripled from 3.6 million 1998 to 11 million in 2003. Several government projects, provided with considerable funds, support the creation of high quality institutions in the country.<sup>27</sup>

These developments are no reason to throw in the towel from the start. They are but another indicator that Europe should better be quick if it does not want to miss the boat.

---

<sup>26</sup> These are the China Scholarship Council (CSC) and Chinese Service Center for Scholarly Exchange (CSCSE), see <http://www.csc.edu.cn/en/> and <http://www.studyinchina.net.cn/>.

<sup>27</sup> See Robert van Kan, Country Report China in the annex

## IV Survey Results

This chapter presents the results of the various large-scale surveys and, to a lesser degree, the interviews on which this study is based. It depicts the views which students (and other stakeholders) hold of European higher education. The first section is a detailed presentation of the characteristics attributed to European higher education and of the perception of Europe's relative position with regard to major competitors over international students, predominantly the United States of America and Australia. The second part of the chapter is devoted to the way the decisions are taken to study abroad (instead of at home) and to the motivations at play in the formation of such decisions, and the third section deals with the sources of information used in making these decisions.

### 1 Perceptions of Europe and its higher education

#### 1.1 *The European Union: A coherent entity or a set of individual countries?*

**In the perception of students responding to the survey the European Union is in many respects characterised by substantial differences between its member states.**

*Question 29: When I think of the EU, I think of it in (1) general terms, (2) terms of economy, (3) in terms of culture / cultural heritage, (4) in terms of higher education as ... one single and coherent entity ... an entity only in an international context, e.g. if compared to the US ... Western Europe ... a number of very different individual countries.*

The workshops held in the target countries prior to the survey implementation revealed that the term "Europe" had various meanings for the workshop participants. Both students and staff members had some ideas on Europe and its higher education. However, when asked about what was behind their "idea of Europe" most workshop participants replied that they had been thinking of their own preferred destination, or at the utmost about a small range of (Western) European countries. The "idea of Europe" ranged from a single and coherent entity, an entity in an international context, especially if compared to other major players like the US, and Western Europe to very different individual countries, depending on the area of concern: Europe in general and political terms, Europe as an economic union, European culture or European higher education.

In the perception of most students responding to the survey the European Union is in many respects characterised by a high diversity between its member states (see table 1.1). However, the growing importance of the European Union as a political and economic actor is reflected in the perception of the EU as an entity in general and economic terms: the majority of students from the target countries considered the EU as a coherent entity or as an entity in an

international context in this respect. On the other hand most students considered the EU in terms of culture and heritage as a set of very different countries.

For higher education, which is of special importance in the context of this study, more than one third perceive the EU rather as an ensemble of different countries and almost one fifth had in mind Western Europe when thinking about the EU. Only one quarter was convinced that the EU is already a space with a single higher education area.

Students from *Brazil* more often than respondents from other target countries considered the EU as a set of different individual countries. Especially in terms of culture (74%) and higher education (51%) Brazilians perceive little similarity. On the other hand students from *Mexico* perceived the EU most often as a single and coherent entity. Nevertheless, they saw cultural differences (57%) more often than students from most other countries.

Like students from Brazil and Mexico a majority of *Russian* students considered the EU in terms of culture and cultural heritage as a group of very different individual countries. A comparatively high share of Russians saw the EU as equal to Western Europe in all respects.

*Chinese* students see Europe more frequently as an entity in an international context for all aspects (in particular in economic terms and in general, 49%). Also for *Thai* students, percentages are above average (except for the “economic” EU, which is regarded as a coherent entity by the *Thais*). More *Indians* than average thought of European culture as dominated by Western Europe. All in all, students from the *Asian* countries perceived Europe more often as a space with a common culture than students from Latin America and Russia.

Differences by destination country inside and outside the EU are rather small. This is interesting because foreign students surveyed in the United States considered the EU much more frequently as a set of different individual countries than students from the target countries. Especially in terms of culture (75%) and higher education (61%), international students in the US perceive a high variety. Chinese students in the US had a more “reduced” idea than their fellows at home and regarded Europe more frequently as Western Europe.

**Table 1.1 (All students from the target countries)  
View of the EU as an entity or loose alliance - by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
<b>in general terms</b>							
one single and coherent entity	30	28	32	40	19	20	28
an entity only in an international context	25	49	25	24	25	44	33
Western Europe	15	12	19	11	39	21	19
a number of very different individual countries	30	12	23	25	16	15	20
Total	100	100	100	100	100	100	100
Count (n)	(3108)	(3047)	(1772)	(2410)	(2018)	(2844)	(15199)
<b>in terms of economy</b>							
one single and coherent entity	38	33	32	50	26	44	38
an entity only in an international context	29	40	31	29	32	27	31
Western Europe	12	14	17	7	25	14	14
a number of very different individual countries	22	13	20	14	18	15	17
Total	100	100	100	100	100	100	100
Count (n)	(3101)	(3050)	(1756)	(2409)	(2005)	(2846)	(15167)
<b>in terms of culture / cultural heritage</b>							
one single and coherent entity	12	26	23	26	15	16	20
an entity only in an international context	6	20	14	7	11	40	17
Western Europe	8	14	26	9	22	13	14
a number of very different individual countries	74	39	37	57	52	32	49
Total	100	100	100	100	100	100	100
Count (n)	(3099)	(3046)	(1753)	(2407)	(2011)	(2843)	(15159)
<b>in terms of higher education</b>							
one single and coherent entity	21	25	28	39	18	21	25
an entity only in an international context	13	26	21	22	18	29	22
Western Europe	15	14	18	11	30	22	18
a number of very different individual countries	51	35	33	27	35	29	36
Total	100	100	100	100	100	100	100
Count (n)	(3099)	(3043)	(1752)	(2401)	(2010)	(2839)	(15144)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 32: When I think of the EU, I think of it as...

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 4 and 5 on a scale from 1 = "No differences at all" to 5 = "Very big differences"

Also respondents to the global online survey considered the EU slightly more often as a group of different countries than students from the target countries. Especially online participants from North America and from Australia perceived the EU in most respects as a set of different countries.

**Respondents saw the largest differences between EU member states for living costs and tuition fees. Also differences in quality were highlighted.**

*Question 31: The European Union currently has 25 member states. In your opinion, how significant are the differences between the individual member states with regard to the following issues?*

Asked about some characteristics of higher education and aspects related to living and studying in Europe one third of students from the target countries perceive only small differences, a further third some and the final third large differences between individual EU member states. The largest differences were expected with respect to living costs (51%) and the level of tuition fees (47%). Also facilities to support international students, quality of higher education, visa regulations, work permissions for international students and multicultural societies were considered to be different from one country to another by a considerable number of respondents (see table 1.2).

**Table 1.2 (All students from the target countries)  
Perceived differences between the member states of the EU - by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Living costs	60	50	46	51	58	41	51
Tuition fees	50	51	46	43	56	41	47
Facilities to support international students	55	39	45	30	40	33	41
Visa regulations	42	39	38	27	43	32	37
Work permissions for international students	48	35	35	30	35	27	36
Quality of higher education	47	40	42	24	39	25	36
Multicultural society	47	34	33	27	38	35	36
Openness towards foreigners	54	34	32	24	35	29	35
Teaching and learning methods	41	35	41	25	37	27	34
Academic degrees awarded	42	38	41	19	23	25	32
Duration of study programmes	23	26	27	11	15	13	19
Count (n)	(3100)	(3044)	(1765)	(2402)	(2003)	(2841)	(15155)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 31: The European Union currently has 25 member states (see question 24). In your opinion, how significant are the differences between the individual member states with regard to the following issues?  
 Sample: Students responding to paper based surveys and respondents to the online survey



\* Points 4 and 5 on a scale from 1 = "No differences at all" to 5 = "Very big differences"

A comparison of responses by target country shows that

- Respondents from *China* and *India* saw more differences in the quality of education than students from most other countries. For aspects directly related to higher education like teaching and learning methods, academic degrees awarded and the duration of study programmes Indians and Chinese perceived greater differences between European countries;
- The percentage of *Brazilians* perceiving large differences was above average for all aspects. 54 percent – at least 20 percent more than respondents from other countries – thought that European countries were open towards foreigners to a very different extent;
- Students from *Mexico* and *Thailand* least often emphasized differences;
- *Russians* comparably often highlighted the diversity of living costs, tuition fees and visa regulations (see Table 1.2).

Foreign students in the United States perceived larger differences especially in academic terms - quality of higher education (62%), academic degrees (49%) and teaching and learning methods (47%) – and in aspects concerning the treatment of foreigners, i.e. openness towards foreigners (47%) and multicultural society (50%). Respondents from China, India and other Asian countries perceived considerably more differences in the quality of higher education than respondents from Latin America, thus confirming the pattern revealed by the survey in the target countries.

Respondents to the global online survey also considered slightly more differences between individual EU member states but not as much as foreign students in the US.

Education staff from the target countries, i.e. lecturers, international officers and education agents, had a similar view of the diversity of the EU as their students as far as administrative issues and costs of living and studying are concerned (see table 1.3). However, regarding quality of higher education and academic degrees awarded more respondents saw substantial differences between the member states. In this context it is interesting that professors, agents etc. recommending primarily the major destination countries in the EU, i.e. the United Kingdom, France and Germany, perceive significantly higher differences in all academic aspects than those recommending the less popular European destinations.

**Table 1.3** (All education staff from the target countries)  
**Differences between the member states of the EU - by recommended destination country (first rank) (percentages\*)**

	Recommended destination country								Total
	DE	FR	UK	Other EU/EFTA	AUS	CA	US	Other	
Living costs	56	60	59	48	49	47	51	48	54
Tuition fees	50	55	55	45	39	37	47	41	49
Facilities to support international students	51	54	40	39	36	32	38	38	41
Visa regulations	47	50	40	38	38	27	36	36	40
Work permissions for international students	43	50	44	48	36	34	37	29	41
Quality of higher education	48	48	47	37	44	31	47	38	45
Multicultural society	43	33	42	20	44	30	35	60	37
Openness towards foreigners	43	42	39	40	36	38	34	38	38
Teaching and learning methods	41	31	38	36	36	23	36	26	35
Academic degrees awarded	43	40	43	27	43	26	41	33	39
Duration of study programmes	26	25	27	12	15	15	20	13	21
Count (n)	(99)	(132)	(225)	(76)	(48)	(48)	(375)	(40)	(1043)

Source: Survey on teaching staff, international officers and educational agents

Question 24: The European Union currently has 25 member states (see question 18). In your opinion, how significant are the differences between the individual member states with regard to the following issues?

\* Points 4 and 5 on a scale from 1 = "No differences at all" to 5 = "Very big differences"

In contrast to education staff the views of students from the target countries aiming to study in the European Union did not differ much by selected or preferred destination country. Students' perceptions of academic matters most strongly vary by country of origin, as described above, and, to some extent, by field of study: Differences in the quality of higher education were most often considered by students in the fields of social sciences (45%) and law (42%) and least often by students in art and architecture (28%).

## **1.2 Which Europe is being perceived, i.e. which member states are international students and staff members familiar with?**

**Almost half of the students from the target countries had considerable knowledge of higher education and study opportunities of only three out of 25 EU member states: The United Kingdom, France and Germany.**

*Question 24: For which of the following countries do you have considerable knowledge of higher education and study opportunities?*

About 90 percent of students stated to have considerable knowledge of higher education and study opportunities in at least one of the member states of the European Union. There were also a large number of respondents who were informed about higher education in two or even more EU countries. However, most students only had substantial knowledge of higher education in the United Kingdom, Germany and France; smaller groups of Spain and Italy (Latin Americans), Sweden, the Netherlands and Austria. The number of students who were well-informed about other countries was negligible. On the other hand, more students were well-informed about the US than about any European country, and large proportions had knowledge of Australia and Canada. In detail (and rank order), a substantial share of respondents was relatively familiar with the following countries (see also table 1.4):

- United States (58 %),
- United Kingdom (54 %)
- Germany (44 %),
- France (40 %),
- Canada (33 %),
- Australia (30 %),
- Spain (24 %),
- Italy (16 %),
- New Zealand (12 %),
- Portugal (10 %),
- The Netherlands (10 %),
- Sweden (9 %) and
- Austria (8 %).

The share of students who mentioned other EU members ranged between zero and four percent. Knowledge of higher education in the new EU member states is extremely limited. With a proportion of two percent the Czech Republic and Poland are the best known among these

countries. Altogether only six percent stated considerable knowledge about at least one of the ten new members.

**Table 1.4** (*All students from the target countries*)  
**Countries for which students have considerable knowledge of higher education and study opportunities - by country of origin (percentages, multiple response possible)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Austria	7	4	13	7	5	12	8
Belgium	5	4	3	7	4	1	4
Cyprus	0	0	2	0	3	0	1
Czech Republic	1	1	2	3	8	0	2
Denmark	5	6	7	5	4	3	5
Estonia	0	0	1	0	2	0	1
France	49	38	25	57	46	16	40
Finland	3	4	4	4	7	2	4
Germany	66	34	36	59	41	17	44
Greece	2	2	3	3	2	1	2
Hungary	1	1	1	1	2	1	1
Ireland	3	4	6	5	4	1	3
Italy	29	8	12	27	8	6	16
Latvia	0	0	1	0	2	0	1
Lithuania	0	0	1	0	2	0	0
Luxembourg	1	1	1	2	2	0	1
Malta	0	1	2	0	5	0	1
Poland	1	1	3	1	4	0	2
Portugal	36	1	2	4	2	1	10
Slovakia	0	0	1	0	1	0	0
Slovenia	0	0	1	0	1	0	0
Spain	37	4	7	70	7	3	24
Sweden	8	9	11	10	10	4	9
The Netherlands	10	17	9	10	5	6	10
United Kingdom	46	62	67	48	48	60	54
USA	62	55	69	51	51	61	58
Canada	40	30	33	58	17	13	33
Australia	26	32	52	22	12	37	30
New Zealand	12	13	14	6	5	19	12
Other major destination	15	9	9	16	9	11	12
Total	467	340	398	477	319	279	387
Count (n)	(3131)	(2530)	(1536)	(2400)	(1662)	(2356)	(13615)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 24: For which of the following countries do you have considerable knowledge of higher education and study opportunities?

Sample: Students responding to paper based surveys and respondents to the online survey

In general, respondents at higher levels of studies are better informed about study opportunities and higher education in different countries. PhD students are usually the best informed, with an average knowledge of three EU member states.

Students taking part in the global survey were generally better informed. This is partly linked to their more advanced level of studies, and surely related to the way they accessed the survey: online, searching for information on study opportunities in Europe. In particular, respondents to the global online survey had more extensive knowledge of European destinations, including the smaller countries. However, like in the target countries, knowledge of higher education opportunities in the new member states was extremely limited.

The knowledge of education staff from the target countries is also limited to only a few member states: The United Kingdom (54%), France (37%), Germany (32%), Spain (16%), Italy (12%), the Netherlands (11%), Austria (10%) and Sweden (8%). All other EU member states were mentioned by less than six percent of the respondents.

A country-by-country comparison of the knowledge of education staff shows that respondents from Brazil, Mexico and Russia most often stated Germany and France. In contrast, respondents from China and India were more often familiar with the United Kingdom (see table 1.5). The US was best-known by staff members from India, Thailand and (neighbouring) Mexico. Further, all Asian respondents were relatively well-informed about Australia. On the other hand, a considerable number of education staff from Thailand (26%) and India (18%) had no information at all about higher education and study opportunities in the EU.<sup>28</sup>

---

<sup>28</sup> The above pattern – better information levels about English-speaking destinations in the Asian countries and about continental Europe in the Latin America and Russia – needs to be weighed with a view to the organisation which implemented the survey. The German Academic Exchange Service (DAAD) coordinated the study in Brazil and Mexico, EduFrance in Russia the British Council in India and Thailand. Information levels about Germany clearly mirror information activities carried out by the DAAD in Latin America; the fact that a continental European organisation (Nuffic) implemented the survey in China may contribute to the slightly minor focus on English-speaking countries compared to India and Thailand.

**Table 1.5 (All education staff from the target countries)**  
**Countries for which respondents have considerable knowledge of higher education and study opportunities - by country of origin (percentages, multiple response possible)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Austria	7	8	12	8	2	16	10
Belgium	8	3	4	10	7	1	5
Cyprus	0	4	1	0	0	0	1
Czech Republic	1	3	0	2	4	0	2
Denmark	8	10	3	6	2	3	5
Estonia	0	4	0	0	1	1	1
France	57	41	22	65	66	16	40
Finland	0	8	3	5	5	0	4
Germany	67	32	35	49	43	15	35
Greece	0	5	0	1	1	1	2
Hungary	1	1	1	1	2	0	1
Ireland	0	6	3	4	1	0	2
Italy	36	10	7	20	12	6	13
Latvia	0	4	0	0	1	1	1
Lithuania	0	3	0	0	1	1	1
Luxembourg	1	4	1	0	0	0	1
Malta	0	2	0	0	4	0	1
Poland	0	5	1	1	0	1	2
Portugal	53	3	0	2	1	1	6
Slovakia	0	2	0	1	1	0	1
Slovenia	0	3	0	1	0	0	1
Spain	51	7	3	67	3	2	17
Sweden	6	15	8	11	5	3	8
The Netherlands	12	18	11	15	2	7	11
United Kingdom	51	74	73	57	36	57	59
USA	62	62	88	80	40	74	67
Canada	37	41	43	60	10	22	34
Australia	18	45	70	24	7	43	36
New Zealand	5	24	19	9	1	24	16
Other country	6	3	5	10	1	4	4
Total	488	449	412	507	259	297	385
Count (n)	(101)	(251)	(109)	(169)	(165)	(338)	(1133)

Source: Survey on teaching staff, international officers and educational agents  
 Question 18: For which of the following countries do you have considerable knowledge of higher education and study opportunities?

Most foreign students taking part in the US study with a non-European background were only informed about higher education in the United Kingdom (75%), Germany (40%) or France (33%).

The results of the interviews with higher education experts, rectors and parents in all six target countries confirm the above described tendencies. Interviewees perceived (or attached importance to) a reduced Europe only, containing France, Germany, the UK (if not viewed separately), and to a lesser extent Switzerland, the Netherlands, and Sweden.

For the Russian interviewees, Europe was represented by the United Kingdom, France, Germany, Italy, Spain, Switzerland, Belgium and the Netherlands. In the Latin American countries, too, interviewees perceived important differences between the EU member states, both within the European Union before enlargement and between the old and the new member states. In the case of Mexico and Brazil, “core countries” were Germany, France and the UK but also Italy, Spain and Portugal. In the Asian countries, the idea of Europe was even more reduced: especially the interviewed parents rarely had a notion of a Europe beyond the UK (if included in Europe), Germany and France.

Like the students and staff members who responded to the survey, interviewees saw considerable divergence between the higher education systems and living conditions in different European countries, for example as far as the quality of higher education, reputation and employability of the degrees and affordability are concerned.

An excerpt from the Chinese country report illustrates these findings and concludes from the interviews that the EU is insufficiently visible in China, that it has no clear identity and that “the concept of a unified Europe is (...) relatively irrelevant.” “The EU member states are considered individual states rather than members of the EU and judged on their individual merits. (...) The Chinese are convinced that there are significant differences between the education systems of the various EU members in terms of characteristics, quality, reputation and cost.”

Rectors and internationalisation staff in India emphasized that it was “difficult to generalise (...) as even within each state, certain universities were better than others. Furthermore, the disputes (specifically the constitution issue) among the 25 member states in EU were seen as a disadvantage and had a bearing on possible cooperation with them in higher education.”

### **1.3 Strengths and weaknesses of Europe and its higher education: Europe's standing in comparison with its competitors**

**Students ranked their own destination highest for most aspects linked to international education (own-destination-wins effect). However, Brazilian, Mexican and Russian respondents had a more positive view of Europe, whereas respondents from the Asian target countries were more inclined towards the US or Australia.**

*Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country?*

*Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1,2,3 (1=best) the EU, the US and Australia with regard to the following aspects.*

The analysis of responses to these questions has revealed a strong correlation between the rankings and the students' selected or preferred destination country. Hence, students aiming to study in Europe tended to rank it on place one, students oriented towards the United States saw the US on place one etc. This "own-destination-wins effect" could primarily be observed for the main factors driving international students' destination choice (see Chapter 4.2 further below), namely the quality of higher education and the expected impact of international education on future success in the labour market. For other aspects, like the affordability of living and studying, culture and tradition, safety etc., the correlation is less dominant.

Therefore, if students from the six target countries differ in ranking Europe, the US or Australia first for aspects linked to quality and employability, this depends first and foremost on the where the majority of students from one given country aim to study. For example, 80 percent and more of the students from Brazil, Mexico and Russia had a European destination country in mind, compared to only about half of the respondents in the Asian target countries. Due to the "own-destination-wins effect" the proportion of respondents placing the EU on place one is much higher in Latin America and Russia than in Asia. In order to control the effect, part of the analysis was done separately for students aiming to study in Europe and students aiming to study in the US.



### 1.3.1 Who offers the best quality education?

**Around 90 percent of the students aiming to study in Europe or in the US had a high opinion of the quality of the education offered in their destination country.**

*Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country?*

*“The quality of higher education/reputation of universities is excellent.”*

The quality of education and the reputation of universities in their selected or preferred destination country were considered as excellent by 92 percent of the students with a destination in Europe and by 90 percent of the students planning to study in the US (see table 1.6). For other destination countries like Australia etc. percentages ranged around 80 percent. Quality in individual EU member states was rated especially high for Germany (95%), the United Kingdom (93%), Sweden (93%) and France (92%). A slightly lower (though still important) percentage of the students going to Finland (75%), Denmark (78%) and especially the new EU member states (71%) associated a high quality education with their destination.

**Table 1.6** (All students from the target countries)  
**Excellent quality and reputation of universities in the selected or preferred destination country - by country of origin and destination country (percentages\*)**

	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
<b>Assessment of quality of higher education/reputation by</b>					
Brazil	95	94	80	91	94
China	90	95	71	71	88
India	97	95	92	95	96
Mexico	94	95	100	89	94
Russia	90	80	93	79	89
Thailand	85	83	76	77	82
Total	92	90	81	82	90

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country from question 19?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Completely agree" to 5 = "Completely disagree"

Students from the target countries aiming to study in Europe rated the quality in their selected or preferred destination country in a slightly different way: 97 percent of Indians considered it as excellent followed by Brazilians (95%), Mexicans (94%), Chinese (90%), Russians (90%) and Thai students (85%). The differences between the Indian and the Thai students' perception contradict the relation between high quality perception and preferred destination country: the

United Kingdom is the preferred destination country for the majority of students from both countries (57% of Indian students aiming to study in Europe and 66% of Thai students).

**For most quality-related issues, students going to Europe and the US ranked their own destination first. However, the US was clearly first for the quality of laboratories, libraries, etc., and a large share of Asian students saw the most prestigious universities and the best quality education in the US.**

*Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1,2,3 (1=best) the EU, the US and Australia with regard to the following aspects:*

- *Best study destination*
- *Best quality of education*
- *Most prestigious universities*
- *Best quality of laboratories, libraries and other facilities*
- *Best student support and academic guidance*
- *Highest flexibility of study and research*
- *Best research environment*

In addition to the assessment of quality of higher education in the future destination country, students were asked to rank the EU, the US and Australia with respect to different quality aspects. As stated above a large share of respondents ranked their destination region or country on place one (see table 1.7). The “own-destination-wins effect” could be observed with regard to

- best study destination (75% in the case of Europe and 66 percent in the case of the US),
- best quality of higher education (60% each),
- most prestigious universities (48% and 61%; however 38% of those aiming to study in Europe nevertheless ranked the US first),
- best student support, orientation and academic guidance (37% and 34%),
- highest flexibility of study and research (33% and 42%) and
- best research environment (41% and 34%).

Although students aiming to study in Australia were also convinced that their destination country was the best place to study, offered more support and advice to students and had a better research environment than the US or the EU, the “own-destination-wins effect” was clearly less dominant in their case. Not their own destination but the US was ranked first for quality of

education and prestige, the quality of laboratories and flexibility of study and research. Also respondents with destinations not covered by the list of countries to be ranked like Canada, New Zealand, Japan etc. were in most aspects slightly more inclined towards the US than towards the EU.

For the quality of laboratories, libraries and other facilities the US was also ranked first by the majority of students aiming to study in the EU. However, respondents from Brazil, Mexico and Russia ranked their own (European) destination first.<sup>29</sup>

This pattern is similar for most aspects: although the "own-destination-wins effect" dominates, there are clear differences between Asian students' perceptions on the one hand and Latin American and Russian students' perceptions on the other hand. Taking into account only students aiming to study in Europe, considerable fewer students from China, India and Thailand ranked the EU on place one than students from the three other target countries (see table 1.8). Although still a minority in most cases, a large share of Asian students saw the US as the winner with respect to the

- best quality of higher education,
- most prestigious universities,
- best quality of laboratories,
- highest flexibility of study and research and
- best research environment.

The strongest orientation towards the US was expressed by Chinese students followed by Indians and Thais: even though they wanted to study in Europe, most Chinese students ranked the US first e.g. for the quality of higher education and for the most prestigious universities.

---

<sup>29</sup> Comparable regional differences apply to the ranking for the most modern and innovative universities and the most traditional universities: for Mexicans and Russians aiming to study in Europe their own destination and the US fare equally well for the most innovative universities. Interestingly, Mexicans aiming to study in the US were the only group that associated the "most traditional universities" with the US by majority.

**Table 1.7 (All students from the target countries)**  
**Ranking of living and studying in the EU, the US and Australia: Quality of higher education - by destination country (percentages\*)**

	Destination country/region			
	EU/EFTA	US	AUS	Other
<b>Best study destination</b>				
EU	75	20	23	44
US	14	66	20	28
Australia	3	4	49	14
No clear winner	2	1	1	2
Don't know	6	8	7	11
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Best quality of higher education</b>				
EU	60	19	26	37
US	23	60	34	35
Australia	2	3	21	5
No clear winner	2	2	1	2
Don't know	13	17	17	21
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Most prestigious universities</b>				
EU	48	21	26	30
US	38	61	45	47
Australia	1	3	12	3
No clear winner	3	2	2	2
Don't know	10	13	15	18
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Best quality of laboratories, libraries and other facilities</b>				
EU	31	11	14	20
US	33	51	34	38
Australia	2	3	14	3
No clear winner	4	2	2	2
Don't know	30	33	36	37
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)

(Table 1.7 continues)

	Destination country/region			
	EU/EFTA	US	AUS	Other
<b>Best student support, orientation, and academic guidance</b>				
EU	37	16	15	24
US	17	34	19	19
Australia	4	6	22	8
No clear winner	2	1	1	1
Don't know	40	43	41	47
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Highest flexibility of study and research</b>				
EU	33	12	10	20
US	23	42	25	26
Australia	4	6	22	8
No clear winner	2	1	2	1
Don't know	37	39	40	45
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Best research environment</b>				
EU	41	19	15	27
US	18	34	21	21
Australia	5	7	25	12
No clear winner	3	2	2	2
Don't know	33	39	36	39
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey

**Table 1.8** (Only students from the target countries aiming to study in Europe)  
**Ranking of living and studying in the EU, the US and Australia: Quality of higher education - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Best study destination</b>						
EU	84	66	54	86	74	62
US	9	24	31	8	11	20
Australia	2	7	7	2	1	6
No clear winner	1	1	2	1	5	1
Don't know	5	2	5	3	9	12
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Best quality of higher education</b>						
EU	69	36	51	75	66	44
US	13	51	34	16	10	27
Australia	1	4	5	1	1	4
No clear winner	2	2	3	1	6	1
Don't know	14	7	8	7	17	24
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Most prestigious universities</b>						
EU	53	26	47	50	64	40
US	32	65	39	42	16	36
Australia	1	2	4	1	1	1
No clear winner	3	2	3	1	8	1
Don't know	11	5	8	6	12	21
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Best quality of laboratories, libraries and other facilities</b>						
EU	36	21	30	41	27	22
US	23	55	36	35	23	35
Australia	1	2	3	2	1	2
No clear winner	4	3	4	2	9	1
Don't know	36	19	27	21	39	40
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)

(Table 1.8 continues)

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Best student support, orientation, and academic guidance</b>						
EU	39	35	39	51	30	22
US	12	32	20	14	11	15
Australia	4	3	7	4	2	9
No clear winner	2	2	3	1	5	1
Don't know	43	27	31	31	51	53
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Highest flexibility of study and research</b>						
EU	37	21	40	51	26	16
US	12	47	27	18	19	22
Australia	3	5	5	4	3	9
No clear winner	2	2	3	1	5	1
Don't know	46	24	25	25	47	52
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Best research environment</b>						
EU	48	35	37	55	26	29
US	10	34	27	14	20	15
Australia	2	9	6	4	3	8
No clear winner	3	2	4	1	7	1
Don't know	36	20	26	26	44	47
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey

This pattern is confirmed by the responses of students aiming to study in the US (see table 1.9). Asians intending to go to the US were much more convinced of the quality of their destination than respondents from Russia and Latin America. Conversely, more students from Brazil, Mexico and Russia than from Asian countries saw the EU on the first rank of various aspects of quality. Russians had a particularly high opinion of the quality of EU education: the same share of Russian students planning to study in the US ranked Europe and their own destination first for the quality of higher education and the prestige of universities. The interviews conducted in Russia confirmed the high esteem of EU higher education: asked about its strengths, the unanimous answer was quality and prestige.

**Table 1.9** (Only students from the target countries aiming to study in the US)  
**Ranking of living and studying in the EU, the US and Australia: Quality of higher education - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Best study destination</b>						
EU	24	17	10	34	37	20
US	65	77	76	58	47	59
Australia	2	2	4	1	0	6
No clear winner	1	1	2	1	5	1
Don't know	7	2	8	5	11	14
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Best quality of higher education</b>						
EU	24	14	10	33	39	19
US	53	76	72	56	40	49
Australia	0	4	5	0	0	3
No clear winner	1	1	3	2	3	1
Don't know	21	6	11	9	18	28
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Most prestigious universities</b>						
EU	19	15	19	24	39	22
US	62	77	58	66	40	54
Australia	2	3	7	1	1	2
No clear winner	2	1	2	2	9	1
Don't know	15	4	14	8	12	21
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)



(Table 1.9 continues)

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Best quality of laboratories, libraries and other facilities</b>						
EU	10	10	14	15	13	10
US	47	68	49	59	34	43
Australia	1	3	4	0	3	3
No clear winner	2	1	2	3	8	1
Don't know	39	18	31	22	41	44
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Best student support, orientation, and academic guidance</b>						
EU	17	18	18	29	14	12
US	30	52	35	25	28	23
Australia	3	3	10	2	5	7
No clear winner	2	1	2	2	4	1
Don't know	48	26	35	42	49	58
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Highest flexibility of study and research</b>						
EU	15	11	16	25	13	7
US	33	59	48	39	37	30
Australia	6	6	6	1	3	7
No clear winner	1	1	1	1	3	1
Don't know	45	23	29	33	45	55
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Best research environment</b>						
EU	18	25	17	26	18	13
US	28	43	44	36	29	24
Australia	4	8	6	4	1	10
No clear winner	2	1	3	2	5	1
Don't know	47	24	30	32	47	52
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey

The comparison groups, i.e. respondents to the global online survey and international students surveyed in the US, did not principally differ in their rankings (in accordance with their destination country). However, international students already studying in the United States were clearly more convinced of the leading role of their destination country than students who were in the phase of planning a stay in the US. For all aspects related to the quality of education, the US was the winner by vast majority. Among participants in the global online survey the US was more often considered as winner by students from Asia and from Africa than from students from Latin American countries, thus confirming the pattern revealed by the survey in the main target countries.

**Table 1.10** (*Only education staff recommending firstly European destination countries*)  
**Ranking of living and studying in the EU, the US and Australia: Quality of higher education - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Best study destination</b>						
EU	88	58	58	70	74	49
US	7	22	29	17	5	32
Australia	0	12	0	2	1	8
No clear winner	1	4	0	2	4	0
Don't know	3	5	13	8	17	10
Total	100	100	100	100	100	100
Count (n)	(67)	(109)	(38)	(87)	(130)	(99)
<b>Best quality of higher education</b>						
EU	71	42	61	62	68	48
US	17	31	33	27	5	25
Australia	0	13	0	0	1	4
No clear winner	2	6	3	3	8	4
Don't know	11	8	3	8	18	18
Total	100	100	100	100	100	100
Count (n)	(66)	(109)	(33)	(86)	(121)	(99)
<b>Most prestigious universities</b>						
EU	52	33	65	48	68	42
US	36	43	29	37	11	37
Australia	0	13	3	2	1	4
No clear winner	0	5	0	6	13	3
Don't know	12	6	3	7	8	13
Total	100	100	100	100	100	100
Count (n)	(66)	(109)	(34)	(87)	(120)	(99)

(Table 1.10 continues)

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Best quality of laboratories, libraries and other facilities</b>						
EU	39	28	26	21	32	18
US	35	39	59	54	30	40
Australia	0	10	0	2	2	4
No clear winner	3	7	3	5	11	3
Don't know	23	17	12	18	25	34
Total	100	100	100	100	100	100
Count (n)	(66)	(109)	(34)	(87)	(117)	(99)
<b>Best student support, orientation, and academic guidance</b>						
EU	48	39	34	34	49	13
US	18	27	47	31	8	25
Australia	0	11	9	8	1	10
No clear winner	0	3	0	1	5	1
Don't know	34	21	9	25	37	51
Total	100	100	100	100	100	100
Count (n)	(67)	(109)	(32)	(87)	(119)	(99)
<b>Highest flexibility of study and research</b>						
EU	51	35	39	38	35	13
US	18	31	45	22	19	25
Australia	0	6	3	8	1	12
No clear winner	3	5	0	5	5	1
Don't know	28	23	12	28	40	49
Total	100	100	100	100	100	100
Count (n)	(67)	(109)	(33)	(87)	(118)	(100)
<b>Best research environment</b>						
EU	46	28	27	44	26	19
US	22	32	58	20	37	26
Australia	0	13	0	3	1	8
No clear winner	3	6	3	3	5	2
Don't know	28	22	12	30	32	45
Total	100	100	100	100	100	100
Count (n)	(67)	(109)	(33)	(87)	(117)	(98)

Source: Survey on teaching staff, international officers and educational agents

Question 21: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Like for the students, the “preferred destination country” of education staff (i.e. the country they usually recommend to students) offers the best quality education in their view: the best quality of education, the most prestigious universities, the best student support and the highest flexibility of study and research are most often attributed to the preferred destination.

Although the "own-destination-wins effect" dominates there are similar tendencies as in the case of the students: more respondents from China, India and Thailand were convinced that the US was the leading country in terms of quality of higher education than their colleagues from Brazil, Mexico and Russia (see table 1.10). This pattern is confirmed by the higher education experts and rectors interviewed in the target countries. However, with the exception of Russia, the US is usually considered as superior to Europe as far as prestige and quality are concerned. In the words of a Brazilian higher education expert, the quality of European higher education is seen as “very good, but not outstanding”. Also the Mexican country report concludes from the interviews that “compared to the educational system in the US Europe would still be considered second.”

### **1.3.2 Which destinations are associated with future success in the labour market?**

**Around 90 percent of the students aiming to study in Europe thought that their future degree would be recognised all over the world. On the other hand, only 57 percent saw good work opportunities in their destination country after graduation.**

*Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country?*

- *“Academic qualifications/degrees from the country are recognised all over the world”*
- *“Good chances to live and work in the destination country after/during my studies”*

This issue is related to the value of qualifications in different labour markets, namely in the student’s home country, in the European destination country and at international level.

The students aiming to study in Europe and those planning to study in the US had the same expectations regarding the recognition of academic degrees: of both sub-groups, 90 percent were convinced that academic qualifications from their host countries would be recognised all over the world. Students with other destination countries less often expected that their degrees would be recognised globally: 84 percent in the case of Australia and 77 percent in the case of other destinations.

With respect to individual EU member states, students intending to study in Germany (93%), the United Kingdom (91%), the Netherlands (90%) or Sweden (90%) most often expected that their degree would be recognised at international level, while slightly fewer students aiming to go to

Italy (78%), Portugal (78%), Finland (71%), and the new EU member states (63%) had this expectation.

With a view to the chances to live and work there after or during the studies the picture of Europe is less positive. Only slightly more than half of the students aiming to study in Europe thought they would be granted this opportunity (57%). For all other destination countries the share is higher, with New Zealand (76%), Canada (75%) and Australia (74%) at the top, and the US in between (67%).

A country-by-country comparison shows considerable differences in the perceptions of students from different target countries (see table 1.11):

- Chinese students least often expected good chances for employment during or after their studies (45% compared to 61% average). Chinese aiming to study in Europe were however most sceptical: only 38 percent believed in good chances to work in Europe, compared to 51 percent of those going to the US and 61 percent of the Chinese going to Australia. Further, the Chinese responses show a bigger “gap” between European and US degrees and degrees earned in other destination countries: 87 and 91% respectively thought that degrees from Europe and the US would be recognised worldwide, compared to 79% for Australia and 74% for other destinations.
- Students from India were generally most often convinced that academic qualifications from their destination country would be recognised worldwide (95% for the EU, 92% for the US and Australia) and that chances were good to live and work in their destination country after graduation (77%, 78% and 83% respectively). Thais too saw good chances for employment prospects in Europe (70%), although slightly less than in other destinations. Interestingly both Indian and Thai students intending to study in Europe had chosen the United Kingdom more frequently as future destination country than students from other countries. They were also more often convinced that the United Kingdom offered good job opportunities.
- A substantial share of Brazilians and Mexicans expected a global recognition of European degrees (93% and 90%) but less often than Indians or Thais saw good employment prospects (57% and 63%) in Europe. For both aspects, the Latin American students going to the US gave a similar or more positive assessment of their destination than those going to Europe.
- More Russians aiming to study in Europe were convinced of the international recognition of their future degrees than those Russian students preferring the US (87 and 80% respectively). They saw however very limited chances to work in Europe (47%, compared to 61% for the US and 86% for Australia).

**Table 1.11 (All students from the target countries)**  
**Perceived employment prospects - by country of origin and destination country**  
**(percentages\*)**

	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
<b>Brazilians</b>					
Academic qualifications/degrees from the country are recognised all over the world	93	96	76	89	93
Good chances to live and work in the destination country after/during my studies	57	69	77	69	60
<b>Chinese</b>					
Academic qualifications/degrees from the country are recognised all over the world	87	91	79	74	86
Good chances to live and work in the destination country after/during my studies	38	51	61	57	45
<b>Indians</b>					
Academic qualifications/degrees from the country are recognised all over the world	95	92	92	88	94
Good chances to live and work in the destination country after/during my studies	77	78	83	81	79
<b>Mexicans</b>					
Academic qualifications/degrees from the country are recognised all over the world	90	89	83	81	89
Good chances to live and work in the destination country after/during my studies	63	68	84	77	65
<b>Russians</b>					
Academic qualifications/degrees from the country are recognised all over the world	87	80	87	73	86
Good chances to live and work in the destination country after/during my studies	47	61	86	67	50
<b>Thais</b>					
Academic qualifications/degrees from the country are recognised all over the world	85	87	82	70	84
Good chances to live and work in the destination country after/during my studies	70	74	74	74	72
<b>Total</b>					
Academic qualifications/degrees from the country are recognised all over the world	90	90	84	77	88
Good chances to live and work in the destination country after/during my studies	57	67	74	70	61

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country from question 19?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Completely agree" to 5 = "Completely disagree"

The interviews carried out with the students' parents in the target countries confirm the perceived lack of employment opportunities for international students and graduates in Europe. One third of the parents interviewed in China hoped that Chinese students would be more "trusted" and provided with better job opportunities upon graduation. This is mostly not even seen as a first step to migration: most parents thought that their children would strongly benefit from work experience gained abroad. However, they wanted them to come back after their experience abroad, as they saw more opportunities in the "emerging country" China.

**The US was the winner in the direct ranking EU-US-Australia for the recognition of degrees at international level, in the home labour market and for the chances to stay on and work after graduation.**

*Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1,2,3 (1=best) the EU, the US and Australia with regard to the following aspects:*

- *Academic degrees are well recognised at international level*
- *Academic degrees have the best reputation in my home labour market*
- *Best chances of getting a job and staying on after graduation*

The US was the winner in the direct ranking EU-US-Australia for the recognition of degrees at international level, in the home labour market and for the chances to stay on and work after graduation. Although more students from the target countries aiming to study in the EU ranked the EU on place one, only slightly less ranked the US first although they were going to study in Europe (see table 1.12). Students aiming to study in other destination countries, i.e. Australia, Canada, the United States, etc. by majority were convinced that the US was the winner for all three aspects.

Students from Asia and Latin America/Russia differ in their perceptions of the employability of degrees and employment chances in Europe, the US and Australia, although differences are smaller than for the quality of higher education. In this case, too, the "own-destination-wins effect" dominates; however, the majority of students from China and Thailand aiming to study in the EU clearly more often ranked the US first. The pattern is less clear for India: a similar share of Indian students ranked the EU and the US first for all three aspects.

Students from Brazil, Mexico and Russia aiming to study in the EU clearly more often ranked the EU at the top than the US (see table 1.13).

Generally, students from all target countries aiming to study in the US had fewer doubts that an education in their destination country promised good employment prospects (see table 1.14). With regard to all aspects more students ranked the US on place one. Differences between Asians and Latin Americans are rather small, although slightly more Latin Americans and Russians ranked the EU first. Next to the Chinese, Mexicans were most convinced of the reputation of US degrees at international level and in Mexico.

**Table 1.12** (*All students from the target countries*)  
**Ranking of living and studying in the EU, the US and Australia: Employment prospects - by destination country (percentages\*)**

	Destination country/region			
	EU/EFTA	US	AUS	Other
<b>Academic degrees are well recognised at international level</b>				
EU	43	15	20	27
US	30	55	37	39
Australia	1	3	13	3
No clear winner	6	3	3	4
Don't know	20	25	28	27
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Academic degrees have the best reputation in my home labour market</b>				
EU	38	14	16	25
US	34	55	39	41
Australia	2	3	13	4
No clear winner	5	2	3	4
Don't know	22	26	29	26
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Best chances of getting a job and staying on after graduation</b>				
EU	35	15	15	24
US	23	44	25	30
Australia	10	10	31	11
No clear winner	4	1	2	3
Don't know	29	30	28	32
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:  
 Sample: Students responding to paper based surveys and respondents to the online survey





**Table 1.13** (Only students from the target countries aiming to study in Europe)  
**Ranking of living and studying in the EU, the US and Australia: Employment prospects - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Academic degrees are well recognised at international level</b>						
EU	49	25	38	55	46	29
US	21	54	33	31	13	38
Australia	1	2	5	1	0	2
No clear winner	6	4	6	3	14	2
Don't know	22	15	18	10	26	30
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Academic degrees have the best reputation in my home labour market</b>						
EU	44	21	33	46	43	28
US	28	53	37	38	14	38
Australia	1	3	4	1	0	3
No clear winner	6	3	5	2	12	2
Don't know	22	20	22	14	31	29
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Best chances of getting a job and staying on after graduation</b>						
EU	41	19	33	48	29	27
US	17	27	31	18	21	35
Australia	5	24	11	12	8	3
No clear winner	5	2	5	2	8	2
Don't know	32	28	20	21	33	32
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:  
 Sample: Students responding to paper based surveys and respondents to the online survey

**Table 1.14** (Only students from the target countries aiming to study in the US)  
**Ranking of living and studying in the EU, the US and Australia: Employment prospects - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Academic degrees are well recognised at international level</b>						
EU	18	12	13	19	23	17
US	54	68	54	66	38	46
Australia	1	2	6	0	1	3
No clear winner	4	1	3	3	11	2
Don't know	24	16	25	12	28	32
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Academic degrees have the best reputation in my home labour market</b>						
EU	15	7	11	20	28	18
US	53	67	53	61	32	52
Australia	1	4	5	1	1	2
No clear winner	5	2	2	1	8	1
Don't know	27	20	29	17	32	28
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Best chances of getting a job and staying on after graduation</b>						
EU	17	13	14	27	12	13
US	44	35	48	43	41	51
Australia	4	20	11	8	11	3
No clear winner	3	1	2	1	5	1
Don't know	32	31	25	20	32	32
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:  
 Sample: Students responding to paper based surveys and respondents to the online survey

Among the participants in the global online survey more students from Asia and from North Africa and the Middle East saw the US as the winner with respect to the recognition and reputation of academic degrees while the EU was the winner for Latin Americans and students from Sub-Saharan Africa. A vast majority of international students in the US was convinced that their destination country offered the best employment prospects. In this case, differences by country of origin were rather small.

Education staff from the target countries had similar views as the students on the recognition of degrees and on employment prospects. Also for them, the US was the clear winner: respondents recommending primarily the US were clearly more often convinced that academic degrees from the US were well recognised and that chances of getting a job were better than in the EU. Staff members counselling destinations in Europe were divided between the winner EU and the winner US (see tables 1.15 and 1.16).

Overall, differences between the staff members' perceptions were rather country-specific than related to "world regions" (Asia/Latin America). As in the student survey, Chinese and Mexicans were most convinced of the recognition and reputation of degrees from the US. Another finding of the student survey is confirmed by the staff's answers: the majority of Russian education staff ranked the EU on place one with respect to international recognition and reputation of academic degrees, and only few Russians recommending a destination in Europe ranked the US first (5 and 10% compared to between 30 and 60% for the other target countries). Interestingly, over half of the respondents from India recommending EU countries saw the EU as the winner – even more than respondents from Russia or Brazil.

Regarding the best chances of staying on and getting a job, especially staff members from Thailand, Brazil and Mexico see better chances in the US although they recommend their students to study in Europe. Again, Indian staff members most frequently rank Europe first.

Most likely, the Indians' positive perception of Europe is linked to their main destination countries: almost 60 percent of those Indians going to Europe aim to study in the UK, another 21 percent in Germany. The overall positive perception of the reputation of European degrees and especially of work opportunities by Indian respondents is at any rate not confirmed by the interviews. Indian higher education experts considered Europe as "less supportive" of students wanting to work in their destination country after completing their studies."

**Table 1.15 (Only education staff recommending firstly the EU)**  
**Ranking of living and studying in the EU, the US and Australia: Employment prospects - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Academic degrees are well recognised at international level</b>						
EU	49	32	51	32	40	38
US	33	36	31	49	5	33
Australia	1	9	0	0	2	5
No clear winner	6	5	6	8	18	3
Don't know	10	18	11	10	35	20
Total	100	100	100	100	100	100
Count (n)	(67)	(109)	(35)	(87)	(116)	(99)
<b>Academic degrees have the best reputation in my home labour market</b>						
EU	42	29	53	26	45	32
US	36	38	29	59	10	45
Australia	1	12	0	0	1	2
No clear winner	3	6	3	7	17	6
Don't know	18	15	15	8	28	14
Total	100	100	100	100	100	100
Count (n)	(67)	(108)	(34)	(87)	(115)	(99)
<b>Best chances of getting a job and staying on after graduation</b>						
EU	27	30	44	14	19	29
US	43	28	32	38	19	45
Australia	0	16	12	23	6	4
No clear winner	3	4	0	5	10	2
Don't know	27	23	12	20	45	20
Total	100	100	100	100	100	100
Count (n)	(67)	(109)	(34)	(86)	(118)	(98)

Source: Survey on teaching staff, international officers and educational agents

Question 21: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

**Table 1.16 (Only education staff recommending firstly the US)**  
**Ranking of living and studying in the EU, the US and Australia: Employment prospects - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Academic degrees are well recognised at international level</b>						
EU	10	16	9	17	27	17
US	57	54	76	72	27	57
Australia	0	7	4	0	0	1
No clear winner	14	6	0	2	27	2
Don't know	19	18	11	9	20	22
Total	100	100	100	100	100	100
Count (n)	(21)	(90)	(55)	(46)	(15)	(143)
<b>Academic degrees have the best reputation in my home labour market</b>						
EU	5	10	7	16	6	16
US	57	65	76	69	19	60
Australia	0	4	4	2	0	1
No clear winner	14	2	0	4	31	2
Don't know	24	19	13	9	44	21
Total	100	100	100	100	100	100
Count (n)	(21)	(91)	(54)	(45)	(16)	(144)
<b>Best chances of getting a job and staying on after graduation</b>						
EU	5	16	7	21	0	11
US	52	46	66	36	38	57
Australia	0	14	13	26	13	1
No clear winner	14	2	4	4	0	4
Don't know	29	21	11	13	50	26
Total	100	100	100	100	100	100
Count (n)	(21)	(91)	(56)	(47)	(16)	(141)

Source: Survey on teaching staff, international officers and educational agents

Question 21: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

In comparison with the survey results, the interviews suggest that a lower ranking than the US not necessarily implies a “bad mark” for the reputation of European degrees. Especially interviewees from China and Mexico - who show the strongest inclination towards the US in the survey – frequently mentioned the prestige of European degrees as one of Europe’s strengths.

### 1.3.3 What is the most affordable destination for international education?

**Overall, Europe was not regarded as an affordable destination. However, perceptions of living costs and tuition fees varied widely between individual European countries.**

*Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country?*

- *Cost of living is affordable for me*
- *Cost of study programmes / tuition fees are low*

Affordability is related to students' perceptions of the cost of living and tuition fees. Generally, the living costs in the European Union are perceived as rather high: only 39 percent considered them as affordable in comparison to 43 percent of students aiming to study in the US and 58 percent of students planning a stay in Australia (table 1.17). However, there are large differences in the perception of costs between individual EU member states. The least affordable in the view of students are the three major destination countries United Kingdom (31%), Germany (36%) and France (42%). On the other hand a majority of students aiming to study in Austria (67%), the Netherlands (57%) and the new EU member states (61%) saw no problems in the level of the living costs.

In contrast to living costs the assessment of the level of tuition fees did not only differ substantially between Western and Eastern Europe but also between individual countries in both regions. The most affordable study programmes were expected by students aiming to study in Sweden (76 percent considered the costs as low), Finland (56%), the Netherlands (53%), Australia (51%) and Germany (49%). High costs on the other hand are expected in the United Kingdom (25%), Switzerland (29%) and the United States (32%).

Table 1.17 shows the responses of students from individual target countries aiming to study in Europe:

- Indians more often than students from other countries expected affordable living costs (52%) and tuition fees (53%). Also about half of the Chinese (48% each the living costs and tuition fees) and slightly fewer Thais (47% and 44%) considered study in the EU as affordable.
- Mexicans were similar to Asian students in the perception of living costs (50% considered them as affordable) but were less convinced that they would be able to pay the tuition fees (38%). Brazilians and Russians were least optimistic that living costs (20% and 30%) or tuition fees (32% and 29%) were affordable to them.

**Table 1.17 (All students from the target countries)**  
**Affordability of living and studying - by country of origin and destination country**  
**(percentages\*)**

	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
<b>Brazilians</b>					
Cost of living is affordable for me	20	30	47	44	23
Cost of study programmes / tuition fees are low	32	18	30	35	30
<b>Chinese</b>					
Cost of living is affordable for me	48	36	57	55	47
Cost of study programmes / tuition fees are low	48	30	47	50	44
<b>Indians</b>					
Cost of living is affordable for me	52	41	56	53	50
Cost of study programmes / tuition fees are low	53	33	50	54	47
<b>Mexicans</b>					
Cost of living is affordable for me	50	54	63	61	52
Cost of study programmes / tuition fees are low	38	20	18	31	36
<b>Russians</b>					
Cost of living is affordable for me	30	30	50	51	31
Cost of study programmes / tuition fees are low	29	21	67	46	29
<b>Thais</b>					
Cost of living is affordable for me	47	53	64	55	52
Cost of study programmes / tuition fees are low	44	42	62	53	46
<b>Total</b>					
Cost of living is affordable for me	39	43	58	54	42
Cost of study programmes / tuition fees are low	39	32	51	45	39

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country from question 19?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Completely agree" to 5 = "Completely disagree"

Compared to students aiming to study in other destinations, the following picture arises:

- For all destinations, respondents from the three Asian countries were more positive about the affordability of living and tuition than respondents from Russia and Latin America.
- While respondents from all target countries going to Australia consider living costs to be most affordable, Indians and Chinese going to Europe find living costs in their destination more



affordable than those going to the US. This is the other way round for Brazilians, Mexicans and Thai respondents.

Respondents aiming to study in Europe thought that tuition fees in their destination were more affordable than their fellows going to the US. Furthermore, Latin American, Chinese and Indian students aiming to study in Europe and their fellows aiming to study in Australia had at least similar views on the affordability of tuition in their destination.

**The direct ranking of Europe, the US and Australia for aspects linked to the affordability of an international education shows Australia as the winner, followed by Europe and the US.**

*Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1,2,3 (1=best) the EU, the US and Australia with regard to the following aspects:*

- *Most affordable level of tuition fees*
- *Best availability of scholarships and loans*
- *Most affordable living costs*
- *Best job opportunities during studies*

The direct ranking of Europe, the US and Australia for aspects linked to the affordability of an international education shows Australia as the winner, followed by the EU and the US (see table 1.18). Especially students from China and from Thailand but also from India were convinced that living costs and tuition fees in Australia are lower than in other destination countries. Europe is placed second, well before the US. On the other hand students from Brazil, Mexico and Russia ranked the EU first with regard to tuition fees but differ in the perception of living costs: Brazilians saw Australia most often at the top while for Mexicans and Russians the EU was the winner.

With respect to offers and conditions like scholarships and loans or job opportunities during study which might help to finance an international education the major destinations were ranked differently. While the EU was perceived first as a provider of scholarships and loans the US was the winner with regard to job opportunities during the study period. Again differences by target country could be observed: students from the Asian countries China, India and Thailand more often perceived the US as the destination country with the best availability of scholarships and job opportunities. However, a substantial share of students from these countries ranked the EU or Australia at the top.

Students from Mexico and Brazil were most often convinced that the EU served best as scholarship provider and offered good job opportunities for students while Russians were most insecure about scholarships and saw the US ahead in terms of job opportunities.

**Table 1.18** (*All students from the target countries*)  
**Ranking of living and studying in the EU, the US and Australia: affordability - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Most affordable level of tuition fees</b>						
EU	21	24	25	40	21	9
US	8	6	11	14	6	8
Australia	14	43	30	16	13	47
No clear winner	2	2	3	1	6	1
Don't know	54	25	31	29	54	35
Total	100	100	100	100	100	100
Count (n)	(3095)	(3127)	(1489)	(2378)	(2052)	(2866)
<b>Best availability of scholarships and loans</b>						
EU	32	16	22	46	18	11
US	9	29	24	16	12	21
Australia	5	21	16	8	5	12
No clear winner	2	2	3	1	5	1
Don't know	50	33	35	29	60	55
Total	100	100	100	100	100	100
Count (n)	(3095)	(3127)	(1489)	(2378)	(2052)	(2866)
<b>Most affordable living costs</b>						
EU	16	17	23	28	20	8
US	15	8	15	25	11	9
Australia	22	43	27	19	15	38
No clear winner	3	2	3	1	6	1
Don't know	44	29	32	26	48	43
Total	100	100	100	100	100	100
Count (n)	(3095)	(3127)	(1489)	(2378)	(2052)	(2866)
<b>Best job opportunities during studies</b>						
EU	23	18	20	39	18	8
US	17	28	34	18	29	33
Australia	9	19	15	10	5	14
No clear winner	3	2	3	1	7	1
Don't know	48	33	27	31	40	44
Total	100	100	100	100	100	100
Count (n)	(3095)	(3127)	(1489)	(2378)	(2052)	(2866)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey

The comparison group of respondents to the online survey perceived the EU (45% in terms of tuition fees and 26% in terms of living costs) as more affordable than Australia (15% and 20%) and the US (7% and 15%). Differences by country of origin are rather small. However, students from Latin America slightly more often expected affordable living costs in the US than in other destinations. The availability of scholarships was most often related to the EU (35%)<sup>30</sup> while the US is leading regarding job opportunities for students (25%).

International students in the US also associated the lowest tuition fees with the EU but ranked the US similarly often in number one position as Australia with respect to living costs. Concerning the availability of scholarships and job opportunities the US is the clear leader in the view of this comparison group.

Overall, education staff from the target countries had a similar perception as their students and ranked Australia most often at the top as the country with the most affordable living costs (32%) and tuition fees (32%). Respondents from Thailand voted to the highest degree in favour of Australia followed by respondents from India and China. While Latin American staff members agreed with their colleagues from Asian countries that Australia was the country with the most affordable living costs they significantly more often came to the conclusion that tuition fees were more affordable in the EU. Regarding the provision of scholarships and job opportunities, Europe was also viewed more positively by Latin Americans, whereas Asians most often ranked the US first (see table 1.19).

The interview results largely confirm the patterns revealed by the survey: tuition fees, for example were frequently considered to be lower in European countries than in other destinations, while high living costs were frequently considered as a problem, especially by respondents from Latin America and Russia.

Chinese interviewees described Europe as a "relatively affordable study destination" and some saw low tuition fees as one of the most attractive features of European higher education. Others however underlined that the low cost of an international education in Europe frequently was a misperception, and that the cost of education in Europe was rising quickly.

Chinese interviewees frequently mentioned another factor linked to affordability: the relatively short time (and hence less money) necessary to obtain a Master's degree in many European countries was considered as an asset of Europe's higher education.

---

<sup>30</sup> This result needs to be viewed carefully, as this group accessed the survey via the websites of European scholarship organisations.

**Table 1.19** (All education staff from the target countries)  
**Ranking of living and studying in the EU, the US and Australia: affordability - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Most affordable level of tuition fees</b>						
EU	31	21	22	43	29	10
US	8	9	14	10	2	9
Australia	12	31	37	16	9	55
No clear winner	2	4	0	1	4	1
Don't know	48	35	28	30	57	24
Total	100	100	100	100	100	100
Count (n)	(101)	(250)	(116)	(177)	(161)	(354)
<b>Best availability of scholarships and loans</b>						
EU	35	20	22	35	20	12
US	16	25	26	16	12	29
Australia	3	20	25	11	4	10
No clear winner	1	3	3	3	6	1
Don't know	45	33	24	36	58	47
Total	100	100	100	100	100	100
Count (n)	(100)	(250)	(116)	(177)	(156)	(354)
<b>Most affordable living costs</b>						
EU	16	21	17	25	21	8
US	23	12	20	17	7	13
Australia	22	27	35	28	9	50
No clear winner	2	3	3	1	7	1
Don't know	38	37	25	29	56	28
Total	100	100	100	100	100	100
Count (n)	(101)	(248)	(116)	(178)	(157)	(353)
<b>Best job opportunities during studies</b>						
EU	23	18	19	24	19	8
US	19	27	45	19	17	41
Australia	15	16	12	24	5	18
No clear winner	1	4	3	2	6	1
Don't know	43	35	21	31	54	32
Total	100	100	100	100	100	100
Count (n)	(101)	(249)	(116)	(178)	(155)	(354)

Source: Survey on teaching staff, international officers and educational agents

Question 21: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

#### 1.3.4 What is the most accessible destination?

**Europe and Australia are seen as more accessible than the US as least as far as visa availability is concerned.**

*Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1,2,3 (1=best) the EU, the US and Australia with regard to the following aspects:*

- *Best supply of information on study opportunities*
- *Best chances of obtaining a place of study with my home qualification*
- *Low bureaucracy/simple administrative procedures*
- *Best chances of obtaining a visa*

In the first place, accessibility refers to access to higher education institutions and programmes. This may include the recognition of prior qualifications, hurdles in the admission system as well as service and information related aspects. Second, accessibility is related to “country-accessibility” and hence to immigration and visa regulations.

The perception of education and country accessibility is at least partly correlated with the selected or preferred destination country. Students aiming to study in the EU or in Australia more often ranked their destination at the top in terms of best supply of information on study opportunities, best chances of obtaining a place of study with the home qualifications, low bureaucracy and simple admission procedures and best chances to obtain a visa. Students planning to study in the US had mixed views: as table 1.20 shows they see the US in the lead for the supply of information and for the recognition of home qualifications but ranked Australia similarly often on place one regarding simple administrative procedures and both Australia and Europe considerably higher with respect to the provision of visa.

Students who had decided to study in the EU differ in their views to some extent depending on their country of origin (see table 1.21):

- regarding all aspects of education and country accessibility Brazilians and Mexicans ranked the EU more often at the top than students from other countries.
- Indian students also saw the EU in front with regard to all aspects but slightly more often than Latin Americans voted for Australia (or the US, except for the availability of visas).
- Similar proportions of Chinese students ranked the EU, the US or Australia first. This is however not the case for the chances to obtain a visa: most Chinese saw Australia on place one (43%) before the EU (28%) or the US (7%). Even those Chinese students aiming to study in the US ranked their own destination last for this aspect.

- Thai students planning to study in Europe saw the EU more often as best supplier of information on study opportunities. On the other hand they ranked the US highest with respect to the recognition of academic qualifications from their home country and Australia for simple administration procedures and the best chances of getting a visa.
- Regarding all aspects Russians saw the EU more often at the top than the US and Australia. However, the share of Russians who stated that they didn't know which destination country offered the best accessibility of education and visa regulations was higher than in any other target country.

Similar country patterns could be observed among students aiming to study in the US. All Asian students but especially Chinese and Thais considered Australia more often than students from Latin America or Russia as the best destination for simple administration procedures and visa regulations. For visa regulations, students from all target countries aiming to study in the US ranked the United States after Europe (Mexico and Russia), after Australia (Thailand) or even last (Brazil, China and India). On the other hand a substantial share of Brazilians and Mexicans considered the EU as best for supplying information on study opportunities (see table 1.22).

Foreign students in the US most often saw their destination country as the winner. However, the EU was ranked first for visa regulations, followed by Australia. Students from China and India ranked Australia most often at the top. Hence, the perceived visa difficulties for students aiming to study in the US persisted for the control group who had already lived through the visa procedure – or at least they thought that it would have been easier elsewhere.

In the comparison group of respondents to the online survey the EU is the clear winner of all aspects of education accessibility. However, more students from Asia ranked the US or Australia on place one than students from Latin America or from Africa.

**Table 1.20** (All students from the target countries)  
**Ranking of living and studying in the EU, the US and Australia: Accessibility of education**  
**- by destination country (percentages\*)**

	Destination country/region			
	EU/EFTA	US	AUS	Other
<b>Best supply of information on study opportunities</b>				
EU	41	15	14	22
US	21	39	18	25
Australia	7	9	31	12
No clear winner	3	2	2	2
Don't know	28	36	35	39
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Best chances of obtaining a place of study with my home qualification</b>				
EU	40	16	14	26
US	17	40	23	25
Australia	8	9	29	11
No clear winner	3	1	2	3
Don't know	31	34	32	36
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Low bureaucracy / simple administrative procedures</b>				
EU	29	15	12	16
US	10	18	9	11
Australia	16	18	36	22
No clear winner	2	1	1	2
Don't know	43	48	42	49
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Best chances of obtaining a visa</b>				
EU	44	21	15	27
US	8	16	9	11
Australia	22	29	44	27
No clear winner	3	2	1	2
Don't know	23	32	31	32
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:  
 Sample: Students responding to paper based surveys and respondents to the online survey

**Table 1.21** (Only students from the target countries aiming to study in Europe)  
**Ranking of living and studying in the EU, the US and Australia: Accessibility of education**  
**- by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Best supply of information on study opportunities</b>						
EU	45	33	42	53	39	26
US	17	28	23	23	18	20
Australia	4	14	10	3	1	14
No clear winner	3	2	3	1	9	1
Don't know	31	22	22	20	33	40
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Best chances of obtaining a place of study with my home qualification</b>						
EU	47	38	43	49	29	23
US	10	29	15	14	13	30
Australia	7	10	12	8	7	10
No clear winner	3	3	3	1	6	1
Don't know	32	19	26	28	45	36
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Low bureaucracy / simple administrative procedures</b>						
EU	32	26	38	40	18	15
US	6	17	11	9	10	10
Australia	14	24	13	12	10	24
No clear winner	2	2	3	1	6	1
Don't know	46	31	35	39	57	49
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Best chances of obtaining a visa</b>						
EU	53	28	42	65	41	17
US	4	7	10	11	9	12
Australia	19	43	23	12	11	31
No clear winner	3	1	3	2	7	1
Don't know	21	21	21	11	32	39
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:  
 Sample: Students responding to paper based surveys and respondents to the online survey



**Table 1.22** (Only students from the target countries aiming to study in the US)  
**Ranking of living and studying in the EU, the US and Australia: Accessibility of education**  
**- by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Best supply of information on study opportunities</b>						
EU	20	17	17	23	10	10
US	41	41	45	46	41	31
Australia	2	13	8	1	2	11
No clear winner	1	1	2	2	9	1
Don't know	36	28	29	28	38	48
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Best chances of obtaining a place of study with my home qualification</b>						
EU	18	16	18	21	13	12
US	34	52	34	37	23	41
Australia	4	7	11	13	10	9
No clear winner	1	1	2	1	6	1
Don't know	43	24	35	29	49	36
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Low bureaucracy / simple administrative procedures</b>						
EU	24	20	17	26	13	5
US	11	24	20	25	15	15
Australia	15	19	17	12	12	21
No clear winner	3	1	1	1	3	1
Don't know	47	36	45	37	57	59
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Best chances of obtaining a visa</b>						
EU	39	16	25	46	30	8
US	15	11	20	23	18	17
Australia	21	46	23	11	16	30
No clear winner	2	1	4	3	5	1
Don't know	23	26	28	17	32	44
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:  
 Sample: Students responding to paper based surveys and respondents to the online survey

Education staff from the target countries had a more complex view than their students. In general, the US was most often considered best in terms of supply of information and recognition of home qualifications of foreign students. All three destinations were ranked by the same share of respondents on place one with respect to simple administrative procedures and the EU was in front regarding visa regulations (table 1.23). A country-by-country comparison shows that

- Brazilians, Mexicans and Russians more often ranked the EU at the top than respondents from other countries. However, Latin American staff members ranked the US first for the supply of information, confirming the lack of information and transparency deplored by their colleagues in the interviews.
- Chinese votes are often balanced between the EU, the US and Australia. Australia was however most often ranked highest with respect to visa regulations and the US last.
- Indian respondents are comparatively often in favour of the US. Australia was considered best for their visa regulations.
- Like their students education staff from Thailand saw Australia in front in terms of simple administrative procedures and visa regulations while the US was considered best for the supply of information on study opportunities and recognition of home qualifications.

Workshops and interviews confirmed the perceived difficulties in getting a visa for the US, compared to easier visa procedures in Australia and Europe. Especially workshop participants in India, China and Thailand considered the difficulty in getting a visa/residence permit as a major barrier for studying in the US, and an important reason for many students to prefer a European country or Australia (in Asia). Similar although less strong attitudes persisted on the Brazilian, Russian and especially Mexican side: “migration to Europe is easier and less humiliating than to the US” (country report Mexico).

- However, Europe is not considered as fully open and accessible by all. Although Chinese parents thought it was easier to get a visa for a European country than for the US, they “realise, however, that immigration policies in European countries are strict and that Europe is not an immigration destination. In their eyes, Europe is less open than the US, and its education systems are less flexible.”

**Table 1.23** (All education staff from the target countries)  
**Ranking of living and studying in the EU, the US and Australia: Accessibility of education**  
**- by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Best supply of information on study opportunities</b>						
EU	31	29	19	30	31	14
US	37	26	44	32	19	29
Australia	1	18	18	11	1	19
No clear winner	2	3	4	5	9	3
Don't know	30	23	15	23	40	36
Total	100	100	100	100	100	100
Count (n)	(98)	(251)	(113)	(177)	(156)	(352)
<b>Best chances of obtaining a place of study with my home qualification</b>						
EU	35	23	24	27	45	17
US	15	24	39	25	8	46
Australia	8	22	13	9	3	8
No clear winner	3	6	3	3	7	3
Don't know	40	26	21	36	37	26
Total	100	100	100	100	100	100
Count (n)	(101)	(251)	(112)	(173)	(158)	(354)
<b>Low bureaucracy / simple administrative procedures</b>						
EU	31	23	22	26	20	8
US	15	19	25	20	10	22
Australia	5	23	18	16	2	29
No clear winner	3	2	0	2	6	1
Don't know	46	33	34	36	63	40
Total	100	100	100	100	100	100
Count (n)	(98)	(251)	(114)	(177)	(157)	(353)
<b>Best chances of obtaining a visa</b>						
EU	63	22	23	53	54	15
US	1	16	14	5	4	11
Australia	17	33	43	24	6	37
No clear winner	4	3	1	3	6	2
Don't know	15	26	19	16	30	36
Total	100	100	100	100	100	100
Count (n)	(101)	(249)	(115)	(178)	(165)	(352)

Source: Survey on teaching staff, international officers and educational agents

Question 21: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

### 1.3.5 What is the safest place to study?

**Four out of five students aiming to study in the EU perceived their future destination as safe. However, especially the major European destinations were not seen as “welcoming”.**

*Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country?*

- *“People are welcoming towards foreigners/people from different ethnic backgrounds”*
- *“It is a safe country to live in”*

“Relaxed”, “peaceful” and safe” – this is how Chinese university representatives described the EU in the interviews.

Safety does not only relate to the perception of Europe’s political situation and stability, but also to cultural issues (cf. lifestyle) linked to tolerance and/or racism.

Four out of five students aiming to study in the EU perceived their future destination as a safe country to live in (see table 1.24). Only Canada (86%) and New Zealand (83) were considered safe by a slightly higher share of students aiming to study in these countries. In contrast, only half of the students planning to study in the US had the feeling that they were going to a country with a high degree of safety.

Although students planning to study in Europe did not fear for their safety, they were slightly less convinced that they would be welcome in Europe. Only about 60 percent expected Europeans to be welcoming towards foreigners. The relevant proportion is even lower among students aiming to study in the US (46%), but there were other major competitors where students expect a warmer welcome: Australia (70%), Canada (71%) and New Zealand (74%). However, the European average hides important variations between different destination countries in Europe: while the “core countries”, especially Germany and the UK were seen as less welcoming destinations, the Netherlands, the Nordic countries and Austria ranked as high or even higher than Australia.

**Table 1.24 (All students from the target countries)**  
**Affordability of living and studying - by country of origin and destination country**  
**(percentages\*)**

	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
<b>Brazilians</b>					
People are welcoming towards foreigners / people from different ethnic backgrounds	49	39	79	55	49
It is a safe country to live in	85	51	90	82	82
<b>Chinese</b>					
People are welcoming towards foreigners / people from different ethnic backgrounds	65	39	66	63	59
It is a safe country to live in	74	39	70	67	65
<b>Indians</b>					
People are welcoming towards foreigners / people from different ethnic backgrounds	72	61	75	84	70
It is a safe country to live in	85	69	82	84	80
<b>Mexicans</b>					
People are welcoming towards foreigners / people from different ethnic backgrounds	64	34	79	74	63
It is a safe country to live in	83	55	97	84	82
<b>Russians</b>					
People are welcoming towards foreigners / people from different ethnic backgrounds	62	54	81	66	62
It is a safe country to live in	77	51	93	62	75
<b>Thais</b>					
People are welcoming towards foreigners / people from different ethnic backgrounds	53	48	66	60	54
It is a safe country to live in	75	50	82	71	68
<b>Total</b>					
People are welcoming towards foreigners / people from different ethnic backgrounds	59	46	70	65	58
It is a safe country to live in	81	51	81	75	75

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country from question 19?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Completely agree" to 5 = "Completely disagree"

Some differences could be observed by country of origin (see table 1.24):

- Indians aiming to study in Europe expected a safe country to live in and most often perceived Europeans as welcoming towards foreigners. Thai and Chinese students had slightly more doubts about the safety of life in the EU and Thais more often feared that they would not be welcome. While a substantial share of Indians and Chinese aiming to study in Europe or Australia regarded their destination as safe and welcoming, percentages were considerably lower especially for Chinese students going to the US.
- Most Brazilians were convinced that their safety was not in danger in Europe but only half expected a warm welcome. Mexican students also did not fear for their safety and were slightly less concerned about the treatment as foreigners than Brazilians. Slightly fewer Russians, like Chinese and Thai students, regarded Europe as a safe place. Interestingly, of those respondents going to Australia more Brazilian, Mexican and Russian students thought that their destination was safe and welcoming than their fellows from Asia.

**Europe and Australia win the direct ranking as the safest places to live, even among students aiming to study in the US.**

*Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1,2,3 (1=best) the EU, the US and Australia with regard to the following aspects:*

- People are most friendly and open towards foreigners
- Safest place to live

The direct ranking of Europe, the US and Australia for safety and friendliness towards foreigners differs to some extent by selected or preferred destination country. Students with the ambition to study in the EU or in Australia clearly ranked their destination at the top while students with other destination countries decided mostly either in favour of the EU or Australia (see table 1.25). At least as far as safety is concerned, this applies also to students aiming to study in the US.

A higher proportion of students from all target countries going to Europe ranked it on place one with respect to safety. Australia was ranked second and only few students saw the US as a safe place. Students aiming to study in the US came mostly to the same conclusion: only Indians ranked the US before Europe and Australia.

People in the EU were most often regarded as “friendly towards foreigners” by Mexicans (61%), Indians (38%) and Russians (35%). Brazilians and Thais more often ranked Australia first in this respect while Chinese votes are balanced between the EU and Australia not only among those

who aim to study in the EU but also among those Chinese preferring to study in the US (see tables 1.26 and 1.27).

Interviews with parents in the target countries confirm these results. In the view of Thai parents, Europe is “safer to live in, multicultural and different from the US.” Mexicans found Europe “more stable in different aspects”, “safe”, “less aggressive and not belligerent” and thought that there was “not such a discrimination”.

Similar percentages of international students in the US considered the EU and Australia as best destinations in terms of safety. In contrast to students from the target countries they were however convinced that US people were most friendly towards foreigners, probably based on their own positive experience. A particularly high share of Indians studying in the US shared this view (60%) while Chinese were less in favour of the US (37%) and more often stated that they did not know in which destination country the people were most friendly and open (37%).

Most respondents to the global online survey considered the EU as the safest and most friendly destination. However, participants from Sub-Saharan Africa saw the US as most welcoming to foreigners.

**Table 1.25 (All students from the target countries)**  
**Ranking of living and studying in the EU, the US and Australia: Personal security (percentages\*)**

	Destination country/region			
	EU/EFTA	US	AUS	Other
<b>People are most friendly and open towards foreigners</b>				
EU	38	19	11	27
US	11	24	12	14
Australia	26	25	48	31
No clear winner	3	2	2	2
Don't know	22	30	26	27
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Safest place to live</b>				
EU	50	29	17	33
US	4	13	6	7
Australia	21	24	47	29
No clear winner	3	2	2	2
Don't know	22	32	27	29
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:  
Sample: Students responding to paper based surveys and respondents to the online survey



**Table 1.26** (Only students from the target countries aiming to study in Europe)  
**Ranking of living and studying in the EU, the US and Australia: accessibility and lifestyle - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>People are most friendly and open towards foreigners</b>						
EU	33	33	38	61	35	19
US	6	16	18	6	11	19
Australia	37	29	15	19	15	29
No clear winner	3	3	5	1	8	1
Don't know	21	19	24	12	31	32
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Safest place to live</b>						
EU	53	52	44	59	38	42
US	3	4	9	4	3	5
Australia	20	26	17	22	20	18
No clear winner	4	2	4	1	7	1
Don't know	20	16	26	14	32	34
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey

**Table 1.27 (Only students from the target countries aiming to study in the US)**  
**Ranking of living and studying in the EU, the US and Australia: accessibility and lifestyle -**  
**by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>People are most friendly and open towards foreigners</b>						
EU	24	29	16	47	13	8
US	16	25	31	14	25	25
Australia	34	25	17	16	16	29
No clear winner	1	1	3	1	6	1
Don't know	25	20	33	21	40	37
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Safest place to live</b>						
EU	33	40	18	43	22	23
US	13	10	26	12	12	9
Australia	23	31	19	19	19	25
No clear winner	3	1	4	2	6	1
Don't know	28	18	34	25	41	42
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey

Education staff from Brazil, Mexico and Russia ranked the EU more often at the top than Australia (see table 1.28).

Like Chinese students, staff members from China have a similar perception of welcoming attitudes in the EU, the US and Australia but more often considered the EU as a safe place to live than the other destinations.

Education staff from India saw the US as most welcoming towards foreigners and Australia as the safest country.

Thai respondents least often considered the EU as the friendliest place but on the other hand more often ranked the EU than Australia on place one for safety.

**Table 1.28** (All education staff from the target countries)  
**Ranking of living and studying in the EU, the US and Australia: accessibility and lifestyle - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>People are most friendly and open towards foreigners</b>						
EU	38	24	22	44	44	14
US	12	19	32	7	17	28
Australia	31	25	26	29	6	30
No clear winner	4	7	3	4	8	1
Don't know	16	24	18	16	25	27
Total	100	100	100	100	100	100
Count (n)	(101)	(249)	(116)	(179)	(158)	(356)
<b>Safest place to live</b>						
EU	47	39	21	34	49	33
US	3	9	20	9	2	8
Australia	31	27	34	38	16	27
No clear winner	5	3	2	3	3	2
Don't know	15	22	23	16	30	30
Total	100	100	100	100	100	100
Count (n)	(101)	(250)	(118)	(176)	(159)	(353)

Source: Survey on teaching staff, international officers and educational agents  
 Question 21: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

### 1.3.6 Which destination has the most innovative or traditional society, labour market and higher education?

The vast majority of students regarded their destination as a modern and technologically advanced country, regardless of where they were aiming to study.

*Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country?*

- *It is a modern and technologically advanced country*

More than 85 percent of students aiming to study in Europe or in the US considered their preferred or selected destination country as modern and technologically advanced. However, other destinations like Australia, Canada etc. were characterised similar by vast majorities of potential future host students.

In a direct comparison between students favouring to study in Europe or in the US we notice slightly higher proportions of students from most target associating modernity and technological advancement with the US (see table 1.29). Only Indians considered European destinations more often as modern as the US.

**Table 1.29** (All students from the target countries)  
**Consideration of the selected or preferred destination country as modern and technologically advanced - by country of origin and destination country (percentages\*)**

Country of origin	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
Brazil	90	95	89	81	90
China	79	82	67	68	78
India	93	90	90	92	91
Mexico	89	94	100	83	89
Russia	85	86	94	74	85
Thailand	80	82	71	72	79
Total	86	86	79	76	85

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country from question 19?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Completely agree" to 5 = "Completely disagree"

The degree to which Europe was considered as modern and technologically advanced differed to a certain extent by target country. While about 90 percent of potential future host students

from India, Brazil and Mexico agreed to the characterisation respective shares were 85 percent in the case of Mexicans and about 80 percent in the case of Chinese and Thais.

Individual European destination countries most often perceived as modern and technologically advanced were Finland (96%), Germany (95%) and Sweden (94%). On the other hand only about half of the few students aiming to study in the new EU member states came to respective conclusions.

**Regardless of their destination, students saw the most traditional universities in Europe and the most modern and innovative universities and the most competitive society and labour market in the United States.**

*Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1,2,3 (1=best) the EU, the US and Australia with regard to the following aspects:*

- *Most traditional universities*
- *Most modern and innovative universities*
- *Most competitive society and labour market*

With regard to all aspects addressing innovation or tradition of society, labour market and higher education students came to the same conclusions, independently of their preferred destination country (see table 1.30):

- the European Union has the most traditional universities,
- the United States has the most modern and innovative universities and the most competitive society and labour market.

Differences in the rankings by respondents from individual target countries are rather small (see table 1.31 and 1.32). However, among students aiming to study in the European Union more Asians than respondents from Latin America or from Russia ranked the US first with respect to modern and innovative universities.

The comparison groups, i.e. respondents to the global online survey and international students surveyed in the US, did not differ in their rankings and considered Europe as the place with the most traditional universities while a majority saw the US on place one in terms of innovation and modernity in higher education and society.

Like the students education staff ranked the EU clearly more often on place one with respect to tradition of universities (see Table 1.33) while the US was ranked highest as the country with the

most competitive society and the most modern and innovative universities. The latter was especially often expressed by education staff from India and from Thailand.

Interviewees in all target countries too viewed Europe's academic traditions positively, but with an inherent criticism: in the words of a Brazilian interviewee "*tradition sometimes means inertia*", while the US is associated with innovation.

**Table 1.30** (All students from the target countries)  
**Ranking of living and studying in the EU, the US and Australia: Traditionally and modernity of higher education and society - by destination country (percentages\*)**

	Destination country/region			
	EU/EFTA	US	AUS	Other
<b>Most traditional universities</b>				
EU	67	49	46	49
US	15	26	20	22
Australia	2	3	11	3
No clear winner	2	1	1	2
Don't know	14	21	22	24
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Most modern and innovative universities</b>				
EU	28	9	12	19
US	45	63	43	47
Australia	3	4	18	5
No clear winner	4	2	2	2
Don't know	20	23	25	26
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Most competitive society and labour market</b>				
EU	26	14	13	21
US	38	46	37	38
Australia	3	4	14	5
No clear winner	3	2	2	2
Don't know	31	34	35	34
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:  
 Sample: Students responding to paper based surveys and respondents to the online survey

**Table 1.31** (Only students from the target countries aiming to study in Europe)  
**Ranking of living and studying in the EU, the US and Australia: Traditionally and modernity of higher education and society (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Most traditional universities</b>						
EU	72	69	63	61	70	65
US	15	17	12	27	4	8
Australia	0	3	5	1	2	2
No clear winner	2	1	2	1	6	1
Don't know	10	10	18	10	18	25
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Most modern and innovative universities</b>						
EU	28	16	30	41	32	14
US	41	65	44	41	32	53
Australia	3	4	6	5	3	2
No clear winner	3	3	4	2	9	1
Don't know	25	12	17	12	24	29
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Most competitive society and labour market</b>						
EU	20	16	29	44	25	17
US	42	49	29	36	25	38
Australia	2	5	5	2	1	3
No clear winner	3	3	3	2	7	1
Don't know	32	27	34	16	42	41
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey

**Table 1.32** (Only students from the target countries aiming to study in the US)  
**Ranking of living and studying in the EU, the US and Australia: Traditionally and modernity of higher education and society (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Most traditional universities</b>						
EU	44	59	38	37	62	50
US	41	26	30	50	9	16
Australia	1	3	5	2	1	2
No clear winner	2	0	2	2	4	1
Don't know	12	11	26	10	24	31
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Most modern and innovative universities</b>						
EU	10	8	11	16	11	7
US	61	76	59	65	55	58
Australia	2	4	6	5	3	2
No clear winner	1	0	3	1	9	1
Don't know	26	12	21	13	23	32
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Most competitive society and labour market</b>						
EU	11	13	14	29	14	12
US	53	58	38	50	34	41
Australia	2	5	7	1	3	4
No clear winner	0	1	3	1	6	0
Don't know	33	23	37	19	43	43
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey



**Table 1.33** (All education staff from the target countries)  
**Ranking of living and studying in the EU, the US and Australia: Traditionally and modernity of higher education and society (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Most traditional universities</b>						
EU	75	59	50	68	76	61
US	15	22	32	20	2	20
Australia	0	7	3	1	1	2
No clear winner	4	4	0	2	13	0
Don't know	7	7	14	10	9	17
Total	100	100	100	100	100	100
Count (n)	(103)	(250)	(117)	(176)	(160)	(356)
<b>Most modern and innovative universities</b>						
EU	18	19	8	20	15	13
US	61	56	76	54	46	64
Australia	3	10	4	6	2	3
No clear winner	1	4	2	2	10	0
Don't know	17	12	10	18	27	20
Total	100	100	100	100	100	100
Count (n)	(100)	(251)	(117)	(178)	(159)	(354)
<b>Most competitive society and labour market</b>						
EU	16	22	23	27	19	15
US	53	42	46	45	23	48
Australia	3	8	7	4	1	2
No clear winner	3	2	1	3	5	1
Don't know	25	27	23	21	52	34
Total	100	100	100	100	100	100
Count (n)	(101)	(250)	(114)	(179)	(158)	(353)

Source: Survey on teaching staff, international officers and educational agents

Question 21: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

### 1.3.7 What is the best place to live?

**With respect to all living and cultural opportunities addressed by the questionnaire the EU was seen more positively than the US.**

*Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country?*

- *“It has a high standard of living”*
- *“I like the climate/weather in the destination country”*
- *“It has a rich history / culture / cultural heritage”*
- *“It has an attractive lifestyle, e.g. music, fashion, nightlife, food”*
- *“I am fascinated by its geography/landscape”*

Lifestyle covers factors such as the standard of living, weather and climate, the cultural offer as regards fine arts, music, fashion, or nightlife, traditions and cultural heritage.

More than 80 percent of students aiming to study in the EU were convinced that their selected or preferred destination country had a high standard of living and a rich history and culture. With respect to all living and cultural opportunities addressed by the questionnaire the EU was seen more positively than the US (see table 1.34). In comparison with other destination countries the EU lost against Australia and New Zealand for weather and landscape and against Canada for the standard of living.

Students from *China* and *Thailand* aiming to study in the EU were in many respects slightly less enthusiastic about characteristics of their future destination country than students from the other target countries. Especially the standard of living, history and culture were seen with more reservations.

*Indians* perceived their destination countries in the EU in many respects more positive than students from the two other Asian target countries. However, relatively few *Indians* expected a rich history and culture. *Brazilians*, *Mexicans* and *Russians* saw the EU most positively.

**Table 1.34** (All students from the target countries)  
**Quality of Life and Culture - by country of origin and destination country (percentages\*)**

	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
<b>Brazilians</b>					
It has a high standard of living	85	83	85	71	84
I like the climate/weather in the destination country	60	55	86	68	61
It has a rich history / culture / cultural heritage	92	52	59	72	86
It has an attractive lifestyle, e.g. music, fashion, nightlife, food	78	65	78	68	76
I am fascinated by its geography / landscape	61	36	78	59	59
<b>Chinese</b>					
It has a high standard of living	76	67	70	68	73
I like the climate/weather in the destination country	55	38	64	55	52
It has a rich history / culture / cultural heritage	71	27	41	45	56
It has an attractive lifestyle, e.g. music, fashion, nightlife, food	59	46	48	52	55
I am fascinated by its geography / landscape	63	37	61	55	57
<b>Indians</b>					
It has a high standard of living	86	83	82	87	85
I like the climate/weather in the destination country	69	56	74	75	66
It has a rich history / culture / cultural heritage	74	45	53	55	62
It has an attractive lifestyle, e.g. music, fashion, nightlife, food	68	64	68	62	67
I am fascinated by its geography / landscape	65	46	59	58	59
<b>Mexicans</b>					
It has a high standard of living	88	86	97	83	87
I like the climate/weather in the destination country	61	53	77	49	59
It has a rich history / culture / cultural heritage	88	26	73	65	82
It has an attractive lifestyle, e.g. music, fashion, nightlife, food	76	64	86	68	75
I am fascinated by its geography / landscape	72	33	90	72	69
<b>Russians</b>					
It has a high standard of living	86	80	94	73	85
I like the climate/weather in the destination country	61	62	100	77	62
It has a rich history / culture / cultural heritage	85	43	33	75	81
It has an attractive lifestyle, e.g. music, fashion, nightlife, food	72	65	73	67	71
I am fascinated by its geography / landscape	64	41	88	71	62
<b>Thais</b>					
It has a high standard of living	73	63	56	66	67
I like the climate/weather in the destination country	62	58	76	72	64
It has a rich history / culture / cultural heritage	64	54	51	63	59

(Table 1.34 continues)

	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
It has an attractive lifestyle, e.g. music, fashion, nightlife, food	64	61	52	63	62
I am fascinated by its geography / landscape	75	57	78	79	71
<b>Total</b>					
It has a high standard of living	83	73	72	73	80
I like the climate/weather in the destination country	60	53	74	63	60
It has a rich history / culture / cultural heritage	82	43	50	61	72
It has an attractive lifestyle, e.g. music, fashion, nightlife, food	71	59	60	63	68
I am fascinated by its geography / landscape	66	45	70	68	63

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 21: To what extent do you agree with the following statements about your currently selected or preferred destination country from question 19?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Completely agree" to 5 = "Completely disagree"

**The direct ranking of the EU, the US and Australia clearly shows the EU as the winner for the most interesting tradition and cultural heritage and most interesting arts, music and cultural offer.**

*Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1,2,3 (1=best) the EU, the US and Australia with regard to the following aspects:*

- *highest standard of living*
- *most interesting tradition/cultural heritage*
- *most interesting arts/music/cultural offer*
- *most vibrant student life*

The direct ranking of the EU, the US and Australia clearly shows the EU as the winner for the most interesting tradition and cultural heritage and most interesting arts, music and cultural offer (see table 1.35 below). Other aspects like standard of living and a vibrant student life were ranked differently and more often according to the selected destination country (own-destination-wins effect) although overall Europe was ranked first by a higher share of respondents.

Students from the target countries aiming to study in the EU also ranked the EU at the top with respect to tradition, culture, arts, music etc. They also saw the highest standard of living in

Europe although significant minorities of respondents from China, India and Russia ranked the US first. However, differences could be observed with regard to some other aspects (see table 1.36):

- Brazilian and Mexican students ranked the EU before other destination countries in terms of standard of living and a vibrant student life.
- Russians ranked the EU more often at the top than other countries but comparatively often stated that they did not know what the best destination was.
- Chinese and Thai students associate a vibrant student life with the US than with the EU, an aspect that had already come out of the workshops.
- Indians aiming to study in the EU more often than students from other countries could not decide about the winner in terms of cultural heritage and arts and music.

European culture and tradition was also highly ranked by students aiming to study in the US. On the other hand especially respective students from India and China considered the US more often as winner in terms of standards of living and vibrancy of student life (see table 1.37).

International students in the US agreed to the leading role of the EU in tradition and culture as well as in arts and music. However, the latter were seen differently by students from Sub-Saharan Africa who ranked the US more often on place one. Regarding most other aspects international students were in favour of their destination country and ranked it at the top. Students from Latin America consistently ranked the EU slightly higher.

Respondents to the global online survey by and large ranked the destinations countries in a similar way to students from the target countries aiming to study in the EU, i.e. the EU was at the top for all aspects.

**Table 1.35** (All students from the target countries)  
**Ranking of living and studying in the EU, the US and Australia: Life and cultural opportunities - by destination country (percentages\*)**

	Destination country/region			
	EU/EFTA	US	AUS	Other
<b>Highest standard of living</b>				
EU	55	32	26	38
US	17	36	25	25
Australia	7	7	24	12
No clear winner	4	2	3	2
Don't know	17	22	22	22
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Most interesting tradition/ cultural heritage</b>				
EU	78	53	43	58
US	3	13	8	6
Australia	3	7	21	10
No clear winner	3	1	2	3
Don't know	13	25	26	23
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Most interesting arts/music/cultural offer</b>				
EU	70	44	41	52
US	9	23	14	14
Australia	3	5	16	7
No clear winner	4	2	2	2
Don't know	14	26	26	25
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)
<b>Most vibrant student life</b>				
EU	41	15	13	23
US	21	43	25	28
Australia	7	8	29	11
No clear winner	3	1	2	2
Don't know	27	33	31	35
Total	100	100	100	100
Count (n)	(9045)	(2327)	(802)	(1073)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey

**Table 1.36** (Only students from the target countries aiming to study in Europe)  
**Ranking of living and studying in the EU, the US and Australia: Life and cultural opportunities - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Highest standard of living</b>						
EU	63	44	46	68	39	55
US	9	25	29	14	25	14
Australia	7	11	5	8	4	5
No clear winner	4	2	4	1	9	1
Don't know	17	18	17	9	23	25
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Most interesting tradition/ cultural heritage</b>						
EU	84	78	60	90	72	61
US	2	5	8	1	3	5
Australia	1	4	6	2	3	6
No clear winner	3	2	3	1	8	1
Don't know	10	11	24	5	14	27
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Most interesting arts/music/cultural offer</b>						
EU	76	71	50	85	59	55
US	8	11	13	4	14	11
Australia	2	4	6	2	1	5
No clear winner	3	2	3	2	10	1
Don't know	12	12	27	7	16	28
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)
<b>Most vibrant student life</b>						
EU	47	26	38	61	34	22
US	11	44	23	13	19	31
Australia	11	6	7	5	3	10
No clear winner	3	2	4	2	9	1
Don't know	28	22	28	20	35	37
Total	100	100	100	100	100	100
Count (n)	(2466)	(1472)	(664)	(1920)	(1437)	(1086)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:  
 Sample: Students responding to paper based surveys and respondents to the online survey

**Table 1.37 (Only students from the target countries aiming to study in the US)**  
**Ranking of living and studying in the EU, the US and Australia: Life and cultural opportunities - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Highest standard of living</b>						
EU	37	31	19	44	26	38
US	30	39	55	38	41	25
Australia	7	12	5	4	4	6
No clear winner	3	1	3	2	10	1
Don't know	22	17	18	12	20	31
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Most interesting tradition/ cultural heritage</b>						
EU	63	69	34	74	55	43
US	12	11	21	10	6	14
Australia	3	8	8	1	9	8
No clear winner	1	0	2	3	8	1
Don't know	22	12	35	12	22	34
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Most interesting arts/music/cultural offer</b>						
EU	47	61	28	64	40	37
US	26	20	27	19	28	21
Australia	2	7	6	2	1	6
No clear winner	3	1	1	1	9	1
Don't know	22	12	38	13	22	35
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)
<b>Most vibrant student life</b>						
EU	17	20	15	34	12	9
US	38	54	39	37	37	41
Australia	9	6	8	5	2	10
No clear winner	1	1	2	1	7	1
Don't know	34	20	35	23	43	40
Total	100	100	100	100	100	100
Count (n)	(299)	(573)	(418)	(145)	(152)	(740)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 27: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Sample: Students responding to paper based surveys and respondents to the online survey



**Table 1.38** (All education staff from the target countries)  
**Ranking of living and studying in the EU, the US and Australia: accessibility and lifestyle - by country of origin (percentages\*)**

	Country of origin					
	Brazil	China	India	Mexico	Russia	Thailand
<b>Highest standard of living</b>						
EU	41	26	25	47	26	38
US	20	32	52	25	25	24
Australia	16	16	6	11	3	11
No clear winner	9	3	2	1	6	2
Don't know	14	22	15	15	40	25
Total	100	100	100	100	100	100
Count (n)	(100)	(250)	(114)	(178)	(160)	(351)
<b>Most interesting tradition/ cultural heritage</b>						
EU	90	59	52	86	84	59
US	1	14	14	3	1	9
Australia	3	9	5	2	1	8
No clear winner	1	3	1	2	4	1
Don't know	5	15	27	7	10	24
Total	100	100	100	100	100	100
Count (n)	(102)	(249)	(113)	(178)	(160)	(355)
<b>Most interesting arts/music/cultural offer</b>						
EU	82	51	50	81	80	55
US	4	17	15	5	2	13
Australia	2	11	2	3	1	7
No clear winner	4	4	1	2	8	2
Don't know	8	17	32	10	9	23
Total	100	100	100	100	100	100
Count (n)	(101)	(250)	(113)	(177)	(158)	(357)
<b>Most vibrant student life</b>						
EU	54	25	17	51	38	15
US	12	31	45	18	10	38
Australia	12	14	6	6	1	11
No clear winner	0	3	1	3	11	2
Don't know	23	28	30	23	40	34
Total	100	100	100	100	100	100
Count (n)	(102)	(250)	(115)	(177)	(156)	(355)

Source: Survey on teaching staff, international officers and educational agents

Question 21: If you compare living and studying in the European Union with the US or Australia, which destination do you prefer? Please rank 1, 2, 3 (1 = the best) the EU, the US and Australia with regard to the following aspects:

Like the students education staff ranked the EU clearly more often on place one with respect to tradition and culture as well as arts and music (see Table 1.38).

The country with the highest standard of living for Chinese and Indian education staff was the US while Latin Americans and Thais more often saw the EU in the lead. Russians ranked the US and the EU in a similar way.

For more respondents from all Asian countries the US had a more vibrant student life than the EU while respondents from Latin America and from Russia ranked the EU highest.

In general, interviews and workshops showed that Europe was perceived as more attractive regarding culture and lifestyle, especially in Brazil, Mexico, and Russia. For Brazilian interviewees, for example, Europe's main advantage was not its (very good) academic quality but its historical and cultural tradition and variety. Mexican interviewees said that Europe stood for "culture, lifestyle, intellect".

Workshop participants in the Latin American countries found the European "cooperative culture" attractive (the EU as a "project aimed at the building of wealth and peace for different nations"). This is however more the view of policy makers and higher education experts - more pragmatic reasons prevail for students and parents. The latter applies even more to the Asian target countries. Although Europe's culture and history were perceived as attractive by interviewees and workshop participants, they did not have major weight in the choice of destination (see also Chapter 4.2).

An excerpt from the Chinese country report illustrates how Chinese parents see the strengths and weaknesses of different destinations, and make their choices on this basis: "Flexible immigration policies and easy visa procedure are the most attractive points to Chinese parents to send their children to Canada or Australia. A long history and traditions, diversified cultures and a relatively safe society are the major reasons for choosing EU countries. Among European countries, many parents prefer to send their child to the UK, as they think this country has orthodox English spoken and has an abundance of suitable courses on offer. As for other European countries, parents do think that there are a lot of options and choices to make there as well, and they think high of the international environment of most European countries. However, language and strict immigration policies are perceived as the two biggest obstacles for parents to choose EU countries as study destination, followed by tuition fees (UK!) and concern about racial discrimination."

#### **1.4 European “myths”: real strengths and weaknesses in the perception of international students?**

**While most respondents saw Europe’s diversity of cultures and languages as attractive, significant minorities from the Asian target countries regarded diversity of languages as a barrier to communication and diversity of cultures as confusing.**

*Question 28: To what extent do you agree with the following statements about living and studying in the European Union?*

In addition to the rankings, survey participants were asked if they agreed to a set of statements covering common ideas about studying and living in the European Union, amongst others diversity of cultures and languages, value for money and low or no tuition fees. Four of the issues were represented by pairs of statements, one with a positive and one with a negative connotation (see table 1.39).

A widespread belief could not be confirmed, namely that free education in many European countries was regarded as an indicator of bad quality. Over 80 percent of students from all target countries found the absence of tuition fees attractive.

Europe’s cultural diversity, the diversity of the languages spoken in Europe and the flexibility of study and research can be perceived as beneficial and enriching or as confusing and a handicap. The majority of respondents saw the diversity and flexibility of the EU rather as strength than as a weakness (see table 1.39):

- Between 73 and 95 percent of the students from the target countries found the diversity of languages spoken in Europe enriching and attractive and not a barrier to communication;
- Between 72 and 94 percent considered the EU as one of the most attractive regions for living and studying due to its cultural richness and were not confused by the cultural diversity;
- Between 74 and 91 percent were convinced to become more independent with the flexibility of study and research in the EU, rather than to become confused.

High agreement could also be observed to other statements indicating strengths of living and study conditions in Europe: between 77 and 95 percent of the students from the target countries had no doubts that academic degrees from the EU were recognised worldwide.

Fewer respondents thought that a study destination in the EU stood for the best value for money and that it offered better opportunities for cooperation and networking than the US (52 to 74% each).

Only a minority of students agreed to the statement that the US was a better destination than the EU to learn to be competitive in a global society (13 to 49%), although responses differed considerably between different target countries.

**Table 1.39** (*All students from the target countries*)  
**Level of agreement to statements about living and studying in the European Union - by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Higher education degrees from the European Union are recognised worldwide	92	87	84	95	88	77	87
As a study destination the EU stands for the best value for money	52	68	63	74	63	56	62
The diversity of languages in the EU is enriching and attractive	91	77	73	95	87	76	84
a barrier to communication	13	36	33	18	20	41	27
The cultural richness and diversity of the EU makes it one of the most attractive regions for living and studying abroad	93	83	73	94	84	72	83
is mostly confusing	4	21	23	8	11	26	16
The flexibility of study and research in the EU is helpful to become more independent	88	84	78	91	81	74	83
is confusing	11	21	30	13	13	37	21
No tuition fees in many EU countries is attractive	88	88	80	82	88	83	85
is an indicator of bad quality of education	5	14	19	8	9	19	12
To learn to be competitive in a global society, it is better to study in the US than in the EU	13	40	49	17	21	34	28
EU offers better opportunities to develop networks of friends and future profess. contacts	70	52	59	74	64	58	63
Count (n)	(3119)	(3063)	(1799)	(2413)	(2038)	(2848)	(15280)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 28: To what extent do you agree with the following statements about living and studying in the European Union?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Completely agree" to 5 = "Completely disagree"

Comparing the six target countries, some distinctive regional patterns could be found. Participants from *Asian* target countries considerably more often had a negative view of diversity of languages and cultures and flexibility of study and research than students from Latin-America or Russia:

- One third of the students from *China* and *India* and 41 percent of *Thai* respondents found that the diversity of languages in the EU was rather a barrier to communication than attractive. The figures for Latin America and Russia are much lower and are between 13 percent in the case of Brazil and one fifth in the case of Russia. Interviews confirm that

the diversity of languages is perceived as Europe's major weakness in Asia: "The abundance of languages in Europe and the fact that English is not the mother tongue in most European countries is considered the most important weakness of the EU as a study destination" (country report China).

- The diversity of European culture was seen as a problem by one fifth of the *Chinese* and by one quarter of the *Indian* and *Thai* respondents, whereas the corresponding share of participants from the other countries did not go beyond 11 percent. The interviews confirmed this picture: like in the survey, cultural diversity and an "unfamiliar culture" were partly seen as a disadvantage (country reports India, Thailand). And even though Europe's rich and diverse culture is regarded as a strength by most Asian interviewees, it is not considered relevant for the students' decision.
- The absence of tuition fees in many EU countries was also slightly more often regarded as an indicator for bad quality of education by Asian students, namely by one fifth of the respondents from *India* and *Thailand* and by 14 percent of *Chinese* students. In comparison, the highest level of such statements in other target countries was 9 percent in the case of Russia.
- One fifth of the students from *China*, 30 percent from *India*, and 37 percent of the students from *Thailand*, agreed to the statement that flexibility of study and research offered at European universities was confusing, compared to a range from 11 up to 13 percent from the other countries;

The level of agreement regarding the other statements follows similar regional patterns. Positive statements like a worldwide recognition of degrees from European institutions and better opportunities for cooperation and networking offered by the EU were stressed by Latin Americans, while Asians were more critical. Russian respondents were in between these two groups. Better opportunities to develop networks in Europe than in other regions were mentioned by more than 70 percent of Latin Americans, more than 60 percent of Russians, but less than 60 percent of Asian students.

Half of the students from *India*, 40 percent from *China* and one third of the *Thais* agreed to the statement that the US was offering a better environment than the EU to learn to be competitive in a global society. The highest share of students from the other target countries was one fifth in the case of Russia, while it was low in the case of Mexico (17%) and Brazil (13%).

In general, students who selected or preferred European destination countries agreed to a higher extent to statements with a positive connotation than students with destinations outside Europe and vice-versa: more of the students with non-European destinations agreed to the negative connotations (see table 1.40).

**Table 1.40** (All students from the target countries)  
**Level of agreement to statements about living and studying in the European Union - by destination country (percentages\*)**

	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
Higher education degrees from the European Union are recognised worldwide	92	83	83	84	89
As a study destination the EU stands for the best value for money	68	55	56	55	64
The diversity of languages in the EU is enriching and attractive	89	76	75	81	85
The diversity of languages in the EU is a barrier to communication	22	37	39	36	27
The cultural richness and diversity of the EU makes it one of the most attractive regions for living and studying abroad	90	76	73	79	85
The cultural richness and diversity of the EU is mostly confusing	11	23	26	22	15
The flexibility of study and research in the EU is helpful to become more independent	88	77	80	79	85
The flexibility of study and research in the EU is confusing	16	29	32	28	20
No tuition fees in many EU countries is attractive	88	82	83	83	86
No tuition fees in many EU countries is an indicator of bad quality of education	9	18	20	15	12
To learn to be competitive in a global society, it is better to study in the US than in the EU	20	48	39	31	27
EU offers better opportunities to develop networks of friends and future profess. contacts	69	50	59	62	65
Count (n)	(8877)	(2307)	(784)	(1044)	(13012)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 28: To what extent do you agree with the following statements about living and studying in the European Union?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Completely agree" to 5 = "Completely disagree"

The overall results of the global online survey confirm by and large the findings reported above, and show that

- A negative view of the diversity of the EU in general, the variety of languages and the flexibility of education systems was more frequent in the case of North African and Asian respondents than among respondents from other countries.
- Nearly all North American and Australian students considered the variety of Europe as attractive, while agreement to the "best value for money" statement was clearly below average.

International students in the US were less positive in their views of Europe and confirmed that Europe's major disadvantage, in their perception, was the diversity of languages:

- Considerably fewer thought that degrees from Europe were recognised worldwide, that Europe stood for best value for money and that it offered better networking opportunities;

- 38 percent of all students and almost 60 percent Indian and Chinese respondents saw the European diversity of languages as a barrier to communication.

In the view of education staff, the absence of tuition fees was the best argument for studying in Europe. 84 percent of the respondents to the staff survey agreed with the statement, while only 14 percent took this aspect as an indicator of bad quality (see table 1.41). Worldwide recognition of European academic degrees and the cultural diversity of Europe follow with 79 percent agreement each. Furthermore, the diversity of languages (77%) and flexibility of studying and research (75%) were also attractive for a majority of survey participants. These averages hide however important differences.

**Table 1.41** (All education staff from the target countries)  
**Level of agreement to statements about living and studying in the European Union - by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Higher education degrees from the European Union are recognised worldwide	79	78	68	93	78	75	79
As a study destination the EU stands for the best value for money	51	69	58	63	50	51	57
The diversity of languages in the EU is enriching and attractive	86	75	53	88	86	73	77
a barrier to communication	11	40	40	19	15	40	31
The cultural richness and diversity of the EU makes it one of the most attractive regions for living and studying abroad	92	76	73	93	84	72	79
is mostly confusing	2	34	20	6	5	26	19
The flexibility of study and research in the EU is helpful to become more independent	81	71	69	89	75	72	75
is confusing	10	46	27	12	8	38	29
No tuition fees in many EU countries is attractive	85	81	70	84	92	85	84
is an indicator of bad quality of education	1	25	18	6	2	17	14
To learn to be competitive in a global society, it is better to study in the US than in the EU	19	49	52	23	15	38	34
EU offers better opportunities to develop networks of friends and future profess. contacts	55	56	50	48	61	47	52
Count (n)	(102)	(251)	(120)	(180)	(177)	(368)	(1198)

Source: Survey on teaching staff, international officers and educational agents  
 Question 22: To what extent do you agree with the following statements about living and studying in the European Union?

\* Points 1 and 2 on a scale from 1 = "Completely agree" to 5 = "Completely disagree"

In a country-by-country comparison of staff responses, the pattern is similar to the findings reported for the students: a higher share of Asian education staff had a negative view of the diversity and variety of the EU, its languages and the flexibility offered by different study and research systems in the individual member states. In contrast to the students, Chinese respondents saw most difficulties in this respect. The diversity of languages is regarded as confusing by as much as 40 percent of staff members from all three Asian countries.

The best place to learn to be competitive in a global society for more than half of the Indian staff members and almost half of the Chinese were the US and not the EU. 38 percent of respondents from Thailand shared this view compared to only one quarter of Mexicans, one fifth of Brazilians and 15 percent of Russians.

The interviews confirm that language diversity and the fact the “English is not the mother tongue” is perceived as problematic in all target countries. Some interviewees and workshop participants said that the opportunity to learn a different or additional language was a competitive advantage, but this applied mainly to widely spoken languages like German, French or Spanish. In any case, the negative perception was dominant.

In the Asian countries and to a lesser extent in Mexico and Brazil, a deficient language preparation surely comes into the game. In the three Asian countries, English is the only language widely taught at secondary school level, and even there the quality of teaching is sometimes doubtful. At undergraduate level, other languages are being taught, but only to a very limited extent.

### **1.5 What are Europe’s attributes?**

**Attributes found under the top five in most target countries were elegant, clean, organised and modern.**

*Question 30: Which of the following adjectives / attributes best describe your idea of Europe?*

Students were asked which attributes best described their idea of Europe, out of a list of adjectives offered (see table 1.42). All in all, there were large differences between responses from the six target countries. While in most target countries a majority of students agreed to some of the adjectives as good descriptors for the EU the level of agreement to individual adjectives were only one third or less in Thailand. In detail,

- students from Brazil associated with Europe most often the attributes organised (84%), elegant (72%), clean (64%), trustworthy (61%) and modern (58%);
- Chinese most often stated elegant (78%), clean (56%), peaceful (48%), open-minded (46%), modern (44%) and elitist (44%);



- Indians saw Europe as modern (64%), clean (56%), organised (52%), elegant (47%), peaceful (45%) and open-minded (45%),
- Mexicans found Europe most often organised (76%), open-minded (70%), clean (62%), modern (61%) and elegant (60%);
- Russians primarily stated modern (59%), organised (55%), clean (40%), trustworthy (40%) and lively (40%);
- Thais characterised Europe most often with the adjectives organised (31%), modern (31%), elegant (29%), clean (26%) and trustworthy (24%).

**Table 1.42** (All students from the target countries)  
**Adjectives / attributes most appropriate to describe the students' idea of Europe - by country of origin (percentages, multiple response possible)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
organised	84	38	52	76	55	31	56
elegant	72	78	47	60	28	29	54
modern	58	44	64	61	59	31	52
clean	64	56	56	62	40	26	51
trustworthy	61	41	25	47	40	24	41
open-minded	35	46	45	70	35	8	39
innovative	40	36	37	56	35	19	37
peaceful	32	48	45	38	21	23	34
lively	39	38	41	21	40	17	32
fun	31	33	34	36	12	12	27
elitist	21	44	19	12	23	10	22
tolerant	18	35	14	39	10	12	22
conservative	38	8	21	16	17	18	20
rigid	21	5	12	7	10	10	11
bureaucratic	13	6	19	6	5	18	11
other attribute	7	3	4	10	4	5	6
Total	632	558	535	615	435	295	514
Count (n)	(3133)	(3058)	(1806)	(2420)	(2022)	(2836)	(15275)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 30: Which of the following adjectives / attributes best describe your idea of Europe?  
 Sample: Students responding to paper based surveys and respondents to the online survey

Attributes found under the top five in most target countries were elegant, clean, organised and modern. Chinese and Indian considered Europe more often as peaceful and open-minded than students from most other target countries. Other attributes with a positive connotation found relatively little agreement:

- innovative (19 to 37 % of respondents in Asia and Russia);
- lively and fun (12% to 41%, with only India and Russia slightly over 40%);
- elitist (10 to 23%, except for Chinese, 44%);
- tolerant (10 to 18 percent for Russia, Brazil, India and Thailand; Mexico and China were slightly higher with 39 and 35% respectively).

The image of Europe in the mind of students from non-target countries was quite similar to the respondents from target countries with regard to the most frequently mentioned attributes. 60 percent and more considered Europe as organised, modern, clean, open-minded and elegant. However, some differences by home region could be observed (see table 1.43).

Compared to students from China, India and Thailand, participants from other Asian countries more often chose the attributes clean (66%), peaceful (64%), open-minded and organised (61% each) than students from China, India and Thailand. Non-target Latin American countries compare with Brazil and Mexico in regarding Europe as organised (82%), clean (69%), elegant (64%) and modern (62%) and with Mexico in the perception of Europe as open-minded.

In addition to these results,

- North Americans and Australians considered Europe more often as lively and fun than other respondents, but less often as organised, clean and trustworthy. Australian most often stated Europe as elegant (75%), most North Americans chose lively (70%). Clearly above average were also tolerant and bureaucratic and, in the case of Australians, conservative.
- Students from North and Sub-Saharan Africa agreed that Europe was best described as organised and modern, but there were also some differences: Two thirds of the Sub-Saharan Africans compared to less than half of their northern neighbours described Europeans as innovative, while percentages were the opposite in the case of open-minded.

**Table 1.43** (All respondents to the global online survey from non-target countries)  
**Adjectives / attributes most appropriate to describe the students' idea of Europe - by region of origin (percentages, multiple response possible)**

	Country of origin						Total
	Other Asia	Other Latin America	Africa Sub-sahara	North Africa and Middle East	North America	Australia, Oceania	
organised	61	82	79	67	51	55	69
elegant	64	64	50	57	60	75	60
modern	61	62	68	73	59	63	64
clean	66	69	57	63	57	41	63
trustworthy	47	55	50	40	39	39	47
open-minded	61	71	48	64	64	67	61
innovative	50	55	65	44	58	58	55
peaceful	64	46	64	61	56	45	58
lively	47	23	53	49	70	72	47
fun	35	31	33	30	63	63	37
elitist	21	15	22	15	20	23	19
tolerant	33	43	35	33	48	54	38
conservative	20	18	30	16	19	27	21
rigid	8	9	8	9	6	6	8
bureaucratic	13	8	19	9	34	34	16
other attribute	12	15	8	9	19	29	13
Total	664	666	689	639	722	749	677
Count (n)	(622)	(486)	(440)	(221)	(227)	(83)	(2079)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 30: Which of the following adjectives / attributes best describe your idea of Europe?  
 Sample: Students responding to the online survey

International students in the US draw a somewhat different picture of Europe (see table 1.44). They preferred aspects related to life-style like elegant, fun and lively to describe their idea of Europe. Regarding the individual home regions, there were substantial differences between respondents studying in the US and participants in other surveys: consensus could be found among all Latin Americans perceiving Europe as elegant, while students from that region responding to the US study more often stated fun (55%) as suitable description for Europe, compared to only one third surveyed in the target countries or with the help of an online questionnaire. On the other hand, more than three quarters of the latter found Europe organised compared to only 38 percent of the Latin Americans studying in the US.

Students in the US originating from China were in relative accordance with other Chinese respondents in describing Europe as elegant, peaceful and clean. Broad differences occurred regarding the attributes conservative, which was chosen by more than half of the Chinese

students in the US compared to one out of ten of the other Chinese participants, and open-minded, which was seen vice versa.

Indians studying in the US as well as their compatriots at home described Europeans as elegant and clean. Further considerations of the Indian students in the US were conservative (51%), fun (49%) and lively (47%).

There was large agreement among African respondents thinking about Europe as modern, peaceful elegant and clean. US students from North Africa more often stated Europe as organised (46%) and clean (42%), while Sub-Saharan Africans rather chose fun (59%) and lively (48%).

**Table 1.44** (*Foreign students in the US*)  
**Adjectives/attributes most appropriate to describe the students' idea of Europe - by region of origin (percentages, multiple response possible)**

	Region of origin								Total
	Europe	Latin America	Africa Sub-Sahara	North Africa and Middle East	China	India	Other Asia	Other (Canada/Australia/Oceania)	
organised	31	38	34	46	35	36	27	33	33
elegant	76	77	69	62	80	64	71	89	73
modern	56	34	62	65	33	42	25	22	42
clean	36	26	48	42	59	58	35	56	42
trustworthy	30	26	14	15	33	26	12	22	24
open-minded	55	58	45	23	14	23	31	78	39
innovative	33	23	21	31	22	17	15	33	23
peaceful	48	28	52	42	59	38	35	56	43
lively	69	34	48	35	22	47	47	67	48
fun	62	55	59	35	29	49	40	78	49
elitist	31	36	31	35	24	40	27	33	31
tolerant	39	30	17	23	8	30	19	33	26
conservative	28	30	41	27	53	51	38	11	37
rigid	10	21	21	15	27	17	21	11	18
bureaucratic	49	32	45	23	16	40	28	11	35
other attribute	8	8	0	0	2	8	6	11	6
Total	662	557	607	519	516	585	478	644	569
Count (n)	(112)	(53)	(29)	(26)	(51)	(53)	(89)	(9)	(422)

Source: Survey on international students in the United States  
 Question 27: Which of the following adjectives / attributes best describe your idea of Europe?

## **1.6 What type of measures could enhance Europe's attractiveness as a study destination?**

**Increased financial support for students from non-European countries, an EU-wide ranking of programmes and higher education institutions and an information portal on study opportunities in Europe would be most appropriate to enhance Europe's attractiveness as a study destination.**

*Question 29: To what extent would the following means and programmes enhance the attractiveness of studying in the European Union?*

A list of twelve measures, some directly linked to the Bologna reforms or to Erasmus Mundus<sup>31</sup>, was presented to the participants in the student survey as well as to the education staff to assess the ability of these means to enhance Europe's attractiveness (see table 1.45). All listed measures were considered as appropriate by at least two thirds of all students from the target countries. The students see the highest potential to increase Europe's attractiveness in the following measures:

- increased financial support for students from non-European countries (82%),
- an EU-wide ranking of programmes and higher education institutions (81%),
- an information portal on study opportunities in the European Union (80%) and
- more agreements between EU universities and universities in the home country (78%).

A high level of agreement could be found among participants from all countries with respect to the measures on top of the list. In addition, some differences become visible:

- For students from *China* and *India*, an information portal and university rankings had the highest potential to make Europe more attractive, next to increased financial support;
- *Indian* students required most often an increased offer of English-language-taught-degree programmes in non-English speaking countries (75%), but did not care about agreements between universities (66%);

---

<sup>31</sup> See introduction – the Bologna Process aims at creating a common European space for higher education until 2010, through the implementation of a common framework of readable and comparable degrees. One of the most important objectives of the Bologna Process is to enhance Europe's attractiveness and competitiveness at global level. Among the most important elements of the process are the introduction of undergraduate (Bachelor) and postgraduate (Master) levels in all countries, the implementation of the European system for credit transfer and accumulation, the introduction of diploma supplements, and the establishment of quality assurance and accreditation systems in all signatory states. Some of these "elements" were explained in the survey, and participants were asked to assess their contribution to the enhancement of Europe's attractiveness. A similar approach was taken regarding the main elements of the Erasmus Mundus programme (scholarships for students from non-European countries; the possibility to study a Master's programme in two different European universities, etc.)

- The opposite applied to *Brazilians*: English-taught programmes were considered as less important (57%), while more agreements with Brazilian universities were seen as a measure with high potential to increase Europe's attractiveness (92%);
- *Mexicans* supported the idea to introduce Bachelor's and Master's degrees in all EU countries (81%) and found the idea to study a Master's programme in two different European countries attractive (80%);
- Students from Russia and *Mexico* saw the Diploma Supplement as a good means to make Europe more attractive, while especially *Indian* and *Thai* students were less convinced.

Respondents to the global online survey and to the US survey considered similar means and programmes appropriate to attract students to Europe: an information portal on study opportunities in the European Union, increased financial support for students from non-European countries and an EU-wide ranking of programmes and higher education institutions were found most adequate to enhance the attractiveness of studying in Europe.

This ranking was confirmed by respondents to the global online survey from all home regions with the exception of Australia. Australian students would prefer increased offers of degree programmes taught in English and require more agreements between EU universities and universities in Australia.

In addition to the three most often stated measures mentioned above, international students in the US would be attracted by some other means: More agreements between EU universities and universities in the home country was demanded by a many Sub-Saharan Africans (86%) and Latin Americans (71%) compared to the average (63%). Increased offer of English taught programmes was often required by Indians (79%), but by less than half of Latin Americans.

**Table 1.45** (*All students from the target countries*)  
**Potential of different means to enhance the attractiveness of studying in the EU - by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Increased financial support for students from non-European countries	94	82	76	83	78	74	82
An EU-wide ranking of programmes and higher education institutions	82	79	86	83	83	74	81
An information portal on study opportunities in the European Union	93	80	78	82	71	73	80
More agreements between EU universities and universities in my home country	92	78	66	76	81	72	78
Introduction of Bachelor and Master degrees in all EU countries	73	68	74	81	71	72	73
A unique credit system that facilitates movement between universities in different EU countries	77	72	70	77	73	66	73
Diploma Supplement with information on the education system and the programme you graduated from	73	71	63	81	76	65	72
The opportunity to study a joint Master's programme at a university in an EU country and a university in my home country	76	70	63	78	69	68	71
Establishment of quality assurance agencies certifying quality standards in all EU countries	71	76	71	74	60	66	70
Increased offer of English language taught degree programmes in non-English speaking countries	57	71	75	69	67	68	67
The possibility to study a joint Master's programme at two universities in two different EU member states	65	70	64	80	58	65	67
Count (n)	(3104)	(3058)	(1768)	(2397)	(2008)	(2844)	(15179)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 29: To what extent would the following means and programmes enhance the attractiveness of studying in the European Union?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "To a very large extent" to 5 = "Not at all"

Education staff chose the same four measures as most important to enhance attractiveness of studying in Europe like the students from the target countries, though with slightly different emphasis (see table 1.46). Increased financial support for students from third countries (84%), more agreements at institutional level (82%) and an information portal on study opportunities in the EU (81%) are the most important tasks to enhance the attractiveness in the view of the staff members, followed by an EU-wide ranking of programmes and higher education institutions and the possibility for students to participate in a joint Master's programme at a university in an EU country and a university in their home country (77% each).

**Table 1.46** (All education staff from the target countries)  
**Potential of different means to enhance the attractiveness of studying in the EU - by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Increased financial support for students from non-European countries	92	80	84	87	85	81	84
An EU-wide ranking of programmes and higher education institutions	83	82	80	72	79	72	77
An information portal on study opportunities in the European Union	92	86	81	86	68	77	81
More agreements between EU universities and universities in my home country	96	75	86	81	89	79	82
Introduction of Bachelor and Master degrees in all EU countries	70	67	83	63	68	79	72
A unique credit system that facilitates movement between universities in different EU countries	79	71	82	75	81	68	74
Diploma Supplement with information on the education system and the programme you graduated from	74	61	66	66	75	65	67
The opportunity to study a joint Masters programme at a university in an EU country and a university in my home country	89	64	74	80	79	79	77
Establishment of quality assurance agencies certifying quality standards in all EU countries	69	64	77	73	48	71	67
Increased offer of English Language taught degree programmes in non-English speaking countries	50	66	80	81	57	71	68
The possibility to study a joint Masters programme at two universities in two different EU member states	71	61	73	77	64	71	69
Count (n)	(104)	(251)	(114)	(180)	(174)	(366)	(1189)

Source: Survey on teaching staff, international officers and educational agents

Question 23: To what extent would the following means and programmes enhance the attractiveness of studying in the European Union?

\* Points 1 and 2 on a scale from 1 = "To a very large extent" to 5 = "Not at all"

Some differences by country of origin could be found among the academic staff members:

- Chinese education staff considered information tools – like an information portal and a Europe-wide ranking – as most important.
- Indian staff members are more convinced of the potential of Bachelor and Master degrees than respondents from other countries.
- An increased offer of courses taught in English would be an adequate instrument to grade up attractiveness of studying in Europe for 81 percent of the educational staff members from Mexico and 80 percent from India, but only for half of the Brazilian staff members.



- 77 percent of the Indian respondents think that quality assurance agencies would have a positive impact on the attractiveness of European higher education, but only 48 percent of the Russian respondents would agree.

Interviews in the target countries were also asked how Europe could enhance the attractiveness of its higher education.

The Bologna Process and Erasmus Mundus were specifically addressed in Mexico and Brazil. Although they were very interested in European higher education reform and in European programmes, Latin American interviewees (experts and rectors/international officers) had doubts vis-à-vis the potential of the Bologna Process and of Erasmus Mundus to enhance Europe's attractiveness. However, their doubts concerned not the concepts but the way they were implemented: interviewees feared that cooperation would be unilateral and lacking transparency. Therefore, they recommended that any approach or new programme should be as little bureaucratic and as transparent as possible, and that it should emphasize cooperation and reciprocity.

Next to increased financial support, interviewees from all target countries recommended that more extensive and targeted information on study opportunities in Europe should be provided, for example via information portals and rankings.

## 2 The destination choice

### 2.1 How is studying abroad valued by different actors in the target countries?

**International education is highly valued by the majority of students, parents, academic staff and employers.**

*Question 12: Overall, how is studying abroad valued by different actors in your country?*

Education staff from the target countries reported that international education is highly valued by the majority of students (88%), parents (79%), professors/teachers (78%) and employers (71%). Some differences by country of origin could be observed (see table 2.1).

- A larger share of education staff from *Brazil* and *Mexico* than from most other target countries reported that international education was highly valued by all types of stakeholders. However, *Mexican* respondents were less convinced that parents were happy if their children study abroad.
- Relatively few *Chinese* (54%) considered that their colleagues, i.e. teachers and professors, or employers would view international education positively, while agreement was high among students and parents;
- In *Thailand* most teachers, professors and students were very much in favour of international education while employers were slightly less convinced;
- *Indians* considered that students viewed international education most positively;
- Only half of the *Russian* education staff had the impression that professors from their own country appreciated international education.

**Table 2.1 (All education staff from the target countries)**  
**Appreciation of studying abroad by different actors - by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Students	92	82	89	93	85	89	88
Parents	86	82	75	72	77	82	79
Professors/teachers	93	65	76	87	52	90	78
Employers	83	54	76	86	76	67	71
Count (n)	(104)	(253)	(127)	(179)	(180)	(361)	(1204)

Source: Survey on teaching staff, international officers and educational agents

Question 12: Overall, how is studying abroad valued by different actors in your country?

\* Points 1 and 2 on a scale from 1 = "Very highly valued" to 5 = "Not appreciated at all"

## **2.2 Factors determining international students' destination choice**

### **2.2.1 Higher education abroad – What are the reasons?**

**The most frequent motivations to pursue an international education were to experiencing new ways of thinking and acting in the field of study, to improve chances for an international career or a career in the home country and to improve foreign language skills.**

*Question 15: How important would you consider the following aspects as reasons for your decision / intention to study abroad?*

*Students were provided with a list of items related to five major groups of reasons for study abroad: (a) lack of suitable university or course programme in home country, (b) desire to broaden the academic profile, (c) desire to improve language and social skills, (d) desire to improve career prospects and (e) desire to acquire social and cultural experiences.*

A ranking of reasons by level of importance shows the broadening of the academic profile, the improvement of career prospects and language and social skills at the top of the list, cultural experience in the middle and lack of academic offers at home at the end. More in detail:

- 88 percent of students considered the experience of new ways of thinking and acting in their field of study as important for the decision to study abroad,
- 81 percent the improvement of chances for an international career,
- 81 percent the improvement of career prospects at home,
- 81 percent learning and improvement of foreign language competences,
- 76 percent the opportunity to develop the personality and to become more independent and
- 74 percent were looking for an education more flexible than in their home country .

Further two thirds stated a more practice-oriented education and access to specific laboratories as important reasons and a similar share emphasized social and cultural experiences as major reasons: the possibility to build up networks in an intercultural context or interest in foreign culture and history. For only about one third of the students limited access to high quality education in their home country or a lack of opportunities to specialise in their subject area were major reasons to study abroad.

However, these averages hide important differences between the six target countries.

For *Chinese* and *Indian* students, a limited number of places available at prestigious universities at home were more important than for respondents from other target countries (44 and 46% respectively). Chinese were more concerned with study opportunities than with career prospects

or the improvement of language skills. To get a broader and more practice-oriented education was rated above average, while the improvement of career prospects or learning a foreign language played a minor role compared to students from other target countries.

*Indian* respondents put strong emphasis on the development of their personality. Opportunities to specialise in an area not offered in their home country were more important for Indians than for most other respondents. On the other hand, learning a foreign language, building of international networks or experiences of foreign cultures and history did not play a major role in their decision.

In contrast to other Asians, learning a foreign language was the main motive of students from Thailand (90%). Furthermore they were comparatively often interested in practice-oriented education and a considerable number stated limited places to study at universities at home as reasons for study abroad. Of relatively less importance were aspects like the flexibility of education or social and cultural experiences abroad.

Students from *Latin-America* comparatively often considered it important to experience new ways of thinking in their field of study, to improve their language competences, to build up international networks or friendship in an intercultural context and to experience foreign culture and history (see table 2.2).

For *Russians*, the improvement of foreign language proficiency was the most important reason to study abroad (89%), followed by improvement of career chances in an international context (84%). Specialisation in an area which is not offered at home was also stated comparatively often by Russians.

Students responding to the global online survey and to the US study confirmed the high importance of new experiences in the field of study and the improvement of chances for an international career as central reasons for study abroad. Limitations of the education system in the home country were push factors for respondents from Asia and Sub-Saharan Africa but did not play a role for Europeans, Latin Americans and North Africans studying in the US, or North Americans and Australians responding to the global online survey. Participants from the latter two countries were especially interested in cultural aspects and career prospects in an international context, whereas the importance of career improvement in their home countries was comparatively low.

**Table 2.2 (All students from the target countries)**  
**Reasons for decision / intention to study abroad - importance by country of origin**  
**(percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Experience new ways of thinking and acting in my field of study	94	85	83	93	79	87	88
Improve chances for an international career	82	66	83	91	84	84	81
Improve career prospects/ chances of getting a job in my home country	85	73	73	84	79	85	81
Learn or improve my knowledge of a foreign language	90	68	49	87	89	90	81
Opportunity to develop my personality / become more independent	72	78	85	78	75	74	76
Get a broader / more flexible education than offered in my home country	77	83	75	83	68	59	74
Possibility to build up networks / friendships in an intercultural context	85	58	57	77	68	61	69
Get a more practice-oriented education than offered in my home country	49	74	77	71	62	72	66
Interest in foreign culture, history and landscape	78	57	43	77	62	58	65
Have access to specific laboratories / equipment / libraries not available / accessible to me in my home country	65	65	56	67	57	64	63
Specialise in an area which is not offered in my home country	18	31	54	54	50	38	38
Limited places available to study at (highly prestigious) universities in my home country	21	44	46	33	23	37	33
Count (n)	(3229)	(2582)	(1621)	(2478)	(1820)	(2513)	(14243)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 15: How important would you consider the following aspects as reasons for your decision / intention to study abroad?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

Education staff members were also asked to estimate the importance of several reasons for the students' or parents' intention to study abroad. Even if the staff had to rate the statements from another perspective than their own, the results were quite similar to those of the students (see table 2.3). However, the staff accorded highest relative importance to the improvement of career prospects: the most important factors were career improvement at home (81%) and abroad (75%), new experiences in the field of study (80%), learning a foreign language (77%) and getting a broader education than offered at home (74%, especially for Asians this was an important aspect). The proportion of staff rating specialised study offers as important was twice as high as the share of students, whereas network building was rated somewhat lower by staff members than by students.

**Table 2.3 (All Education staff from the target countries)  
Reasons for the students' decision to study abroad - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Experience new ways of thinking and acting in the field of study	90	73	84	81	70	83	80
Improve chances for an international career	77	62	90	79	78	75	75
Improve career prospects/ chances of getting a job in the home country	89	74	79	82	85	82	81
Learn or improve knowledge of a foreign language	86	69	35	75	93	87	77
Opportunity to develop the personality/ become more independent	57	67	65	62	66	75	67
Get a broader / more flexible education than offered in home country	66	83	74	71	47	82	74
Possibility to build up networks/friendships in an intercultural context	54	48	40	52	60	67	56
Get a more practice-oriented education than offered in home country	38	83	73	60	54	74	68
Have access to specific laboratories/ equipment/ libraries not available/ accessible in home country	70	68	66	66	72	64	67
Specialise in an area which is not offered in the home country	61	55	74	65	54	73	65
Count (n)	(104)	(250)	(126)	(178)	(182)	(364)	(1204)

Source: Survey on teaching staff, international officers and educational agents

Question 8: In your view, how important are the following reasons for the students' / parents' decision to study abroad?

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

Comparing country by country, some of the results of the student surveys could be confirmed:

- Learning a foreign language were important reasons to study abroad especially in the view of education staff from Russia (93%), Brazil (86%) and Thailand (87%), but not for Indians (35%).
- To get a more practice-oriented education was of less importance for Brazilians than for other respondents.
- Chinese staff members put less emphasis on the improvement of career prospects.

The respondents differ slightly by their main activity. Education agents more often stressed limitations of study opportunities in the home countries, while cultural, social and career aspects were seen as less important. International relations officers put more emphasis on improvement of language skills and secondary school teachers found a more practice-oriented education than offered in the home country more important.

The interviews in the target countries largely confirmed the above picture, although, especially among higher education experts and rectors/international officers, the experience of different cultures and perspectives and the general development of the student was seen as the most important motivation (and advantage) of an international education. Indian interviewees, for example, agreed that “global exposure” was the single most important advantage of earning a degree abroad. Overall, interviewees also underlined the improvement of knowledge and skills, both generally (soft skills, communication skills etc.) and in the students’ field of study, as well as access to better facilities.

Although these views were shared by the interviewed parents, they also underlined more pragmatic motivations, like a higher quality of education abroad, better opportunities in the labour market or a gain in prestige for the student and the family. Some regarded a study period abroad as a first step for future migration. Only in Brazil, it was the other way round: parents emphasized more the cultural aspects whereas staff members focused on the academic side.

The improvement of language skills was frequently seen as an “important side effect”. Only in Thailand, it was mentioned as first and most important motivation, thus confirming the results of the survey. In this case, however, “language skills” should be read “English skills”: “Improving English skills, getting a good quality of education, getting a better career in the future, developing a broader horizon, [experiencing a] diverse culture and enhancing social skills are believed to be the most important benefits from studying abroad.”

## **2.2.2 Type of activity: pursue a degree or study abroad for a limited time?**

**Most students were aiming to earn a Master’s degree abroad.**

*Question 7: What is the primary goal of most of your students/clients aiming to study abroad?*

In interviews in the target countries the Master’s level was considered to be the most adequate moment to pursue an international education. The main reasons mentioned were

- that a first domestic degree would be preferable as the formal recognition of foreign undergraduate degrees could prove difficult. An international Master’s degree was viewed as an additional qualification;
- that undergraduate education especially at prestigious universities in the students’ home country was of equivalent or even better quality, whereas the educational offer was frequently still limited at advanced levels (for example in India and China);
- that the students would not be able to build up professional contacts and networks if they spent their entire education abroad.

Only in Brazil, the focus was slightly different and much more centred on exchange programmes, thus confirming the survey results.

However, as markets become more mature, mobility structures can change. Chinese experts, for example, predicted more variety in the type of Chinese students going abroad. “More students will prefer to stay abroad for a shorter period of time. Thus, fewer students will choose to do an entire undergraduate programme at an overseas university and more will prefer to do short-track studies or even (non-degree) programmes or modules. It is also predicted that there will be a shift towards a higher percentage of graduate students going abroad because pressure on the Chinese labour market makes it more attractive and necessary for more students to obtain a Master’s degree before entering the labour market” (Chinese country report).

Due to methodological decisions about the drawing of stratified samples and the use of European scholarship organisations as interfaces to the global online survey a valid estimation of proportions of future mobile students by level of study is not possible. However, information about the primary goals of students for going abroad provided by education staff supports the results of the interviews. According to secondary school teachers, professors, international relation officers and education agents in the target countries most students intend to obtain an academic degree abroad, followed by the attendance of language and summer courses and limited study periods abroad. More in detail:

- 54 percent of education staff stated as primary goal of students to obtain a Master’s degree abroad,
- 35 percent the attendance of a language course,
- 32 percent to study abroad for a limited period of time,
- 28 percent a doctorate / PhD,
- 25 percent a Bachelor’s degree or similar and
- 24 percent the attendance of a summer course (24%).

As table 2.4 shows, to obtain an academic degree is more often the goal of *Asian* students than of students from Latin America or from Russia. More education staff from *China* (40%), *India* (31%) and *Thailand* (28%) stated a Bachelor’s degree as the goal of students for going abroad. Additionally, the students’ ambition to obtain a Master’s degree was most frequently mentioned by education staff from *India* (74%) and *Thailand* (68%).

Studying abroad for a limited period abroad did not seem to be an attractive option in Asian countries. However, in contrast to Chinese and Indian respondents, Thai staff members relatively often saw the attendance of language courses as a reason for Thai students to spend a period abroad.



Similar to Asian respondents, Mexican staff members underlined the importance of obtaining an academic degree: 61 percent stated a Master’s degree, 35 percent a PhD and 21 percent a Bachelor’s degree as primary goal of their students.

**Table 2.4 (All Education staff from the target countries)**  
**Primary goal of the students pursuing an international education - by country of origin (percentages, multiple reply possible)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Obtain a Bachelor’s degree or similar	13	40	31	21	11	28	26
Obtain a Master’s degree or similar	37	52	74	61	21	68	55
Obtain a Doctorate / PhD	52	26	30	35	31	19	28
Studying abroad for a limited period of time	61	28	30	36	52	18	33
Attendance of a language course	45	23	5	35	43	50	36
Attendance of a summer course	22	9	7	23	46	31	24
Total	230	179	177	211	203	214	202
Count (n)	(99)	(229)	(122)	(167)	(167)	(352)	(1136)

Source: Survey on teaching staff, international officers and educational agents  
 Question 7: What is the primary goal of most of your students / clients aiming to study abroad?

Responses from *Russia* and *Brazil* show a different result: the most frequent goals of *Brazilian* students in the view of education staff was to spend a limited period abroad (61%), to obtain a PhD (52%) or to attend a language course (45%). On the other hand it seemed to be of less importance to obtain a Master’s degree (37%). Only slightly more than half of the *Russian* education staff stated that Russian students intend to obtain an academic degree abroad – even less than their Brazilian fellows. On the other hand all types of short-term study and learning abroad were considered as important: Studying abroad for a limited period of time (51%), attending a summer course (45%) or a language course (42%).

**Table 2.5 (All respondents to the global online survey)**  
**Primary goal of the study abroad period - by region of origin (percentages)**

	Country of origin						Total
	Other Asia	Other Latin America	Africa Sub-sahara	North Africa and Middle East	North America	Australia, Oceania	
Obtain a Bachelor degree or similar	13	14	15	10	12	20	14
Obtain a Master degree or similar	42	40	45	32	32	26	39
Obtain a Doctorate/PhD	25	29	19	38	15	10	24
Other qualification	2	3	2	3	2	2	2
Study abroad for a limited period of time	9	7	11	9	21	29	11
Attendance of a language course	3	3	2	3	7	7	4
Attendance of a summer course	1	1	1	1	2	1	1
Other purpose	4	3	4	4	8	5	4
Total	100	100	100	100	100	100	100
Count (n)	(735)	(554)	(524)	(288)	(253)	(91)	(2445)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 12: What is the primary goal of your study abroad period?  
 Sample: Students responding to the online survey

For the majority of respondents to the global online survey the primary goal of the planned study period abroad was it to obtain a Master's degree (39%) or a PhD (24%). Only about one quarter aimed to study in a Bachelor programme or only for a limited period of time (see table 2.5). Although we could expect a high proportion of scholarship searchers among the respondents to the online the large interest in the attendance of advanced study or PhD programmes abroad might be used as a further indication about the future demand on the market for international students.

### 2.2.3 What do students choose first, region, country, or university?

**The world region was of least importance in the students' destination choice: most respondents chose the country first. 40 percent of the students going to the US chose the university first.**

*Question 23: Once you know that you want to study abroad, do you first choose the world region (e.g. Europe, North America, Australia, etc.) the destination country, or the host university?*

Students were asked to state the sequence in which the world region, the destination country and the university came into play during their orientation and decision process.<sup>32</sup> The region was clearly least important for respondents:

- 51 percent of the students stated the sequence "country-university",
- 29 percent first chose the destination university and thus, also determined country and region,
- 15 percent stated "region-country-university" and
- 5 percent "region-university".

Students from the Asian target countries, especially from China and Thailand, attributed least importance to the world region where they would obtain their international education. Students from China (38%) and India (34%) more often chose the university first than students from other target countries. The highest share of students choosing the destination country first could be found among respondents from Thailand (60%). Only one out of ten Thai students had a world region in mind before thinking about an individual country or a university, compared to a fifth of all participants.

Brazilians, Mexicans and Russians slightly more often than students from Asia chose first the region and then the country or the university. However, the vast majority also decided first on the country or the university (see table 2.6).

---

<sup>32</sup> Although theoretically nine different sequences or combinations could be created practically the number is reduced to four because some sequence orders are determined by the first choice. For example, if students first choose the host university the destination country and destination region are evident.

**Table 2.6** (*All students from the target countries*)  
**Sequence order of world region, destination country and host university when choosing where to study abroad - by country of origin (percentages)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Region-country-university	18	11	16	19	19	9	15
Region-university	5	5	7	7	4	2	5
Country-University	54	46	44	45	53	60	51
University	23	38	34	29	25	29	29
Total	100	100	100	100	100	100	100
Count (n)	(3032)	(2441)	(1396)	(2318)	(1691)	(2306)	(13184)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 23: Once you know that you want to study abroad, do you first choose the world region (e.g. Europe, North America, Australia, etc.), the destination country, or the host university?

Sample: Students responding to paper based surveys and respondents to the online survey

As table 2.7 shows, students intending to study in Europe slightly more often had first decided about the region (22%) than students in favour of Australia (19%) or the US (13%). Students aiming to go to the US were clearly more often oriented towards a specific university (40%) in their decision process.

**Table 2.7** (*All students from the target countries*)  
**Sequence order of world region, destination country and host university when choosing where to study abroad - by destination country (percentages)**

	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
Region-country-university	17	9	15	10	15
Region-university	5	4	4	4	5
Country-University	50	47	58	60	51
University	27	40	23	26	29
Total	100	100	100	100	100
Count (n)	(8977)	(2217)	(755)	(1037)	(12986)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 23: Once you know that you want to study abroad, do you first choose the world region (e.g. Europe, North America, Australia, etc.), the destination country, or the host university?

Sample: Students responding to paper based surveys and respondents to the online survey

Respondents to the global online survey differ from students in the target countries in terms of the importance of the world region in the orientation and decision process (see table 2.8). About one third had thought first about the region and then about the country and the university. Especially respondents from North-America (46%) and Australia (46%) first chose the world region.

**Table 2.8** (*Respondents to the global online survey from non-target countries*)  
**Sequence order of world region, destination country and host university when choosing where to study abroad - by country of origin (percentages)**

	Country of origin						Total
	Other Asia	Other Latin America	Africa Subsa-har a	North Africa and Middle East	North America	Aus-tralia, Oceania	
Region-country-university	24	28	31	26	38	33	28
Region-university	7	6	4	7	8	13	7
Country-University	46	43	38	48	42	46	43
University	23	23	27	19	11	7	22
Total	100	100	100	100	100	100	100
Count (n)	(637)	(509)	(436)	(236)	(228)	(84)	(2130)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 23: Once you know that you want to study abroad, do you first choose the world region (e.g. Europe, North America, Australia, etc.), the destination country, or the host university?  
 Sample: Students responding to paper based surveys and respondents to the online survey

A comparison of respondents from non-target countries by selected or preferred study destinations shows that students preferring countries in the EU slightly more often chose the region first while students preferring the US comparatively often chose universities first (see table 2.9)

**Table 2.9** (*Respondents to the global online survey from non-target countries*)  
**Sequence order of world region, destination country and host university when choosing where to study abroad - by destination country (percentages)**

	Destination country/region			Total
	EU/EFTA	US	Other	
Region-country-university	29	23	22	28
Region-university	6	7	7	6
Country-University	44	36	48	44
University	21	34	24	22
Total	100	100	100	100
Count (n)	(1925)	(90)	(106)	(2121)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 23: Once you know that you want to study abroad, do you first choose the world region (e.g. Europe, North America, Australia, etc.), the destination country, or the host university?  
 Sample: Students responding to the online survey

An excerpt of the Chinese country report illustrates the role that regions and counties where universities are situated play for Chinese students and staff. "Students considering foreign study destinations and professionals considering international cooperation opportunities seem to be

taking a very different approach toward their decision making. Students usually first consider a country (or a continent!), then start to consider a school and a programme. In contrast, professionals in government or universities typically attach greater importance to the quality and suitability of a certain foreign university, whereas the country of its origin is of less relevance. This is a relative disadvantage for Europe. Professionals and researchers, especially those with personal experience, typically have very high esteem for European education and universities and high appreciation of what Europe may have to offer to them. However, this is not a driving force in their decision making processes. Students are truly focussed on the general characteristics of countries and regions, but they are much less aware of the opportunities of the EU and its member states.”

#### **2.2.4 What are the main criteria for selecting the destination country?**

**The worldwide recognition of degrees from a country and the prestige and quality of an institution were clearly the most important criteria in the choice of a destination country.**

*Question 16: How important are the following aspects for selecting a destination country?*

The most important reason for students deciding on their destination country is the global reputation and employability of degrees (87%). Further important criteria on the check-list for possible destination countries are affordability of living costs and tuition fees (76%), acceptance of home qualifications (73%), personal safety and security during the stay abroad (72%) and the proficiency in the language of the destination country (68%). Other aspects like lifestyle and culture (51%) or friends or family members already living in the destination country (25%) seemed to be of less importance.

Although the ranking of individual criteria is more or less similar in most target countries (see table 2.10) some differences in the level of agreement to various reasons could be observed:

- *Chinese and Indians* highlighted the worldwide recognition and reputation of degrees (93%) and personal safety (78%). For Chinese students, affordability was the second most important reason, followed by safety, whereas Indians stated the acceptance of home qualifications comparatively often (85%). *Thai* students most often stated the proficiency in the language of the destination country (80%) and personal security (79%) as important criteria. For over one third of Thai and Indian students, compatriots living in the destination country were an important motive.
- *Brazilians* put less emphasis on the proficiency of the language of the destination country (57%), affordability of living costs and tuition fees (64%) and personal safety (63%) but stated more often the lifestyle and cultural opportunities (58%); *Mexicans* more often than students from other countries were concerned about the acceptance of their home qualifications (86%) and affordability (83%).

- *Russians* least often mentioned employment prospects through worldwide recognition of destination country degrees (81%) but comparatively often underlined the importance of language proficiency (77%).

There were hardly any differences by destination country or region. Family or friends already living in the destination country slightly more often influenced the decision in favour of Australia and the US (35 and 31% compared to 22% for students going to the EU).

**Table 2.10** (*All students from the target countries*)  
**Reasons for selecting the destination country - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Academic qualifications/degrees from the country are recognised all over the world	86	93	92	87	81	85	87
My home qualification is accepted there and it allows me to pursue the studies I want	66	71	85	86	68	66	73
My proficiency in the language of the destination country	57	66	60	70	77	80	68
Affordability of cost of living and tuition fees	64	81	79	83	76	75	76
Personal safety and security while studying in the destination country	63	78	78	73	65	79	72
Lifestyle, cultural opportunities, e.g. art, fashion, nightlife	58	50	47	53	51	47	51
Compatriots, friends or family are living in the destination country	18	25	34	19	23	36	25
Prior visits to the destination country	16	34	26	20	21	25	23
Count (n)	(3181)	(2578)	(1602)	(2449)	(1803)	(2508)	(14121)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 16: How important are the following aspects for selecting a destination country?  
 Sample: Students responding to paper based surveys and respondents to the online survey  
 \* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

The acceptance of home qualifications was more often stated by postgraduate and PhD students than by school and undergraduate students from the target countries, who were however more concerned about their personal security. Students of Natural Sciences and Engineering expected the recognition of their home qualifications slightly more often than students from other fields but least often stated the proficiency in the language of the destination country or lifestyle and culture as important selection criteria. A quote from Thailand illustrates this picture: "You would choose the UK because there is a good education system. While, in the case of Germany, it is because they are good at technology. However, the acceptance of the degree from both countries will depend on the field of study. For example, if you want your engineering degree to be recognised, graduating from Germany would be preferable. The

criteria about cost of living, financial support or culture are not important for us in making a decision because our kid can take her own responsibility.”

Respondents to the global online survey mainly differ from students in the target countries by a higher weight of acceptance of home qualifications (80% compared to 73%) and less importance of proficiency in the language of the destination country (57%). These differences are at least partly caused by the higher proportion of postgraduate and PhD students in the comparison group and the stronger orientation towards European destination countries. Students from Asia and Sub-Saharan Africa most often considered the global recognition of degrees and personal security as important criteria while respondents from North America and Australia are especially interested in the lifestyle and cultural opportunities of the potential destination countries (see table 2.11).

**Table 2.11** (*Respondents to the global online survey from non-target countries*)  
**Reasons for selecting the destination country - importance by country of origin (percentages\*)**

	Country of origin						Total
	Other Asia	Other Latin America	Africa Sub-sahara	North Africa and Middle East	North America	Australia, Oceania	
Academic qualifications/degrees from the country are recognised all over the world	94	87	94	91	73	77	89
My home qualification is accepted there and it allows me to pursue the studies I want	79	83	82	78	73	78	80
My proficiency in the language of the destination country	61	63	49	68	39	41	57
Affordability of cost of living and tuition fees	83	79	73	78	71	72	78
Personal safety and security while studying in the destination country	80	74	86	79	62	53	77
Lifestyle, cultural opportunities, e.g. art, fashion, nightlife	51	52	41	53	67	70	52
Compatriots, friends or family are living in the destination country	24	19	18	33	24	22	23
Prior visits to the destination country	23	16	18	28	34	29	23
Count (n)	(715)	(544)	(504)	(276)	(245)	(87)	(2371)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 16: How important are the following aspects for selecting a destination country?

Sample: Students responding to the online survey

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

For international students in the US, the reputation of academic degrees was by far the most important reason to study in the US (83%). The second most important criterion was the proficiency in English (68%, especially for the Asian respondents), followed by the acceptance of home qualifications (54%). All other aspects were mentioned by at most about one third of the



respondents (see table 2.12). As in the other surveys, Chinese and Indians in the US study were above average with respect to the worldwide reputation and recognition of degrees and personal security, as well as for the acceptance of home qualifications (especially Indians). For African students, compatriots living in the US were a more important motivation than for other respondents.

Education staff from the target countries ranked the criteria for selecting the destination country in a similar order as their students. However, in their view safety played a more important role while acceptance of home qualifications was considered as slightly less important (see Table 2.16 further below). Especially staff members from India (89%) and Thailand (85%) considered personal security as a major criterion.

**Table 2.12** (*International students in the US*)  
**Reasons for selecting the US as destination country - importance by region of origin (percentages\*)**

	Region of origin								Total
	Europe	Latin America	Africa Sub-Sahara	North Africa and Middle East	China	India	Other Asia	Other (Canada/Australia/Oceania)	
Reputation of academic qualifications/degrees	71	79	82	92	92	96	90	44	83
Home qualification are accepted and allows to pursue the studies wanted	47	42	57	46	53	67	63	56	54
Proficiency in English	67	58	59	46	68	73	82	44	68
Affordability of cost of living and tuition fees	27	26	38	22	50	56	38	22	36
Personal safety and security while studying in the US	14	27	41	35	38	46	42	22	32
Lifestyle, cultural opportunities, e.g. art, fashion, nightlife	27	19	28	35	36	46	54	22	35
Compatriots, friends or family are living in the US	20	23	54	42	16	27	33	22	27
Prior visits to the US	30	36	25	29	6	14	27	22	25
Count (n)	(112)	(53)	(29)	(27)	(51)	(53)	(89)	(9)	(423)

Source: Survey on international students in the United States

Question 14: How important were the following aspects for selecting the United States as a destination country?

\* Points 1 and 2 on a scale from 1 = "very important" to 5 = "not important at all"

The importance of safety, especially for the parents, could also be confirmed in the interviews. While safety was an important issue in all countries, it was strongly underlined by the Asian interviewees, and particularly by parents. For Chinese parents, for example, personal safety, security and health are the most important concern when considering study abroad issues. Because of the one-child policy, children are usually the "princes or princesses in a family". Hence, parents are concerned about the safety of their children wherever they may be, but

understandably even more if this “wherever” is thousands of miles away (Chinese country report).

In addition to safety, Chinese parents consider the quality and reputation of education and the time and thus money required to obtain a degree. Also for Indian parents, quality, safety and money were the most important criteria in the choice of a destination country; in Thailand, the range of criteria was similar.

Latin American and Russian interviewees did not substantially differ in their views. While Brazilians underlined cultural issues prestige was particularly important for Russian and Mexican parents: Opinions such as “a foreign title will open many doors” or “a foreign title brings more money” reflect what some parents call: “In Mexico prestige counts” (country report Mexico).

### **2.2.5 What are the main criteria for selecting the university?**

**Prestige, quality and a specific offer of study programmes are most important in the decision for a university.**

*Question 17: How important are the following aspects for selecting a university / a higher education institution in the destination country?*

“When choosing a university, parents want to be informed about the university’s reputation, teaching quality and the level of tuition fees. It is important to note that Chinese parents pay a lot of attention to ranking. Even if certain rankings of foreign universities are not directly related to its teaching quality, they still prefer to choose the highest ranked institutions for their children.” (Country report China)

Prestige, quality and a specific offer of study programmes are most important in the decision for a university. The vast majority of the students from the target countries stated the general prestige of the university in terms of quality of education and research (91%) and the offer of specific programmes in the own area of specialisation (90%) as most important criteria. The affordability of tuition fees, the level of support and advice given to foreign students and modern and technologically advanced teaching and learning methods (81% each) are also major decision criteria.

Well-organised study programmes (76%), transparent and simple admission procedures (74%) and suitable accommodation on or near the campus (67%) are important for more than two thirds of the students. Slightly less important were study programmes taught in English (61%), attractiveness of the city in which the university is located (58%) and a campus with students from many different nationalities (46%).

A comparison of the major reasons of students from individual target countries shows some noteworthy differences (see Table 2.13):

- *Chinese* are especially concerned with high prestige of the university (see also quote from the country report above) but are less interested in modern teaching and learning methods. *Indians* also emphasize the reputation of universities but different to Chinese they are also looking for technologically advanced teaching and learning methods (87%) and for study programmes taught in English (85%). *Thai* students put slightly less emphasis on the reputation of universities and the level of support provided to international students but more often than students from most other countries stated English-language-taught programmes (80%), suitable accommodation near the campus and an attractive city as important criteria for the selection of a university. Again, the survey results confirm the findings from the workshops which suggested that Indian and Thai students would almost exclusively be interested in English-taught programmes.
- *Brazilians* more often highlighted transparent and simple admission procedures and less often study programmes taught in English than other students. *Mexicans* also were less interested in English-language-taught-degree programmes but most often considered offers in their fields of study and the level of support and advice as crucial. Interviews with the parents widely confirmed the students' views. Most Mexican parents, for example, stated that a university "must offer the program the children are looking for", or that it "must offer the desired program with good services at a low costs". The lower interest in English-taught programmes (at least in non-English-speaking countries) is in line with the workshop results for both Latin-American target countries. Often, a country with a Romance language is favoured because of greater cultural and linguistic affinity.
- *Russians* put less emphasis on the level of support and on transparent admission procedures but more than students from other countries take the attractiveness of the city into account in which the university is located.

**Table 2.13** (All students from the target countries)  
**Reasons for selecting the host university / higher education institution - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
General prestige of the institution / quality of education and research	93	95	95	94	86	84	91
It offers specific programmes / courses in my area of specialisation	90	92	89	95	87	86	90
Level of support / advice given to international students	82	80	83	87	74	76	81
Affordability of the course / tuition fees	79	81	82	85	86	77	81
Modern and technologically advanced teaching and learning methods	81	70	87	85	79	84	81
It offers well-organised study programmes of limited duration	75	80	81	76	77	70	76
Transparent and simple admission procedures to study programmes	79	76	78	77	61	71	74
Easy to get suitable accommodation on or near the campus	64	54	72	76	66	75	67
Study programmes / courses are taught in English	61	46	58	85	47	62	80
Attraction of living in the city where the institution is located	52	47	50	64	69	67	58
Students are from many different nationalities	50	35	46	48	43	54	46
Count (n)	(3152)	(2567)	(1603)	(2445)	(1803)	(2499)	(14069)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 17: How important are the following aspects for selecting a university / a higher education institution in the destination country?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

For students aiming to study in the US and Australia it was more important that programmes were taught in English (71 and 79% respectively) than for those going to Europe (56%). However, the European average hides important differences by destination country: while programmes taught in English were fairly unimportant for students going to the major non-English-speaking European destinations like Germany (46%) or France 40%), it was very important for those respondents aiming to study in the UK, in one of the Nordic countries, in the Netherlands or in a new EU member state (73-84%).

Technologically advanced teaching methods were more crucial in Natural and Technical Sciences than in Humanities or Social Sciences (84% as compared to 78%) while students in the latter disciplines were more interested in studying in an attractive city.

Respondents to the global online survey found most criteria slightly more often important than students from the target countries (see table 2.13). The order of importance of various aspects is

very similar for the global survey. Students from Asian countries but also from Sub-Saharan Africa put considerable emphasis on study programmes taught in English (83 and 77% respectively) while students from Latin America stressed this point less often (49%), thus confirming the results from the target countries.

**Table 2.13** (*Respondents to the global online survey from non-target countries*)  
**Reasons for selecting the host university / higher education institution - importance by country of origin (percentages\*)**

	Country of origin						Total
	Other Asia	Other Latin America	Africa Sub-sahara	North Africa and Middle East	North America	Australia, Oceania	
General prestige of the institution / quality of education and research	94	94	92	91	73	74	90
It offers specific programmes / courses in my area of specialisation	93	97	94	87	92	91	93
Level of support / advice given to International students	89	89	91	88	77	70	87
Affordability of the course / tuition fees	89	79	80	81	80	80	83
Modern and technologically advanced teaching and learning methods	91	88	94	88	65	71	87
It offers well-organised study programmes of limited duration	83	79	83	71	61	70	78
Transparent and simple admission procedures to study programmes	84	88	89	75	68	70	82
Easy to get suitable accommodation on or near the campus	68	72	68	73	73	69	70
Study programmes / courses are taught in English	83	49	77	67	60	66	69
Attraction of living in the city where the institution is located	56	59	47	55	71	76	57
Students are from many different nationalities	59	49	69	47	45	35	55
Count (n)	(705)	(542)	(503)	(273)	(244)	(87)	(2354)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 17: How important are the following aspects for selecting a university / a higher education institution in the destination country?

Sample: Students responding to the online survey

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

The results of the US survey (see table 2.14) reveal an interesting pattern. Overall, the rank order of criteria is similar, however

- Affordability of tuition fees is considered as less important (44%);
- The possibility to receive financial aid from the university is the third most important criterion, and of particular importance for Chinese and Indians (74 and 87% respectively);
- Together with the offer of specific programmes in the student's area of specialisation, the level of support provided to international students is the second most important criterion for Chinese students studying in the US and comes right after the institution's prestige.

**Table 2.14 (International Students in the US)**  
**Reasons for selecting the host university - importance by home region (percentages\*)**

	Region of origin								Total
	Europe	Latin America	Africa Sub-Sahara	North Africa and Middle East	China	India	Other Asia	Other (Canada/Australia/Oceania)	
General prestige of the institution/ quality of education and research	58	68	69	64	86	76	88	56	72
It offers specific programmes/courses in the area of specialisation	69	83	72	73	78	83	79	89	77
Possibility to receive financial aid from the host university	55	65	66	63	74	87	53	44	63
Level of support/ advice given to international students	45	50	62	63	78	54	64	44	57
Affordability of the course/tuition fees	36	38	48	42	42	54	52	56	44
Modern and technologically advanced teaching and learning methods	41	51	70	52	66	66	72	67	58
It offers well-organised study programmes of limited duration	33	43	50	48	61	66	67	67	52
Transparent and simple admission procedures to study programmes	35	38	59	52	40	59	60	33	47
Easy to get suitable accommodation on or near the campus	28	35	52	43	22	33	41	67	35
Attraction of living in the city where the institution is located	43	17	38	50	27	31	47	33	37
Students are from many different nationalities	28	36	38	52	24	47	50	22	38
Count (n)	(111)	(53)	(29)	(27)	(51)	(53)	(89)	(9)	(422)

Source: Survey on international students in the United States

Question 15: How important were the following aspects for selecting your host university/a higher education institution in the United States?

\* Points 1 and 2 on a scale from 1 = "very important" to 5 = "not important at all"

Education staff were also asked about the importance of transparent and simple admission procedures to study programmes and English as the language of instruction for students and parents when selecting the host university. By and large the results from the student survey

were confirmed, i.e. both aspects were considered as relevant by the majority of respondents and transparency of admission procedures were rated as slightly more important than courses taught in English (see table 2.15).

**Table 2.15** (*All education staff from the target countries*)  
**Reasons for selecting the host university and the destination country - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Quality of higher education/reputation of universities in general	97	90	98	99	90	85	91
Academic qualification / degrees from the country are recognised all over the world	92	88	97	75	89	82	86
Existence of exchange programmes between institutions in home country and institutions in the destination country	86	59	56	83	79	57	67
Affordability of cost of living and tuition fees	73	77	91	81	87	85	83
International students can easily get work permissions	31	60	74	53	64	63	59
Personal safety and security while studying in the destination country	67	73	89	61	80	85	77
Lifestyle, cultural opportunities, e.g. art, fashion, nightlife	52	40	49	27	49	52	45
Home qualification are accepted and allows to pursue the studies wanted	68	60	92	71	64	70	69
Transparent and simple admission procedures to study programmes	79	65	89	65	70	70	71
Study programmes / courses are taught in English	40	64	92	67	55	74	67
Personal contacts to professors, teachers etc. in the destination country, e.g. through prior visits	73	41	73	56	60	62	58
Count (n)	(103)	(251)	(124)	(167)	(167)	(358)	(1170)

Source: Survey on teaching staff, international officers and educational agents  
 Question 10: How important are the following aspects to you when advising students / parents in their choice of a destination country?

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

A comparison of the ratings of education staff from individual target countries shows in most cases similar patterns as in the case of the students:

- Education staff from India most often underlined both, the importance of transparent admission procedures (89%) and English as language of instruction;
- Thais put a higher weight on courses in English than on admission procedures (74% and 70%);
- Brazilians and Russians least often considered courses in English as important (40% and 55%) but were concerned about simple admission (79% and 70%);

- Chinese and Mexican education staff considered both aspects as similar important (about two thirds each).

Substantial differences between students and education staff could be found in the case of China and Mexico. Students from both countries considered courses in English less often as important and put more emphasis on transparent and simple admission procedures than staff members.

## **2.2.6 What are the main problems and obstacles international students are facing?**

**Getting the resources to finance an education abroad was the outstanding problem reported by more than half of the students. Other obstacles concerned immigration regulations and language preparation.**

*Question 22: Were / are any of the following issues a problem when planning your stay in your selected or preferred destination country?*

Getting the resources to finance an education abroad was the outstanding problem reported by more than half of the students (see table 2.16). This is not so surprising, as the survey was mainly carried out through scholarship organisations. Hence, the next important issues are probably the more interesting ones: complicated visa procedures, limited proficiency in the language of the destination country and the lack of agreements between the home university and universities in the destination country.

While financial issues were problem number one for students from all target countries, the picture is more complex for the next important problems. It reveals different patterns for target countries in Asia and Latin America/Russia:

- For Asian students, visa procedures represented the second most important problem, while Latin American and Russian students emphasized the lack of exchange programmes;
- For all students except Russians (who have a better language preparation) and Indians (who have English as an official language), limited language proficiency was the third most important issue.

Problems with getting the financial resources for the stay abroad were stressed most often by respondents from Brazil (71%), Mexico (63%) and Russia (62%). Russian students reported also more problems with the recognition of academic qualifications than students from other target countries. Students from the three Asian target countries and from Russia were more often concerned with personal difficulties than students from other countries. However, this might not



only be caused by different cultural backgrounds but could also be a result of the relatively low age of students from these countries.

Viewed by preferred or selected destination country as shown in table 2.17, difficulties to get a visa were significantly more often reported by students aiming to study in the US (44%) than by students choosing the European Union as destination (25%).

Problems regarding language proficiency concerned potential host students in English speaking destination countries nearly to the same extent as students preferring the European Union (23% as compared to 28%).

Students from non-target countries had to solve more or less the same problems as students from the target countries. The major obstacle was the lack of financial resources (58%), a problem most often stated by Latin American students (67%). Complicated visa procedures (33%), lack of agreements between universities in the home and the destination country (31%) and limited language proficiency (27%) were the next often stated difficulties.

**Table 2.16** (*All students from the target countries*)  
**Problems encountered when planning the stay in the selected or preferred destination country - by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Getting the financial resources for studying abroad 57		71	49	47	63	62	46
Lack of agreements between home university and universities in the destination country 31		24	24	39	43	23	30
Complicated visa procedures / strict requirements 29		27	39	31	18	29	28
Limited proficiency in the language of the destination country 28		31	22	26	26	27	27
Difficulties with the recognition of credits / academic qualifications obtained in my home country 21		25	23	19	33	21	23
The study programme I wanted was not available 22		18	24	23	19	29	22
Fear of social exclusion as an international student 18		15	24	18	10	13	26
Personal difficulties to stay far from home / homesickness 13		13	15	9	17	20	15
Parental opposition against study abroad 7		14	12	7	13	15	11
Count (n)	(3077)	(2531)	(1499)	(2378)	(1749)	(2471)	(13705)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 22: Were / are any of the following issues a problem when planning your stay in your selected or preferred destination country from 19?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 4 and 5 on a scale from 1 = "No problem at all" to 5 = "To a very large extent"

Respondents from Sub-Saharan Africa were affected by complicated visa procedures to a much higher extent (45%) than other participants while, unlike in the target countries, Asian students were not above average. A lack of institutional agreements was seen as an obstacle by 44 percent of Latin Americans, while only 18 percent of Australian and 13 percent of North American students had the same problem. North Africans more than others reported difficulties to find a suitable study programme (21% compared to 14% on average) and had more personal problems like homesickness (20%, average: 10%).

More than half of international students in the US identified complicated visa procedures as the major problem when planning their stay. Especially Chinese students (78%) were confronted with this kind of difficulty. Insufficient financial resources were an obstacle for one third of US students from all home countries. One fifth of the respondents encountered difficulties with the recognition of their home qualifications.

**Table 2.17** (*All students from the target countries*)  
**Problems encountered when planning the stay in the selected or preferred destination country - by destination country (percentages\*)**

	Destination country/region				Total
	EU/EFTA	US	AUS	Other	
Getting the financial resources for studying abroad	60	51	51	51	57
Lack of agreements between my home university and universities in the destination country	32	27	25	30	31
Complicated visa procedures / strict requirements	25	44	28	26	29
Limited proficiency in the language of the destination country	28	23	23	28	27
Difficulties with the recognition of credits / academic Qualifications obtained in my home country	23	26	23	21	23
The study programme I wanted was not available	21	22	24	24	22
Fear of social exclusion as an international student	16	22	20	21	18
Personal difficulties to stay far from home / homesickness	13	20	18	18	15
Parental opposition against study abroad	10	13	14	14	11
Count (n)	(9228)	(2345)	(797)	(1091)	(13461)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 22: Were / are any of the following issues a problem when planning your stay in your selected or preferred destination country from 19?  
 Sample: Students responding to paper based surveys and respondents to the online survey  
 \* Points 4 and 5 on a scale from 1 = "No problem at all" to 5 = "To a very large extent"

Education staff members do not differ much from the students in the perception of their students' major difficulties (see table 2.18). However, personal issues were considered more often by staff than by students. The most important problems from the perspective of education staff is the acquisition of sufficient financial resources (55%), getting a visa (48%) and limitations in the students' language proficiency (44%). Difficulties with the recognition of academic qualifications

obtained in the home country and deficiency of agreements between the home university and universities in the destination country were also mentioned by many staff members (38% each). The fear of social exclusion (26%) and parental opposition against study abroad (22%) were seen as problems by a noticeably higher share of staff than of their students.

The regional pattern emerging from the student survey is confirmed by the responses of education staff. Difficulties due to complicated visa procedures or strict requirements concerned Asians to a higher degree than Latin Americans. More than half of the Indian staff members (55%), but only 39 percent of the Brazilians considered visa regulations as a source of problems. For Chinese and Thai staff, visa issues are even the most important problem and rank before financial issues and language problems.

Financial problems were most often perceived by Latin Americans. Three quarters of both Brazilian and Mexican staff members saw an important problem to bring up the resources for the stay abroad. About 70 percent of Russians and Indians stated the same difficulties, while only less than half of Chinese (43%) and Thai (36%) respondents did so as well.

**Table 2.18** (*All education staff from the target countries*)  
**Problems encountered by students who pursue an international education - by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Getting the financial resources for studying abroad	76	43	67	75	70	36	55
Lack of agreements between the home university and universities in the destination country	46	28	41	40	49	35	38
Complicated visa procedures/ strict requirements	39	51	55	47	47	48	48
Limited proficiency in the language of the destination country	44	39	36	56	43	47	44
Difficulties with the recognition of credits/ academic qualifications obtained in home country	30	39	49	38	45	33	38
Fear of social exclusion as an international student	22	20	19	18	28	36	26
Parental opposition against study abroad	14	17	26	12	21	33	22
Count (n)	(104)	(253)	(123)	(175)	(174)	(338)	(1167)

Source: Survey on teaching staff, international officers and educational agents

Question 11: From your experience, to what extent have the following issues been an obstacle for students from your country / institution who pursue an international education?

\* Points 4 and 5 on a scale from 1 = "No problem at all" to 5 = "To a very large extent"

Limited language proficiency was seen as an obstacle by more than half of the Mexican academic staff, compared to only one third of the Indians. Lack of agreements between universities in the home country and the destination country was seen as a problem by half of

the Russian respondents and 46 percent of the Brazilians, but only by a comparatively low proportion of Chinese staff (28%).

Interviewees in the target countries were asked about “disadvantages” and of an education abroad. While the most recurrent opinion was that “there were no disadvantages at all”, interviewees (mostly experts and rectors/international officers) in several target countries pointed out that students would lose their personal and professional networks, considered as very important in countries like China, India and Russia. Brain drain was not considered as a problem in China and India, or at the utmost as a temporary one. It was however seen as a problem by Mexicans and by some Russian interviewees.

Asked more specifically about the obstacles students had to face, the answers widely confirmed the results of the student and staff survey. “On the issue of obstacles for Chinese who wish to study abroad, the three experts agreed in unison: money, language and visa. Although the number of Chinese students going abroad is sizable (100 000 per year), it is just a small percentage of the number of youth who do not have access to Chinese higher education for a first degree or who wish to further their education for a second. For the vast majority, the cost of a foreign education is still unaffordable. Language is another major obstacle, especially since some schools and countries have become stricter in checking language proficiency of Chinese applicants. Mentioning of visa as an obstacle almost exclusively points at the tightening of US visa policies since “9/11” and does not apply much to access to Europe” (country report China). For parents in different target countries, the financial burden was the most important obstacle, but they also mentioned personal problems like the distance from family and home or the “loss of identity”. Only Brazilians had a somewhat different approach and mostly underlined the difficulties that students may have upon return from abroad.

A lack of agreements between universities was less emphasized in the interviews. Another obstacle which was however frequently pointed out was the lack of information on study opportunities (see also section 3.2 below).

### **2.3 Ideal destination and alternative destination**

**About 25 percent of the students who responded to the survey finally preferred a country that had not been their first choice.**

*Question 18: If you had free choice / sufficient financial resources, what would be your ideal destination country for study abroad? If you have more than one country in mind, please rank them in the order of your priority.*

*Question 19: Have you already decided in which country you will finally study abroad?*

*Question 20: If you have decided upon or prefer a destination country which is not the first country on your list in reply to question 18, what are the reasons for rejecting your top priority country?*

The workshops held in the target countries prior to designing the survey suggested that a substantial number of students considered a destination country which was actually not their first choice. For example, many Asian students dreamt of studying in the US, but thought that it was impossible to get a visa. In the survey, this “anecdotal evidence” was further investigated, and students were asked to state their ideal destination country, i.e. the country where they would like to study if they had completely free choice and sufficient financial resources.

The vast majority of those answering the question stated not only one country but made use of the possibility to state up to three alternatives: 6 percent stated one ideal destination country, 12 percent two and 82 percent three (or in the paper questionnaire even more) alternatives.

For about three quarter of the students a successful match between the ideal destination country ranked on place one and the finally selected or preferred destination country could be observed. A further fifth is still in favour of the destination country ranked as ideal on place two or three. Thus, only a very small share of students had given up the hopes to study abroad in one of the favoured countries and had chosen a completely different alternative.

However, students who finally selected one of the major destination countries, i.e. the US, UK, Germany or France, more often decided in favour of their first priority country than students intending to study in other European countries or in Japan, Australia or New Zealand. For about half or more of students finally intending to study in Denmark, Finland, the Netherlands, Sweden or in the new EU member states, the destination was only second or third choice (see table 2.19).

A quote from a Chinese mother illustrates this: “Firstly we planned to send our boy to US as we think the academic level there is pretty high. However, after hearing the story of my friend’s child in Holland, we decided maybe that’s a better choice for us considering the tough visa policy of the US embassy.” (country report China)

**Table 2.19** (*All students from the target countries*)  
**Matching of ideal and finally selected destination country - by destination country**  
**(percentages)**

	The selected destination country was the student’s top priority		Total
	Yes	No	
AT	67	33	100
CH	78	22	100
DE	84	16	100
DK	49	51	100
ES	71	29	100
FI	51	49	100
FR	80	20	100
IT	74	26	100
NL	47	53	100
PT	67	33	100
SE	44	56	100
UK	87	13	100
New EU member	47	53	100
Other Europe	63	37	100
AU	64	36	100
CA	66	34	100
NZ	65	35	100
US	84	16	100
JP	67	33	100
Other	41	59	100
Total	78	22	100
Count (n)	(10708)	(3017)	(13725)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 18: If you had free choice/ sufficient financial resources, what would be your ideal destination country for study abroad? If you have more than one country in mind, please rank them in the order of your priority.

Question 19: Have you already decided in which country you will finally study abroad?

Sample: Students responding to paper based surveys and respondents to the online survey

Asked about the reasons why they did (or would) reject their top priority country, survey respondents stated the following obstacles:

- financial issues: high costs of living (55%), high tuition fees (48%) or lack of scholarships (37%)
- lack of language competences (24%)
- lack of information (24%)
- visa difficulties (18%)
- issues related to course contents (14%) and admission to courses (13%) and
- personal reasons (14%).

While the costs of studying abroad were stressed by respondents from all countries as a critical point a relatively high percentage of Indian and Chinese students was concerned with visa difficulties. Missing language competences were more frequently mentioned by students aiming to study in non-English speaking countries, i.e. from Brazil, Mexico and Russia. Students from China, Russia and Thailand were more concerned with too high tuition fees.

Students studying in the US had been asked if they had at some point considered studying in a European country. When selecting a destination for study abroad, slightly more than half (58%) of the respondents reported having considered studying in one or more member states of the EU. A very significant number, 90%, of respondents from Africa had considered studying in Europe. Of those who considered study in the EU, the United Kingdom was the most popular destination by a wide margin (53%), followed by France (14%), Germany (13%) and Spain (7%).

Students who had at one point considered study in the EU were asked why they chose not to study in an EU member state. Responses were highly varied. Multiple responses were possible but only one category was listed by more than a third of respondents. 37% of students listed the lack of scholarships in the EU as a deciding factor. Lack of information was the second most often listed reason for deciding against study in the EU. Students from Sub-Saharan Africa (54%) and from South Asia (60%), as well as Master's (45%) and doctoral students (47%) were more likely to indicate that lack of scholarships as an important reason for deciding against studying in the EU than other students.

## **2.4 Choice of destination and field of study**

**More students in Humanities, Languages and Philological Sciences, Education and Teacher Training, International Relations, Social Sciences or Law aimed to stay in Europe than the average of their fellow students.**

*Question 13: What is the main area or field of your intended study abroad?*

The single most important subjects mentioned by students from the target countries were Engineering or Computer Sciences (22%) and Management and Business studies (16%). About one quarter of the students from the target countries intended to study in Humanities, Languages and Philological Sciences, Education and Teacher Training or International Relations. Further large areas covering more than five percent of the students were Mathematics/Natural Sciences (8%), Art and Architecture (8%), Social Sciences (7%) and Medicine (6%).

Are there differences between the favoured destination country of students from hard and soft sciences? The assumption that the US is the dreamland for students in Natural Sciences or in Engineering and Computer Sciences could only partly be confirmed for the Asian target countries: more Asian students in Natural Sciences and Medicine aim to study in the US than the average of Asian students in all subject areas. In Engineering and IT, the share of Asian students going to the US is close to the average. Latin American and Russian students from the hard sciences had no significant preferences for the US.

On the other hand students from all or from the majority of target countries intending to study Humanities, Languages and Philological Sciences, Education and Teacher Training, International Relations, Social Sciences or Law abroad more often aimed to stay in Europe than the average of their fellow students.

Among respondents to the global online survey the same pattern in the orientations of students from different subject areas towards some destination countries and regions could be observed, i.e. the US was slightly more often the destination country for students from Agriculture and Natural Sciences while Europe was slightly above average in Humanities and Languages, Art and Architecture and Law.



### **3 Information on Europe and its study opportunities**

#### **3.1 Information sources and flows**

**Workshop participants, interviewees and survey respondents agreed upon one major message: information on Europe and its higher education is missing or hard to access.**

Information on Europe and its study opportunities was an important issue in the workshops, in the interviews and in the survey. Overall, workshop participants, interviewees and survey respondents agreed upon one major message: information on Europe and its higher education is missing or hard to access.

Regarding the information sources used by students and other stakeholders, the most important source was clearly the Internet. All other types of sources were used by between 40 and 60 percent of survey participants. The surveyed staff members used a wider range of information sources than the students.

The interviews in the target countries showed that information levels varied considerably between the different target countries and groups of interviewees. Mexican, Brazilian and Russian interviewees were better informed than interviewees in the Asian target countries. Interviewed parents mostly got their information from the Internet, from magazines, education fairs and friends and family. Especially Asian parents' knowledge was largely limited to study opportunities in English speaking destination countries. A frequent concern was the difficulty to judge if the information was reliable and complete.

##### **3.1.1 The Internet, the direct line to students?**

**The Internet is the most important source of information for students and staff members responding to the survey.**

*Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?*

- *Internet in general*
- *Website of individual universities*
- *Websites of scholarship providing organisations*

For all groups of survey respondents, the Internet is by far the most important information source. Asked to rate the importance of several sources of information about studying in the

European Union and in other world regions or countries, more than three fourths of students from the target countries considered the Internet in general as important (points 1 and 2 on a scale from 1 “very important” to 5 “not important at all”). The websites of individual European universities were important for 72 percent, and local websites of scholarship providing organisations from the EU in the home countries for two thirds (see table 3.1).

**Table 3.1** (All students from the target countries)  
**Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Internet in general	81	76	80	78	69	81	78
Website of individual universities	66	69	80	70	80	76	72
Websites of scholarship providing organisations	55	65	73	68	79	69	66
Count (n)	(3125)	(2535)	(1525)	(2408)	(1780)	(2465)	(13838)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

Some differences can be found between students from the six target countries:

- *Indian* students are extensive users of all types of websites: the Internet in general (80%), sites of individual universities (80%) and of scholarship organisations (73%).
- Students from *Russia* were more interested in websites of individual universities (80%) and scholarship providing organisations (79%) than in the Internet in general (69%).
- *Brazilian* students least often stated university websites (66%) and scholarship providing organisations (55%) as important sources of information.
- Students from *Thailand* were slightly above average with regard to websites from universities while use of Internet by *Chinese* and *Mexican* students did not differ from the overall figures.

A comparison with students responding to the global survey and to the US study confirmed the high importance of the Internet also for students from other countries and regions. The special role of the Internet for Indian students could also be observed in the US study.

In contrast to the students, staff members placed more emphasis on websites of individual universities and scholarship organisations (see table 3.2), especially education staff from China, Mexico and Russia. General websites about higher education in certain destination countries or regions were on the other hand most important for teaching staff, international staff and agents from Thailand and Brazil. In correspondence to the user profile of students the most extensive use of different Internet sources was reported by staff members from India.

**Table 3.2 (All education staff from the target countries)**  
**Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Internet in general	84	70	90	77	68	91	80
Website of individual universities	77	73	90	86	86	88	84
Websites of scholarship providing organisations	77	79	88	79	84	81	81
Count (n)	(104)	(253)	(127)	(179)	(182)	(369)	(1214)

Source: Survey on teaching staff, international officers and educational agents

Question 19: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

### 3.1.2 How important are previous visits to the destination country?

**Education staff members placed considerably more emphasis on personal visits and journeys than their students.**

*Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?*

- *Personal visits/journeys*

Personal contact or visits to potential destination countries can provide relevant information about conditions of studying and living and may influence the selection process. Nearly half of the participants from the target countries rated journeys as important for their current knowledge about study opportunities in foreign countries. However, the possibility to travel may depend on various factors, e.g. the pocket of parents or the level of their own income and thus, differences by country are difficult to explain (see table 3.3):

- more than two thirds of the *Russian* and more than half of the *Thai* respondents get at least part of their knowledge about study abroad from personal visits in other countries (see table 3.3) in comparison to
- two out of five of the *Chinese* students and
- one third of the *Latin American* and the *Indian* students and pupils.

On average, international students in the US (49%) and respondents to the global online survey (44%) attributed similar importance to personal visits as students from the target countries.



**Table 3.3 (All students from the target countries)**  
**Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Personal visits/journeys	34	43	37	37	69	58	46
Count (n)	(3125)	(2535)	(1525)	(2408)	(1780)	(2465)	(13838)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

Education staff members put much more emphasis on personal visits and journeys for information purposes than their students. However, it could be assumed that they had undertaken a much higher number of private and professional journeys to other countries than students. Two thirds of the staff members considered personal contacts as an important source (see table 3.4). Remarkable differences could be observed between the target countries:

- Brazilian education staff found personal visits more often important than their colleagues from other target countries (84%). For this group, personal visits are as important as the Internet to increase their knowledge about study opportunities abroad.
- A comparatively high utility of visits abroad was also reported by *Mexican* and *Russian* academic staff members (73% and 71%).
- *Indian* (65%), *Chinese* (63%) and *Thai* respondents (51%) least often stated visits as important sources of information.

**Table 3.4 (All education staff from the target countries)**  
**Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Personal visits/journeys	84	63	65	73	71	51	64
Count (n)	(104)	(253)	(127)	(179)	(182)	(369)	(1214)

Source: Survey on teaching staff, international officers and educational agents

Question 19: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

### 3.1.3 What is the role of higher education institutions, teaching staff, international offices?

**For Asian and Russian students, teaching staff in their destination country were a more important source of information than for Latin Americans.**

*Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?*

- *Teachers/professors at my home school/university*
- *Professors at universities in my destination country*
- *Student associations*

“Teachers have an enormous influence.” (Country report Mexico)

Workshops and interviews suggested that, while a central international office is usually the most important actor at institutional level, international cooperation and student counselling frequently takes place in a more informal way: through teaching staff at the faculties. Teachers and professors at the home or host institution as well as student associations can play an important role in advising students about the "best" destination country and university for their field of study, about conditions to get a scholarship etc.

The expectation that teachers and professors from the home school or university are the first address for students is only partly true as a comparison between the target countries shows:

- the majority of *Brazilian* and *Mexican* students considered their own teachers and professors as important sources of information while professors from universities in the destination countries played only a minor role;
- in all *Asian* countries and in *Russia* professors from destination countries were strongly involved in the process of informing students about study opportunities and played at least a similar role as staff members from the home schools and universities (see table 3.5).

Student associations seem to be most active in *Russia* (55%), *India* (48%) and *Thailand* (41%) but were of little importance in the Latin America.

**Table 3.5 (All students from the target countries)**  
**Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Teachers/professors at my home school/university	58	56	53	55	64	63	58
Professors at universities in my destination country	28	57	56	32	71	61	48
Student associations	21	35	48	24	55	41	35
Count (n)	(3125)	(2535)	(1525)	(2408)	(1780)	(2465)	(13838)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?  
 Sample: Students responding to paper based surveys and respondents to the online survey  
 \* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

Academic staff members usually are in contact with colleagues at other institutions in their home country and in an international context. It is therefore not surprising, that these networks play a major role for them.

Education staff from *Brazil* and *Thailand* most often exchanged information with both, colleagues from their home institutions and colleagues from other countries. *Indian* and *Mexican* staff members are somewhere in between and *Chinese* and *Russians* less often stated colleagues from at home or abroad as important sources (see table 3.6).

**Table 3.6 (All education staff from the target countries)**  
**Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Teachers/professors at my home school/university	84	67	74	77	70	80	75
Teaching staff at universities in other countries	79	62	72	69	60	73	68
Count (n)	(104)	(253)	(127)	(179)	(182)	(369)	(1214)

Source: Survey on teaching staff, international officers and educational agents  
 Question 19: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?  
 \* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

### 3.1.4 What is the role of family and friends?

**Half of the respondents from China and India but only one third of students from Latin-America would ask their family at home for information (or for their agreement) on studying abroad.**

*Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?*

- Friends / fellow students in my home country
- Family members/friends living abroad
- Family (parents, siblings, spouse, etc.)

Friends and fellow students in the home country were considered as important sources of information by 58 percent of the students from the target countries, i.e. they are of similar importance as teachers and professors at the home institutions (see table 3.7). Relatives or friends living abroad were rated less important than friends at home. Half of the respondents found family members or friends living abroad relevant to provide information, slightly more than the family in general (46%).

**Table 3.7 (All students from the target countries)  
Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Friends / fellow students in my home country	58	59	57	50	59	66	58
Family members/friends living abroad	42	56	54	43	60	55	50
Family (parents, siblings, spouse, etc.)	32	50	51	34	46	66	46
Count (n)	(3125)	(2535)	(1525)	(2408)	(1780)	(2465)	(13838)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?

Sample: Students responding to paper based surveys and respondents to the online survey

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

Comparing the results for different target countries, substantial differences, especially concerning the role of the family at home, could be observed:

- Half of the respondents from *China* and *India* and two thirds of the students from *Thailand*, but only one third of students from *Latin-America* would ask their family at home for information (or for their agreement) on studying abroad.



- Family members or friends living abroad are important for 60 percent of the *Russians* and 55 percent of Asian students, while they play only a minor role in *Latin-America*.
- Overall, fellow students and friends were most important in all target countries.

Not surprisingly, the role of the family was more important for secondary school and undergraduate students than for postgraduate or PhD students.

The results from the US study and the global online survey correspond to the findings in the target countries. The high importance of the family for individuals from Asia could be verified in both groups.

Workshop results and interviews confirm this pattern: while the family - both as counsellor and as decision-maker - played an important role in all target countries, this role was much more important in India, China, Thailand and Russia. In Brazil and Mexico, parents rather “help their child with information” or “exchange opinions”. In Russia and in the Asian target countries, a large proportion of parents decide for their children or at least together with them.

### **3.1.5 How important are education fairs, guides and the media?**

**Television and newspapers as well as education fairs reach more than half of the students in the target countries, while guides and directories are slightly less important.**

*Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?*

- *TV, newspapers, magazines, etc.*
- *Education events/exhibitions/student fairs*
- *Guides and directories of agencies in charge of student mobility*

Television and newspapers as well as education fairs reach more than half of the students in the target countries, while guides and directories of student mobility agencies are important for less than half (see table 3.8). A comparison by country of origin shows no clear regional pattern:

- Students from *Latin America* least often used guides and directories of agencies in charge of student mobility. Differences between Brazilians and Mexicans could be found in the importance of student fairs which are more often considered by Mexicans (57% in comparison to 42%). In Mexico, the survey had however partly been marketed via a special European education fair for postgraduate studies.

- Participants from *India, Thailand* and *Russia* most often visited education fairs or made use of guides and directories. Additionally, Indian and Thai students most often used TV, newspapers etc. to gather information.
- The *Chinese* students' use of these sources of information corresponds to the average.

For younger students from the target countries the above sources of information were more important than for postgraduate or PhD students.

**Table 3.8** (*All students from the target countries*)  
**Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
TV, newspapers, magazines, etc.	60	56	68	52	57	62	59
Education events/exhibitions/student fairs	42	50	64	57	60	63	55
Guides and directories of agencies in charge of student mobility	23	44	56	29	55	60	42
Count (n)	(3125)	(2535)	(1525)	(2408)	(1780)	(2465)	(13838)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?  
 Sample: Students responding to paper based surveys and respondents to the online survey  
 \* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

On average, a somewhat lower share of students from non-target countries found education fairs, guides and media important than respondents from the target countries. The share of North Americans and Australians making use of these information sources is remarkably low, whereas students from the other non-target countries in the survey were similar to the respondents from the target countries.

International students in the US generally stated a relatively low importance of the above information sources.

As table 3.9 shows, staff members draw information more from guides and fairs than from the media: in contrast to the students, live events and directories of student mobility agencies were rated much higher than TV, newspapers etc. Regional differences corresponded to the student survey:

- TV or in newspapers were used more than the average (53%) by *Thai* (64%) and *Indian* (62%) academic staff.
- Education fairs were visited more frequently by staff members from *India, Russia, Thailand* and *Mexico* than by their colleagues from *China* and *Brazil*.

- *Latin American* education staff pay less attention to guides and directories than respondents from the other regions.

In some countries (Russia, Brazil), interviewees felt that the media did not provide enough (or enough unbiased) information, and that news from the US were covered more often and more extensively than news from Europe.

**Table 3.9** (*All education staff from the target countries*)  
**Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
TV, newspapers, magazines, etc.	43	50	62	44	41	64	53
Education events/exhibitions/student fairs	60	55	79	76	78	78	71
Guides and directories of agencies in charge of student mobility	47	58	75	49	69	69	63
Count (n)	(104)	(253)	(127)	(179)	(182)	(369)	(1214)

Source: Survey on teaching staff, international officers and educational agents

Question 19: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

The importance of fairs is partly reflected in the country reports: in all target countries, fairs are being organised and represent one source of information on education opportunities abroad. Some of the interviewed parents mentioned fairs as a source of information, and some of the reports' authors underlined, from their own experience, the importance of providing students with the opportunity to meet face-to-face with representatives of foreign institutions (especially mentioned in Russia and Mexico).

### 3.1.6 How important are education agents?

**Commercial education agents were relatively important for Asian and Russian students but not for Latin Americans.**

*Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?*

- *Commercial education agents*

Commercial education agents are well established in Asian countries and Russia but not in Latin America. Most importance was devoted to education agents by Thai students (54%) followed by Indians (45%), Russians (43%) and Chinese (40%; see table 3.10).

Education agents in Asian countries are of special importance for school and undergraduate students. While half of school students and undergraduates made use of education agents, it is only one third of the postgraduate and about one quarter of PhD students.

The higher importance of education agents in Asian countries was confirmed by the results from the US survey and the global online survey. In addition, education agents seem to play an important role in Africa, too.

**Table 3.10** (*All students from the target countries*)  
**Sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
(Commercial) education agents	28	40	45	21	43	54	38
Count (n)	(3125)	(2535)	(1525)	(2408)	(1780)	(2465)	(13838)

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"  
 Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?  
 Sample: Students responding to paper based surveys and respondents to the online survey  
 \* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

This picture is confirmed by the country reports: at least for the Asian countries and especially in India, students and their parents frequently use commercial agents to arrange their stay abroad. Agents may be less important for the postgraduate level but very relevant for (future) undergraduate students. Indian students and parents, for example, use agents because they lack knowledge and understanding of overseas education systems, and simply because they lack time to look for it themselves. The British Council in India, formerly reluctant to cooperating with commercial agents, has changed its policy and now cooperates closely with all major agencies working with EU institutions.

In China, agents play an important though decreasing role, as a maturing market and stricter government regulations had a strong impact on recruitment agencies. At present, more than 300 agencies are licensed to provide study abroad services. According to the Chinese country report, only the strong agencies and the ones offering good services with added value for reasonable service fees are likely to survive in the future. Still, their importance should not be underestimated, especially as foreign providers are forbidden to recruit in China independently since 2001.

### 3.1.7 What is the role of foreign embassies?

**Also foreign embassies were relatively important information sources for respondents from the Asian countries and Russia, but not for Latin Americans.**

*Question 25: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?*

- *Foreign embassies*

In addition to other fields of activity, foreign embassies provide information about study opportunities in the country they represent. Some embassies supply detailed information about admission requirements, accreditation, scholarships etc. Half of the students responding to the survey made use of this offer (see table 3.11). Whereas foreign embassies play a minor role as information providers concerning study opportunities in *Latin American* countries, especially in Brazil, they were rated higher by respondents from the *Asian* countries and *Russia*.

The comparatively high relevance of foreign embassies for information seeking students from Asia could also be found in the global online survey and the US study. Respondents from Africa too made considerable use of the information offered by embassies.

Overall, for nearly two thirds of teaching staff, international officers and agents embassies were important sources of information. The regional patterns stated for the students remain true concerning the high relevance of embassies for Asian respondents, but not in the case of Russia and Mexico. Only 45 percents of Russian respondents but 64 percent of Mexicans would make use of information offers from embassies.

**Table 3.11** (*All students and education staff from the target countries*)  
**Foreign embassies in the home country as sources of information on studying in the European Union and in other world regions / countries - importance by country of origin (percentages\*)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Students <sup>1</sup>	27	58	57	41	62	64	50
Count (n)	(3125)	(2535)	(1525)	(2408)	(1780)	(2465)	(13838)
Staff <sup>2</sup>	38	61	74	64	45	71	62

Count (n) (104) (253) (127) (179) (182) (369) (1214)

---

<sup>1</sup> Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Sample: Students responding to paper based surveys and respondents to the online survey

<sup>2</sup> Source: Survey on teaching staff, international officers and educational agents

Question 25/19: How important are / were the following sources of information in contributing to your current knowledge on studying in the European Union and in other world regions / countries?

\* Points 1 and 2 on a scale from 1 = "Very important" to 5 = "Not important at all"

### **3.2 What type of information on study opportunities in Europe is needed?**

**Apart from information on scholarships and cost-related issues, rankings and information on suitable programmes were most requested.**

*Question 26: If you are intending or have thought about studying in a member state of the European Union, for which of the following issues was it difficult to get information?*

Asked about their experiences to get information about living and studying in member states of the European Union (see table 3.12), the largest share of students found it difficult to find appropriate information on scholarships from individual universities, member states or from the EU, living costs and tuition fees, rankings of universities by quality of education, and suitable course programmes. Less students (but still about one third) had problems in finding information on visa and admission requirements.

A country by country analysis shows a few differences:

- While most students had problems in finding information on financial issues, Indian students reported most problems in their search for university rankings (48%).
- Information on EU scholarship programmes (49%) and the availability of accommodation (48%) were the most problematic issues in the case of Chinese participants.
- Respondents from *Thailand* had more problems to find information about tuition fees (56%) and living costs (55%) than about scholarships. More than half of them also had difficulties in getting general information on living and studying in their potential destination country, and almost half with information on available accommodation.
- Most students from *Brazil* and *Mexico* (40–60%) reported difficulties in finding information on scholarships, living costs and tuition fees. However, over 40 percent also emphasized difficulties in getting information on university rankings and suitable courses.
- *Russian* students generally reported least difficulties. They had most problems in finding information about the availability of accommodation (44%).

Only few students had difficulties in getting information on English-taught programmes or language teaching facilities.

Participants in the online survey put more emphasis on scholarships and less on information about living costs and tuition fees. A ranking of universities by quality aspects in individual subject areas was also strongly requested.

**Table 3.12 (All students from the target countries)**  
**Aspects linked to studying in the EU on which it was difficult to get information - by country of origin (percentages, multiple response possible)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Scholarships from individual universities	60	42	42	47	35	41	46
Living costs	49	37	42	55	30	55	46
EU scholarship programmes	50	49	39	45	34	38	44
Scholarship programmes supported by individual EU member states	48	43	41	39	30	37	41
Availability of accommodation	32	48	27	38	44	48	40
Ranking of universities by quality of educational offers in my subject area	47	36	48	46	36	30	40
Tuition fees	45	21	37	39	30	56	39
Where to find a suitable course programme in my subject area	41	37	29	45	33	36	38
Admission requirements	39	31	37	34	35	38	36
Application procedures for visa / residence permit	32	33	36	32	33	39	34
General information on living and studying in this country	25	24	38	23	16	52	29
Academic degrees and teaching methods	22	29	20	22	17	37	25
Courses taught in English (in non-English-speaking countries)	17	17	21	15	15	24	18
Language teaching facilities	17	16	21	16	15	15	16
Other issues	3	1	4	2	2	2	2
<b>Total</b>	<b>526</b>	<b>465</b>	<b>482</b>	<b>497</b>	<b>405</b>	<b>549</b>	<b>494</b>
<b>Count (n)</b>	<b>(3032)</b>	<b>(2512)</b>	<b>(1437)</b>	<b>(2341)</b>	<b>(1721)</b>	<b>(2435)</b>	<b>(13478)</b>

Source: Student questionnaire on "Perceptions of European Higher Education in Third Countries"

Question 26: If you are intending or have thought about studying in a member state of the European Union, for which of the following issues was it difficult to get information?

Sample: Students responding to paper based surveys and respondents to the online survey

In contrast to the students, education staff demanded information on a broader range of issues (see table 3.13). Information about tuition fees (69%) and living costs (65%) were mostly required by this group, followed by general information about living and studying conditions and admission requirements (63% each).

The main fields of required information vary between the target countries:

- A large share of *Brazilian* and *Mexican* staff members demanded information about all forms of scholarships, but also more than average asked for university rankings.
- Education staff in the three *Asian* countries requested more information on visa procedures and residence permits than their colleagues in other target countries. Further, Asian staff were more interested in information about living costs and tuition than in information on



scholarships. *Indian* and *Thai* respondents more than average needed information on English-taught programmes and general information on living and studying in Europe. *Indian* staff members also emphasized rankings and admission requirements.

- *Russian* respondents put emphasis on admission requirements.

**Table 3.13** (All education staff from the target countries)

**Aspects linked to studying in the EU on which more information is desired - by country of origin (percentages, multiple response possible)**

	Country of origin						Total
	Brazil	China	India	Mexico	Russia	Thailand	
Scholarships from individual universities	90	45	65	70	45	66	61
Living costs	62	53	77	71	58	72	65
EU scholarship programmes	73	44	65	70	62	51	57
Scholarship programmes supported by individual EU member states	77	38	61	65	45	48	52
Availability of accommodation	51	41	59	41	58	68	54
Ranking of universities by quality of educational offers in my subject area	63	54	69	66	49	52	57
Tuition fees	55	62	81	55	70	78	69
Admission requirements	41	62	77	63	74	61	63
Application procedures for visa / residence permit	31	57	67	51	44	58	53
General information on living and studying in this country	61	57	72	55	40	80	63
Academic degrees and teaching methods	41	50	52	55	34	75	55
Courses taught in English (in non-English-speaking countries)	30	39	46	45	17	46	38
Language teaching facilities	42	36	48	17	43	30	34
Other issues	1	0	2	1	0	2	1
<b>Total</b>	<b>717</b>	<b>637</b>	<b>840</b>	<b>725</b>	<b>638</b>	<b>786</b>	<b>723</b>
Count (n)	(104)	(249)	(124)	(179)	(182)	(366)	(1204)

Source: Survey on teaching staff, international officers and educational agents

Question 20: Regarding higher education and study opportunities in EU member states, on which of the following issues would you like to have more information?

As stated initially, the country reports (and especially the Asian ones) emphasized a lack of information on study opportunities in Europe. More than lacking information about specific issues, interviewees deplored that there was no clear source or channel of information. EU delegations in the target countries were either not mentioned or did not appear to fill this lack. For example, according to the Chinese country report, “students and experts complain about the difficulty to obtain information about study opportunities. Most European governments and universities are not yet geared towards the effective provision of information on study opportunities. Experts and universities are not or hardly aware of European funding or

scholarship programmes. They complain about the unclear role and function and the inaccessibility of the EU delegation in China.”

## **vii Interpretation of Results**

The results of the surveys and interviews carried out within the study “Perceptions of European higher education in third countries” are presented in detail in chapter four. What do these results imply? First of all, it is worth reconsidering the main questions the survey was aiming to answer:

- What do non-European students think and know about Europe and its higher education?
- How do they decide?
- How do they inform themselves?
- Why don't they come?
- What do we have to change?

In order to “extract” the main results and answer these questions, it is necessary to put the results into the context of the global higher education market. Several factors have to be taken into account:

- If one looks at the two million international students studying outside their countries, the number of students sent out by China or India is considerably higher than the share represented by the sum of all other countries included in the study. Hence, in order to know how the international student community perceives Europe, the study needs to give more relative weight to the responses given by Chinese and Indian participants.
- The survey was carried out by scholarship organisations. Many respondents, especially to the online survey, were hence scholarship seekers. This applies also to the paper-based survey, as institutional facilitators were appointed by the country coordinators (representing a scholarship organisation). Hence, financial problems and scholarship-related issues may be overrated by respondents, and responses may reflect a successful cultural policy of the coordinating institution. This needs to be taken into account when interpreting the survey results.
- There is an overall trend favouring European destinations in the study, i.e. students aiming to study in non-European destination countries are underrepresented. To be able to answer the question why many international students don't come to Europe, it is important to consider the answers of respondents aiming to study in a non-European destination, for example the United States, as well as the results of the side-study carried out among international students in the United States.

With due account to the above factors, the following paragraphs will highlight the main results of the survey.

## 1 How they see us

### 1.1. Does “Europe” exist in the perception of international students?

**There is a perception of Europe as an “entity” in general terms and as an economic union. However, when it comes to cultural aspects and higher education, most students rather see Europe as a range of very different countries.**

One of the main challenges in the implementation of the present study was to find out how a union is perceived – opposed to investigating the perception of one single country with “typical” features. It could not be taken for granted that non-European students had a perception of Europe, or that “Europe” was of any relevance in their decision for a given country or university.

Does “Europe” exist in the minds of non-European students at all? It does. Europe was seen as a political and economic entity or at least as one single player in an international context by the majority of respondents. However, the perception of Europe as an economic and general/political union was much stronger than that of Europe as a common cultural and educational space.

With slight nuances, this is true for students from all target countries. Interestingly, international students in the US (i.e. who already decided against pursuing a European education) saw Europe more frequently as a set of individual countries for culture and higher education.

When directly asked about Europe/the EU, for example in comparison with the US or Australia, all respondents did however make statements and were able to characterise “Europe” as a whole, especially in comparison to the United States.

**Over 40 percent of Chinese and Indian respondents see large differences between the quality of education provided in individual EU member states.**

If Europe is not perceived as a “whole” with regard to higher education and study opportunities, what are the differences between individual European countries? Overall, respondents saw the most substantial discrepancies regarding cost-related issues (both tuition fees and living costs) and student support. However, a number of findings suggest that quality of education is an important issue:

- Respondents from China and India, who represent the biggest share of the international student population, saw more differences in the quality of education than students from most other countries. Also for teaching and learning methods, academic degrees awarded and the duration of study programmes Indians and Chinese perceived greater differences between European countries.
- The same goes for international students in the US, and especially for Chinese and Indians: over 60 percent see large differences in the quality of education within Europe.

- Most of the surveyed education staff members (especially those recommending major destinations like the US, the UK, Germany or France) saw the biggest differences in the quality of education provided.

The interviews carried out in the target countries confirm this picture: most interviewees had doubts that the quality of European higher education was “consistent” throughout the EU. An excerpt from the Chinese country report illustrates these findings: “the EU member states are considered individual states rather than members of the EU and judged on their individual merits. (...) The Chinese are convinced that there are significant differences between the education systems of the various EU members in terms of characteristics, quality, reputation and cost.”

**Respondents perceive only “a reduced Europe”: almost half of them only have considerable knowledge on the UK, Germany and France. Knowledge about the UK and the US was above any other destination.**

Which Europe exists in the students’ minds? The workshops and interviews suggest that many students have their preferred destination country or at the utmost a small range of major European countries in mind when thinking of Europe.

The survey confirms this perception of a “reduced Europe”: most students only had considerable knowledge about higher education in the United Kingdom, Germany and France; smaller groups about Spain, Portugal and Italy (Latin-Americans), Sweden, Switzerland, the Netherlands and Austria (this range of countries also corresponds to the students preferred destination countries). The number of students who were well informed about other countries was negligible. Especially knowledge of higher education opportunities in the new member states was extremely limited.

Further, more students had substantial knowledge of the US and the UK (58 and 54% respectively) than of any other destination. Germany and France follow with around 40 percent, before Australia and Canada (ca. 30%).

Next to their individual destination, students are often knowledgeable about neighbouring countries (region) or countries of a similar “type”, e.g. English speaking countries, Nordic countries, etc.

The workshops and interviews confirmed that also other stakeholders (experts, rectors and directors of international relations, parents) were informed about the same range of countries and lacked information about the rest of Europe. In general, the perception focused on core/Western Europe and its biggest countries. Especially in Asia, the UK was frequently perceived as a separate entity from continental Europe. Interest in cooperating with the new member states (or the perception of their attractiveness to students) was much lower.

## **1.2. Flexing muscles or struggling to survive? Europe's standing in the global education market**

**Students were convinced of the qualities of their chosen “destination region” and mostly ranked it above other destinations.**

Respondents to the ACA survey were generally convinced of the virtues of their destination. Due to the focus and theme of the survey, there was a large share of students aiming to study in a European country. These students had an overall positive perception of Europe and positioned it high in comparison to its competitor countries. An analogous pattern applied to respondents aiming to study in the US and, to a lesser extent, to those aiming to go to Australia. For example, around 90 percent of the students aiming to study in Europe or in the US had a high opinion of the quality of the education offered in their destination country. For Australia percentages ranged around 80 percent.

This “own-destination-wins effect” may seem an obvious finding, but it has several implications: first, it shows that European countries are not only second-choice alternatives, and that Europe does not need to hide away. Second, wherever responses differ from this “own-destination-wins effect”, a perception can be considered as truly solid:

- Regardless of the students' destination, all students ranked the US first for issues linked to innovation, competition and dynamism (most dynamic universities and most competitive society) and Europe for the most traditional universities.
- Overall, the US was also the winner for aspects concerning the prestige and reputation of universities and degrees (although a considerable number of students going to European countries ranked Europe first).
- Europe was clearly ranked first in all aspects concerning culture and safety, and, together with Australia, (visa) accessibility.

**Although respondents mostly rank their own destination first, the results reveal a clear regional pattern: Europe has a better standing in Russia and Latin America, while the US and Australia are at the top in the Asian target countries.**

Results differ often substantially between Asian countries and Russia/Latin America: Brazilian, Mexican and Russian respondents had a more positive view of Europe, whereas respondents from the Asian target countries were more inclined towards the US or Australia.

Participants from Brazil, Mexico and Russia had a positive idea of the quality of education and of the worldwide reputation of degrees earned in Europe. Especially Russian students, staff and interviewees associated European higher education first and foremost with quality and prestige.

In contrast, Asians only clearly ranked Europe first for “soft factors” like tradition and cultural heritage, lifestyle, safety, arts and cultural offer and living standard but not for aspects linked to

academic quality and employability. For the affordability of living expenses and tuition fees, the chances to get a visa and welcoming attitudes towards foreigners, Australia was ranked first by Asians (followed by Europe).

This pattern is confirmed by the survey carried out among international students in the US: They ranked their own destination far above Europe for all aspects except the most traditional universities, visa availability, safety and a range of issues related to culture and lifestyle. For quality, reputation of degrees and prestige, the ranking of Europe and the US are worlds apart in the perception of this group.

### **Survey participants from the Asian countries rank the US above Europe in most academic and labour-market related issues.**

Survey participants from the Asian target countries - who make up the biggest share of international students worldwide - ranked the US above Europe in most academic and labour-market related issues. Even though they aim to study in Europe,

- students from the three Asian target countries thought that the US had the best quality laboratories, libraries and other facilities;
- a majority of Chinese students and significant minorities of Indian and Thai students thought that the US had the best quality of education and the most prestigious universities;
- most Asian students ranked the EU below the US for the recognition and reputation of degrees (recognition of academic degrees at international level and at home labour market). Even if only students aiming to study in a European country are taken into account, Asian students ranked the US well above the EU (China and Thailand) or similar to the EU (India).

Furthermore, especially students from Asia ranked the US well above the EU for the chances of getting a job and staying on after graduation as well as for work opportunities during their studies. This perception was shared by interviewees. Chinese parents, for example, said they “hope that Chinese students would be more trusted and provided with more job opportunities in Europe upon graduation”, as they believed that work experience abroad would benefit their child’s future career perspectives (in China).

### **Europe is the safest place to study.**

“Relaxed, peaceful and safe” – this is how Chinese interviewees characterised Europe. This perception is reflected in the survey results. Europe and Australia were perceived as safe destinations, but not the US: while 80 percent of the respondents aiming to study in a European country or in Australia thought that it was a safe country to live in, only 51 percent of those going to the US thought that their destination was “safe”. Europe and Australia also win the direct ranking as the safest places to live. With the exception of Indians, even students aiming to study

in the US and international students in the US found their destination considerably less safe than Europe or Australia.

The country reports confirm that Europe is considered a safe study destination, and underline the weight of safety in their decision for a destination country. Especially interviewees in the Asian countries, but also the surveyed education staff placed great emphasis on this factor (see 1.2.1).

**Europe and Australia are more accessible than the US at least as far as visas are concerned.**

Further, Europe and Australia were considered as relatively accessible regarding entry to higher education and visa regulations. The survey results clearly place Australia and Europe before the US for the “best chances of obtaining a visa”. Students from Mexico, Brazil, Russia and India tended to place Europe first, whereas students from China and Thailand see Australia as most accessible. Interviewees in all target countries regarded Europe’s visa procedures as relatively easy, especially if compared to the US (“easier and less humiliating”, Mexico). However, there was also awareness that European immigration regulations were becoming stricter; and that there were strict limitations to stay on in Europe after graduation.

With regard to the accessibility of education, interviewees considered Europe as “relatively accessible in academic terms”. The survey results however show a mixed panorama: in overall terms, Europe is ranked above the US and Australia for aspects like the recognition of the students’ home qualification, low bureaucracy and simple admission procedures. However, especially Chinese and Thai students have a more positive perception of the US and of Australia with regard to these aspects. Many survey respondents preferred to say that they “did not know” what destination was the best.

**Europe has the most interesting cultural heritage and artistic offer.**

Europe was clearly perceived as the destination with the most interesting tradition and cultural heritage and with the most attractive arts, music and cultural offer by the vast majority of respondents (including staff members, students aiming to study in the United States and international students already studying in the United States). This perception was confirmed by interviewees in all target countries. In Brazil, a rich culture and cultural diversity were even regarded as Europe’s main assets. However, culture and lifestyle do not really count in the students’ decision for a destination (see 1.2.1.).

**An innovative, modern and competitive United States is opposed to a traditional Europe.**

When it comes to tradition Europe has it all: the most traditional universities, the most interesting cultural heritage and traditions, the longest academic traditions. However, Europe was clearly

not seen as the cradle of innovation when compared to the US. In the view of the majority of survey participants, the US had the most modern and innovative universities and the most competitive society.

Yet, the survey results still suggest that Europe is “modern” (and hence that “traditional” can be understood in a positive way): both students preferring European destinations and students preferring the US believed that they were going to study in a “modern and technologically advanced country”. When asked for Europe’s attributes, a substantial share of respondents from all target countries characterised Europe as “modern” - but not as “innovative”. In the words of a Brazilian interviewee: “tradition can also mean inertia”.

### **1.3. *European myths and the reality***

**Classic European assets like diversity of cultures and languages, a cooperative mentality or free tuition are more attractive to Brazilian, Mexican and Russian respondents than to students from the Asian target countries.**

Students from Latin America and Russia viewed Europe more positively than those from the Asian target countries not only as regards academic quality. They also valued more the “classic” European assets like diversity of cultures and languages, a cooperative mentality, etc. These aspects were however perceived as obstacles by a considerable proportion of Asian students.

**Free tuition is regarded as an asset, but Europe is not perceived as particularly affordable.**

In general, free or low tuition is perceived as an important asset by international students (although slightly more students from Asian countries than from other regions thought it could also be an indicator for bad quality).

However, international students do mostly not perceive Europe as an affordable destination. This applies both to living costs and tuition fees, although there is considerable variation depending on the students’ destination country (and country of origin). Especially in the Asian countries, Australia seems to have been very successful in marketing itself as a safe and affordable alternative even though charging considerable tuition fees: students from the three Asian target countries as well as education staff believed that Australia was the most affordable destination. On the other hand, Russian, Mexican and Brazilian respondents as well as international students in the US saw Europe as most affordable for tuition.

Overall, Europe is perceived as more affordable than the US, but as less affordable than Australia. According to the workshop results, this is mainly due to

- the strong Euro;



- (perceived) high living costs in the countries dominating perception (especially in Russia and Brazil, living in Europe was regarded as expensive);
- the perception of UK tuition fees/living costs as high compared to Australia and the US.

Further, especially Asian students thought that it was easier to obtain a scholarship in the United States. In this context, it is interesting to consider the results of the US student survey: The possibility to receive financial aid from a higher education institution was important for these students' destination choice, and particularly for Chinese and Indians (74 and 87% respectively).

**Diversity of cultures and languages is mainly seen as attractive, but their “abundance” is regarded as a problem by a significant group of Asians.**

Overall, Europe's diversity of cultures and languages is perceived as rather attractive. Especially in Latin America, all diversity issues were perceived as enriching and partly even as Europe's main strength - which may also be linked to a perceived juxtaposition of Europe and the US equalling diversity versus monoculture. According to a Mexican interviewee, Europe stands for “culture, lifestyle, intellect”.

However, in all Asian target countries, substantially more respondents perceived diversity of languages as a barrier to communication and diversity of cultures as confusing. The interviews confirmed this trend: although diversity was mentioned as one of Europe's strengths by some interviewees, the majority considered the “abundance” of cultures and languages as an obstacle.

This picture is reinforced by international students who already had decided against Europe and were studying in the US: 38 percent of all students and almost 60 percent of Indian and Chinese respondents saw the European diversity of languages as a barrier to communication.

**Europe's single major disadvantage in Asia is that English is not the mother tongue.**

Not only linguistic diversity was seen as a barrier by an important share of Asian respondents. In their view, (continental) Europe's single major disadvantage is that English is not the mother tongue. Furthermore, the interviews showed that information about English-taught programmes in non-English speaking countries was not widespread. Especially in countries where the language is not English, French or German, English-taught programmes were seen as important.

The “verdict” was spoken out by interviewees especially in China and India, but it was also confirmed by the survey results at least for Indian students:

- For 85 % of Indian students and 92% of the surveyed education staff it is important that programmes in the destination country are taught in English. 75% of the Indian students

thought that Europe could become more attractive if it introduced more English-taught programmes;

- For students aiming to study in the US or in Australia, it was more important that programmes were taught in English (71 and 79%) than for those aiming to study in the major non-English speaking European destinations like Germany (46%) or France (40%). It was however very important for students who wanted to pursue an education in one of the Nordic countries, in the Netherlands or in a new EU member state.
- For international students in the US (especially those from Asia), their own proficiency in English was the second most important criterion in their decision for the US (after the reputation of United States degrees);

In the Asian countries and to a lesser extent in Mexico and Brazil, a deficient language preparation surely is an important factor. In the three Asian countries, English is the only language widely taught at secondary school level, and even there the quality of teaching is sometimes doubtful. At undergraduate level, other languages are being taught, but only to a very limited extent.

**A cooperative mentality and good opportunities for networking are regarded as European assets mainly by Latin American respondents.**

A more cooperative mentality and solidarity in society and labour market are perceived to be rather characteristic of the EU, whereas the US is seen as more dynamic and competitive. However, only respondents from Latin American countries agreed clearly that the European context offered better networking opportunities (and had also voiced this in the workshops). Asian respondents also perceived good networking opportunities in the US; furthermore, the concept of “cooperation” did not seem relevant to interviewees or workshop participants.

**1.4. Europe’s attributes**

**Elegant, clean, organised, modern, possibly peaceful and open-minded – this is how most respondents see Europe. For them, it lacks innovation, tolerance and joie de vivre.**

For many interviewees, European strengths were cultural openness, tolerance, a positive attitude towards foreign students and a liberal and open society. The workshop participants had similar opinions. Survey participants, however, had mixed views on these issues:

- When asked about Europe’s attributes, most respondents chose organised, elegant, modern and clean. Chinese and Indians, who represent the biggest international student cohorts, considered Europe also frequently as open-minded and peaceful.
- About 60 percent of respondents thought people in their (European) destination country would be welcoming to foreigners. This percentage is higher than for the US but considerably

lower than for Australia, New Zealand or Canada. The average hides however important variations between different destination countries in Europe: while the “core countries”, especially Germany and the UK, were seen as less welcoming destinations, the Netherlands, the Nordic countries and Austria ranked as high or even higher than Australia.

- Europe was not seen as innovative, lively, fun or tolerant by the majority of respondents. This reinforces the picture of a “traditional” Europe that lacks dynamism. It also shows that liveliness and tolerance are only too easily taken for granted in a society that sees itself as diverse, open and multicultural.

### **1.5. Will Bologna and Erasmus Mundus help to enhance Europe’s attractiveness?**

**Bologna measures are a good but not the best means to enhance Europe’s attractiveness: an information portal, Europe-wide rankings and financial support for non-European students are more essential.**

An information portal on study opportunities in Europe, a Europe-wide ranking of programmes and higher education institutions and increased financial support for non-European students could best enhance Europe’s attractiveness. More agreements between European universities and universities in the students’ home country were seen as a fourth important means to enhance Europe’s attractiveness, and were especially important for students from Brazil and Russia.

Students from China and India and especially those students going to the Nordic countries or the Benelux placed strong emphasis on the introduction of English-taught programmes.

Overall, students from all target countries also had a rather positive view of Bologna measures (Bachelor-Master system, a credit system that facilitates recognition, Diploma Supplement, quality assurance, etc.) and of Erasmus Mundus-type models (a joint Master programme in two different European countries). However, these were less important than the above mentioned measures. More students found joint Master programmes with an institution in their home country more attractive than studying in two different European countries.

These main points correspond widely to the recommendations of the country reports: those interviewees who were aware of the Bologna process regarded it as a good but not sufficient means to make Europe more attractive as a study destination. In Latin America, interviewees were more aware of the Bologna process and Erasmus Mundus, but they had doubts vis-à-vis their potential for enhancing Europe’s attractiveness. However, their doubts concerned not the concepts but the way they were implemented: interviewees feared that cooperation would be unilateral and lacking transparency. Therefore, they recommended that any approach or new programme should be as little bureaucratic and as transparent as possible, and that it should emphasize cooperation and reciprocity.

Overall, the “Common Space of European Higher Education” is still quite new and not yet well established in students and other stakeholders’ minds.

## **2 How they choose**

The previous section explained how non-European students (and other stakeholders) see Europe and its higher education, partly already making reference to the importance of the different factors. The following paragraphs will help to weigh the described perceptions and put them into the context of “what really counts” for the students: Why do they go abroad? What do they choose first, region, country or university? What factors are important in their choice of destination country and university? What puts them off? Are some choices alternative choices, and if so why?

### **2.1. Factors driving international students’ destination choice...**

83 percent of the students stated three or more alternatives when asked about their ideal destination country, and were hence thinking about different alternatives. What factors are driving the decision process?

**The most important reasons to go abroad are career-oriented. Also aspects related to personal and professional growth play a major role.**

A ranking of the students’ most important reasons to pursue an education abroad looks as follows:

1. Experiencing new ways of thinking and acting in the field of study
2. Improve chances for an international career
3. Learn or improve competences in a foreign language
4. Improve career prospects / chances of getting a job in the home country
5. Opportunity to develop own personality and become more independent

Hence, the most important reasons are career-oriented (not only better chances for a career at international level or at home, but also the acquaintance of language skills) or linked to personal and professional development (new ways of thinking and acting related to the field of study; language skills). Most education staff accorded even higher importance to the improvement of career prospects. Only Chinese students and staff are an exception: for them a more flexible (or practice-oriented education) was most important, next to making new experiences in their field.

Limited places at prestigious universities in India and China played an important role for over 40 percent of Indian and Chinese students, who represent the most substantial share of international students worldwide. This had also been an important factor for Asians already studying in the United States.

On the other hand, students from China and India accord less importance to the acquisition or improvement of foreign language skills, to the socio-cultural experience and to “networking” in an intercultural context than for example students from Latin America.

Overall, socio-cultural aspects (interest in foreign culture and history, building up friendship and networks) seem to be more important for students aiming to study in Europe than for those who preferred the US or Australia.

### **The biggest group of respondents was aiming to study a Master’s degree.**

The workshops and interviews revealed that most students preferred to acquire a first degree in their home country. Especially top universities in China and India would always be the students’ first choice at undergraduate level. In these countries, the undergraduate offer at prestigious institutions was considered of equivalent or even better quality to what students could find abroad, while the offer at Master and Doctoral level was still seen as limited. Overall, it was also considered a better option to do the first degree at home in order to ensure recognition by employers and academia, and in order to be able to build up a network of professional contacts at home.

The survey results can only partly be used in this context, as at least the paper-based survey was designed to include students from different levels of study. Still, the results from the staff and from the online survey widely confirmed that about half of the students aimed to obtain a Master’s degree abroad. Further, the target countries can clearly be divided into two groups: the share of students interested in obtaining a Master’s degree was considerably higher in Asian countries and in Mexico than in Brazil and Russia. In Brazil and Russia, short-term mobility was the most popular option, while only a minority of Asians wanted to study in another country for a limited period of time.

Workshops, interviews and survey also revealed that considerably more Asians aimed to go for a Bachelor’s degree abroad. However, as markets become more mature, mobility structures can change. Chinese experts, for example, predicted that more Chinese students would prefer to stay abroad for a shorter period of time and fewer would do an entire undergraduate programme abroad. They also expected that more graduate students would go abroad because the labour market increasingly requested them to hold a Master’s degree.

### **Most students do not seem to care about the world region where they are going to study.**

The majority of respondents stated to choose either the country and then the university or even first the university and then the country. Only 20 percent of all respondents cared about the region. Hence, the majority did not care if they were actually going to study in Europe! Again, this was especially true for respondents from the Asian target countries. On top, students from China and India more often chose the university first then their fellows.

Survey results also showed that US universities were much more prominent in the students' decision: 40 percent of the students favouring the US chose their university first. On the other hand, students who were planning to go to a European country cared more about the region, especially respondents preferring smaller EU countries (the Netherlands, Nordic countries, etc.).

**Prestige, quality of education and the reputation of degrees play the most important role in the students' decision for a destination country/university.**

The survey shows that students were mainly quality and prestige-oriented in their choice: the worldwide recognition of degrees from a country and the prestige and quality of an institution were clearly the most important factors for students from all target countries. For the choice of destination country, the most important criteria are ranked as follows:

1. Recognition and prestige of awarded degrees;
2. Affordability of living;
3. Accessibility with home qualification;
4. Safety.

The importance of safety was underlined even more by respondents from the three Asian target countries, by Asian interviewees and by education staff. The acceptance of home qualifications was likewise especially important for groups representing a substantial share of the international student population: Indians and Chinese, next to Mexicans, underlined this factor.

There were hardly any differences by destination. However, students going to the major English speaking destinations (and to France and Canada) placed more emphasis on their proficiency in the language of the destination country.

The answers of the control group of international students in the US confirm and overdo this picture: the reputation of academic degrees was by far the most important criterion for these students, followed by proficiency in English.

Overall, the factors driving the students' decision for a country or university are reflected in characteristics of the destination students finally preferred (see 1.1.2). These were, by order of preference

- Excellent quality of education;
- Degrees are recognised worldwide;
- Modern and technologically advanced;
- High standard of living;
- Safe.

**Students are predominantly looking for a specific and high-quality offer in their area of specialisation, at an up-to-date and well-managed institution of high standing which they can afford.**

What about the choice of the higher education institution? In this case, the following aspects were regarded as most important:

1. Prestige, quality, offer of adequate programmes;
2. Student support, modern and advanced teaching methods, affordability of tuition;
3. Well-organised study programmes of limited duration and transparent and simple admission procedures.

The importance of well-organised study programmes of limited duration is interesting, as it was emphasized by Chinese interviewees: in their perception, an advantage of Europe (probably with the UK in mind) was that it offered shorter Master's programmes which required less financial effort.

Asian students (especially Indians and Thai) strongly emphasized the importance of English-taught programmes, which were less important for Latin Americans and Russians. English-taught programmes were obviously an important criterion for students aiming to study in English-speaking destinations but also or even more for those going to Northern European countries, the Netherlands or one of the new EU member states (see also 1.1.3).

Again, the results of the US survey reveal an interesting preference structure of those students who decided against Europe: also for them, prestige, quality and adequate programmes were most significant. However, while affordability of tuition was far less important, the possibility to receive financial aid was crucial above all for Chinese and Indian students in the US. Likewise, the US survey confirms the importance of student support for this group: students don't want to be left alone.

## **2.2. ...and the reality**

**Obstacles encountered by the students are often situated outside European higher education and concern finances, immigration policy and language preparation.**

Obstacles encountered by the students were mainly of financial nature. This was probably to be expected, as scholarship organisations carried out the survey. Nevertheless, financial problems should by no means be neglected and were also underlined by interviewees in the target countries.

Although getting the financial resources was the main problem for students from all target countries, it was underlined much less by Asian students. This becomes particularly evident in the staff survey: complicated visa procedures were the most important problem for most Chinese and Thai staff.

There were some other interesting findings:

- A high number of students going to the US had difficulties with obtaining a visa (45% compared to 29% average). This was confirmed by international students in the US, especially by the Chinese: almost 80 percent had experienced difficulties in obtaining a visa.
- For Asian students, visa procedures represented the second most important problem, while Latin American and Russian students emphasized a lack of exchange programmes.
- Limited language proficiency was a problem for students from all target countries except India (where English is an official language) and Russia (where the quality of language preparation is better). Overall, the interviews showed that language preparation in all target countries except Russia is rather poor. In Asian countries, English is - across the board - almost the only language taught at secondary school (see also 1.1.3).
- A lack of work opportunities during and after studies in Europe was perceived as a problem/weakness (see also 1.1.2).

The country reports widely confirmed these results, but also pointed out another problem: lacking information on study opportunities.

**About one quarter of the students who responded to the survey finally preferred a country that had not been their original ideal destination.**

The survey results showed that dreams do not always correspond to reality: about 25 percent of respondents gave up their dream of studying in their number one destination and turned to an alternative.

In general, students going to the US, the UK and Germany (France and Italy) changed their mind less often and could make their dream reality. However, the workshops had already suggested that a number of Chinese and Indian students decided against the traditional English-speaking destinations (US and UK) although these were their ideal destinations. The survey confirms this pattern: the percentage of students from China and India who had been dreaming of pursuing their studies in the US or in the UK was higher than those who finally planned to go to one of these countries. The opposite was true for Chinese and Indian students going to Germany, France, the Netherlands and Australia.

For about half of the students who were planning to study in one of the Nordic countries or in the Netherlands, their destination was only their second or third choice.

The main reasons for the change of mind were financial (lack of scholarships, high living costs and tuition fees). Too high tuition fees were a problem for more students from Asia (except India). For students from India, visa difficulties were more often the reason to choose another but the ideal destination.



International students in the US who had considered studying in the EU gave up their plans partly because of a lack of scholarships and because of a lack of information on study opportunities. However, the context of the survey suggests that the main reason for their change of mind was that they were simply more convinced of the quality of education in the US.

### **3 How they know**

#### **3.1. Main information channels**

**The Internet and websites of individual universities in particular is the most widely used source of information, followed by the offices/websites of different national internationalisation agencies.**

Regarding the information sources used by students and other stakeholders, the most important source was clearly the Internet, followed by the offices/websites of different national internationalisation agencies. All other types of sources were used by between 40 and 60 percent of survey participants: teaching staff and family or friends (at home and in the destination country) agents, education fairs, guides, the media, foreign embassies or personal visits. The surveyed staff members used a wider range of these information sources than the students.

Although web-based channels are clearly most important, the significance of the network of offices of different internationalisation agencies, of personal contact and of commercial agents (with whom most continental European universities do not cooperate), should not be underestimated. Workshops and interviews also underlined the importance of personal contact, on top of the information available online.

At least for the Asian countries and especially in India, students and their parents frequently use commercial agents to arrange their stay abroad. Agents may be less important for the postgraduate level but very relevant for (future) undergraduate students. The British Council in India, for example, formerly reluctant to cooperating with commercial agents, has changed its policy and now cooperates closely with all major agencies working with EU institutions. According to the country reports, Indian students and parents use agents because they lack knowledge and understanding of overseas education systems, and simply because they lack time to look for it themselves.

In China, agents play an important though decreasing role, as a maturing market and stricter government regulations had a strong impact on recruitment agencies. According to the Chinese country report, only the strong agencies and the ones offering good services with added value for reasonable service fees are likely to survive in the future. Still, their importance should not be underestimated, especially as foreign providers are forbidden to recruit in China independently since 2001.

The survey also showed that for over half of the Chinese and Indian students, and for an even bigger share of Russian and Thai students, teaching staff in their destination country were an important source of information. Latin American students relied more on their own academic staff, probably linked to a stronger “exchange mentality”. Further, for over half of the Asian students, their family is also an important source of information – or, as the interviews suggest, they are even the ones who decide for their child.

### **3.2. *European what...? The big information gap***

**Interviewees, especially from the Asian target countries, deplored a lack of information on study opportunities in Europe and of a “clear sender”.**

Overall, workshop participants, interviewees and survey respondents agreed upon one major message: information on Europe and its higher education is missing or hard to access. Basically, respondents to the survey had experienced difficulties in finding information on scholarship opportunities from different sources, living costs and tuition fees. Next to financial issues, they underlined a lack of university rankings and of information on suitable programmes.

Education staff demanded information on a wider range of issues than the students. Education staff in the three Asian countries requested more information on visa procedures and residence permits than their colleagues in other target countries. Further, Asian staff was more interested in information about living costs and tuition than in information on scholarships.

Many interviewees were unsure about whom to turn to in order to obtain information on study opportunities in Europe. A frequent concern was the difficulty to judge if the information was reliable and complete. Some interviewees found that the media was providing lop-sided information (more comprehensive about the US than about the EU).

The interviews in the target countries showed that information levels varied considerably between the different target countries and groups of interviewees. Mexican, Brazilian and Russian interviewees were better informed than interviewees in the Asian target countries. Especially Asian parents’ knowledge was largely limited to study opportunities in English speaking destination countries.

## VI Recommendations for a European brand

The ultimate mandate of this study was to devise recommendations to the European Commission with regard to a future European brand: the study should develop a clear idea of what a European higher education brand should look like and which should be its core elements, it should determine who its sender should be in a worldwide campaign, and find out what the message of this sender should be.

How international students see Europe, how they choose and how they inform themselves are key data for the shaping of a European brand. Based on the results presented in the previous section, the following questions need to be discussed, with reference to the brand, its sender and the necessary context:

- Will it be possible to devise one brand for the whole of Europe?
- What are Europe's "unique selling points"?
- Can one and the same brand and strategy be used worldwide?
- What are the most appropriate channels to reach the students, and who should be the sender?
- What needs to happen on the supply side in order to ensure the success of a European brand?

### 1 The brand

**A European brand can only cover elements which are common to all European countries.**

There is a clear potential for a European brand. The challenge is to create a perception of the entire Europe.

The three main selling points for European education should be its quality education, its tradition and the offer of internationally compatible degrees. Other attributes – safety, accessibility, etc. - should be used in the context of specific campaigns.

Using one and the same brand worldwide is necessary in order to create a clear European identity. Under this common European umbrella brand, tailor-made campaigns may be run for different target countries, regions and target groups.

### **1.1. Will it be possible to devise one brand for the whole of Europe?**

**There is a clear potential for a European brand. The challenge is to create a perception of the entire Europe.**

Europe is not perceived as a union as regards higher education: the perception of individual countries dominates. An obvious conclusion could be that there is no sound basis to build a European education brand on. However, there are indications that there is a potential for such a brand:

1. Participation in the survey was overwhelming, and “Europe” was regarded as an attractive study destination by the majority of respondents.
2. Europe “in general” and in economic terms exists on the “mental map” of most survey respondents, and this could be transferable to higher education.
3. When asked about the characteristics of European higher education in comparison with the United States or Australia, students – both in the preparatory workshops and in the survey – were able to give an assessment for a broad range of factors.
4. Europe is neither an established “product” nor a totally new one. Existing brands and campaigns run by individual European countries highlight their location in Europe, either as a gateway to the continent or as a basis for leisure travel.

Overall, there seems to be a potential for promoting European higher education. However, as only a “reduced Europe” exists in the minds of respondents, the challenge is to create a more “complete” perception. Marketing Europe should aim to strike a balance between providing a clear and concise message that builds on the perceived strengths of the well-known European destinations, and giving more detailed information on the less known countries without confusing the students.

This challenge is even bigger as most students do not seem to care about the world region where they are going to study. Hence, it is not only necessary to create a perception of Europe but also to explain what studying in this world region adds to the students’ experience.

#### **A European brand can only cover elements which are common to all European countries.**

There are substantial differences in perception and popularity of the different European countries, which could result in different strategies:

- “Selling dreams” may only be possible for the main destination countries, i.e. the UK, Germany, France; maybe for specific fields and target groups also Spain, Italy (and Switzerland).
- Reinforcing rational quality arguments for “good alternatives” seems to be appropriate for the Netherlands, the Nordic countries, Belgium, Ireland and Austria. Well-developed higher

education systems and offers for international students can serve as “evidence” in a campaign.

- Eastern and most of Southern Europe are not well-known or valued. There is clearly a lack of information and probably in some cases also a lack of active creation and promotion of good higher education opportunities for international students. An information campaign next to sustainable development of higher education sectors, English-language offers etc. seems to be appropriate. English-language-taught programmes seem to be particularly important for students choosing smaller destinations in Eastern, Central and Northern Europe.

While all European countries would probably profit from a European brand and marketing strategy, it would be most beneficial for the second and the third group. The fact that the country is situated in Europe is, in these cases, perceived as a stronger asset.

However, devising different strategies for these countries or groups of countries can only be part of specific campaigns. These campaigns need an umbrella under which they are run, a common European brand. In order to create a perception of “Europe as a whole”, a brand should

- be an umbrella brand, based on the “greatest commonality” of perceived and real qualities of European countries. Otherwise, the brand will not be taken as representative of the whole of Europe;
- have a clearly identified sender;
- use the term “Europe” in the brand in order to avoid confusing students (i.e. refer to a Europe including Switzerland and EFTA although these are at present not part of the EU).

### **1.2. What are Europe’s “unique selling points”?**

**The three main selling points for European education are its quality education, its tradition and offer of internationally compatible degrees. Other attributes – safety, accessibility, etc. - should be used in the context of specific campaigns.**

The above explanations show that it is a challenge to devise a brand for the whole of Europe. What are the starting points?

Overall, a brand can **reinforce** and build upon Europe’s perceived strengths and/or **correct** misperceptions regarding those aspects that are important in the students’ choice of a destination country. Hence, there are several issues that have to be taken into account:

- (1) What drives students to study abroad and what criteria are important for the choice of their study destination?
- (2) What do they perceive as Europe’s strengths?

- (3) What are other clear European attributes with ambiguous, i.e. both positive and negative connotations?
- (4) For what aspects are perceptions mixed? Are there misperceptions which can be corrected?
- (5) What are Europe's main disadvantages?

Based on the answers to the above questions, Europe's unique selling points can be identified. While there is a range of possible selling points, only a limited number should constitute the "umbrella brand". Further attributes may be used in specific campaigns run under the overall European brand, or they may be addressed and explained in information materials. The attributes used in the brand should be such that all European countries can identify with them, and they should be sustainable or even have a potential to improve over time.

- (1) *What drives students to study abroad and what criteria are important for the choice of their study destination?*

The reasons driving students to study in another country and their criteria when choosing their destination are explained in detail above (see section 1.2.1 in the previous chapter). The lesson that should be remembered for the creation of a European brand is essentially "what counts" in the foreign students' destination choice:

- Students wanting to study abroad are mainly driven by career-oriented reasons and by the wish to grow in professional and personal terms;
- Socio-cultural motivations and cultural and lifestyle-related criteria are of minor importance for the biggest student cohorts;
- The most important criteria for students choosing their study destination are the quality of education and research and the recognition and reputation of awarded degrees. Other important criteria are the suitability of programmes on offer, affordability of living and tuition, modernity of teaching methods, accessibility (acceptance of home qualification, student support, transparent admission structures) and safety.

Which of the above items can be used for a European brand is subject to Europe's strengths and attributes. However, some of the mentioned criteria, like student support and admissions, are institution-specific and would be difficult to transfer to the European level, except for specific initiatives and networks.

(2) *What do respondents perceive as Europe's strengths?*

Clear **strengths** of Europe are:

➤ **Quality of education**

Quality of education is most essential in the students' choice of a destination country and university and therefore cannot be ignored in a brand. Overall, the perception of the **quality of European education** is high. This becomes evident from the survey results and is confirmed by interviewees in all target countries. Europe may not be the world leader, and some groups may have a higher opinion of the quality of US education. However, Europe offers an education of sound quality, and it has to capitalise on this asset.

Quality is linked to **prestige**, for which perceptions were similar, although in this case Europe lags behind the United States. Prestige is however a more rooted and "nebulous" concept. In addition, an enduring quality image will sooner or later be followed by "prestige". A brand for the whole Europe should therefore build on the quality of education.

➤ **Safety**

Europe is clearly regarded as a safe destination: both Europe and Australia are perceived as safe, but not the US. Even most students aiming to study in the US found their destination considerably less safe than Europe and Australia.

On the other hand, safety is an important issue for students, staff and interviewed parents and hence of particular relevance in the Asian countries where parents are the main decision makers.

For it is a clear European strength and it counts in the decision for a destination, safety should be used as a selling point. It should however not be in the "first line", as safety conditions can change overnight (as was the case, for example, with the terrorist attacks in Spain or the UK and the riots in France) and the news are usually quickly spread by the media. Even if these changes are only temporary, they could negatively impact a campaign carried out under this umbrella.

(3) *What are other clear European attributes with ambiguous, i.e. both positive and negative connotations?*

➤ **Tradition**

Tradition is probably Europe's clearest attribute: regardless of the students' destination and origin, all students ranked the US first for dynamic issues (quality of laboratories, most modern and innovative universities) and Europe for the most traditional universities. Matching the interview results, tradition may well be linked to the quality of higher education in Europe, or to European cultural traditions.

Also tradition needs further attributes and explanation. It may have positive (quality) but also negative (inertia) connotations, especially as students clearly do not perceive Europe as an innovative region. It should be made clear that tradition does not exclude dynamic developments, modern teaching methods and advanced technology, but that these apparently opposed poles build upon and complement each other.

➤ **Diversity of cultures and languages**

Overall, Europe's diversity of cultures and languages is perceived as attractive and enriching. However, there are striking arguments which clearly speak **against** using it as part of a global brand:

- There is an underlying negative perception in the Asian target countries, where substantially more respondents perceived the diversity of languages as a barrier to communication and a diversity of cultures as confusing;
- Although diversity was mentioned as one of Europe's strengths by some Asian interviewees, the majority considered the "abundance" of cultures and languages as an obstacle;
- Culture- and lifestyle-related criteria are least important in the decision for a destination country, especially in the case of Asian students.

In Latin America, all diversity issues were perceived as rather enriching and partly even as Europe's main strength. Therefore, diversity could be used as a selling point in a campaign tailor-made for Latin American countries. But it would not be wise to use it for a global brand.



(4) *For what aspects are perceptions mixed? Are there misperceptions which can be turned into an asset?*

➤ **Reputation and employability of degrees**

The perception of the reputation and employability of European degrees was mixed: most respondents were convinced of the worldwide recognition of European degrees and of their usefulness both for an international career and a career in their home country. At the same time, United States degrees are seen as stronger especially by students from Asia.

Students aiming to study abroad are mostly career-oriented and the employability and reputation of degrees is essential to their decision for a destination. Even if European degrees only play second fiddle, they play it well in the perception of international students. A brand should build on this solid reputation and on a promising perspective: internationally compatible Bachelor and Master degrees (the Bologna degrees) which are being introduced all over Europe.

Other arguments could be used in this context: European industry, its strength in some sectors and worldwide presence could be one of them, testimonials another, accreditation by national authorities and professional bodies a third. Finally, related issues should be addressed, for example the difficulties in staying on and gaining work experience in Europe after graduation (see below).

➤ **Affordability**

Free or low tuition is seen as an important asset by international students and hence is something that marketing should definitely address. However, marketing Europe as an affordable destination may prove difficult for various reasons:

- Most international students do not perceive the majority of European countries as an affordable destination regarding both living costs and tuition fees. Even if Europe is perceived as more affordable than the US, Australia is perceived as most affordable destination, especially by Asian students.
- Within Europe, living costs and tuition fees vary widely. It would be difficult at best to find an attribute valid for the entire region.
- Even countries which are renowned for providing education for free, like the Nordic countries, are facing discussions over the introduction of tuition fees for non-European students. In this context, it would not be appropriate to use “free education” for marketing purposes.
- The interviews in the target countries confirmed that the increasing fee burden for non-European students does not remain unnoticed in the students’ home countries.

Overall, affordability should rather be addressed in terms of “value for money”, and providing information on the real level of living costs, tuition fees and possible sources of financing, in order to counterbalance misperceptions.

## ➤ **Accessibility**

Europe is considered a relatively accessible destination regarding access to higher education and visa regulations. Overall, accessibility could probably be used as a selling point but would need explanation.

- For **access to higher education** - recognition of the students' home qualification, low bureaucracy, simple admission procedures – perceptions are mixed. Although Europe is assessed quite positively, this is similar for Australia and the US, and many respondents did not seem to have a clear opinion. This picture reflects in the first place a lack of information, and secondly a high degree of diversity within Europe (and all other destinations): access to higher education is surely not equally smooth in all European countries. Hence, if accessibility of higher education were to be used as a selling point, it would need to go hand in hand with better information and improvement of admission and support structures on the European supply side.
- The picture is much clearer for **visa or country accessibility**. The survey results undoubtedly place Australia and Europe before the US for the “best chances of obtaining a visa”. Even students already studying in the US thought that Europe and Australia were more accessible destinations. However, this is not an advantage that should be taken for granted: interviewees were aware that immigration regulations were becoming stricter; and that there were strict limitations to stay on in Europe after graduation. If European immigration regulations are not tailored to include special windows for foreign students and graduates, Europe could soon stay behind – especially as United States institutions and authorities are making considerable efforts in advertising the US as an open and welcoming destination.

Overall, the perceived difficulties in obtaining a visa for the US surely result in an advantage for Europe (and Australia). Although it is, for obvious reasons, difficult to use “ease of access to European visas” as a concrete selling point, “accessible” could be used as wider concepts in European marketing activities.

### ➤ **Open and welcoming**

Also with regard to the Europeans' open and welcoming attitudes, perceptions were mixed. Overall, Europe was seen as a welcoming destination – less than Australia but more than the US. Chinese and Indian survey respondents, who represent the biggest international student cohort, saw Europe as an open-minded and peaceful place.

However, there are some indications that “open and welcoming” cannot be taken for granted as clear European strengths to build a brand on:

1. Only about 60 percent of the survey respondents thought that their European destination was welcoming, and the majority of respondents did not see Europe as lively or tolerant.
2. There was no homogeneous image of Europe in this respect: the major destinations, especially Germany and the UK, were seen as less welcoming, whereas smaller destinations like the Netherlands or the Nordic countries ranked as high as or even higher than Australia.

Open, welcoming and accessible lack foundation as strong unique selling points in a European brand. However, they should be addressed by specific campaigns carried out under the European brand, and they should be addressed in information material. For a society that sees itself as diverse, open and multicultural, this is a judgement that needs to be corrected. European marketing activities should address this issue, and work on Europe's reputation and integrity as an open and tolerant society.

#### *(5) What are Europe's main disadvantages?*

Europe's perceived weaknesses cannot simply be ignored if Europe aims to enhance its attractiveness as a study destination. They can be addressed in a threefold way:

1. Marketing can argue against a perceived weakness and try to counterbalance it;
2. Information on existing initiatives, improvements or examples that respond to the problem in question can be elaborated and diffused;
3. The problem can be addressed on the supply side, i.e. action can be taken to correct a weakness.

Ideally, the three approaches would complement each other.

Especially in the Asian countries, the major single disadvantage of most European countries was that:

➤ **English is not the mother tongue**

Students and other stakeholders in the Asian target countries attached high importance to studying in an English-speaking destination. Enrolling in an English-taught programme in a non-English-speaking country was not regarded as a true equivalent, but at least as an alternative. Furthermore, the interviews showed that information about English-taught programmes in non-English speaking countries was not widespread. Especially in countries where the language is not English, French or German, English-taught programmes were seen as important.

On the other hand, even in the Asian target countries, some respondents/stakeholders considered Europe's diversity of languages as an opportunity to learn another language and gain an advantage. At the marketing level, this perception should be reinforced. Marketing should make clear that students can at least enter European higher education in English, and, in the context of specific strategies, it should capitalise on the existing offer of English-taught programmes.

➤ **Difficulties to work during studies and to stay on and work after graduation**

Bad prospects for getting a job and staying on after graduation and little work opportunities while studying were seen as one of Europe's major disadvantages, especially by students and interviewees from Asia. Adapting immigration regulations to provide special windows for foreign students to stay on after graduation and gain some work experience, and creating work and placement opportunities during the studies are all important to increase Europe's attractiveness as a study destination. At the same time, this is of no use if it is not well communicated: information on existing and upcoming opportunities should be made available to international students.

➤ **Differences between educational systems and their quality, especially between core countries and periphery / old and new member states**

Europe is still perceived as very varied, and this perception can hamper the establishment of a brand especially with regard to selling points like quality. There were frequent doubts about the "consistency" of the quality of education across Europe. Partly, quality education was only associated with Western Europe or with a range of individual higher education institutions in specific fields. The Bologna Process - if known - was not seen as transparent and there were doubts if it would really solve the discrepancies in European higher education. For a European brand to be successful, it is crucial that all member states and higher education institutions work on the quality of their education offer, and that they invest in their quality image.

Differences between the member states will always persist. If used in a meaningful way, they can also be an asset. Targeted marketing campaigns under the European umbrella should be run by groups of countries including those with a lower visibility and very deliberately capitalise

on their specific assets. Brought together under one European umbrella, the different qualities of member states will enrich the image of European higher education and widen the choice Europe can offer to international students.

*(6) How can Europe distinguish itself from existing brands?*

In general terms, many of the assets that could be used by Europe (and distinguish it from the US) also apply to and have been used successfully by Australia: affordability, safety, welcoming attitudes, accessibility. However, Australia does not have Europe's academic tradition and although marketing initiatives are now focusing on Australia's quality image, the study shows that it is not perceived as a destination offering a quality of education comparable to the US or Europe. The US, on the other hand, is not seen as an accessible and welcoming or as an affordable destination and, like Australia, it does not have Europe's tradition to build on.

With regard to existing brands of individual European countries, the discussed attributes are also used by a range of European countries and would hence not contradict their individual brands. Further, individual attributes could be filled with a European content to make them different: European academic traditions are more varied than one national tradition. Promoting studies in Europe as a starting point for an international career can rely on more arguments, more national industries and potential multinational employers, more labour markets.

Along this line, one item that could be added to the list of Europe's selling points is **choice**. Finding "the right programme" was one of the most important issues in the students' destination choice. Choice is translated and applied diversity, it implies freedom of choice, a broad offer, multiple possibilities – something that Europe is surely able to offer.

**The three unique selling points to constitute a European brand should be quality of education, tradition and internationally compatible degrees.**

These three attributes

- are a unique combination;
- include clear European features (tradition, European degrees);
- address aspects which are of utmost importance in the students' decision to pursue a degree abroad and in their destination choice (quality and employability);
- are unlikely to undergo sudden changes;
- cover common factors of and are likely to be assumed by all European countries.

**Safety, accessibility and welcoming attitudes, and affordability should be used as selling points in specific campaigns under the European brand.**

Safety, accessibility and welcoming attitudes, and affordability are all issues that European marketing should address. Safety is perceived as a clear European strength and it is important in the students' choice of destination, but it (and its perception) can be subject to unexpected changes. For the other attributes, there is either no clear positive perception, or a quality is not clearly associated with Europe but only with specific countries. For these reasons, they should be addressed in the context of specific campaigns and information materials rather than be part of the brand, and they should be shaped and presented in a way that counters negative associations and creates a European image.

**Europe's perceived weaknesses, especially language and the lack of work opportunities after graduation, should be addressed in specific campaigns and information materials.**

Also Europe's perceived weaknesses should not be part of Europe's brand. They should however be an issue in specific marketing activities run under the brand: the existing offer of English-language-taught programmes, for example, should be widely promoted by the relevant countries, as well as special measures to provide students and graduates with work opportunities. Efforts aiming at the improvement of these issues should be clearly communicated.

### **1.3. *Can one and the same brand and strategy be used worldwide and for all target groups?***

**One common brand is necessary in order to create a clear European identity. Under this common European umbrella brand, tailor-made campaigns may be run for different target countries, regions and target groups.**

In the same way as specific campaigns may be different depending on the destination countries promoting themselves under the European umbrella, different campaigns should be run depending on the target group and country. The differing survey results for the six target countries included in the study, especially for Mexico, Brazil and Russia on the one hand and for the three Asian countries, on the other, suggest such a use of different approaches.

For example:

- A campaign with the aim to recruit students in Brazil could focus not only on quality of European higher education but also on the diversity and richness of European cultures and languages and on the advantages of mastering an additional language on top of English. It could present Europe as elegant, trustworthy, organised and characterised by a cooperative mentality.
- Contrary to that, a campaign aiming to recruit students in China could emphasize the broad offer of English-taught programmes in non-English speaking Europe, the quality and affordability (value for money) of its higher education. It could present Europe as a safe and peaceful place, with an elegant lifestyle and open-minded people.
- A campaign tailor-made for Russian students could focus on the longstanding quality and prestige of European higher education and on historic, political and economic links between the EU and Russia. It could depict the EU as an organised and modern society.

Like specific target countries and regions, the campaigns run under the European brand should focus on particular pre-defined target groups in terms of level and field of study. If the aim is to attract postgraduate students in Engineering, a campaign will look different from one aimed at Art students at undergraduate level.

Finally, individual member states should capitalise on their links with specific sending countries. It is beyond doubt that Spain and Portugal have a competitive advantage in Latin America, France in numerous African countries, Germany in Russia, the Netherlands in Indonesia. These bilateral relations should be further developed in specific campaigns run under a common European brand.

## 2 The sender

**A clearly identifiable European “sender” is essential in order to reinforce Europe’s identity on the global education market and coordinate campaigns carried out under the European umbrella.**

All country reports underlined the lack of or the confusing information policy regarding study opportunities in Europe, and emphasized the importance of having a concise information campaign with a clear sender and message. The following “set-up” would be most appropriate to resolve this problem:

- (1) A widely promoted and carefully administered Internet portal;
- (2) A European office with coordinating functions that looks after the brand and runs the Internet portal;
- (3) Cooperation with the member states in the implementation of marketing campaigns.

First, an **Internet portal** providing information on higher education opportunities in Europe is essential to reach the students, and should be the main tool to support a European brand. The portal should

- be offered in English and possibly in the main languages of the target group (Chinese, Spanish, Russian, etc.);
- build on the brand and have a clear message;
- have a clear addressee;
- have a clear sender (i.e. an email address students can write to);
- link to national European web portals providing information on study opportunities;
- be used on all print material used in the campaigns.

The Internet portal should build on the characteristics of the brand and provide, in a journalistic manner, “soft information” and explanations on the assets used by the brand (e.g. quality of education, tradition, etc.). This way, it can refer to existing knowledge in the target countries: for example, Europe’s famous old universities, like the Sorbonne, Cambridge and Oxford, Heidelberg, Salamanca and Bologna, were mentioned by interviewees in different target countries as evidence of Europe’s prestige and quality education. On the other hand, it is also possible to use examples from different European countries and introduce new concepts or correct misperceptions.

The portal should not give details of any specific study programmes, nor should it be a search engine for individual programmes (like, for example, Ploteus). Instead, it should link to “hard information” provided on the information portals run by individual European countries, where study opportunities at different levels, programmes on offer, etc. are presented. Hence, the



responsibility over this information remains with the individual countries or even higher education institutions, if the country portals ultimately link to them. There should be minimum standards for the quality of both the listed information portals and the study offers promoted by them.

Second, it is recommendable to create a **European office with coordinating functions**. For several reasons, it is preferable to create an independent body: first, engagement in marketing requires a body that is able to move quickly and react on market developments. Commission structures, for example, would be too slow and too much bound by administrative restrictions to cope with this requirement. Second, a separate and newly founded body would make sure that it is seen as truly independent and that it would give equal treatment to all member states running campaigns under the European umbrella. The tasks of this office should include:

- managing the European brand;
- running the information portal;
- coordinating campaigns of different European countries run under the European umbrella;
- organising training courses on marketing-relevant themes for European higher education institutions, possibly in cooperation with national internationalisation and marketing agencies.

The office should cooperate with existing offices of European internationalisation agencies, embassies, European representations, commercial agents etc. worldwide, and hence ensure that students have access to personal contact, next to the information provided online. It should outsource the actual running of specific operations and campaigns. Instead, it would be the “wire-puller” behind jointly organised campaigns of individual member states, working along the lines of the method of open coordination.

Third and consequently, **cooperation with and between the member states** and with other European countries (EFTA, Switzerland, accession countries) is essential to make a European brand work. The member states are the ones carrying out the “work on the ground”: they are the ones who mainly implement the marketing campaigns run under the European umbrella. Some of them already run campaigns on their own or have joined forces, like the PEER consortium, to organise European fairs. They would run these campaigns in a similar way, but under the European umbrella brand, promoting one European identity complementary to their own national brands. Secondary to the brand, other concrete selling points specific to the countries running a campaign (for example English-taught programmes, affordability etc.) should be used.

The member states are ultimately responsible for the information they provide on study opportunities in their countries, and for the campaigns they run. In order to ensure a representation of less active member states, incentives should be provided to national-level organisations to build up national information portals, and to higher education institutions to provide information on their institution, context and programmes on offer at least in English.

These three measures would achieve a delicate balance: reinforcing Europe’s identity in the global education market and providing students with a clear sender and contact point, while respecting the individual brands and marketing activities of European countries. At the same

time, they represent an ideal state of affairs, which may be subject to budgetary restrictions: for a European brand to be successful, the Union should provide at least initial funding for a European body, a European-level marketing strategy and brand. The less active member states, in turn, should provide at least initial funding for national networks in charge of generic marketing.

### 3 The context

**To create and promote a European brand is a necessary but not sufficient condition to enhance the attractiveness of European higher education:**

European higher education needs to be of sound quality if it is to be successfully promoted.

It is vital to implement flexible immigration and visa policies allowing international students to stay on and work after graduation and to provide them with work opportunities.

English is the key, especially in the less popular destination countries.

The long-term success of a European marketing strategy will not only depend on the overall quality of European higher education, but also on its capacity to diversify.

**European higher education needs to be of sound quality if it is to be successfully promoted.**

A first and overarching measure to enhance Europe's attractiveness is the continuing and vigorous implementation of the Bologna reforms and Lisbon strategy at all levels. However, a mere following of "technical instructions" bears the danger of missing the overall objectives. One of them, and a crucial one, is quality, and the success of a European marketing strategy will depend on the quality of the "product".

The European Union, its member states and higher education institutions should therefore continue and reinforce initiatives in quality assurance, accreditation and benchmarking, but they should not limit their efforts to these measures. Providing higher education institutions with the necessary autonomy to select their students, to offer institutional scholarships to highly qualified international applicants, to access alternative sources of funding and to recruit quality teaching and research staff is equally if not more essential to reach and ensure quality in higher education. The same goes for the creation of special immigration and financial conditions for highly qualified foreign teaching and research staff.

**It is vital to implement flexible immigration and visa policies allowing international students to stay on and work after graduation and to provide them with work opportunities.**

Employment opportunities in the destination country and at home play a major role in the international students' destination choice. Europe will neither be the most competitive knowledge economy in the world nor the most favourite destination of students and scholars if the door is slammed in their face. The Union should hence further progress on the development of common European immigration regulations for young researchers and extend existing initiatives to include foreign undergraduate and postgraduate students. National authorities should revise their regulations accordingly. Along the same lines, the Union and the member states should progress on common European regulations for work permits for non-European students and graduates, and create incentives for European industries to employ international students (trainees) and graduates.

**English is the key, especially in the less popular destination countries.**

A third issue is language, which is an issue mainly but not exclusively for the non-English-speaking European countries. First and foremost, it is crucial to further promote the introduction of English-taught programmes at least outside the major European destinations. The results of this study clearly suggest that this is the only way to attract international students e.g. to the new member states. A second measure is the provision of language courses for international students prior to and during their studies. Third, the teaching of European languages should be promoted in the main non-European sending countries. Especially in Asia, foreign language competencies were limited and in most cases restricted to a (mostly passive) knowledge of English. Fourth, language is also an issue in the provision of information: nothing is more suitable to put international students off than a series of links in English which lead to the description of a study programme in a language they do not understand. It is crucial that higher education institutions and national organisations provide full information on their study offers and services online and (at least) in English.

**The long-term success of a European marketing strategy will not only depend on the overall quality of European higher education, but also on its capacity to diversify.**

It is an impossible (and counterproductive) dream for every higher education institution and country to reach academic excellence in all fields. While the overall aim should be to achieve solid quality across the board, European countries and higher education institutions should attempt to find their niche and invest into their specific strengths. This way, a European brand will escape the risk of becoming a lowest common denominator in the negative sense of the term. Instead, it can be a flagship of a strong and diversified offer, standing for quality education.