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"Trends in international student mobility: prospective students' choices, expectations and online attitudes"

Relatore: Candidata:

Dott. Alessandro Gandolfo   Monica Vannozzi

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Alla mia nonna..

che mi ha sempre volute dottoressa.

Non vesto col camice bianco

ma sempre dottoressa sono

e ne sará contenta.

Contents

Introduction

International mobility of students is not a new phenomenon and it evolved over time. Already in the Middle Ages in Europe foreigners accounted for 10% of the student enrolment across the continent[1]. A much higher figure compare to the share of foreign students in higher education enrolment worldwide today, which is about 2%. However, the number of international students today is above 4 million worldwide, compared to few hundreds in the medieval Europe. At that time, students travelled abroad simply because there were no institutions where they lived. Today, there are over 17 thousands institutions of higher education worldwide and opportunities for access have been vastly improved since then.

In recent years, the field of international student recruitment has come to occupy an ever more central position for higher education strategists and decision-makers. This diverse, dynamic and increasingly competitive sector is of significant economic value for individual higher education institutions and also for wider national economies, both in established study destinations and emerging ones.

The division between recruiting and target recruitment countries seems to be blurring since several countries are key recruitment countries for other nations, while they are also actively recruiting foreign students themselves.Amongst the emerging body of research into the most effective strategies for international student recruitment, there's growing recognition of the importance of targeting recruitment messages to more specific segments of the international student market. [2]

The '*art of international student recruiting*', as defined by Negar C. Davis, director of International Student Services at The Pennsylvania State University in 2004, is progressively more complex and creative, challenging stakeholders to establish and maintain an effective presence across multiple platforms (both online and offline),

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[1] *'Higher education and international student mobility in global knowledge economy', Kemal Kürüz, 2008*
[2] *See, for example, 'Student Segmentation for an Effective International Enrollment Strategy', WES Research & Advisory Services (September 2013) www.wes.org.*

create compelling messages targeted to different and distinct target groups – and at the same time work towards integration, brand consistency and of course budget efficiency.

Those involved in international student recruitment need to know more about the priorities, needs and decision-making processes of their target audiences but yet, the body of knowledge available about international applicants and their motivations, choices and attitude towards online resources remains limited.

This research aims to contribute to this essential field, specifically focusing on international students applying for degree courses at graduate level.

The research was commissioned by QS Quacquarelli Symond, an international provider of educational services, who has been active in the educational sector for more than 20 years. The data was collected through two global surveys, one via online questionnaire hosted on QS' website *topuniversities.com,* and one via paper questionnaires submitted at Qs World Grad School Tour, a series of educational fairs for graduate students applying for master's or PhD abroad that QS organise worldwide.

The results provide insights into applicants' preferred study destinations and subjects, the most important factors they identify when choosing about their education, their expectations and hopes for the future and their digital preferences when researching about higher education online.

Chapter 1: objectives and literature review

1.1 Focus of the study

The purpose of this research is to provide an in-depth understanding of the trends and issues related to international student enrolment and to add to the body of knowledge available about international students' preferences, expectations and online behaviour specifically at graduate level.

The research aims to fill in some gaps, providing insights into students' preferences, motivations and expectations but also how prospective students approach their online search, the types of online platform they value most, the tasks for which they are most likely to use different types of resource, and the information they find most challenging to access.

In fact, while universities know the online sphere is essential when communicating with prospective students, there's little information available about what are top students' choices and expectations and how they use the internet during their research and how they would prefer to communicate with universities.

The information provided should be of interest and value to those directly involved in international student recruitment, as well as anyone with an interest in the internationalization of higher education and those with an interest in the ongoing evolution of digital technology and our relationships to it.

Based on the research findings, institutions should examine the decision-making process of prospective students, experiment with various recruitment models, and adopt strategic plans to maximize the return on investment in international student recruitment. Therefore, the information provided should help those engaged in international student recruitment to ensure the messages and resources they provide are tailored to match applicants' driving concerns and priorities.

The research consists of three chapters.

This *first chapter* sets out the objectives of this study and gives an overview of the main factors that influence international student mobility in general, offering an up-to-date overview of globally observable trends.

The *second chapter* presents the outputs of the study, as results of the analysis of two separate surveys which have been conducted.

The former aims to study international students' preferences, motivations and expectations focusing on:

- Top study destinations
- Main motivations when choosing a destination
- Top preferred subjects of study
- Professional goal to achieve in 10 years' time
- Target salary
- Expected working hours per week.

The second survey sets its focus on students' attitude towards online when researching about higher education options, identifying:

- Importance of online and offline resources
- Devices most used
- Importance and usage of the different online resources
- Social media channels most used
- Easiest and hardest-to-find information online
- Most used and preferred methods of getting in touch with universities and preferred methods of being contacted by universities and institutions.

The *third chapter* offers the conclusions of this study and considers the potential implications of the international student mobility phenomenon to help institutional leaders and administrators make informed decisions and effectively set priorities.

Although student mobility is expected to grow, institutions have to compete hard for talented and self-funded students. A better understanding of mobility trends and their relationship to the applicant pipeline will help institutions channel their efforts and also national governments to identify the emerging implications of these developments and set out appropriate policies and strategies.

Institutions that are strategic, deliberate and informed in their recruitment efforts will maximize the investment in an efficient manner.

1.2 Research questions

According to the objective of this research, the study aims to answer to the following research questions:

- **Are prospective students considering a broader range of destinations when applying for a graduate degree abroad?**

- **Have prospective students' main motivations for choosing a destination remained relatively stable in the course of the years?**

- **Does gender influence postgraduate career expectations?**

- **Are online resources considered indispensable when researching options about higher education?**

- **Are the youngest applicants more online-oriented when it comes to getting in touch with universities and institutions?**

1.3 Literature review

1.3.1 Definition of Higher Education Institutions

According to the 'Higher Education Act of 1965' enacted by the Senate and House of Representatives of the United States of America in Congress assembled, an Institution of Higher Education is a school that:

- Awards a bachelor's degree or not less than a two year program that provides credit towards a degree or,
- Provides not less than one year of training towards gainful employment or,
- Is a vocational program that provides training for gainful employment and has been in existence for at least two years.

And must meet all three of the following criteria:

- Admits as regular students only persons with a high school diploma or equivalent; or admits as regular students persons who are beyond the age of compulsory school attendance
- Public, Private, or Non-Profit
- Accredited or pre accredited and is authorized to operate in that state

1.3.2 History of international academic mobility worldwide

The Sophists are considered the first example of international academic mobility[3]. Appeared around 445 BC, the Sophists were itinerant, professional teachers who travelled in the Greek-speaking world, teaching the children of the wealthy, which they were paid for.

The Shih in China are liken to the Sophists in Greece. They were wandering scholars who sold their knowledge to warring rules in China in the fifth century BC[4].

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[3] *'The peripatic professor: the internationalization of the academic professor' Welsh, 1997*
[4] *'Academic and scientific traditions in China, Japan and the West' Narayama, 1984*

The Hellenic world was united by a common language, Greek, and students and scholars from all over the region travelled to Athens, intellectual capital of the world at the time. Even Cicero (c. 106-43 BC) was a Roman politician who studied Greek philosophy to gain advantage in politics. In the waning years of the Hellenic world, Alexandria rose as intellectual centre: the Museum and library served as a centre for studies and research for centuries, attracting students and scholars from all over the Hellenic and Roman world. In the period 750-850, Abbasid caliphs established translation centres and libraries where students were exposed to the work of Plato and Aristotle and learned methods such as dialectic, logic and rhetoric. Baghdad emerged as intellectual centre attracting students from far away as Central Asia.

The university instead evolved as uniquely Western European institution in the Middle Ages. The works of Greek philosophers and Muslim scholars became a major part of the curricula transforming the medieval university in an international institution, with students and teachers coming to study and teaching from all over Europe. A look into the oldest universities, such as Bologna, clearly shows the international character of the medieval university. The University of Bologna was organised into two guilds: Citramontana and the Ultramontana. The former comprised students from the Italian peninsula; the latter included students from the north of the Alps[5]. The universities in the medieval period had a common teaching language, Latin, and a similar organizational structure which facilitated students and teachers mobility. The phenomenon has been called the European "academic pilgrimage".

Additional factors supporting international academic mobility in the Middle ages were:

- Universities existed in only few places and students had to travel, especially from Scandinavia, Ireland, Scotland, Eastern Europe.
- A travel culture existed in Europe.

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[5] *'A History of the university in Europe. Vol. I: Universities in the Middle Ages' Hilde de Ridder-Symoens 1992*

- The church provided support, especially to students from the newly Christianised lands.
- Different institutions were prestigious in different fields of study, such as law in Bologna, arts and theology in Paris and Oxford.
- A network of roads was built with a revival of international trade.
- Privileges were granted to travelling students and teachers, such as exemption from custom dues and tolls, and protected from penal actions by local authorities.

As universities spread all over Europe, studying at the nearest or regional university became the preferred option and that is why in the fourteenth and fifteenth centuries international academic mobility started to wane and European higher education became increasingly regionalised.

The total enrolment and the number of foreign students in European universities started to increase again in the 1600 with the advent of humanism. At this time, foreign travel came to be considered as educational value in humanistic studies, but also the interest in learning other languages such as French, Italian, Spanish and Greek increased as well as the interest in the studies of natural sciences as part of medical sciences or in addition to law. Students from the Alps flocked to Italy to source for knowledge and culture increasing foreign enrolment in some Italian universities by 50%. The so-called first transport revolution made intercontinental sea voyages possible and took the universities to the newly discovered lands: the first university outside of Europe was founded in Santo Domingo in 1538, followed by the one in Manila in 1611 and other in Latin America and the Middle East. The person who epitomises international academic mobility as such is Desiderius Erasmus (1466-1536), father of the Reformation: born in Rotterdam and educated in a humanistic school, a monastic school, the University of Paris and the University of Turin, but mostly self-taught, he spent time in many universities in France, England,

Italy, Germany Belgium and Switzerland spreading humanism across Western Europe[6].

With the Reformation, Protestants founded 42 universities in Northern Europe and Catholics founded 95 between 1500 and 1800. Thus, this changed the nature of international academic mobility, with Protestants attending the Protestant universities and the Catholics attending the Catholic ones. However, a third group of universities emerged, which were called "tolerant universities" and became new centres of excellence and destinations for foreign students. Those were for example Siena, Padua, Montpellier and Leiden University. In general, Catholic universities were more resistant to curricular reform and the Papal States required swearing fidelity to the Holy Roman Church, which cause a decline of foreign student enrolment in Italian universities.

The social composition of students began to change at the turn of the sixteenth century: children of aristocrats and urban merchants started to attend universities[7], aspiring to positions in the newly emerging state bureaucracies and diplomacy. At this time, international student mobility was an important aspect of university life, with foreign student enrolment across the continent averaging about 10% of the total.

International mobility started to wane again in the eighteenth century due to the European wars which were taking place but also to restrictions imposed by home governments on holders of diplomas from foreign universities in entering civil service and licensing to practise the regulated profession.

Rüegg[8] (2004) describes the European university scene at the turn of the nineteenth century as follows: "*Until the French revolution, European universities, although divided by their dependence on Catholic or Protestant sovreigns, were organised in*

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[6] *http://www.britannica.com/EBchecked/topic/191015/Desiderius-Erasmus*
[7] *'University development in the seventeenth and eighteenth century: a comparative study' Hammerstein 1983*
8 *'Universities in the nineteenth and the early twentieth century (1800-1945), Rüegg 2004*

the same way and taught more or less the same branches of knowledge in four or five classical faculties. The structure and content of higher education converged to such a point that Rousseau complained in 1772: 'Today there are no longer any French, Spanish German or English, in spite of what they say, there are only Europeans. They all have the same tastes, passions, morals because none of them has received a national moulding from a particular institution'."

However, with the French revolution all changed: all existing French universities but also those in the countries Napoleon had conquered were closed. On May 10th, 1806, Napoleon founded the Université de France and the national system comprised professional schools at the tertiary level and lycees at the secondary. In 1789 there were 143 universities in Europe, in 1815 only 83 were left. Following Napoleon's defeat, it was the philologist and diplomat Wilhelm von Humboldt's views which were adopted. von Humboldt's views on the structure of the university are collectively expressed as the "unity of teaching and research": his lasting legacy has been the introduction of research as the second function of the university in addition to teaching. Germany emerged as the centre of academic world in the second half of the century, where research became an integral function of universities.

The nineteenth century witnessed the orientation of the higher education towards utilitarian purposes and the spread of universities to Eastern and Southeastern Europe, to the Middle East, Africa, the Far East and the Oceania[9] and institutions of higher education had spread to almost all parts of the world by the first half of the twentieth century. Governments viewed them as key instruments for development, socioeconomic progress, nation building and social cohesion. Indian students started going abroad from 1870, mainly to England (India's first prime minister, J. Nehru, was

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[9] *'International Handbook of universities' Perking (2006)*

an undergraduate at Cambridge)[10]; while many Russian young men were sent to study in German and Swiss universities[11].

International academic mobility continued to grow until World War I due to the following factors:

- Establishment of the scientific disciplines and the emergence of the German research university as international model.
- Discrimination against Jews and women: many Hungarian and Russian Jews and women left the country to study abroad.

By the end of the nineteenth century Britain, France and Germany had emerged as leading academic centres of the world. The outward mobility of teachers from Europe and the inflow of students to Europe increased during the era of European colonisation, when European institutions were implanted in the colonies[12]. The tables below[13] shows the number of foreign students enrolled in French and German institutions of higher education.

Table 1: Foreign Students in France in the late nineteenth and the early twentieth century - Klineberg (1976)

France		
Year	Number of students	Share of enrolment %
1899	1,635	5.7
1916	1,945	15.4
1925	8,789	16.5
1928	14,368	22.3
1936	9,061	12.2

Table 2: Foreign Students in Germany in the late nineteenth and the early twentieth century - Klineberg (1976)

Germany		
Year	Number of students	Share of enrolment %
1860	753	6.1
1880	1,129	5.2
1910	7,088	10.7
1930	7,422	5.7
1940	1,927	4.3

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[10] *The diffusion of European models outside Europe in 'Universities in the nineteenth and the early twentieth century (1800-1945)' Shils & Robert (2004)*
[11] *Medicine, Luyendijk-Elshout (2004) in 'Universities in the nineteenth and the early twentieth century (1800-1945)' Rüegg (2004)*

[12] *Internationalisation and exchanges in a globalised university in 'Journal of studies in international education', Altbach & Teichler (2001)*
[13] *'International student exchange: an assessment of its nature and its prospects' Klineberg (1976)*

As shown in *Table 1 and 2*, foreign enrolment in French institutions made up over a 20% of the total tertiary enrolment in the country just before the Great Depression of the 1929, from which date on, with the onset of the global economic crisis and the looming global conflict, it started to decreased noticeably.

By 1910, foreign student enrolment in Germany accounted for 10.7% of the total tertiary enrolment of the country: European students made up 92.3% of the foreign enrolment, followed by Americans 4.6% and Asians only 2.6%. By 1936 the share of European students had dropped to 71.3% and those of the Americans and Asians had increased to 11.5% and 10% respectively.

World War II obviously had a devastating effect on international student mobility worldwide. By 1940, the number of foreign students in Germany had dropped to less than 2 thousands; however, it started increasing again as Germany started to recover from the debacle of the war.

Of the international academic mobility that took place between the nineteenth and twentieth centuries, none had more far-reaching consequences than that which involved American students who went to study in German universities. Between 1815 and 1914, there was an extraordinary migration of about 10 thousands American students to Germany. Until the turn of nineteenth century, American universities were teaching institutions – small liberal arts colleges. As students returned from Germany and took up positions in universities, this all began to change: the idea of the unity of teaching and research became central to the new universities, such as MIT, Cornell and Chicago. By the beginning of the twentieth century, American universities had transferred and adapted the German research university model to build what would grow into the largest and best higher education system in the world today. The innovations made in the process were the following:

- The graduate school was established.
- Departments were established as the basic academic unit.

- The PhD degree was introduced, which included research and coursework.
- Community service was introduced, which included consultancy to continuing education of adults.
- Students' services and admission offices were established and undergraduate and graduate admission procedures were standardised.
- Universities built their own libraries and museums.
- Degree programs in a wild variety of professional, vocational and technical fields were established.

The U.S. institutions soon became centres of excellence and attracted scholars and scientists from all over the world. The original colonial model, imported from England, was combined with the German research university idea and the American conception of service to society, to produce the modern American university.[14]

Following the World War II, greater emphasis began to be placed on vocational and technical education. The U.S. Office of Scientific Research and Development was established to channel the scientific research potential of the country in support of the war effort. This was a major step in the transformation of the United States from an industrial to a knowledge-based economy and major factor in the United States assuming an undisputed leadership role in the world. This was the main reason why English language became the global language of communication in science and of the increasingly internationalised higher education in the global knowledge economy, with the United States as its main hub.

While the nineteenth century witnessed the "nationalisation" of higher education with the emerge of the nation-state, the second half of the twentieth century saw the interaction of governmental policies with the views espoused by international organisations. The academic exchanges have been considered as foreign policy instruments worldwide and their use accelerated after World War II. New programs

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[14] *'Tertiary education and management' Altbach (2004)*

were started and many scholarships were established, both by international organisations such as NATO and EU, and by governments.

The Bologna Declaration of 1999 was born by the commitment of ministers responsible for higher education from European countries, to reform their higher education systems in order to create convergence at the European level. The objectives of the Bologna Declaration are:

1. Adoption of a system of easily readable and comparable degrees.
2. Adoption of a system essentially based on two main cycles, one at the undergraduate level with a minimum duration of three years, and the other at the graduate level with automatic qualification for the second cycle upon the completion of the first.
3. Establishment of a system of credits, such as in the European Credit Transfer and Accumulation System (ECTS) as a proper means for promoting and expanding student mobility.
4. Promotion of mobility for students, teachers, researchers, and administrative staff, recognition and valorisation of periods spent in a European context researching, teaching and training without prejudicing their statutory rights.
5. Promotion of European cooperation in quality assurance, introduction of standards of accreditation and peer assessment.
6. Promotion of the necessary European dimensions in higher education, including joint degrees.

The ERASMUS (European Community Action Scheme for the Mobility of University Students) was established in 1987 with the aim of increasing student mobility within the European Community. In 2012-2013 nearly 270,000 students benefitted from the

EU grant to study abroad. 60% of those students were female, 67% were studying at undergraduate level and by far the most popular destination was Spain.[15]

The Fulbright programs instead was created in 1946 and funded by the United States. Its first participants went overseas in 1948 and today 250,000 awards have been made with operations in 144 countries.

International academic mobility has comprised not only the movement of people, but also the movement of institutions and programs across borders. Throughout history until today, it has been driven by not only academic considerations, but also by cultural, political and economic rationales.

1.3.3 International student mobility phenomenon

Internationalization of education has grown massively over the last three decades and its growth is expected to continue. The number of students enrolled outside their country of citizenship has risen from 0.8 million worldwide in 1975 to 4.3 million in 2011 and it almost doubled in the past ten years [16] [*Chart 1*]. UNESCO also predicted that the number of international students might rise approximately to 7 million by the year 2020.

Chart 1: Evolution in the number of students enrolled outside their country of citizenship, by region of destination (2000 to 2011)

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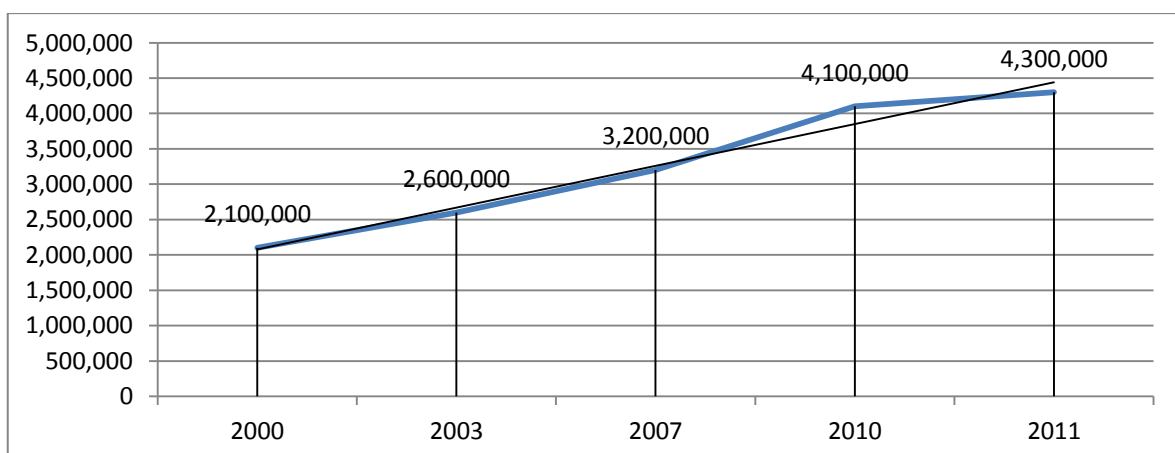
[15] *Another record-breaking year for Erasmus – press release, European Union Brussels 10th July 2014*
[16] *'Education at glance 2013: OECD indicators' UNESCO institute of Statistics (2013)*

According to the Organization of Economic Cooperation and Development (OECD), Eurostat and the UNESCO Institute for Statistics, international students' are "*those who travel to a country different from their own for the purpose of tertiary study*". Through the pursuit of high level studies in countries other than their own, students have the opportunity to expand their knowledge of other cultures and languages and to be equipped in an increasing globalised labour market. Some countries, especially in the European Union, have established policies and schemes that promote such mobility to foster intercultural contacts and help build social networks.

The division between recruiting and target recruitment countries is blurring since several countries are key recruitment countries for other nations, while they are also actively recruiting foreign students themselves[17]. International student mobility is so worldwide spread in both directions.

Even the United States, top leading worldwide study destination, are increasing their effort in both recruiting and fostering American students to study abroad. *"International education promotes the relationship building and knowledge exchange between people and communities in the United States and around the world that are necessary to solve global challenges",* said Evan M. Ryan, Assistant Secretary of State for Educational and Cultural Affairs. "*The connections made during international education experiences last a lifetime. International students enrich classrooms, campuses and communities in ways that endure long after students return to their home countries. We encourage U.S. schools to continue to welcome more international students to their campuses and to do more to make study abroad a reality for all of their students."* The number of international students enrolled in U.S. higher education increased by seven percent to 819,644 students in 2012/13, 40% more than a decade ago and the rate of increase has risen steadily for the past three years. The continued growth in international students coming to the U.S. for higher education has a significant positive economic impact on the country itself. International students contribute more than $24 billion to the U.S. economy,

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[17] '*International student recruitment: policies and developments in selected countries' Nuffic, January (2012)*

according to the U.S. Department of Commerce. About 72% percent of all international students receive the majority of their funds from sources outside of the United States, including personal and family sources as well as assistance from their home country governments or universities. Students from around the world who study in the United States also contribute to America's scientific and technical research and bring international perspectives into U.S. classrooms, helping prepare American students for global careers, and often lead to longer-term business relationships and economic benefits. [18]

In the 2011/12 academic year, 283,332 American students studied abroad for academic credit, a yearly increase of 3% percent. Study abroad by American students has more than tripled over the past 2 decades, from only about 71,000 students in 1991/92. Many campus leaders have shown that they are committed to ensuring that large numbers of their students have an international experience before graduating and the participation rate grows up to 70% in some campuses.

Student mobility is proven to be increasingly important in United Kingdom as well and internationalisation plans as a key action line of the Bologna Process are therefore a fundamental aspect of the emerging European Higher Education Area (EHEA)[19]. The Leuven Communiqué, adopted on April 29th 2009 by HE Ministers in Bologna countries, states that by 2020, at least 20% of graduating students in the EHEA should have had a study or training period abroad. Not only does outward student mobility feature more prominently in institutions' internationalisation strategies, but the government is also keen to see more UK graduates with the language and cultural awareness skills that come from having spent time studying or

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[18] *Open Doors Report on 'International Educational Exchange' by the Institute of International Education (2013) retrieved from http://www.iie.org/opendoors*

[19] *The Bologna Process, launched with the Bologna Declaration, of 1999, is one of the main voluntary processes at European level, as it is nowadays implemented in 47 states, which define the European Higher Education Area (EHEA). Members of the Bologna Process are the 47 countries, together with the European Commission, and the consultative members, namely the Council of Europe, UNESCO, EUA, ESU, EURASHE, ENQA, Education International and BUSINESSEUROPE. Every two or three years there are Ministerial Conferences organised in order to assess the progress made within the EHEA and to decide on the new steps to be taken.*

working overseas. In an interview with The Telegraph in August 2010, the Minister of State for Universities and Science David Willets said *"One of my aims is to try to encourage our undergraduates and postgraduates to study abroad. It would enrich the outlook of British students and make them more employable."*

In 2010, the UK Higher Education International Unit has estimated the number of UK students studying abroad at 33,000 and the most recent HESA (Higher Education Statistics Agency) data show that there are nearly 370,000 foreign students studying at UK universities. In other words, the number of foreign students in the UK is eleven times that of UK students abroad. Whilst the UK comes second (after the US) in the global list of 'receiving' countries for foreign students, it ranks 22nd as a 'sending' country. Put another way, whilst foreign students account for 15% of the student population in UK higher education institutions (HEIs), UK students abroad are only about 1.6% of the total population of UK students in higher education. The gap between foreign students studying in United Kingdom and UK students studying abroad is still remarkable, but efforts from governments and universities are made in order to reduce the gap further.

1.3.2 Postgraduate enrolment and career facts: an overview by gender

The 1963 report of the President's Commission on the Status of Women[20] states:
"*The difference in occupational distribution of men and women is largely responsible for the fact that in 1961, the earnings of women working full time averaged only about 60% of those of men working full time*."
The formal barriers that characterized much of the labour market for women in the 1960s have long gone. The same applies to universities and institutions that are no longer permitted to artificially restrict women's entry to educational programs and

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[20] *The President's Commission on the Status of Women (PCSW) was established by the executive order of John F. Kennedy on December 14, 1961 and it was charged with evaluating and making recommendations to improve the legal, social, civic, and economic status of American women.*

so international student mobility phenomenon seems to be equally represented by both genders.

Female candidates represented a total of 44% of all United States international students in 2013 and this percentage increased more than 10% over the past 3 decades[21], as represented in *Chart 2*.

In United Kingdom the proportion of women at postgraduate research level in 2011-2012 was around 47% showing an increase from 44% in 2003/04. At the same time, the gender split varies widely by country: 79% of students from Pakistan were male, but just 30% of students from Taiwan were male.[22]

Chart 2: Gender of international Students in the US, 1980 - 2013, OpenDoors 2013
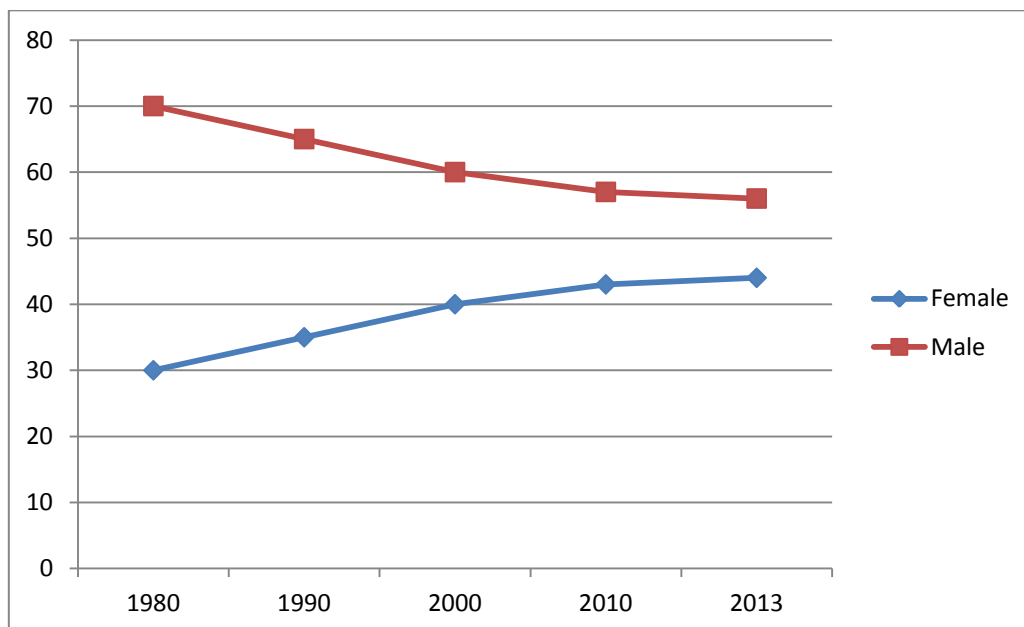
Despite women and men paying the same amount for their degrees, they often do not reap the same rewards when it comes to postgraduate career and salary. President of the United States, Barak Obama, said on April 8 2014,"*Today, the average full-time working woman earns just 77 cents for every dollar a man earns: in 2014, that's an embarrassment. It is wrong.*"[23]

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[21] *Open Doors Report on 'International Educational Exchange' by the Institute of International Education (2013) retrieved from* http://www.iie.org/opendoors
[22] *'Patterns and trends in UK higher education', Universities UK in collaborations with HESA, (2013)*
[23] *http://www.forbes.com/sites/kylesmith/2014/04/10/the-gender-pay-gap-is-just-the-beginning-of-americas-pay-inequity-problem/*

Education and occupational differences between men and women help explain the pay gap. Men are more likely than women to major in fields like engineering and computer science, which typically lead to higher-paying jobs. Women are more likely than men to major in fields like education and the social sciences, which typically lead to lower-paying jobs. But one year after graduation, a pay gap exists between women and men who majored in the same field. Among business majors, for example, women were paid just over $38,000, while men were paid just over $45,000.

Differences in the number of hours worked also affect earnings and contribute to the pay gap. One year out of college, women in full time jobs reported working 43 hours per week on average, and men in full-time jobs reported working an average of 45 hours per week. But again, when comparing the earnings of men and women who reported working the same number of hours, men were paid more than women were paid. For example, among those who reported working 40 hours per week, women were paid 84 percent of what men were paid. Among those who reported working 45 hours per week, women's earnings were 82% of men's.[24]

1.3.3 Study destinations

The leading destination countries for international students in 2011 were the Unites States (16.6% of foreign tertiary students reported to the OECD who are enrolled in each country of destination), United Kingdom (13%), Germany (6.3%), France (6.2%) and Australia (6.1%).[25] [*Chart 3*]

The dominance of English-speaking destinations (Australia, Canada, New Zealand, the United Kingdom and the United States) reflects the progressive adoption of English as a global language. It may also reflect the fact that students intending to study abroad are likely to have learned English in their home country or wish to improve their English language skills through immersion in a native English-speaking

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[24] *'Graduating to a pay gap' AAUW (2013)*
[25] *'Education at glance 2013: OECD indicators' UNESCO institute of Statistics (2013)*

context. Given this pattern, an increasing number of institutions in non-English-speaking countries now offer courses in English to overcome their linguistic disadvantage in attracting foreign students. This trend is especially noticeable in countries in which the use of English is widespread, such as the Nordic countries.

Chart 3: Percentage of foreign tertiary students reported to OECD who are enrolled in each country of destination in 2011, UNESCO 2013
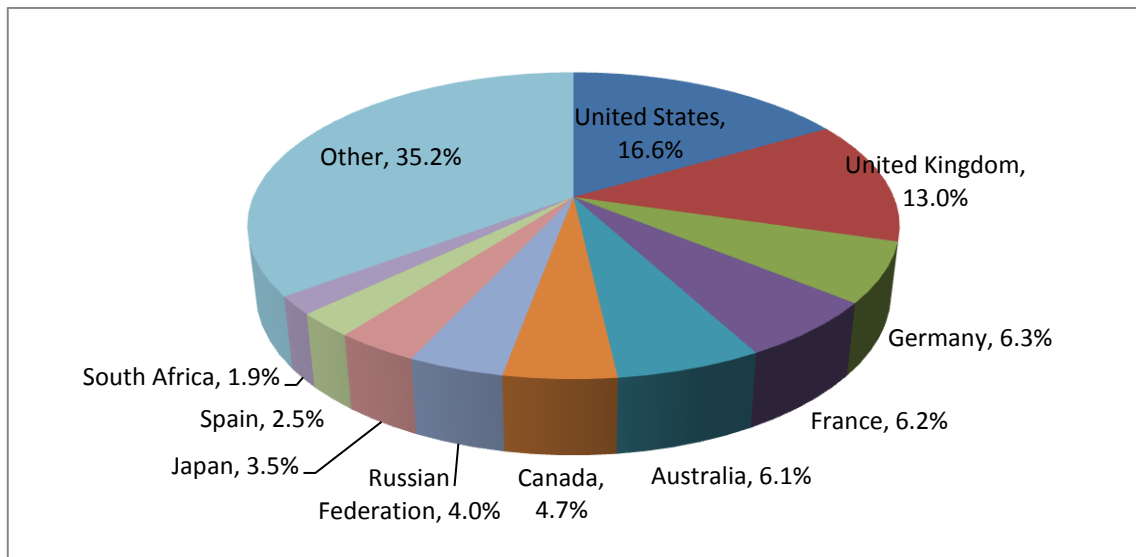
The trends in international education market share show a loss of 6.4% for United States compared to 2000. Among the European countries, United Kingdom and Germany increased in popularity (respectively +2.5% and +1.3%) while France saw the biggest decrease in market share, -2.3%. [*Chart 4*]

Chart 4: Trends in international education market shares (2000, 2011)
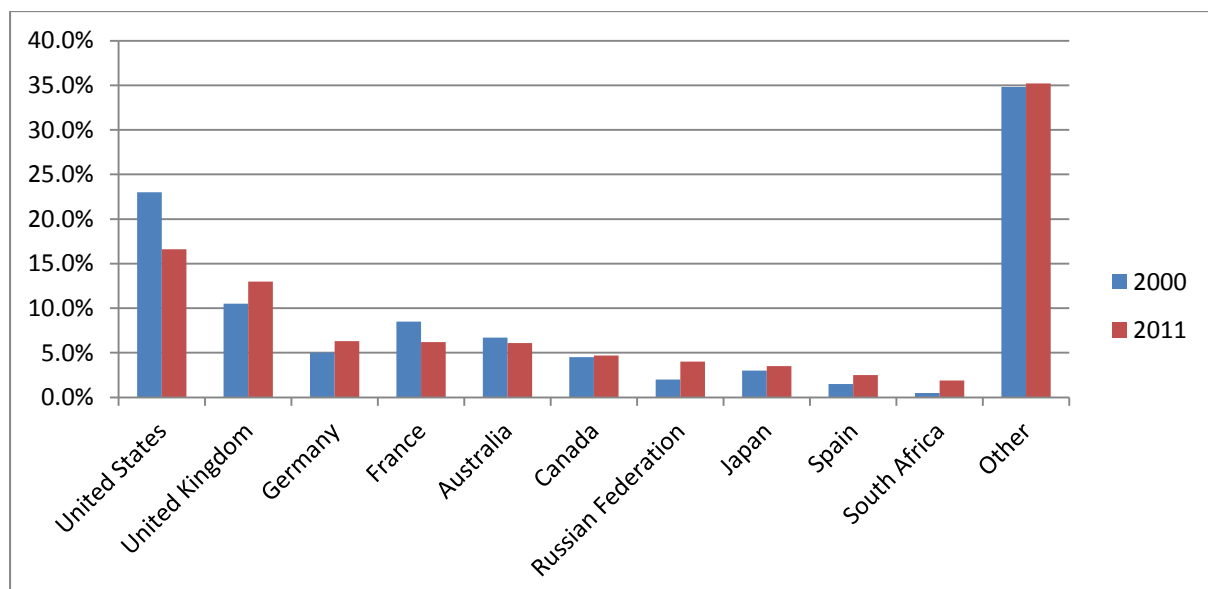
1.3.4 Motivations when choosing a country destination

International students have different reasons to choose a particular course programme and study location. To better understand the motivations of these students and develop more effective recruitment policies, it is vital to know how students decide on a particular study location and course programme, and which factors led them in this choice.

With respect to the choice of location, the academic literature mainly talks about the "push" and "pull" factors. These factors can apply at the level of individual students, but can also be related to higher levels such as characteristics and policy measures of cities, regions, countries or indeed continents or supranational organisations (e.g. the European Union and the European Higher Education Area).

The available literature on how international students arrive at their decisions on study destinations, and on the factors that influence those decisions is limited.

Several studies try to fill this gap by designing student choice models specifically for international students. What most of these models have in common is their adoption of the push and pull theory, which attempts to explain the factors affecting the decision-making of international students. The theory argues that there are basically two forces at play: push factors and pull factors. The push factors "operate within the source country and initiate a student's decision to undertake international study", while the pull factors "operate within a host country to make that country relatively attractive to international students"[26].

Note that in some cases a push factor can also be a pull factor, and vice versa. Moreover, if the country of origin does not have certain push factors, this could mean that students are keener on staying in that country. The same applies to pull factors of countries, which can also be regarded as blocking factors. Strict immigration policies are a clear example of this.

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[26] *'Push-Pull Factors Influencing International Student Destination Choice', International Journal of Educational Management, Mazzarol, T. and G.N. Soutar (2002) Vol.16 (2), p.82*

<u>Pull Factors</u>:

Domestic factors encouraging international students to study abroad can be push factors. Push factors can roughly be divided into personal push factors and environmental push factors. The former relate to the personal characteristics, preferences and motivations of individual students. The environmental push factors relate, for instance, to national characteristics.

Not much is known about the personal push factors of international students, due to the large diversity of the international student group and with the consequence this has for the extent to which results can be generalised. Among the models that have been empirically tested, the adopted methodology differs substantially, for example in terms of the included nationalities of respondents.

The Mazzarol and Soutar study involves 2,485 students from Taiwan, India, China and Indonesia, while the Chen study is based on 140 students from China, Hong Kong, Japan, Korea and Taiwan.

According to Chen's synthesis model[27], the three most important influential sources for international students are their family/spouse, other students or friends, and professors. Other influential sources that can convince students to study abroad are family members (especially if they live abroad or have studied abroad themselves), educational agents, alumni, sponsors and employers.

Chen found that the most important motivations to study abroad are the wish to acquire an advanced degree for personal satisfaction or to improve foreign language skills, and the importance of advanced degree for the student's future career and salary level.

Besides these personal push factors, there are push factors that relate to the environment. Although better documented, these factors are rarely tested empirically. They can include the following:

- the unavailability of, and difficult access to, higher education and/or cutting edge research facilities;

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[27] *'Synthesis Model', Chen (2007).*

- the value of a national higher education degree on the domestic labour market;

- a low value of a national higher education degree and/or work experience (on the domestic labour market);

- a low quality and reputation of the domestic higher education and research;

- high recognisability, acceptance and perceived value of foreign degrees by domestic employers and higher education institutions;

- cultural, economic, educational, linguistic, historical, political or religious ties to another region, country, city and/or institution;

- the demographic, economic and/or political climate within the country of origin. Note that both a high and low performing economy can be push factors (e.g. a high performing economy can give more students the financial means to study abroad, whereas a low performing economy can lead to a shortage of jobs, encouraging students to study abroad). The same applies to a stable or unstable political situation, and to a growing or declining population;

- the attractiveness of the environment in the country of origin (e.g.climate),

- the high availability of information of possible hosting regions, countries, cities and/or institutions;

- the level of domestic tuition fees and living costs;

- favourable financial (i.e. scholarships) and emigration policies in the country of origin.

A study by McMahon [28] suggests that the lower quality and prestige of local programmes/institutions and the unavailability of desired programmes in the home country are important push factors for studying abroad. It is clear, however, that more research is required in order to gain more detailed insight into the influence of specific environmental push factors.

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[28] *'Higher Education in a World Market, Higher Education', McMahon, M.E. (1992). Vol.24(4), pp.465-482*

Pull Factors:

The main pull factors of a country as a study destination are the following:

- the availability of information on the country and its higher education institutions, existing cultural, economic, educational, historical, linguistic, religious, strategic linkages, and active promotion or recruitment policies;

- the quality and reputation of education in the country (for instance, but not only, through rankings of institutions within a country), and the level of academic freedom;

- mutual recognition of degrees/qualifications (by the host country and the domestic country);

- costs of higher education and living in a country (tuition fee, availability of financial aid, travel expenses, living costs);

- governance of higher education institutions (public vs. private);

- safety levels within the country (crime rate, racial discrimination);

- internationalisation of a country (number of foreign students, availability and diversity of international programmes, stringency of immigration policies);

- the living, study and work environment of a country (climate, research facilities, ambiance, employment and immigration opportunities/regulations during and after study, demographic growth/decline);

- social and geographical linkages (friends/relatives living or studying in same country, geographical proximity).

For respondents in the Mazzerol and Soutar study (coming from Taiwan, India, China and Indonesia), the five most important factors for deciding to study in a particular host country were:

1. the quality of its education,
2. the fact that the qualifications of the host were recognised at home,
3. the ease of obtaining information on the host country,
4. the reputation of institutions in the host country,
5. the knowledge of the host country.

The Chen study indicates that environmental factors (particularly the perception of the country as a safe place to study) were the most important pull factors of Canada[29]. In 2012, a study by the British Council that polled 160,000 students over a 6-year period in order to determine which factors influence the choice of study location, found that personal safety has risen sharply in importance from being 17th out of a possible 19 factors in 2007, to position 5 in 2012[30].

The importance of pull factors can differ between the types of study in which the students were enrolled: factors related to study costs and future employment prospects were found to be more important for students enrolled in professional postgraduate programmes.

From the above it can be concluded that the most important pull factors of a country are a high quality and good reputation of education, and a good knowledge and student awareness of the destination country.

While what we know about what factors influence the choice of a city or country comes from the Chen study, which found that overall, international postgraduate students were concerned about safety and internationalisation of the city in which they decided to study, Chen also found that business students rated factors related to the location of the university and the potential for future employment in the same city as more important than students enrolled in research programmes. Besides these results, no other research was found on pull factors of cities. Hence, the pull factors that influence international students at this level remain largely unknown.

Compared with the other levels, the pull factors that operate at the institutional level have been researched more extensively. This is perhaps because at this level, it is easier to adjust features of the institutions to meet the international students' requirements. It is also important to know the exact pull factors for institutions, so that they can adjust their recruitment policies. The outcomes are largely in line with the studies by Mazzerol & Soutar and Chen.

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[29] *The next set of important pull factors were the positive influence of a Canadian degree on future employment prospects, the ease of the visa process, a lower tuition fee and Canada's proximity to the US.*
[30] *'The rise in global student safety concerns' British Council (2012) London: Education Intelligence.*

The former study indicates that, as compared with domestic students, important pull factors for international students to choose a particular institution relate to:

- The quality and reputation of the institution,
- The recognition of the institution's qualification (in the student's home country),
- The international strategic alliances of the institution,
- The quality of the institution's staff,
- The size of the alumni base and the existing international student population of the institution.

The Chen study used more factors and thus gives a more detailed picture. Chen found that the factors related to quality and reputation were the most important. Furthermore, the reputation, quality and ranking of the university at large was found to be more important than the reputation, quality and ranking of the programme. The ranking and reputation of a university were particularly important for students enrolled in professional programmes. This is because of their focus on a good return of investment. The next important set of pull factors relate to the funding and costs of the education at the selected institution. These factors were found to be more important than the environmental factors of the institution.

The above results suggest that the institutional pull factors for an institution are largely in line with the national pull factors. Hence, also here, the pull factors related to the quality and reputation of the institution seem to be the most important factors pulling international students to an institution. One notable difference however is that at the institutional level, the cost of higher education plays a more substantial role. The specific characteristics of the institution, such as the overall level of internationalisation, are also more important at the institutional level.

What we expect to see in recruitment strategies of countries that aim to attract international students is that national strategies capitalise on specific national pull factors, and also form new pull factors through new policy instruments. An example of the former is targeted marketing through advertisements that express the high

reputation of domestic higher education programmes. An example of the latter is offering new scholarship programmes.

The sending countries are at the other end of the equation, where the push factors can be expected play an active role. It is assumed that these factors are taken into account in national student mobility policies of the sending countries. It is also interesting to see to what extent these countries use the pull factors as a way to attract both international and home students. This would mainly apply to Asian countries, which in the last decade have seen substantial economic growth and are becoming more attractive as study destinations themselves.

The state of the country, in terms of economic growth and focus on improvement of the academic infrastructure, is reflected in its mobility policies: some policies can focus on improvement of the initial push factors, such as improvement and increased availability of higher education courses, while a practical example of this are policies that give home students a financial incentive to study abroad (e.g. in a particular country) and also to return home afterwards.

In fact, a consequence of the rise of international student mobility is the growing trend for international students to remain in the country in which they study after graduation. In Australia, for example, significant numbers of international students are applying for permanent residency, taking advantage of changes in Australia's immigration policy. The policy, introduced in 2001, allows foreign students permanent residency if they apply within six months of completing their course and if they meet the selection criteria[31]. The New Zealand government also applied changes to their immigration policy that make international student graduates in areas of skill shortages eligible for work permits[32]. International students studying in Canada are able to work while studying and can apply for a 2-year work permit upon graduation on the condition they work outside major cities[33]. In the United Kingdom the government has adopted a 'managed migration' policy; migration policy

[31] http://www.immi.gov.au/ DIMA Department of Immigration and Multicultural Affair (2006)
[32] http://www.immigration.govt.nz/ New Zealand Department of Labour (2005)
33 'Canada invites its overseas graduates to stay longer' MacLeod, D. (2005) http://education.guardian.co.uk/.

designed to respond to the skill needs of the UK labour market. Policy initiatives include the Science and Engineering Graduates' Scheme aimed at encouraging non-European Economic Area national science and engineering graduates of UK universities to pursue their careers in the United Kingdom, and the introduction of 2-year extensions for overseas graduates from Scottish universities, who will be permitted to work or set up a business[34].

Given the contribution that returning students may make to their home country, the goal of many developing countries is to encourage students to return home after graduation, if not permanently, at least for the purpose of collaboration and sharing knowledge. There are a number of policy options that sending countries can adopt in order to encourage return migration. Fostering a robust research and development sector and providing conditions and incentives that will encourage both transnational investment and entrepreneurship, would encourage students to return home once they have completed their studies, allowing the sending countries to benefit from the skills, knowledge and networks the student may have acquired during their time abroad[35].

1.3.5 Subjects of study

Universities and institutions willing to improve their efforts on internationalization are very interested in what are the preferred subjects of study of international students. The most popular subject areas become a key factor for implementing a better targeted offer of courses and programs which best suit the preferences of the candidates.

The available literature about worldwide preferred subjects of study of international students is still limited.

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[34] '*Working in the UK*' *Home Office (2006) www.workingintheuk.gov.uk*
[35] '*Policy options for managing international student migration: the sending country's perspective*' *Cate Gribble (2008)*

Data available for United Kingdom and United States gives an overview of trends and differences in the preferences of students applying at graduate level internationally compared with those applying at domestic level.

In the United Kingdom, almost a quarter of full-time postgraduate students in 2011-12 were taking courses in business-related subjects (including accounting, finance and management), making this by far the most popular subject group at graduate level [36].

Similarly, in the United States, business accounts for the largest segment of graduate-level students; as of 2010-11, more than a quarter of master's degrees awarded were in business[37].

The main preference seems to be contemplated at international level as well: 30% of international students in the United Kingdom in 2011-12 applied for a business-related course,[38] and the percentage was 21.8% in United States in 2012-13[39].

The reasons for this are not too difficult to explain. Graduate-level business qualifications (including MBAs but also other Master's in Business) are in high demand among employers, and are increasingly popular among those seeking either to progress within their current career, or break into a new sector. A recent GMAC survey of MBA and other Business Master's students in 33 countries worldwide found that 60% had already received a job offer before graduating, so it's easy to see why business is such a popular graduate-level option.[40].

A popular subject area among domestic and international students is the STEM group (including natural and life sciences, technology, engineering and mathematics, *to see the full list go to Index pp. 99*). 11% of full-time postgraduate students in United Kingdom were taking courses in science-related subjects in 2011-12 and the same percentage emerges among international students. In United States, 12% of

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[36] *data from the Higher Education Statistics Authority (HESA), www.hesa.ac.uk*
[37] *data from the National Centre for Education Statistics, www.nces.ed.gov*
[38] *data from UKCISA, www.ukcisa,org,uk*
[39] *data from 'Open Door 2011-2013', www.iie.org*
[40] *'Alumni Perspectives Survey' GMAC (2014)*

domestic students chose a science-related course in 2010-11 and the percentage increases up to 18% among international students applying in 2012-13.

Many countries worldwide have been reporting shortages of STEM graduates in the past few years, and there has been widespread publicity of the demand and opportunities available within these fields.

For examples, in the United States, presidential advisors called for an additional 1 million STEM graduates in the next decade from 2012[41]; the UK's Royal Academy Engineering forecast demand for 830,000 SET (science, engineering and technology) professionals and 450,000 SET technicians between 2012 and 2020 engineering skills to the UK economy[42]; in Germany, the Cologne Institute for Economic Research estimated in 2013 that the country already has a shortage of 210,000 graduates in 'MINT' subjects (mathematics, engineering, science and information technology)[43] and similar reports and statistics have emerged worldwide.

In both the United States and United Kingdom, large groups of graduate students are those studying education, including teacher training; in the UK, 13% of postgraduate students were studying in this category, while 25% of US master's degrees were awarded in this field. This is a notable point of divergence between preferences of candidates at international level as numbers are much lower than those reported in actual graduate-level enrolment figures. Only 6% of international students applying in the United Kingdom in 2011-12 chose Education as subject of their study and the percentage drops to 2% in United States in 2012-2013. This loss of correlation is largely explained by the fact that those studying education/teacher-training are less likely to be studying outside of their own country, especially if their intention is to work there as a teacher afterwards.

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[41] *'Report to the president engage to excel: producing one million additional college graduates with degrees in science, technology, engineering, and mathematics' Executive Office of the President, President's Council of Advisors on Science and Technology (February 2012)*

42 'Jobs and growth: the importance of engineering skills to the UK economy' Royal Academy of Engineering econometrics of engineering skills project' September 2012

43 'MINT-Frühjahrsreport 2013 Innovationskraft, Aufstiegschance und demografische Herausforderung' Anger, Demary, Koppel, Plünnecke (May 2013)

1.3.6 International recruitment as a marketing strategy

The spread of education internationally has clearly had effects on cultures worldwide. Educational institutions have reacted accordingly, by becoming more market oriented and education is increasingly being drawn into a global competition. The internationalisation of education has become one of the key themes of educational policy and planning and the integration of worldwide capital and labour markets; educators are being forced to respond to a new set of challenges. As said, the internationalisation of education, particularly higher education, is a growing phenomenon. Universities and institutions around the world are increasingly becoming forced to compete in the global market and engage in entrepreneurial activity to sustain themselves in an increasingly 'uncertain world'.

The internationalisation of higher education can be linked to various internal and external changes in the international system. Externally, there have been changes in the labour market, which have resulted in calls for more knowledge and skilled workers, and workers with deeper understandings of languages, cultures and business methods from all over the world. The role of education has become more linked to globally competitive positions. Subsequent changes in university functions have lead universities toward direct entrepreneurial activity to sustain themselves.

This in turn produces a change in institutional approaches to the development of international education. University courses must now be cross-cultural in content, which is in association with the growing number of students searching for higher education outside of their own country.

But it is not just about their offer: universities are required to equip themselves with marketing tools and staff and set their minds into entrepreneurial thinking.

The role of marketing in higher education has never been so important and seems to be a matter universities can't avoid anymore. As universities across the world are planning to increase the number of international students, they grapple with the marketing challenges of finding and enrolling these students and the challenges of making the educational experience valuable for everyone involved.

1.3.7 Examples of marketing strategies and tools

According to Richard Levin, executive director of enrolment services and university registration at the University of Toronto in Canada, the key to a successful student recruitment strategy is thinking about "what you communicate, to whom, and how" and send underlined targeted messages to the different audiences (school pupils, transfer students, careers counsellors, parents and other family members) which all require a slightly different approach.

For the Hong Kong University of Science and Technology, recruiting not only international students but also international staff has been a crucial part of its strategy. The university's president, vice-presidents and deans have made numerous visits to Europe, the US, Canada, South Korea as well to high schools throughout mainland China. In 2012, HKUST participated in 9 overseas education fairs and held information sessions at 102 high schools across 40 cities in 11 countries. With applications from Europe – in particular UK, France, Germany and Russia – doubling since 2011, the message seems to be getting through.

Universities more and more rely on external agencies and companies specialised in the education sector in order to maximise their effort in international recruitment. In 2012 a survey conducted by the Observatory on Borderless Higher Education[44] reported the proportion of international students recruited with agents in 181 colleges and universities in 7 different countries. [*Table 3*]

Table 3: Proportion of international students recruited with agents - Observatory on Borderless Higher Education (2012)	
Australia	53%
Canada	41%
Malaysia	56%
Netherlands	20%
New Zealand	47%
United Kingdom	38%
United States	11%

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[44] 'Higher education across borders: Models of engagement and lessons from corporate strategy', Tim Gore OBE (April 2012)

The American colleges and universities reported that only 11% of international students had been recruited through agents. That is the smallest share of the countries surveyed, while Australia and New Zealand, after Malaysia, are the most likely to engage with agents. This is possibly due to their geographical location which doesn't allow them to easily expand their recruitment process worldwide. Many UK universities have developed a collaborative alliance with overseas agents who recruit international students for them and promote them as brands in foreign markets[45] The BBC News in 2010[46] reports that about 80% of UK universities use recruitment agents to deal with potential students' enquires on a day-to-day basis, especially in China. Operating in China and being able to speak in Mandarin to communicate with students and relatives without the need of translation, these Chinese recruitment agents serve as the front line for UK universities. They play pivotal roles in influencing students' HE choices by talking to students on behalf of the universities, offering counselling services, helping students screen through various programmes and filling in application forms[47].

Agencies not only deal with direct recruitment of students but offer diversified services to universities. INTEAD (International Education Advantage, LCC), for example, develops strategies and deploys underline digital tools to attract, recruit, orient and retain international and U.S. students, creating a systematic approach to supporting an institution's vision for a broader, deeper, more diversified student population[48]. While some companies focus on a digital approach, others implement online options with offline alternatives, such as underline educational fairs. The primary aim of those fairs is to help universities to travel in their target recruitment countries and meet directly with potential candidates. Qs Quacquarelli Symonds[49] is one of those companies: as global

[45] 'Toward the model of university image, the influence of brand personality, external prestige and reputation'. Sung and Young Journal of Public Relations Research, Vol. 20, No. 4, pp. 357-376 (2008)

[46] 'Bogus students facing global crackdown'. BBC News (2010) http://www.bbc.co.uk/news/10106279

[47] 'The influence of peers and students recruitment agencies on Thai students' choices of international education'.Pimpa Journal of Studies in International Education, Vol. 7, No.2, pp. 178-192 (2003) 2, pp. 178-192.

[48] http://www.intead.com/

[49] http://www.qs.com/

provider of specialist higher education and careers information and resources, the company runs a global series of events, called QS World Grad School Tour. The events are set as half-day graduate education fairs, created especially for institutions worldwide who are recruiting international students across all disciplines and so meet face to face with targeted candidates who wish to embark on graduate-study abroad. The events take place in more than 50 countries in North America, Latin America, Europe, Asia and Africa and the size of those events grew massively in the last five years, in terms of attendance from institutions and candidates. The number of institutions which joined Qs World Grad School Tour rose by 33%, from 400 in 2009 to 534 in 2013. 19,859 students attended the events worldwide in 2009 and the number raises up to 23,927 in 2013, showing an increase in attendance of 17%.

1.3.8 Digital marketing approach

With the evolving technology, change has become an integral part of success and, if technology is something related to internet, then higher education institutions must embrace the technology as soon as possible. Digital marketing is the trending marketing strategy that is replacing conventional marketing and it involves lot of field work. Digital marketing differs from traditional marketing as it involves the use of channels and methods that enable an organization to analyse marketing campaigns and understand what is working and what is not in real time.

Technology transformed the way potential students search for, discover, and choose institutions and courses[50]. The education decision journey is moving online: nine in ten enrolled students have used the Internet to research higher education institutions, according to a 2012 study conducted by Google and market analysts Compete. Brand-related search queries (searches for specific institutions or schools) were down marginally (-1%) in the second quarter of 2014 when compared to the

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[50] *http://www.thinkwithgoogle.com/articles/search-for-knowledge.html*

same quarter in 2013. Non-branded queries, meanwhile, were up slightly (+1%) over the same period. These findings extend an important observation first noted in 2012: that 9 in 10 prospective students don't know which school they want to attend at the onset of the search process and they reflect this non-brand orientation in their search behaviour.

Google categorises non-branded education search as follows:

- Programme searches: pertain to specific fields of study;
- Degree queries: factor in specific credentials (ex. Bachelor, Master's);
- General queries: reflect very broadly structured search requests.

Google also indicates that "geo terms" – search keywords that include a geographic modifier (e.g., "bachelor degrees in computing science in London") – performed well and so it is recommended that education marketers target their efforts to promoting particular programmes in specific locations.

Moreover, the average 18-34 year-old student owns 7 tech devices .The laptop computer is the most commonly owned device, by 85% of the student population, with smartphone penetration nearing 70% and tablets (36%) more widespread than cell phones (33%)[51]. No doubt that <u>mobile</u> continues to play a larger role. The dramatic growth in mobile usage is now having a greater impact in terms of shaping user behaviour and related marketing strategies. Mobile education queries were up 23% in Q2 2014 (when compared to the same quarter last year), and Google reports that prospective students are using mobile devices earlier than ever. Google research shows that half of the visitors to the education mobile sites report having had a poor experience. As a result, 40% of prospect students report a negative perception of the brand and 35% said they moved onto a competitor's website. As said by Mansoor Iqbal, education expert and content editor/writer for TopMBA.com "*to launch a website today which is not optimised for mobile is tantamount to online suicide*".[52]

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[51] *www.marketingcharts.com*
[52] *'Finding the right MBA' M. Iqbal, T. Dhoul (2014)*

Also, shorter lead generation forms convert better: forms of 3 pages or less had a 20% better chance of converting a prospective student than was the case for longer forms. Ross Woodard, Chief Marketing Officer for Iowa's Ashford University concurs: "*When Ashford University looked at students' new decision journey, the school found prospective students often visited its website on smartphones early on and then returned later on desktop for more information. So the university simplified its mobile website to focus on three features: embedded video, programmes offered, and a short contact form. It's about optimising the experience as it relates to smartphones and tablets. We made it very simple – the videos talk about an emotional experience as it relates to the school, and the short form allows them to conveniently enter an inquiry*."

The path to choosing a programme and an institution or school is often a long one, and a process that unfolds over an extended period of time[53]: 77% of education seekers will first visit a school's website at least two weeks – and often two months – before taking action. Education is a highly-involved decision and one that requires many different touch points along the way. Asking prospects to fill out a lead form too soon might result in short-term success for a marketer, but in the end, both the student and the school will lose. The key for institutions is to engage with potential students on <u>multiple channels</u> [*Figure 1*] which can be divided in two categories:

- "Assisting" channels are those that help to build awareness and intent at the earlier stages in the customer decision-making process;
- "Last interaction" channels are the pivotal last points of contact prior to a purchase.

The education sector is one of the top industries in the world currently using <u>social media</u> as part of their overall strategy[54]. Over a 72% of institutions in the education industry said they currently implement social media tactics in their daily marketing

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[53] *http://monitor.icef.com/2014/08/search-trends-playing-an-increasing-role-in-international-education-marketing/*
[54] *www.emarketer.com*

activities. 17% of educational institutes worldwide said they are planning to add social media to their marketing programs.

Figure 1: Multi-step Process of recruitment - ICEF Monitor (2014)
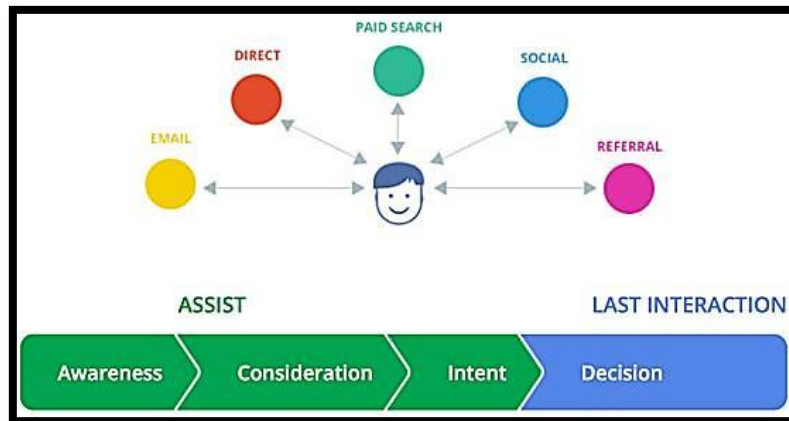
Tufts University was the first one that conducted its admissions process online using social media platforms. The admission tool consisted of a testimonial in which students explained their desire and motivation to attend a university specialization. Thus, the future students uploaded a video, which did not exceed one minute, to the university's official YouTube page in response to the university's video that described the admission process.

This particular admission plan proved to be effective both in terms of university reputation, as well as the intake of new students, which led to a more diversified marketing strategy via different social media platforms[55].

A Dutch study[56] in 2012 identified the role and importance of social media platforms in choosing the suitable university by prospective students, as compared to traditional marketing channels. The study concludes that young adults (18-34 years) use social media platforms every day in order to seek out information. The article proposes that marketing through social media should become a pillar of attracting

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[55] *'Higher Education marketing: Is the student the client or the product of universities?' Anastasiu, Moldovan, Muresan (2013)*

[56] *'Higher Education Marketing: A study on the Impact of Social Media on Study Selection and University Choice' Constantinides & Stango (2012)*

prospective students, being included in the marketing/communication strategies of universities to the fullest.

The focus of educational marketing using social media channels should be on the two-way communication, based on feedback and continuous dialogue, rather than using these channels for disseminating strictly advertising information. In 2011, Lock Haven University of Pennsylvania has tested the effect of social media platforms on those applying at bachelor's degree. They followed a dichotomous approach: the effect of Twitter on student dialogues and its relevance to student performance. The study concludes that the platform has facilitated or helped complete the following educational activities:

- to continue course discussions;

- to create a non-formal context in which to resolve student issues. The paper argues that first-year students are often introverted and reluctant to ask questions in class and the dynamics of Twitter allows students to overcome the inherent face to face communication barrier;

- discussion-based teaching materials: all first-year students received the same book as mandatory course literature;

- reminders: the Twitter platform was used to remind the homework due dates and the exam dates;

- to provide academic and professional support: opportunities on campus (tutoring location and program), both regularly as well as a response to students' requests for additional aid;

- to encourage students to help each other in order to solve their queries. And to make them feel as part of a learning community which ensure educational progress;

- to organise study groups.

It is important, however, to point out the fact that these merits cannot be assigned exclusively to technology. While Twitter has facilitated the democratization of both communication and the roles and teacher-student relations, introducing this

platform in the learning process has mobilized the institution to improve the student-faculty communication system, thus streamlining their dialogue.

The University of Phoenix, instead, has looked at its online content and how it helps prospective students along their journey. "*We're trying to actively drive traffic to our website, and we spend quite a bit of time making sure that the site has the kind of content it needs,*" explains Les Lifter, VP of Brand Marketing. This has led university of Phoenix to produce a "*massive amount*" of video content on YouTube, which "*really provides a full picture for prospective students,*" Lifter says. Education seekers are increasingly looking at videos to gather information about schools, with a four-time year-on-year increase in those using video in 2012[57]. University of Phoenix's latest ad campaign garnered more than 2.4 million views on YouTube in its first week after launching on TV, suggesting that Lifter's strategy to create content that "deeply engages while explaining the school's unique platform" is working.

Education is becoming more invaluable to individuals. In today's environment, education provides individuals with a better chance of employment, which in turn leads to a better lifestyle, power and status. Given the growing international competition between universities and countries for high-quality students, it has become increasingly important to gain a better understanding of factors that influence their choices and expectations of candidates applying for a course at graduate level.

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[57] *http://www.thinkwithgoogle.com/articles/search-for-knowledge.html*

1.4 Methodology and samples

1.4.1 The commission: QS Quacquarelli Symonds

This research was born in collaboration with Qs Quacquarelli Symonds, a company who has worked in the educational sector for more than 20 years.

Founded in 1990, QS Quacquarelli Symonds is a leading global provider of higher education and graduate careers information and resources. The company is headquartered in London, United Kingdom, with major offices in Paris, Stuttgart, Singapore and Portland.

QS's products and services include:

- Events: hosting higher education recruitment fairs in almost 50 countries worldwide, QS's main events series are the QS World MBA Tour, QS World Grad School Tour and QS World University Tour; events which are direct to students who want to study abroad.

- Websites: QS's main online platforms are TopUniversities.com and TopMBA.com, the first a comprehensive resource for prospective and current international students, and the second providing specialized resources in the MBA sector. Both websites have large and growing international audiences, reaching a combined total of just under 85 million pageviews in 2013.

- University Rankings: in 2013, QS became the first compiler of global and regional university rankings to receive the "IREG Approved" label from the International Ranking Expert Group (IREG) Executive Committee. The company's flagship QS World University Rankings® is accompanied by the QS World University Rankings by Subject, QS Top 50 Under 50, a selection of regional rankings and specialized MBA rankings including the QS Global 200 and Distance/Online MBA Rankings.

- Publications: as well as student-focused publications such as the QS Top Grad School Guide, QS Top Universities Guide, QS Top MBA Career Guide and QS Top Executive Guide, QS also publishes annual market research reports such

as the Top MBA Jobs & Salary Trends Report, Top MBA Applicant Survey and QS World Grad School Tour Applicant Survey.

- Software: QS Unisolution offers a portfolio of software and services for the international higher education sector, including solutions for international recruitment, applications and admissions management.

1.4.2 Methods of research conducted

This research is based on exploratory and descriptive types of research.

The exploratory research aim is to look for patterns, hypotheses or ideas that can be tested and will form the basis for further research. Descriptive research is used to describe characteristics of the population or phenomenon being studied. As descriptive research, quantitative method is used to seek empirical support for research hypotheses.

The descriptive research is based on the analysis of two different surveys, which responses were collected in two different periods and directed to two groups of prospective students applying for a graduate level degree.

The _former_ collected data from prospective students who were aiming to apply for scholarships to study a master or PhD abroad between May 2012 and April 2013.

The process of scholarships application consisted of attending one of QS World Grad School Tour events worldwide, then completing a survey on the website _topuniversities.com_ and writing an essay about a given topic. An internal committee evaluates the applications and allocates scholarships for a total value of $1.7 million every year.

The objective of this survey is to collect demographical information of applicants, together with their studies' preferences, choices and motivations: this information has been for internal use only in the past 5 years.

This research analyses the available data and produces relevant content to worldwide students, universities and all those involve in higher education, making it valuable for external use also.

The survey was built on QS Qualtrics platform and it was accessible via *topuniversities.com*. The survey is composed of several sections and for the purpose of the research the following ones will be analysed and taken into consideration: top study destinations preferences, motivations when choosing a destination, top preferred subjects of study and expectations for the future career.

Additional data has been made available for further insights from 2009. This data has been collected with the same process, but it hasn't been personally analysed and it will be reported as it has been given from Qs Intelligence Unit.

The available data is covering the following topics: top study destinations preferences, motivations when choosing a destination, top preferred subjects of study and current situation and salary.

The second set of surveys was collected via paper form at Qs World Grad School Tour events worldwide between August 2013 and May 2014. During those events, the company meets with more than 23,000 prospective graduate students worldwide, which make it as an ideal location to gather even further and deeper insights of who are those candidates and what are their preferences and behaviour towards higher education.

Considering the growing importance and role of digital resources worldwide in everyday life (and my role in the company as part of the Online Team) it seemed valuable to understand the growing importance of online resources for prospective students when research their options about higher education.

A total of 2,215 responses were collected from 49 cities in 35 countries across Europe, Asia, North America, Latin America and Africa. Data collected includes candidates' preferences between online and offline resources, importance and usage of online resources, devices most used and analysis of methods used to or preferred for contacting universities and institutions.

1.5 Limitations

This research is conducted as a final dissertation of the MA in 'Marketing and Market Research' at the Faculty of Economics of University of Pisa and it has been developed in collaboration with QS Quacquarelli Symonds.

The first set of data was collected via *topuniversities.com* as part of the scholarships application process and it was limited to candidates who were aiming to apply for scholarships and nothing says about those who are self-funding their future studies.

Moreover, there might be differences in the demographical breakdown of the two populations studied through the first questionnaire, largely due to the fact that Qs World grad School Tour events were closely linked to Qs World MBA Tour in 2008 - 2009 and typically attended by an older group. Since then, Qs World Grad School Tour has rapidly evolved to attract a broader range of graduate-degree applicants, so that by the 2013 survey, respondents might present different demographic characteristics.

Also, the candidates might have experienced difficulties while filling in the online questionnaire due to internet connection problems or they might drop out due to its length. Questions cannot be skipped though, as completing each session is mandatory to proceed to the following one.

The platform, QS Qualtrics, allows access to the data and to export it in Excel, but it requires several manual operations of decoding and it is not the most user-friendly platform.

The second questionnaire used is a one page paper form composed of ten questions plus personal information. The surveys were distributed to Qs World Grad School Tour events and for this reasons the provenience of the candidates is limited to the countries in which the Tour is held.

A person from QS staff was put on charge of distributing the questionnaires at the registration desks and collecting them back filled in from the candidates when

leaving the fair. Limitations have been experienced, either when being short of staff and not able to collect enough questionnaires back or when the fair was quiet and not many candidates attended and so completed the survey. No incentives were given to students for completing the survey and the return rate was an average worldwide of 62%.

Both surveys were written in English. Despite this language's worldwide diffusion, candidates in certain countries might have experienced difficulties in answering all the questions and also eventual misinterpretations of content need to be taken into account.

For all the above reasons the samples taken into exam might present representation limits and the results of the analysis need to be evaluated by considering a 5% of error.

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Chapter 2: analysis of results

2.1 Analysis of the first quantitative research (2013-2009)

The first part of the descriptive research is based on the analysis of two large global surveys of students applying for graduate-level courses worldwide, conducted in 2008-2009 and 2012-2013. During these periods, survey respondents attended a Qs World Grad School Tour event, higher education fairs targeted at students seeking to apply for Masters and PhD programs at local or international universities, with particular focus on studying a graduate degree abroad.

Attendees were then sent an email inviting them to complete an online questionnaire, covering key issues relating to their graduate and international study plans. Data collected for both years included information about their desired subject of study; preferred study destinations; most important factors when choosing a country destination and current employment/education situation. Future career aims and expectations were included in the survey in 2012 -2013 only.

A total of 3,358 candidates completed the survey in 2008-2009 and 4,155 in 2012-2013, with respondents coming from 194 different countries in 2009 and 132 in 2013.

The results provide insights into the preferences and motivations of prospective graduate-level students worldwide, and (given the focus of QS events) especially those with an interest in studying outside of their own country.

The following section of the research firstly conducts a comparative analysis of the two sets of survey results, with the aim of highlighting trends in the choices being made by prospective international students worldwide, and the factors underlying those decisions. Secondly, it analyses postgraduate expectations of respondents according to the survey responses of 2012-2013.

2.1.1 Demographical breakdown of the samples

A breakdown of both samples per gender, region of provenience, age and current situation is shown in the charts below.

Survey respondents were asked to indicate their gender and the breakdown is shown in the *Chart 5* and *Chart 6* below.

Chart 5: Gender breakdown of the sample 2009
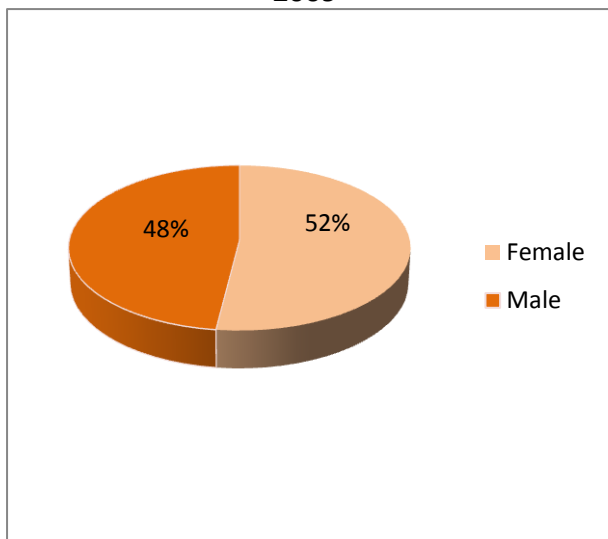
Chart 6: Gender breakdown of the sample 2013
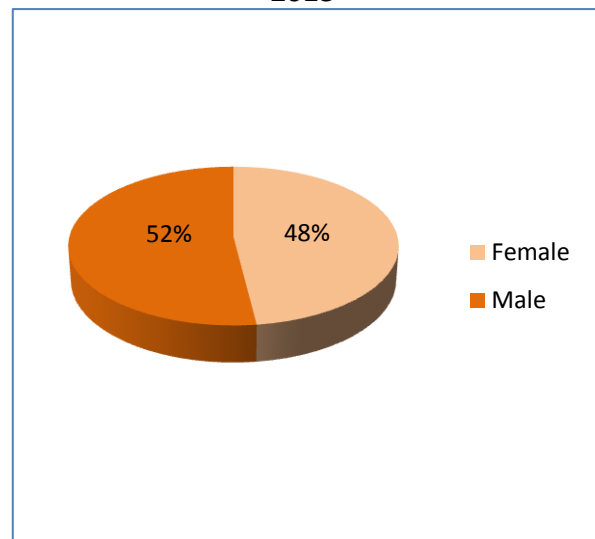
In each survey year, the two gender were almost equally represented. The percentage of female candidates grew during the 5 years period and inversely the male gender dropped from 52% to 48%.

Survey respondents were asked to indicate their nationality. The surveys collected responses from 194 different countries in 2009 and 132 in 2013. To facilitate the analysis the countries are grouped in regions and the countries included in each region are listed in the *Index on page 99*

As *Chart 7 and 8* shown, the percentage of respondents from Africa and Eastern Europe was equally represented in both survey years; the highest number of responses came from Asia Pacific, but the percentage decreases from 40.8% in 2009 to 31,7% in 2013. The biggest increase in number of responses was registered in Western Europe, where the the percentage rose up by 83% between 2009 and 2013,

representing a 15% of total responses collected. Respondents from Latin America were 9.2% in 2009 and the number increased to 13.9% in 2013. Conversely, there was a slight decrease in responses coming from United States & Canada, going from 9.6% in 2009 to 7.3% in 2013.

Chart 7: Region breakdown of the sample - 2009
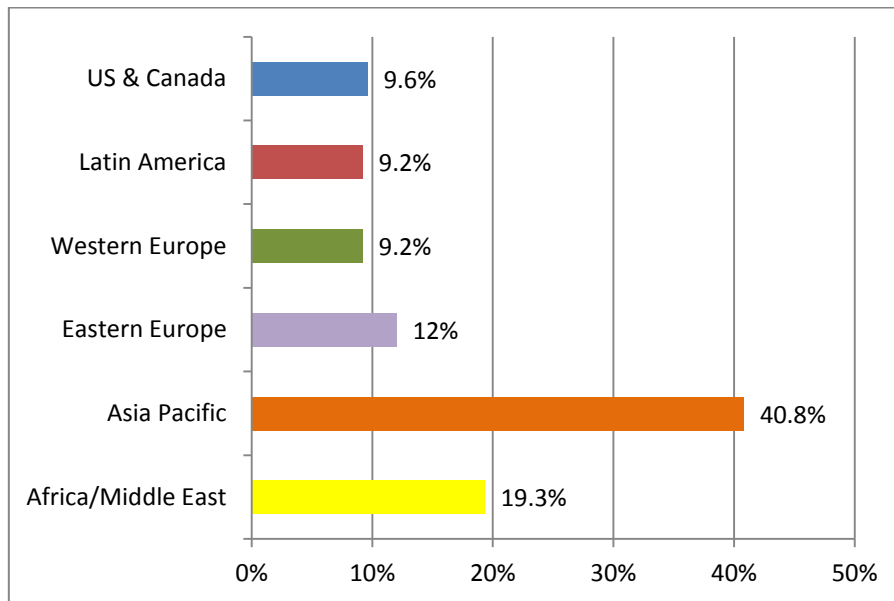
Chart 8: Region breakdown of the sample - 2013
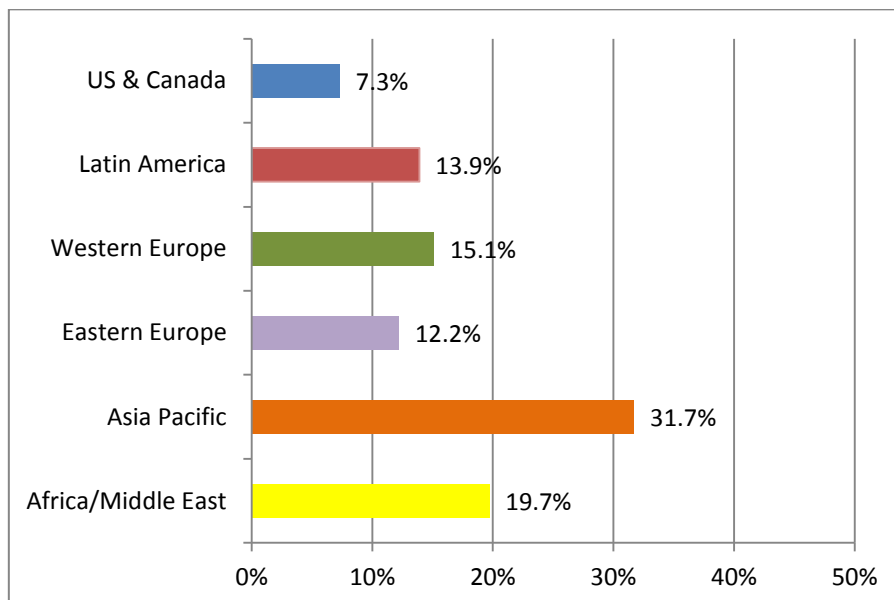
Survey respondents were asked to indicate their current age. Respondents were able to choose from a drop down list, going from 21 to >65 years old. For a easier analysis of the data, the years of birth are grouped as per *Chart 9 and 10* below.
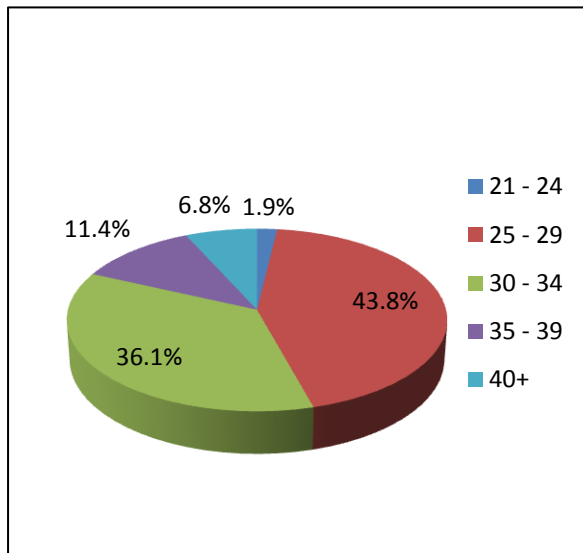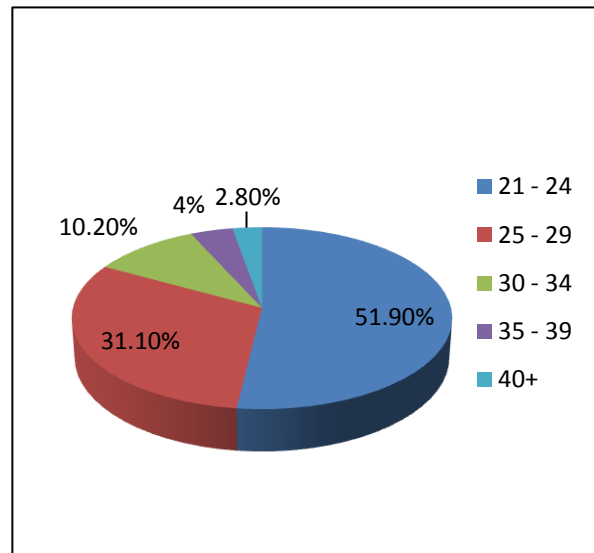
Four out of ten respondents in 2009 were aged between 25 and 29 years old, representing the most popular age group. Another big portion of respondents (36.1%) were aged 30-34, and nearly 20% of survey respondents were older than 35 years old. While not even a 2% or respondents were younger than 25 years old in 2009, the predominant age group in 2013 was the one of 21 to 24, representing more than half of the survey's sample. More than 30% of respondents in 2013 were aged between 25 and 29 years old, 10% between 30-34 and a 6.8% or respondents were older than 30 years old.

There is a notable change in the age range of the respondents, which is partly linked to the history and development of QS World Grad School Tour. The very low percentage of respondents aged 24 and younger in the 2009 survey is likely to be largely due to the fact that Qs World grad School Tour events were at that time closely linked to Qs World MBA Tour and typically attended by an older group. Since then, Qs World Grad School Tour has rapidly evolved to attract a broader range of

graduate-degree applicants, so that by the 2013 survey, the youngest age group represented more than half of all respondents.

This development and expanding audience of the QS World Grad School tour is also likely to at least partially underlie the decrease in respondents in full-time employment (from 67% to 47%) over the period, and the corresponding increase (from 11% to 33%) in the number of survey respondents currently studying, either with or without a part-time job. The percentage of respondents with a part-time or temporary employment remained unchanged (12% in 2009 and 13% in 2013). The below *Chart 11 and 12* show results to the question: *"What is your current work situation?"*

Chart 11: Breakdown of the current situation of the sample - 2009
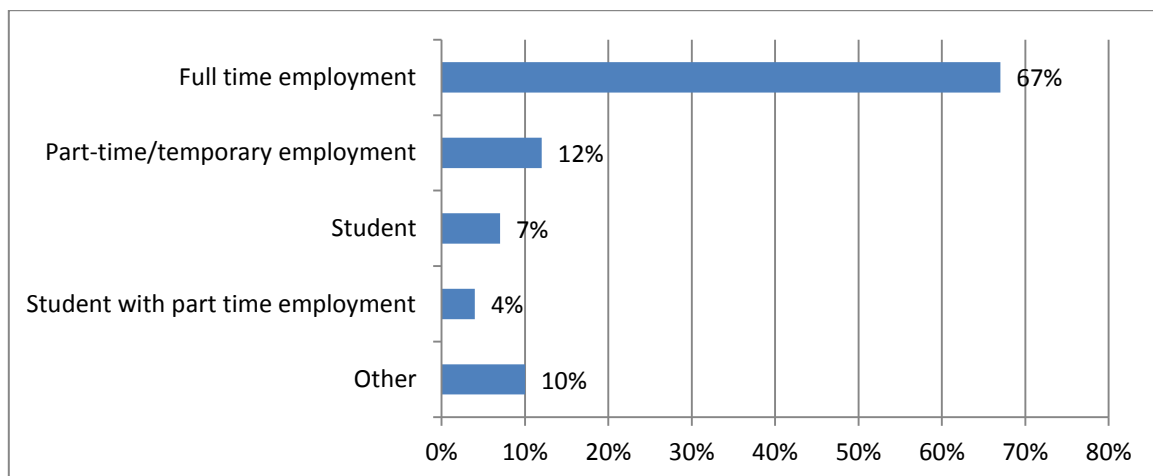
Chart 12: Breakdown of the current situation of the sample - 2013
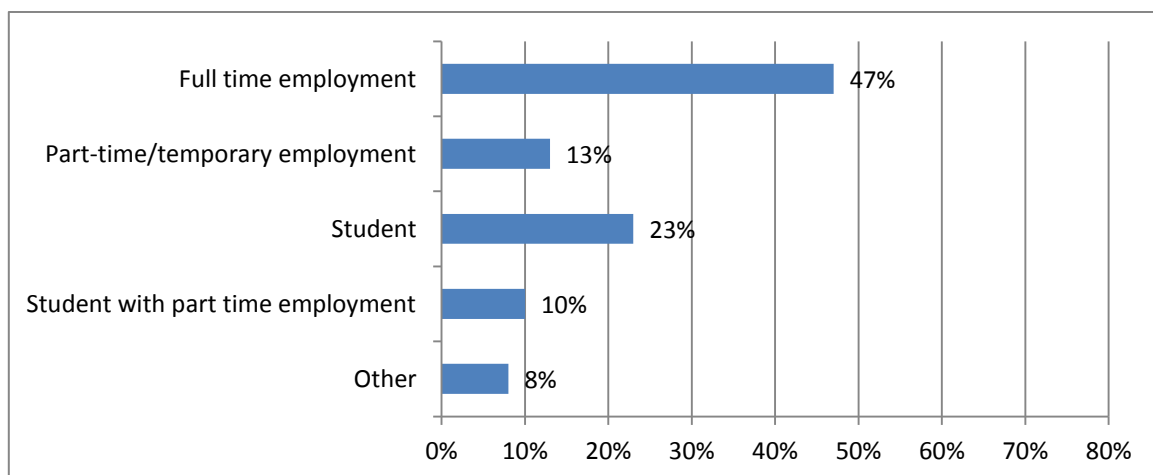
The above explanations goes together with changes in the current salary of respondents. Being the vast mojority of respondents from younger group and less likely to have a full time employment, the percentage of those earning <$20,000 per year increased between 2009 and 2013 by 15%.

The *Chart 13 and 14* represent the breakdown of responses to the following question: *"What is your current salary per year?".* The charts show a breakdown of responses by gender.

In both years, the range including salaries <$20,000 per year got at least 60% of responses and for both genders this percentage increased between the 5 years period. The increase is more evident for the female gender as the percentage of those with a current salary of <$20,000 rose from 60% to 74% (23% increase compared to 9% for males).

While a clear trend is not observable between genders for those earning <$20,000 to $60,000, data shows that male gender is more likely to earn higher salary: the percentage of those earning more than $60,000 when applying for a graduate level degree is higher for males in both years (6.7% compared to 5.3% for female in 2009 and even a higher gap in 2013, 6.4% compared to just a 4%).

Chart 13: Breakdown of current salary by gender - 2009
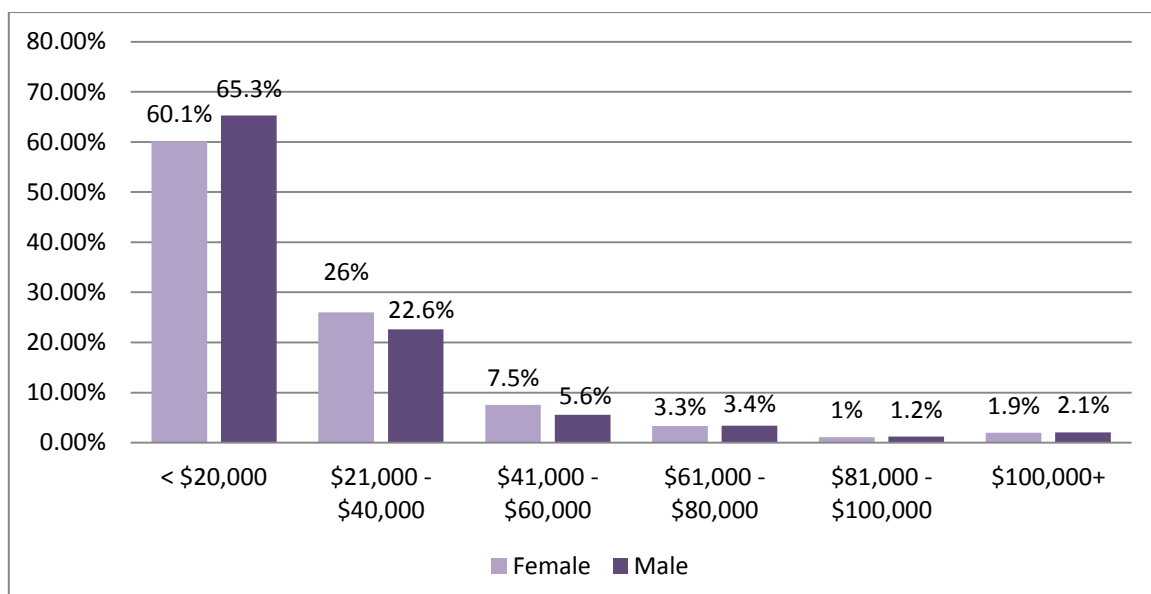
Chart 14: Breakdown of current salary by gender - 2013
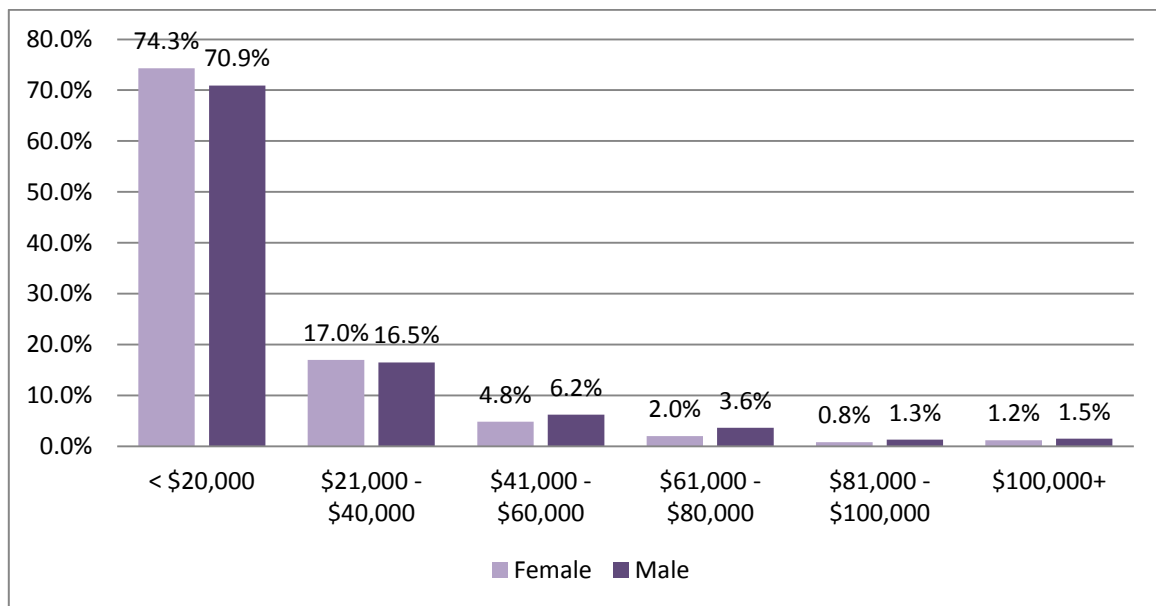
2.1.2 Study plans: top study destinations and preferred subjects of study

The survey asked respondents to identify which countries they were interested in studying in and the reasons underlying their choice of study destination. They were also asked the subjects of study they were applying for.

The *Chart 15* below represents responses to the questions: *"In which countries are you considering studying? (Please choose all that applied)"*

Chart 15: Top 10 study destinations comparison between 2013 and 2009
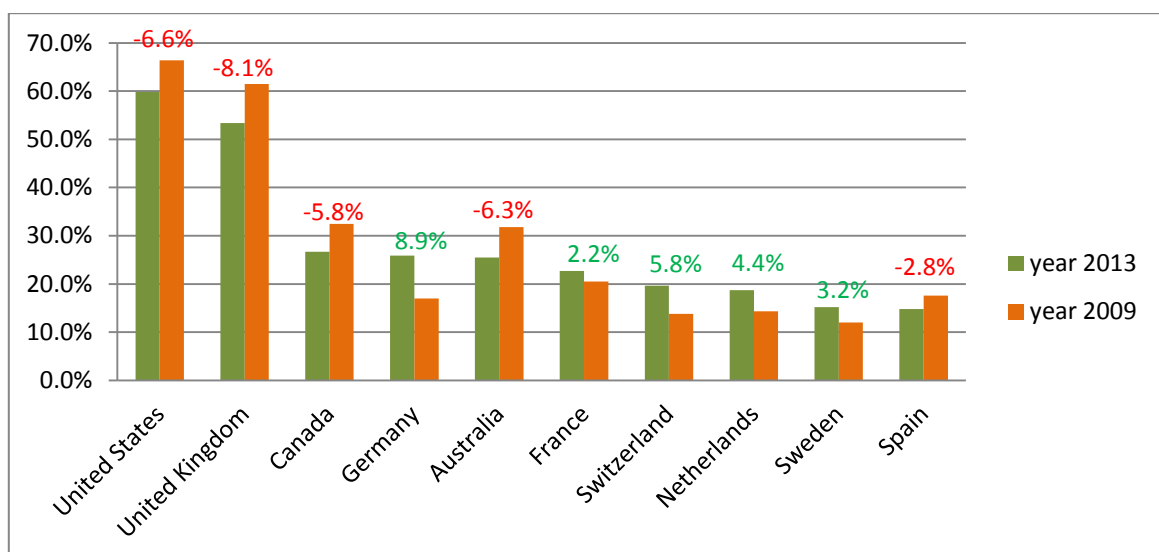
The leading destination countries for international students in 2013 were United States (chosen by 59.8% of respondents), United Kingdom (53.4%) and Canada (26.7%).

Comparing responses from the 2009 and 2013 surveys, one of the most significant trends is the decline of popularity of the big Anglophone destinations. While United States, United Kingdom, Canada and Australia remain the most popular countries, all received fewer responses in 2013 compared to 2009.

The loss market share experienced by these four countries is in part due the growth in popularity of alternative study destinations: Germany saw the largest increase in popularity, being selected by 25.9% of respondents in 2013 compared to 17% in 2009.

Other countries which gained in popularity over the period include France (+2.2%), Switzerland (+5.8%), Netherlands (4.4%) and Sweden (+3.2%).

Also, there is a growing trend of "regionalization" of higher education that can be observed by analysing preferred study destinations in 2013 by region of provenience of the respondents. [*Table 4*]

Most study destinations enjoy strongest popularity among respondents within their own world region – and in some cases the impact of regionalization is particularly evident. Over a 30% of candidates who chose United States as main study destination were from US and Canada, as well as 30.4% of those who chose Belgium and 23% of those who chose Germany were from European countries. Also, the highest percentage of preferences for Australia, New Zealand, Singapore or Japan came from respondents whose region or provenience is Asia Pacific. Another good example of a beneficiary of this trend is the United Arab Emirates (UAE): more than 37% of respondents who chose this country as preferred study destinations were from Africa & Middle East. A different trend emerges for Spain as study destination,

which seems to be the most popular destination among Latin American countries. This is rather due to a language and cultural proximity than geographical one.

Table 4: Top study destinations by Region of provenience – 2013					
Preferred Destination	Africa & Middle East	Asia Pacific	Europe	Latin America	US & Canada
United States	18.6%	17.5%	16.2%	17.3%	30.4%
United Kingdom	19.7%	18.7%	20.5%	19.8%	21.3%
Canada	22.7%	19.0%	17.8%	19.9%	20.6%
Germany	16.6%	20.6%	23.0%	22.2%	17.6%
Australia	21.2%	24.2%	17.3%	20.4%	16.9%
France	18.0%	19.8%	21.8%	22.2%	18.1%
Switzerland	20.4%	19.8%	21.6%	21.7%	16.5%
Netherlands	20.6%	19.3%	23.2%	21.6%	15.3%
Sweden	20.9%	18.8%	22.7%	19.3%	18.5%
Spain	17.6%	18.3%	21.4%	24.8%	17.9%
Italy	18.9%	17.8%	24.1%	23.3%	15.9%
Singapore	19.9%	32.9%	14.9%	18.2%	14.1%
New Zealand	20.8%	26.0%	20.2%	20.6%	12.4%
Denmark	19.8%	21.6%	24.1%	22.3%	12.3%
Norway	21.7%	20.3%	23.7%	19.0%	15.3%
Finland	21.4%	19.7%	22.2%	22.3%	14.5%
Belgium	15.9%	21.3%	30.4%	19.2%	13.3%
Japan	15.9%	24.9%	16.8%	20.6%	21.7%
Ireland	19.3%	21.2%	26.3%	19.0%	14.2%
South Africa	37.9%	17.5%	13.7%	13.1%	17.7%
China	24.1%	19.6%	16.5%	17.7%	22.1%
UAE	37.1%	16.2%	12.8%	10.6%	23.3%

Respondents were then asked to *"identify your reasons for your top choice country of destinations (Please select all that applied)"* and responses are represented in *Chart 16.*

"International recognition of qualifications" remains the top motivating factor for students in both surveys, although this was selected by fewer respondents in 2013 compared to 2009 (17.7% compared to 18.3%). The second most popular motivations is "cultural interest and lifestyle", despite a decrease of 1.71% between 2013 and 2009. "Scholarships/Financial aid" saw the biggest increased in the

motivations preferences, shifting from 12.2% in 2009 and 13.8% in 2013. Students seem also to increasingly considering post-graduation employment prospects when deciding where to study. The percentage of respondents selecting "would like to work there afterward" increased from 11.2% in 2009 to 12% in 2013. The "location of the target school" seems to influence the choice of 1 out of 10 respondents and the percentage increased in the 5 years period (10.7% in 2013 compared to 9.4% in 2009), meaning that a target school can be the driven factor for subsequently choose the country destination.

Chart 16: Top motivations when choosing a destination Comparison between 2013 and 2009
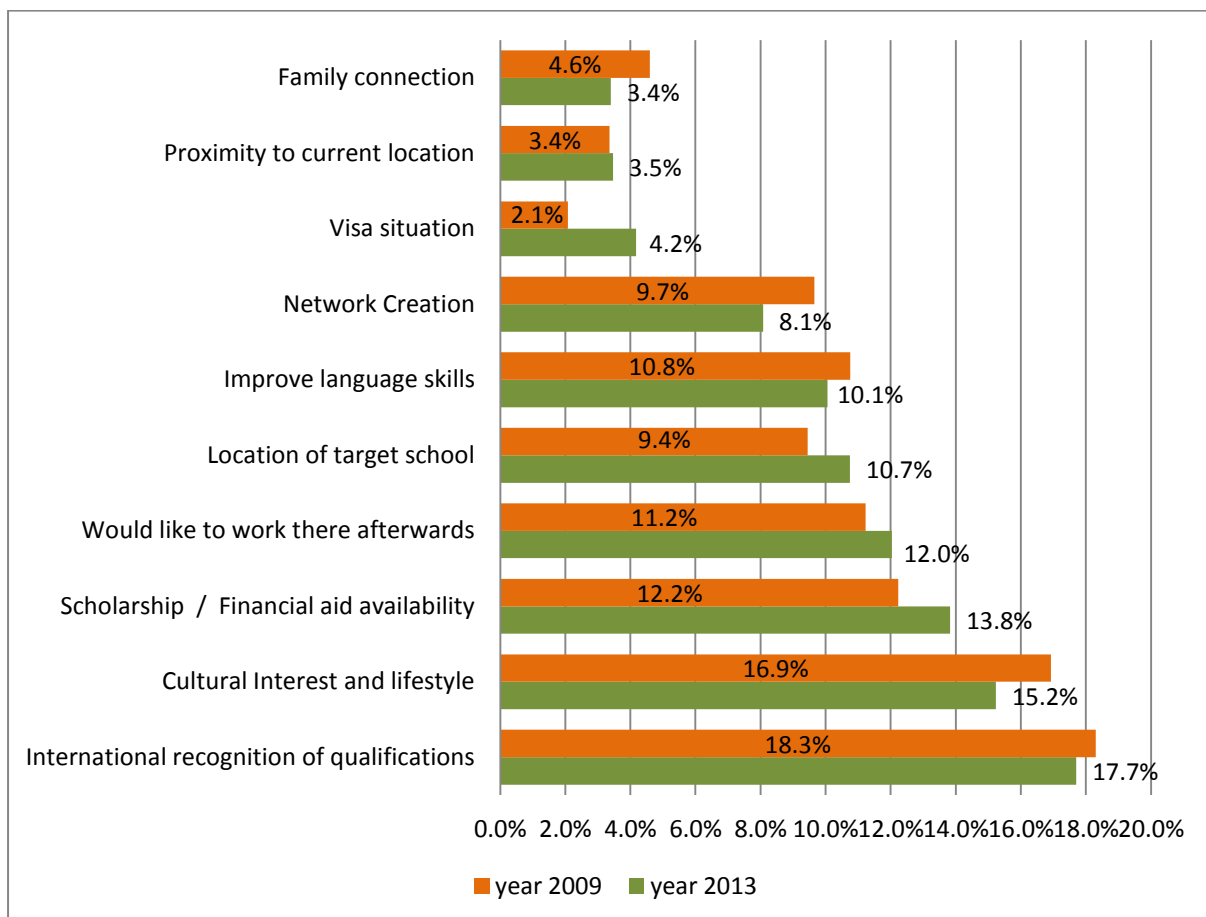
A slightly lower percentage of survey respondents identify "improve your language skills" and "network connection" as motivations to choose a country destination in 2013 compared to 2009. The former was selected by 10.1% of respondents in 2013 compared to 10.8% in 2009; the latter was chosen by 8.1% of respondents in 2013

compared to 9.7% in 2009. The rest of the available options of motivations for choosing a destination were "visa situation", "proximity to current location" and "family connections": those options collected no more than 4.6% of responses in both years.

What is interesting to study is whether gender has an influence on the motivation of choosing a study destination. The *Chart 17* represents choices of male and female respondents of the survey in 2013.

Chart 17: Motivations when choosing a destination - breakdown by gender 2013
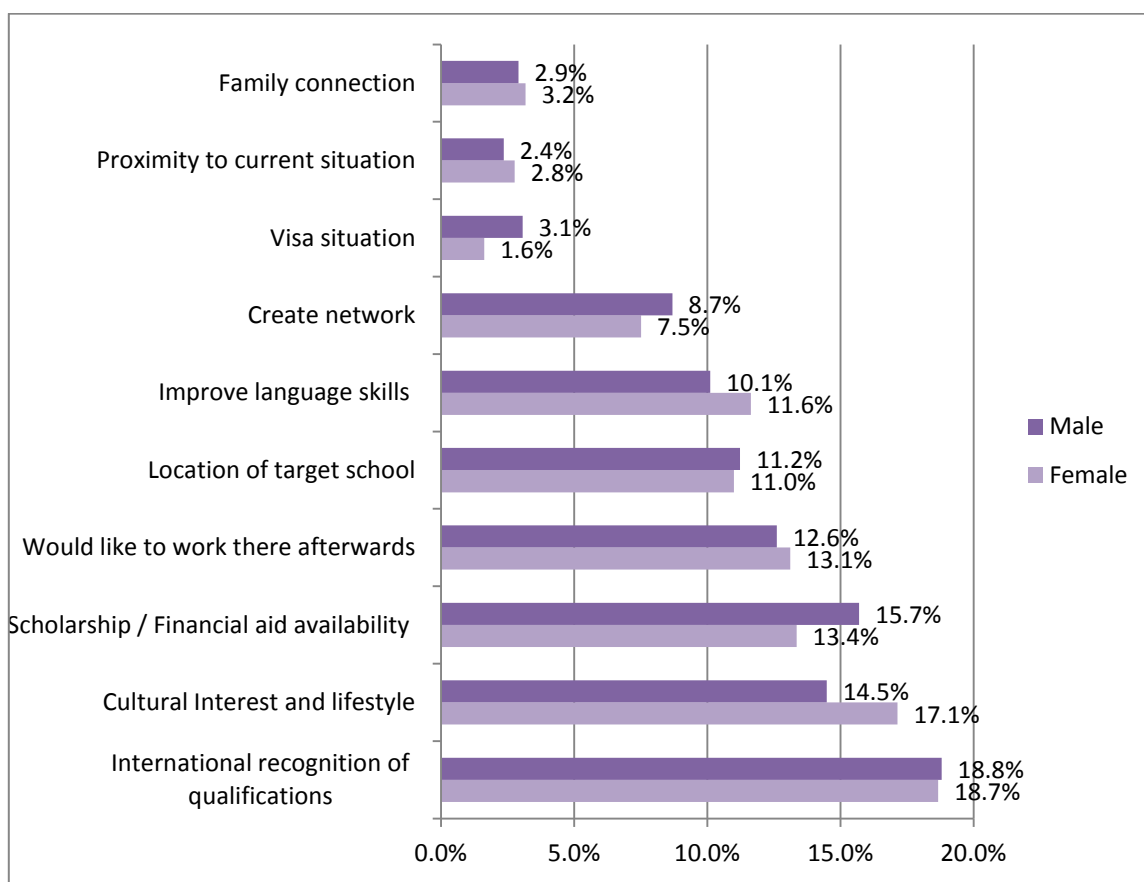
There are not major variations in what appear to be the main motivations when choosing a study destination between female and male prospective students applying for a course at graduate level, although some percentages vary consistently.

Both female and male chose "international recognition of qualifications" as first motivation when choosing a destination, selected by at least 18% of respondents for

both genders. The second motivation is "cultural interest and lifestyle", but this option was chosen by 17.1% of female students and just 14.5% male candidates.

Female candidates were also more likely to choose "proximity with current location" and "family connection" as a main motivation when choosing a destination, possibly reflecting a more explicit need to keep a closer relationship with family and home. Male candidates are more likely to choose "scholarship and financial aid availability" and "create a network" instead.

The most significant gender variation has been verified with a Chi-square test, in order to check its statistical significance. The use of the chi-square test is to examine whether two variables are independent or not[58]: in our case, it examines if there is a relationship between the gender of candidates and a specific motivation when choosing a study destination.

The chi-square test answers the following hypothesis:

H_0: *The choice of "cultural interest and lifestyle" as motivation when choosing a destination is associated with the gender of candidates.*

H_1: *The choice of "cultural interest and lifestyle" as motivation when choosing a destination is independent from the gender of candidates.*

The below tables *Table 5 and 6* shows the observed and expected distribution of choices of "cultural interest and lifestyle" as a motivation broken down by gender.

Table 5: Chi-Square test - observed values

Observed Values	Cultural Interest and lifestyle	Other Options
Female	1214	5869
Male	1127	6654

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[58] *http://ccnmtl.columbia.edu/projects/qmss/the_chisquare_test/about_the_chisquare_test.html*

Table 6: Chi Square test - expected values

Expected values	Cultural Interest and lifestyle	Other Options
Female	1116	5967
Male	1225	6556

The Chi-square statistic is calculated by the formula:

$$\chi^2 = \sum \frac{(observed - expected)^2}{expected}$$

The chi-square statistic is = 19.5201

When a comparison is made between one sample and another, a simple rule is that the degrees of freedom are equal to *(number of columns minus one) x (number of rows minus one) not counting the totals for rows or columns.* For our data this gives (2-1) x (2-1) = 1.

The corresponding probability p-value is = 9.02843E-06 and it is compared with a conventionally accepted significance level of 0.05.

p-value < 0.05

H_0 is not rejected and these results indicate that there is a statistically significant relationship between "cultural interest and lifestyle" as a motivation when choosing a destination and the gender of the prospective student.

The third question of the "study plans" section of the survey aims to identify top subjects choices of prospective graduate students. Respondents were asked to *"Select up to three programs you are considering studying"* [*Chart 18*]. The list of subjects is represented according to conventional grouping (*see Index on page 99*).[59]

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[59] *STEM Subjects are listed according to:*
http://www.publications.parliament.uk/pa/ld201213/ldselect/ldsctech/37/3705.htm

Chart 18: Preferred subjects of study Comparison between 2013 and 2009
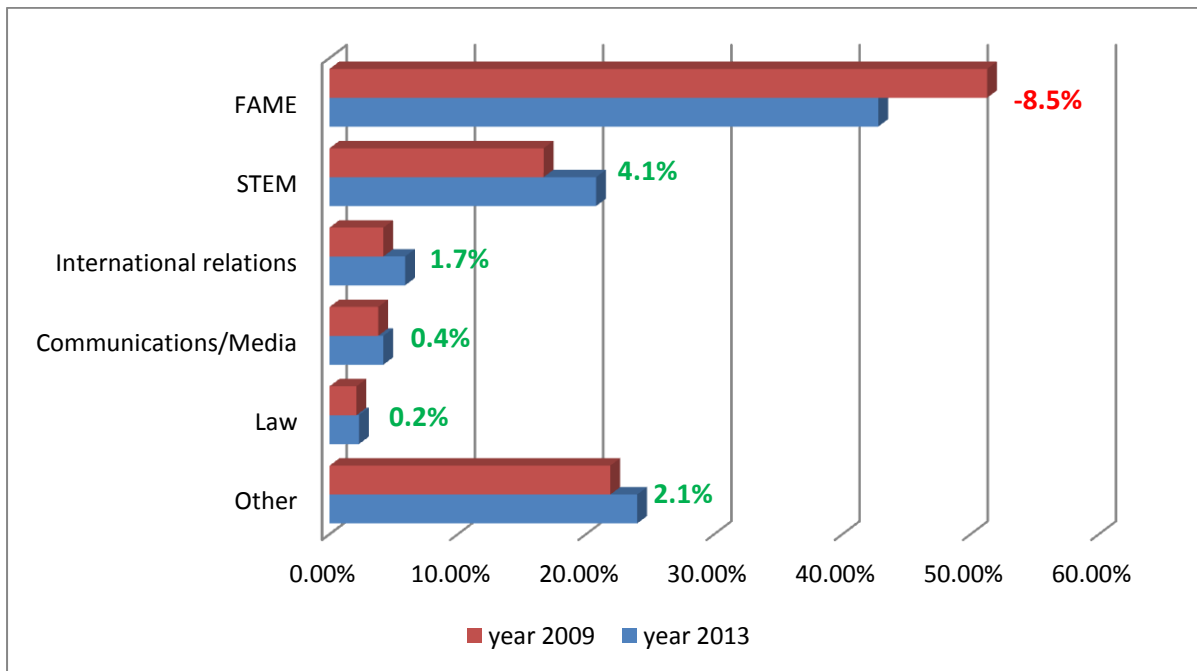
The two survey years show relative stability in terms of the subjects respondents said they were interested in studying at graduate level.

The largest group, the FAME field (including finance, accounting, business, management, economics, administration) remained by far the most popular among the respondents, though it received a significantly lower proportion of selections in 2013 compared to 2009 (42,8% of preferences in 2013 compared to 51.3% in 2009).

Conversely, the STEM group (including natural and life sciences, technology, engineering, mathematics and related subjects) grew in popularity across the two survey years, from 16.7% in 2009 to 20.8% in 2013.

The choices that follow are relatively stable between the two survey years: the third subject choice of prospective graduate students is international relations (5.9% of preferences) followed by communications and media studies (4.2%) and law (2.3%).

2.1.3 Expectations for future career plans

The objective of this section of the survey is to investigate what are the expectations for future career plans of prospective students planning to embark a graduate-level degree abroad. Respondents were asked in which professional position they would see themselves in 10 years' time, what would their target salary be and how many hours they would expect to work. Data for this section was collected just in 2012-2013.

Respondents were asked *"Which one of the following choices best describes where you see yourself in 10 years' time?"[Chart 19].*

In the 2013 survey, almost a quarter of respondents said that in ten years' time they would have seen themselves running their own business. The next most popular choices were director or CEO of large companies: together those roles were selected by almost 32% of respondents.

Chart 19: "Where do you see yourself in 10 years' time?" 2013
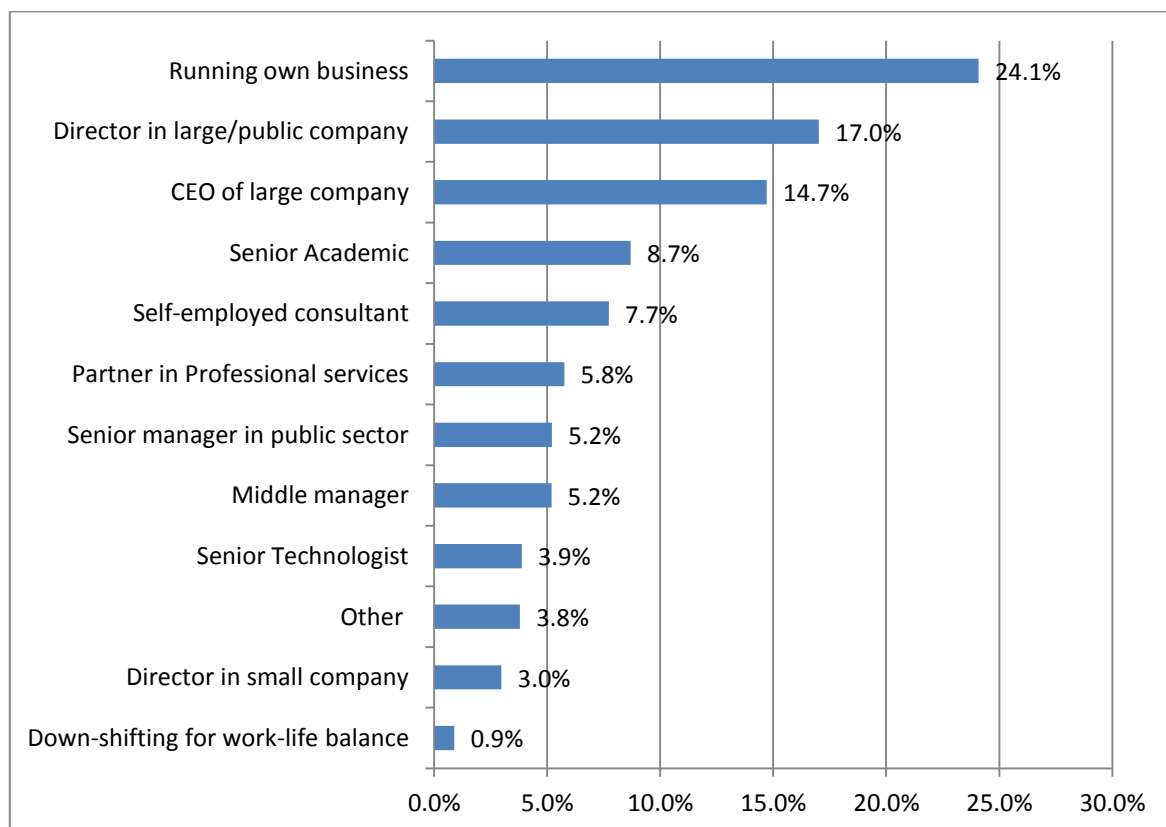
Comparing male and female respondents in *Chart 20*, 10-year career goals are generally very similar, with some variation within an overall pattern of correlation. Female respondents were even more likely than males to see themselves running their own business (over 35% of females compared to just under 23% of males), but significantly less likely to expect to be CEOs (just under 11% compared to over 18%), while expectations of becoming director in a large company were almost equally likely to be expressed by either gender (just over 17% of female respondents and just under 17% of males).

Chart 20: "Where do you see yourself in 10 years' time?" Breakdown by gender - 2013
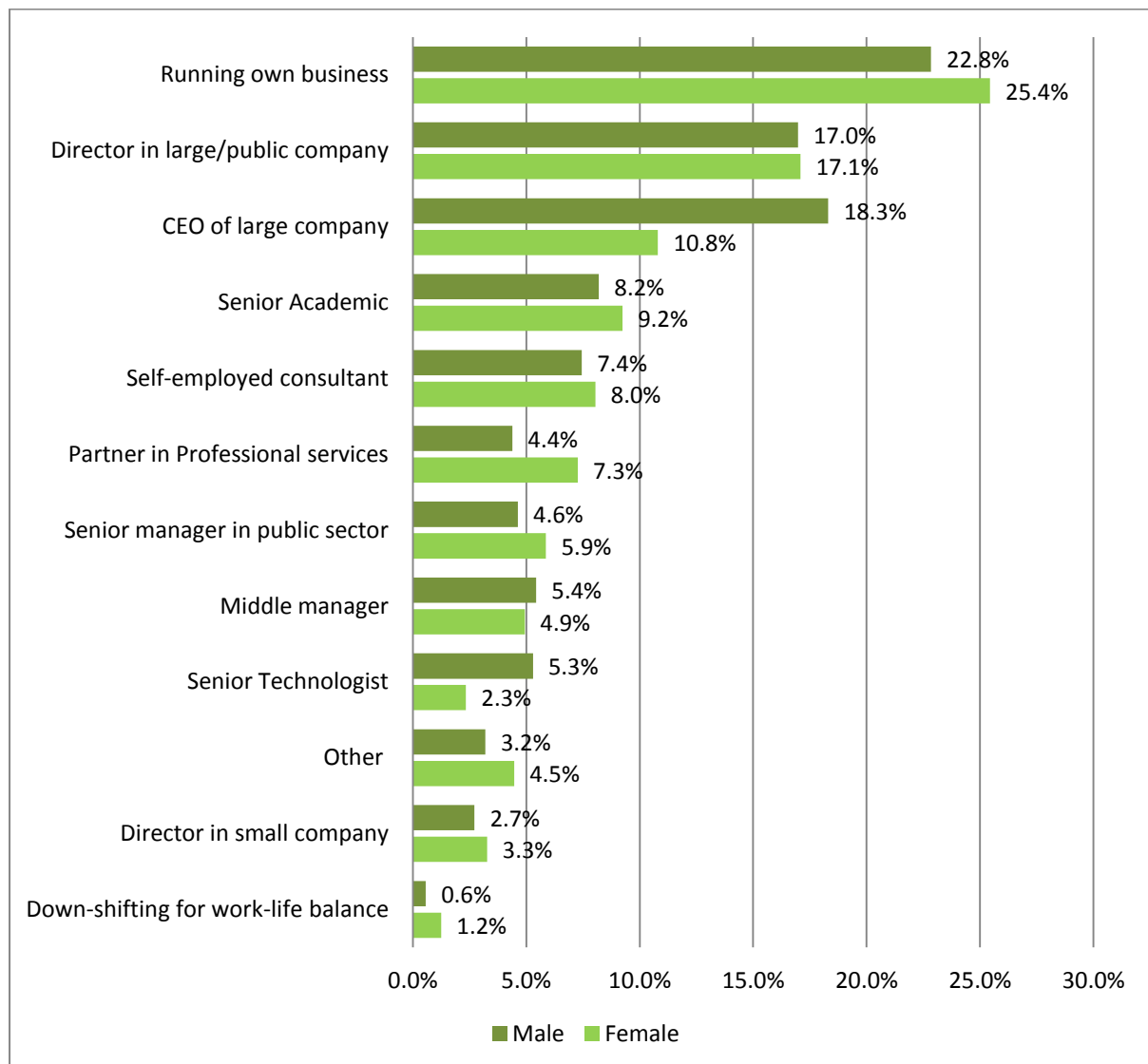
Although the percentage is very low, it's worth mentioning than while just 0.6% of male respondents said they will see themselves down-shifting for work-life balance in ten years' time, the percentage raises to 1.2% for female respondents, double the number.

Respondents in 2013 were asked to identify a target annual salary representing their desired earnings after completion of a graduate degree.

The overall results suggest graduate-degree applicants aiming at a significant salary increase, with many aiming extremely high.

Variations can be highlighted by gender, as per *Chart 21* below. Female respondents seem to keep their expectations lower than male when it comes to a target salary. Nearly half of females (45.5%) are expecting to earn less than <$40,000 compared to just 37.5% of male respondents. The highest discrepancy is evident for those who are aiming to earn more than $80,000 per year. While 31.7% of male gender indicates such aspiration, this option was expressed by just 22% of female respondents.

Chart 21: Target salary by gender - 2013
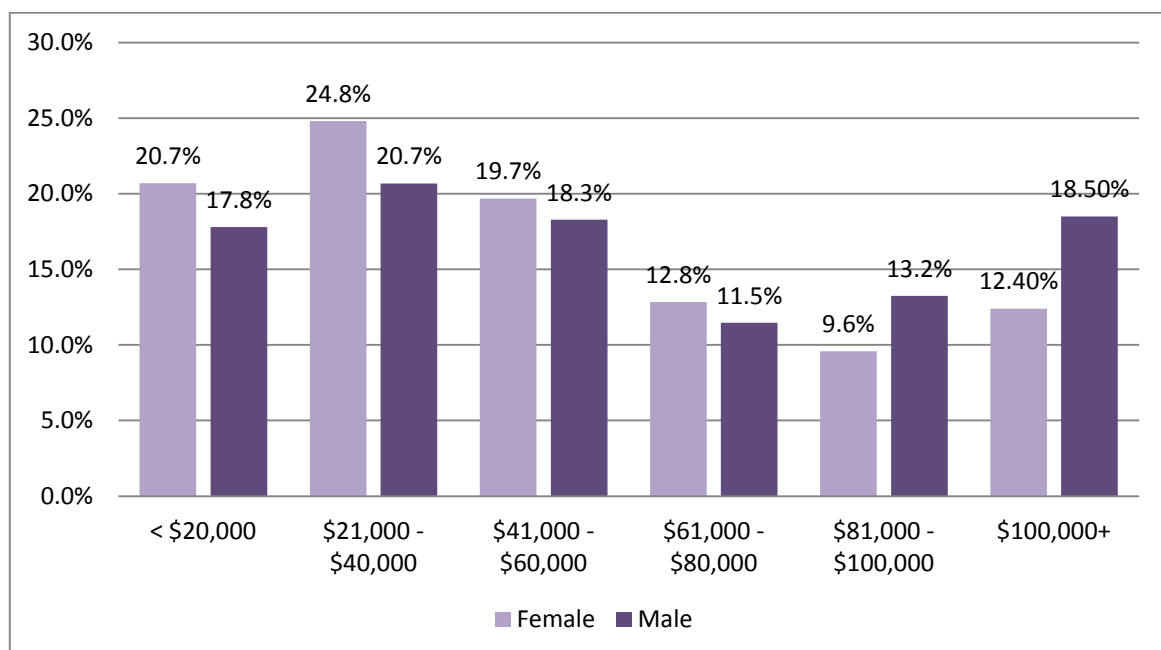
Lastly, survey respondents were asked *"How many hours per week do you expect to work in their first job after obtaining your qualification?"* [*Chart 22*]

Chart 22: Expected working hours - 2013
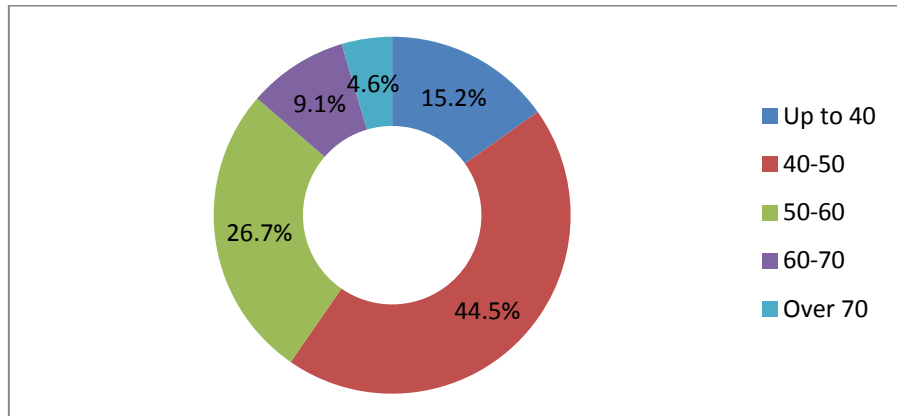
The following *Chart 23* shows how 'working hours' expectations differ between male and female respondents. We can say that male prospective students are expecting to work longer hours compare to female. The vast majority of both genders expected to be working more than a 'standard' 40-hour week, almost 85% of respondents, with more than 40% from both genders expecting to work 40-50 hours. Almost as many expected to be working upwards of 50 hours per week, but the difference of responses from the two genders vary: male increasingly chose those option, with more than 6% expecting to work over 70 hours, compare to 2.7% of female respondents.

Chart 23: Working hours by Gender - 2013
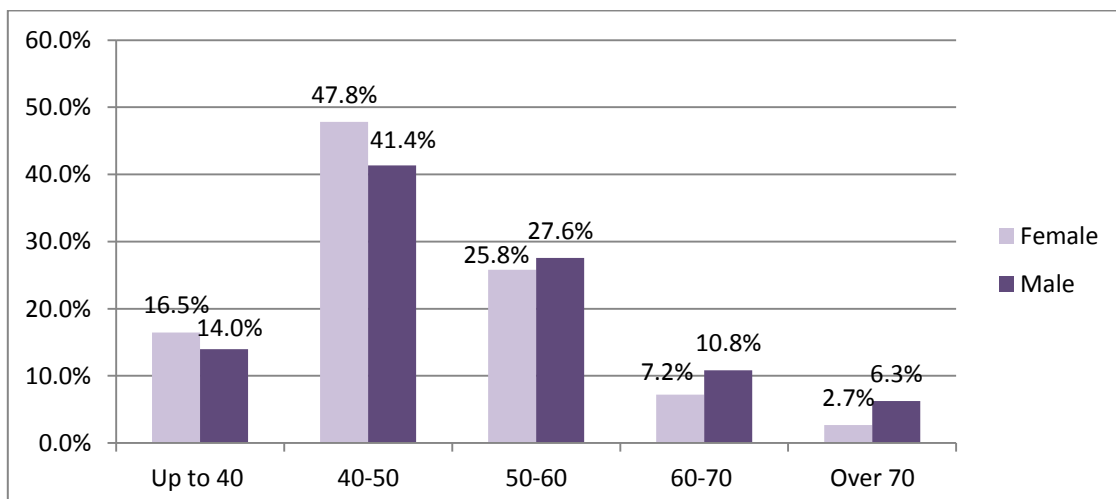
These patterns are fairly consistent across each region, tough few differences might be highlighted, as per *Chart 24* below. Respondents in Western Europe were particularly likely to expect to work for more than 50 hours per week and those in Latin America least likely to expect a working week in excess of 50 hours.

Chart 24: Working hours by region 2013

US & Canada
Up to 40: 14%
41-50: 47%
51-60: 28%
61-70: 8%
70+: 4%

Latin America
Up to 40: 18%
41-50: 50%
51-60: 22%
61-70: 6%
70+: 4%

Western Europe
Up to 40: 11%
41-50: 41%
51-60: 32%
61-70: 11%
70+: 4%

Eastern Europe
Up to 40: 15%
41-50: 48%
51-60: 25%
61-70: 7%
70+: 5%

Asia Pacific
Up to 40: 14%
41-50: 42%
51-60: 29%
61-70: 9%
70+: 5%

Africa/Middle East
Up to 40: 18%
41-50: 43%
51-60: 22%
61-70: 11%
70+: 5%
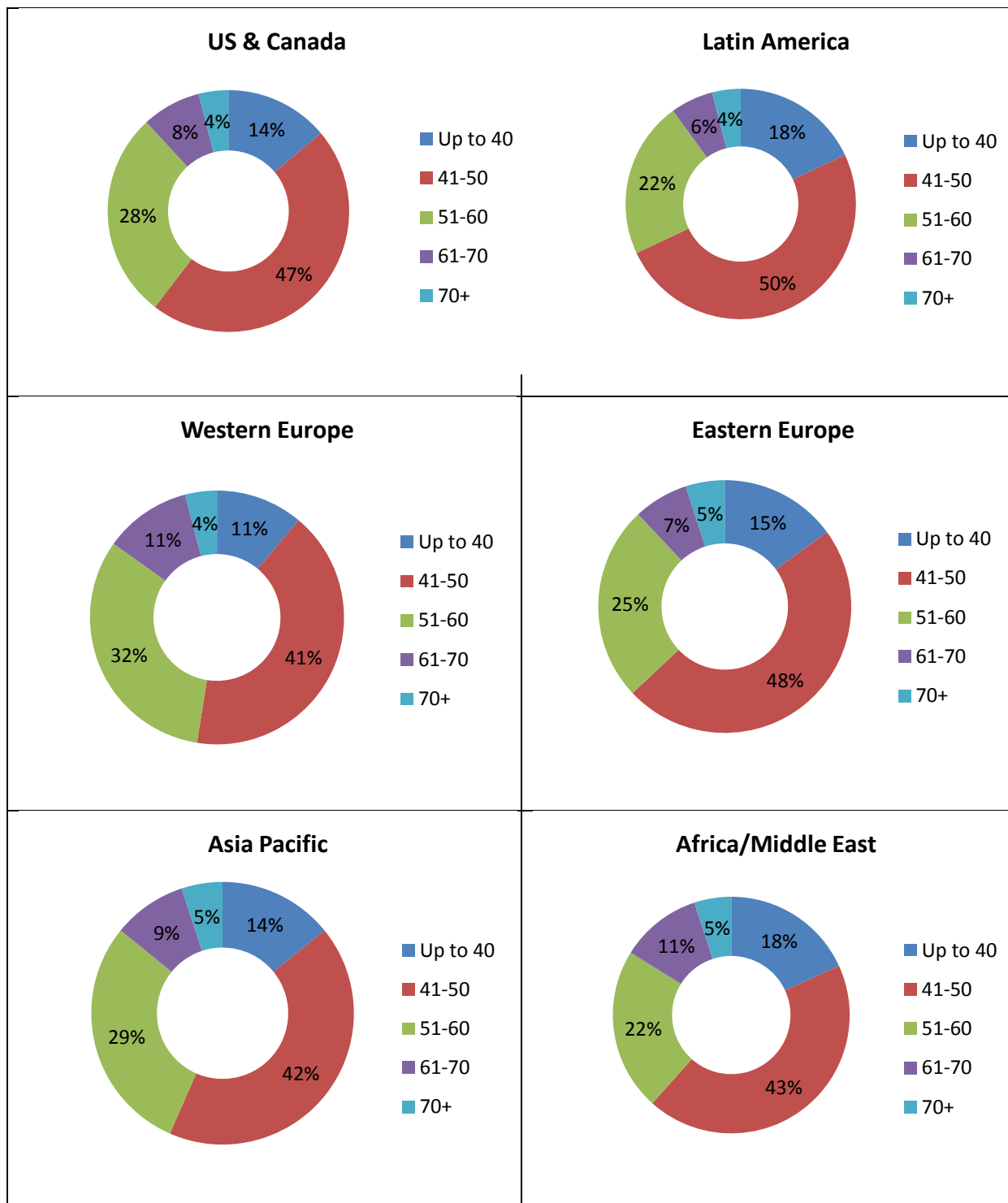
2.2 Analysis of the second quantitative research (2013-2014)

The second part of the descriptive research is based on the analysis of a global survey of students applying for graduate-level courses worldwide, conducted in 2013-2014.

Again, survey respondents attended a Qs World Grad School Tour event, being prospective candidates for Masters and PhD programs at local or international universities, with particular focus on studying a graduate degree abroad.

Attendees were invited to complete a one-page paper questionnaire on the day of the event, covering key issues relating to how prospective students use digital resources to research about universities and courses.

Data collected and analysed will provide insights into how students approach their online search, the types of online platform they value most, the tasks for which they are most likely to use different types of resources and the information they find most challenging to access.

A total of 2,215 candidates completed the survey, covering 35 countries across Europe, Asia, North America, Latin America and Africa.

Specific insights into trends within each world region, but also age, level of education and, to a minor extend, gender will be highlighted.

2.2.1 Demographical breakdown of the sample

A breakdown of the survey sample per gender, region, age, level of education achieved and level of the course of interest can be observed in the below charts.

Survey respondents were asked to indicate their gender [*Chart 25*].

Chart 25: Breakdown of the sample by gender
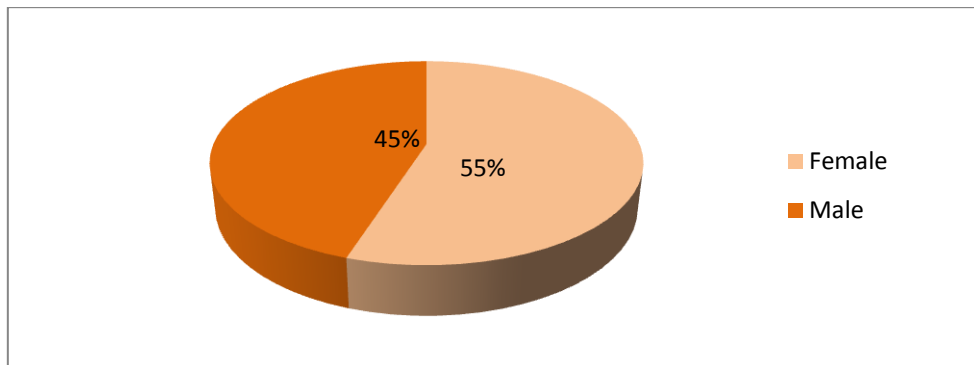
The survey sample is composed 55% of female candidate and only 45% by male gender. The percentage of females applying for a graduate level degree increased by 14.6% in the last 5 years: the number of women completing one of our survey rose from 48% in 2009 (see *Chart 5* for gender breakdown of survey 2009) to be the predominant gender in 2014.

Survey respondents were asked to indicate their nationality. The *Chart 26* below represents the results.

Chart 26: Breakdown of the sample by region of provenience
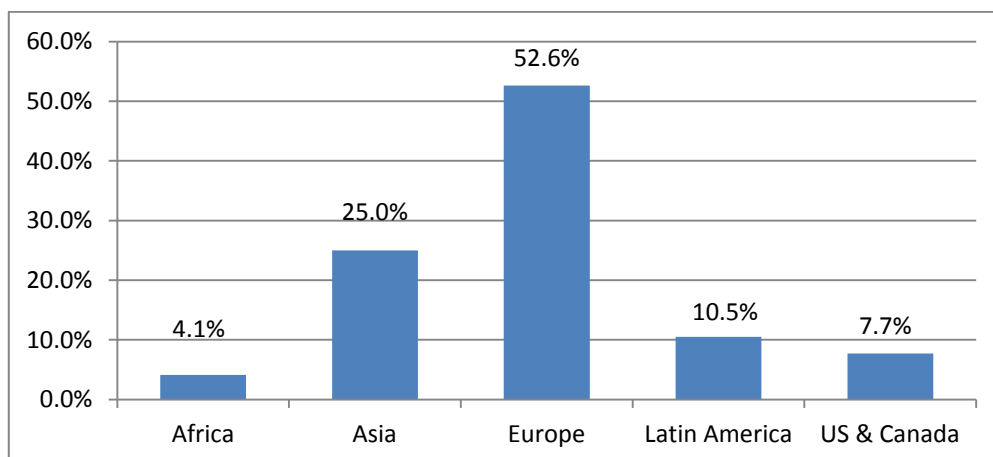
Nearly 53% of responses were from prospective students in Europe, 25% in Asia, 11% in Latin America, 8% in the United States and Canada and 4% in Africa.

Respondents were subsequently asked *"What is your age?".* Respondents were able to choose from the age groups represented in *Chart 27*, which covered and age range between 17 and under and +30 years old.

Chart 27: Breakdown of the sample by age
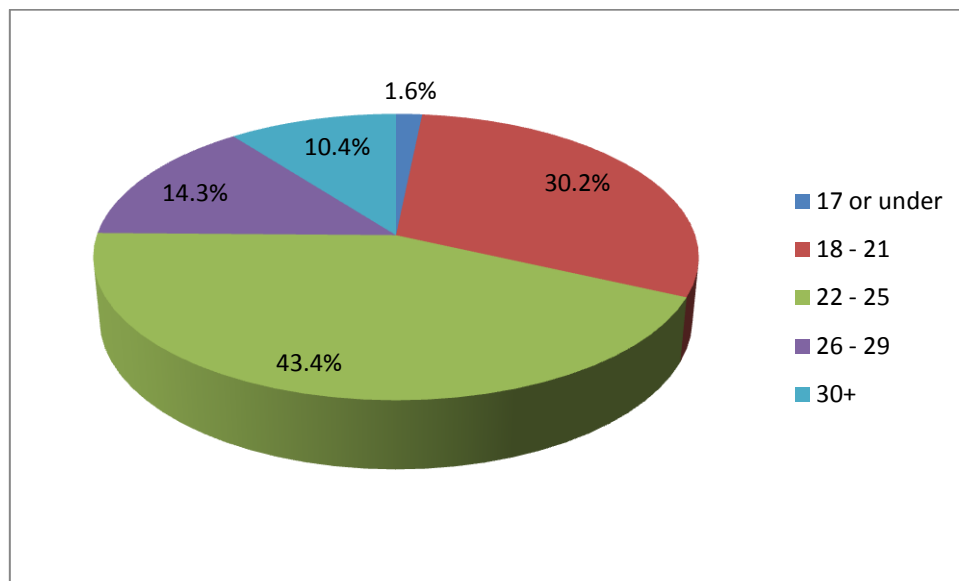
The age range covered is between 17 to +30 years old. More than 70% of the sample is composed of those aged between 18 and 25; less than 2% of respondents were 17 or younger; 14.3% were aged 26-29 and 10.4% were 30 or older. The composition of the sample reflects a further shift towards a younger generation of candidates applying at graduate level. In the survey of 2012-2013 half of the candidates were aged 21-24 (see *Chart 10* for age breakdown of survey 2013). In 2103-2014, despite the largest age group being 22-25, a 30% of responses came from a younger group ages 18-21.

Survey respondents were asked '*Which is the highest level of education you have completed so far?'[Chart 28]* and *'Which level of course are you interested in applying for?'[Chart 29]*

Chart 28: Level of education achieved
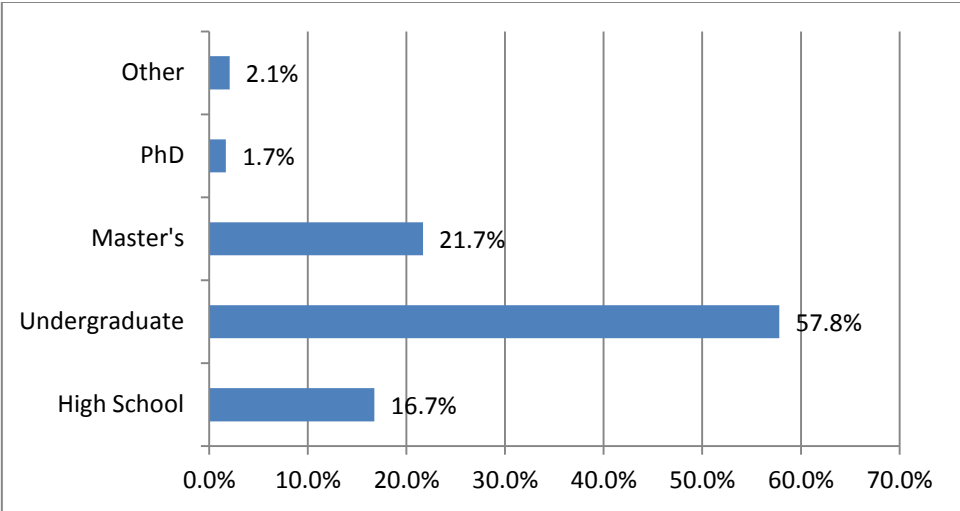
Chart 29: Level of course of interest
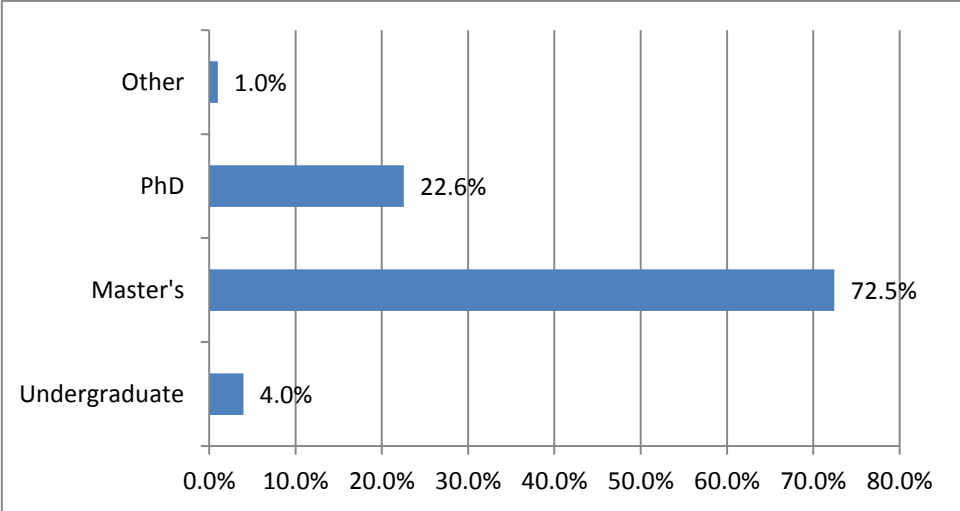
As the events at which the survey was conducted were focused on those applying for postgraduate level courses, the majority of respondents (73%) were interested in applying for master's programs, with 23% preparing for PhD study and just 4% for undergraduate degrees. This reflects the level of education achieved: as applying for a postgraduate degree, the majority of respondents have already completed an undergraduate course or probably still completing it.

2.2.2 Most-used online resources and devices

In this first section the survey explores the importance given to online and offline resources when researching about higher education options, the types of devices students access the web from and the types of online platform they value the most.

Survey respondents were firstly asked: *'Would you say online or offline resources are more important in helping you make decisions about your education?'[Chart 30].*

A large majority (almost two-thirds) of respondents said they considered online and offline resources equally important when researching their higher education options. Just over 30% classed online materials as more important, with less than 6% placing greater value on offline resources.

Chart 30: Importance of online vs offline resources
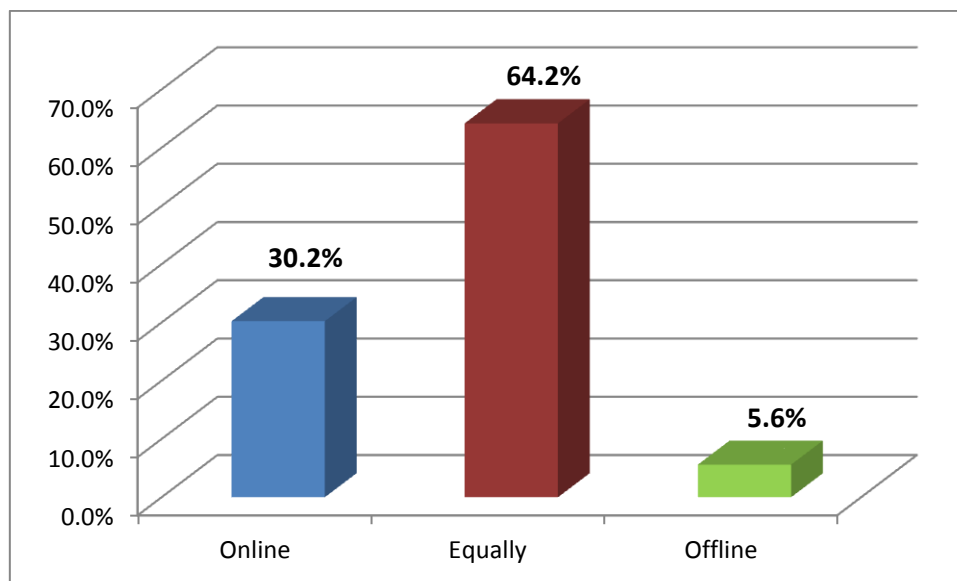
As shown in the next *Chart 31*, while this trend is fairly consistent across the regions covered by the survey, the major exception is Africa. Almost half (48%) of respondents in this region said they considered online resources more important, with additional 47% valuing online and offline sources equally.

Chart 31: Online vs Offline resources – breakdown by region

Chart 31: Online vs Offline resources – breakdown by region

Region	Offline	Equally	Online
US & Canada	4.2%	64.5%	31.3%
Latin America	6.5%	66.2%	27.3%
Europe	6.0%	63.7%	30.2%
Asia	4.9%	66.8%	28.3%
Africa	4.7%	47.1%	48.2%
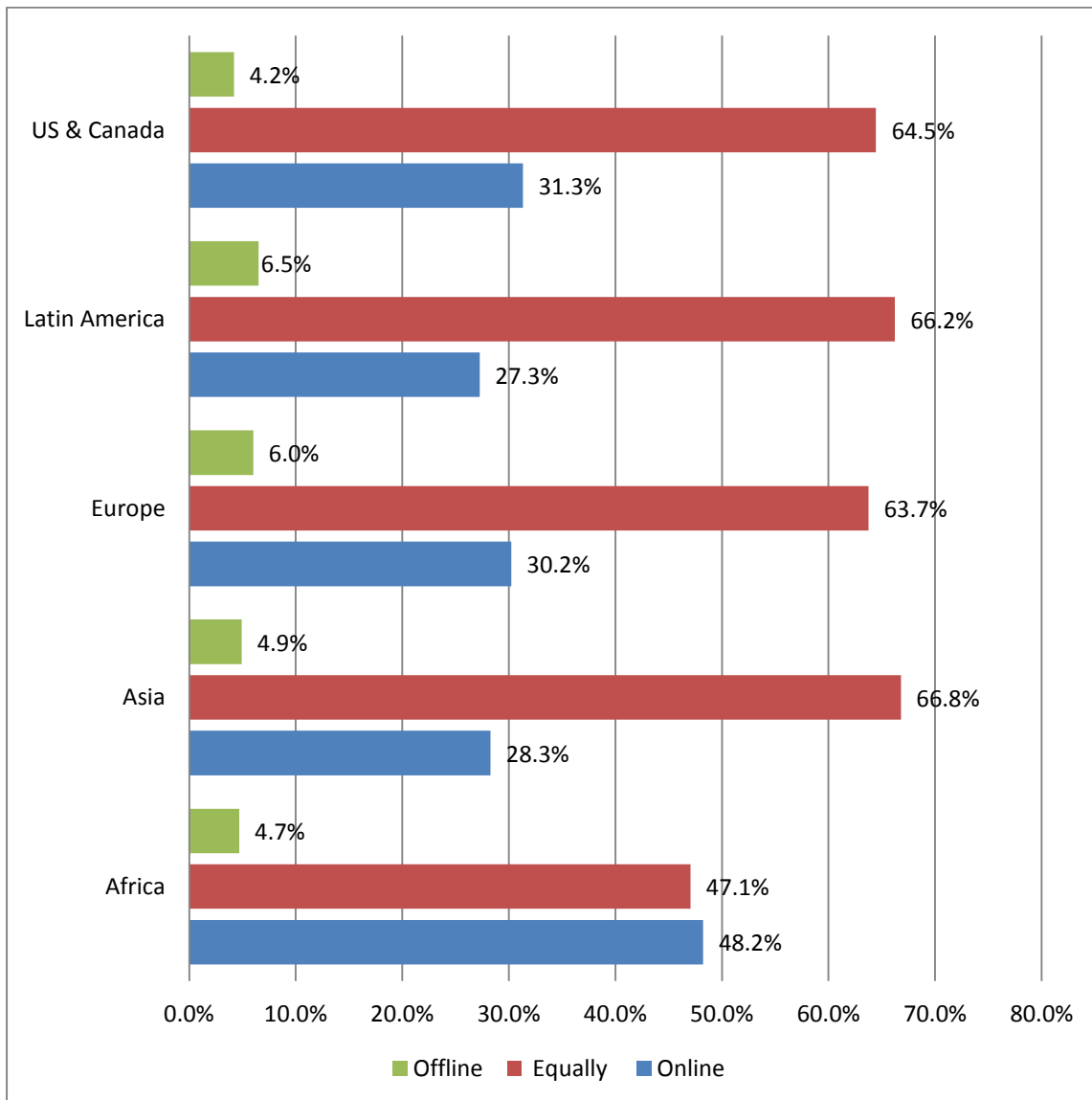
Chart 32 shows the breakdown of results per age group instead. When comparing responses by age range, the trend is perhaps not in the intuitive direction: younger respondents were in fact less likely to prioritize online resources. Only less than 20% of the younger age group chose online resources as more important when researching their higher education options. They are the most likely to prioritize offline resources instead. Conversely the older group is more likely to choose online resources rather than offline resources (the former was chosen by 33.5% of respondents, the latter from just 2.8% of them).

Chart 32: Online vs offline resources – breakdown by age group
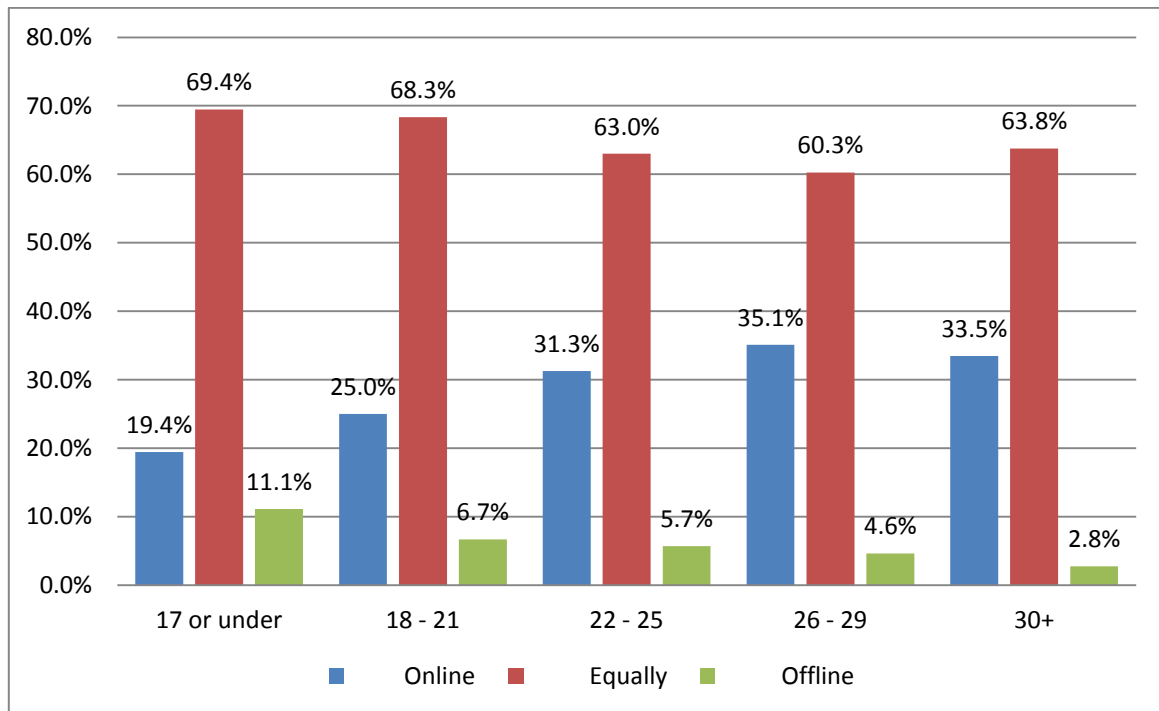
The survey asked participants which devices they used when researching universities and courses (they could choose all that apply. Results are represented in *Chart 33*.

The most selected device by far was the laptop, chosen by 82.2% of respondents; this was followed by smartphone, chosen by 38.6% of respondents, then desktop (29.3%) and tablet (26.5%).

Chart 33: Devices most used when researching about HE options online
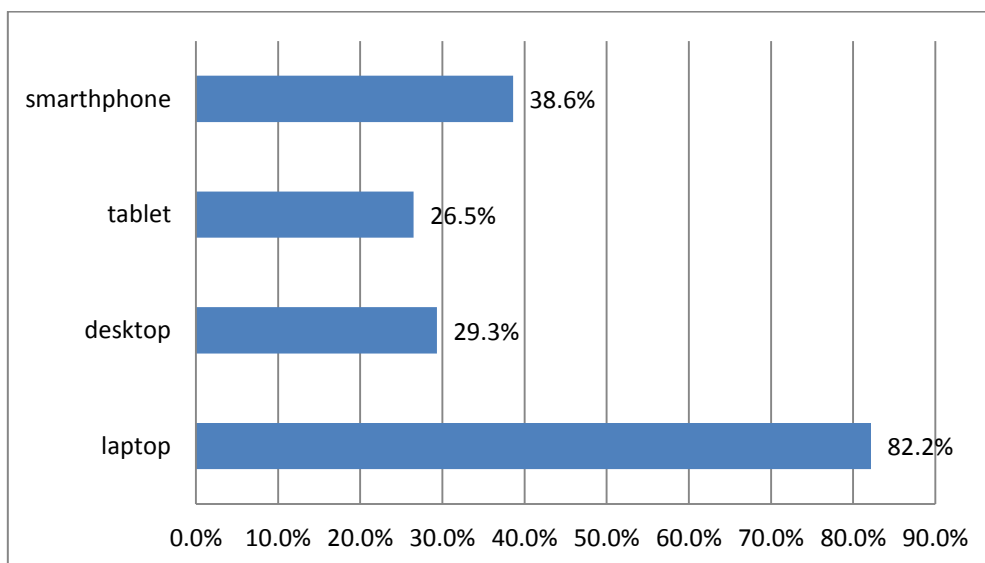
The survey shows that the majority of prospective students conduct their research across multiple types of device. Just 26% of respondents said to use just one device while the rest 74% accessed the web across 2, 3 or 4 devices[*Chart 34*].

Chart 34: Number of devices used when researching about HE options online
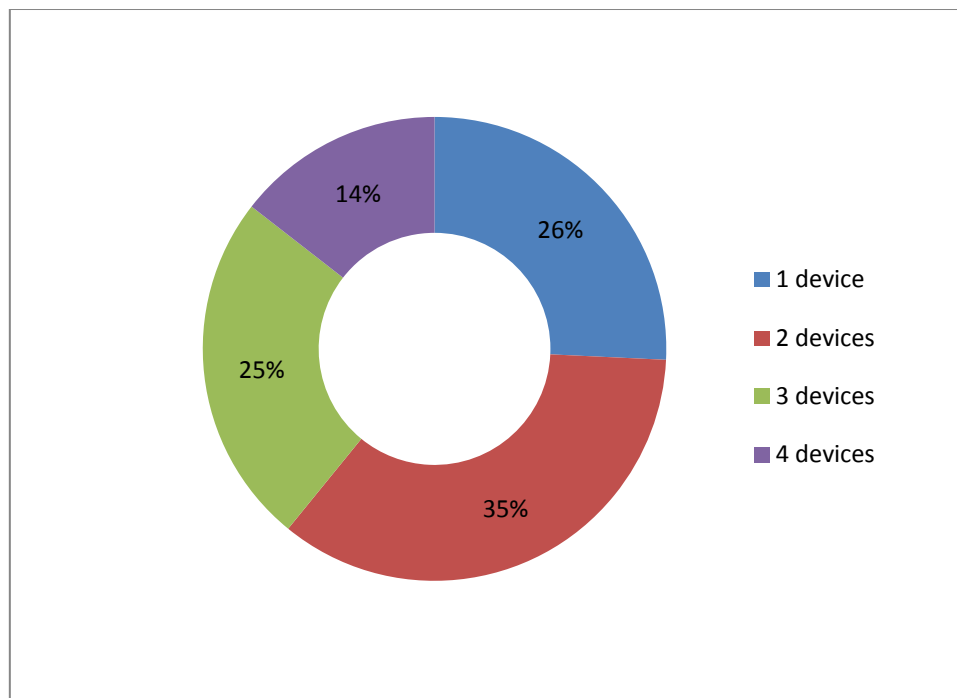
Out of those who said they used 2 devices, the most common combination was 'laptop and smartphone' (49%). (See *Table 7* below for a full breakdown of combinations).

Table 7: Breakdown of combinations of devices for those who used 2	
2 devices	Percentage
Laptop + Smartphone	49%
Laptop + Desktop	23%
Laptop+ Tablet	17%
Desktop + Smartphone	6%
Tablet + Smartphone	3%
Desktop + Tablet	2%

Among the 25% of respondents who said they access the web across 3 devices, the most common combination is 'laptop, smartphone and tablet', chosen by 46% of respondents. *Table 8* shows a full breakdown of combinations.

Table 8: Breakdown of combinations of devices for those who used 3	
3 devices	Percentage
Laptop + Smartphone + Tablet	46%
Laptop +Smartphone + Desktop	33%
Laptop + Desktop + Tablet	18%
Desktop + Tablet + Smartphone	4%

The final questions of this section focus on the different types of online source, trying to understand how valuable each resource is during the research and what each resource is mainly used for.

Survey respondents were asked to complete a grid indicating the importance of each online resource, in a scale from "essential" to "I don't use it".

Table 9 below shows the output to the question: '*How important are the following online resources when researching universities and courses? (Please tick one for each resource)'.*

Focusing on different types of online resource, a clear hierarchy or importance emerges. Two third of respondents said they considered official university websites "essential" when researching higher education options, while university rankings websites were most likely to be classified as "very important", and "other websites about universities "quite important".

Table 9: Importance of different online resources					
Online resources	Essential	Very Important	Quite Important	Not so important	I Don't use it
Official university websites	66.6%	24.9%	7.5%	0.7%	0.3%
University rankings websites	29.4%	40.2%	24.8%	4.2%	1.3%
Other websites about universities	11.1%	30.8%	39.6%	14.8%	3.8%
Online Student Forums/chat rooms	13.4%	28.8%	32.6%	16.5%	8.8%
Social Media	10.2%	20.3%	31.6%	27.7%	10.3%

Although online forums and social media were generally considered less critical, they were still rated "essential", "very important" or "quite important" by a majority of prospective students (more than 60%). Prospective students seem to value a wide range of online resources when researching their options, with a majority placing at least some importance on all five of the different types of resource the survey asked about.

These trends are fairly consistent across age and gender, with some slight variation by region, shown in *Chart 35*. Mostly, respondents in Latin America and Africa were more likely to class social media as an essential part of their research, while those in the US and Canada were most likely to say they didn't use it at all for this purpose, followed by those in Europe. However, respondents were most likely to place social media somewhere in between. Across Africa, Asia and Europe, the most selected category was "quite important". The top choice for respondents in US and Canada was "not so important", while those in Latin America were at the other end of the spectrum, with a majority classing social media as "very important".

Chart 35: Importance of social media when researching HE options - by region

Region	Essential	Very Important	Quite Important	Not so Important	I dont Use it
Africa	15.7%	28.9%	32.5%	18.1%	4.8%
Asia	13.1%	25.5%	32.5%	21.2%	7.7%
Europe	7.6%	16.1%	33.6%	30.9%	11.8%
Latin America	16.4%	31.4%	21.7%	23.0%	7.5%
US & Canada	7.1%	12.5%	28.0%	36.9%	15.5%
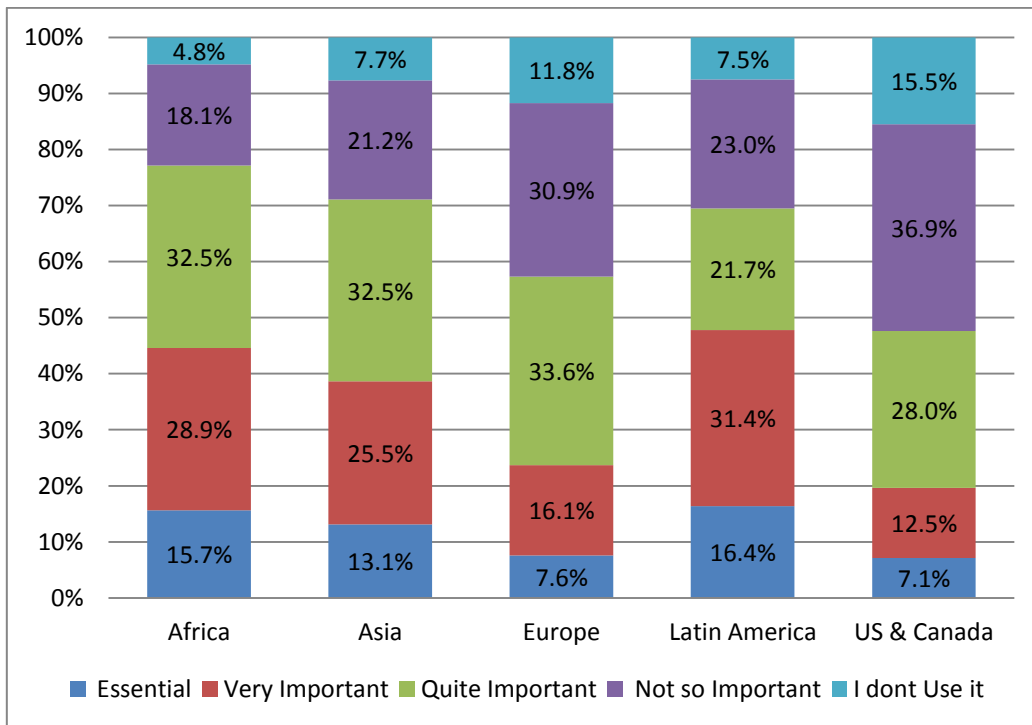
Survey respondents were given a grid with a list of options to complete replying to the following question: *'What do you use each online resource for when researching universities and courses? (Please tick all the activities that apply)' [Table 10].*

The survey's results reveal well-distinguished usage patterns, which largely confirm intuitive assumptions. Respondents typically said they used official websites to research courses and applications and funding (the options were chosen respectively by 32% and 23% or respondents), while rankings websites were the leading source used to compare universities by the majority of respondents. Social media and online forums were associated with seeking ideas and inspirations by 30% of respondents, while information about locations was the field of research spread most widely across different platforms. At the same time, the overall pattern is one of multi-resource use at every stage of the research process. Today's applicants are integrating many different information sources when assessing future higher education options.

Table 10: Usage of different online resources						
Online resources	Research courses	Compare universities	Research locations	Get ideas/inspiration	Research applications & funding	I Don't use it
Universities official websites	32.1%	14.3%	17.9%	12.8%	23.0%	0.3%
University Rankings websites	11.6%	58.3%	9.5%	13.4%	7.2%	3.7%
Other websites about universities	14.7%	26.2%	14.9%	21.5%	14.4%	8.3%
Online Student Forums/chat rooms	10.7%	20.0%	9.0%	29.9%	10.8%	19.7%
Social Media	11.4%	16.0%	10.5%	30.5%	9.0%	22.6%

Survey respondents were asked *'Which of the following social networks have you used to find information about universities and courses?'*. *Table 11* below shows results, broken down by region of provenience.

Table 11: Social media channels used to research HE options - by region						
Region/Country	Twitter	Facebook	LinkedIn	G+	YouTube	Other
Africa	11.0%	60.4%	18.7%	24.2%	5.5%	6.6%
Asia	13.4%	52.5%	20.8%	14.1%	19.0%	14.4%
Europe	11.2%	53.8%	24.9%	12.8%	21.1%	10.7%
Latin America	19.7%	62.2%	27.9%	18.9%	20.2%	7.7%
US & Canada	11.7%	46.8%	32.2%	8.8%	24.6%	9.4%

Facebook claimed the most responses across all world regions, followed by LinkedIn and YouTube. Several differences can be noticed at region level though. Out of the total respondents, Latin America prospective students were the most active on social media channels and heaviest users when it comes to researching universities and courses via social networks, reporting the highest percentage of usage of all social media channels with the exception of G+ and LinkedIn. Facebook was even more dominant in Africa and Latin America than in other regions (more than 60% of respondents in both regions said they used it to research information about universities and courses). 32.2% of respondents from US & Canada said they used LinkedIn to research their higher education options, being the most active on this channel. Twitter is most used in Latin America, while G+ is most popular in Africa. Almost 20% of respondents in every region said they used YouTube to research about universities and courses, except for Africa where the percentage is slightly over 5%. It is worth to notice that the percentage of those who said they used "other" social networks other than the ones mentioned is higher in Asia and Europe, reflecting the continued success of the region's own popular social networks. Local social media networks that can be mentioned are RenRen and Youku in China, Mixi in Japan, Vkontacte in Russia and Xing in Germany.

Considering differences by age group shown in *Table 12*, the trends are clear and reasonably intuitive: younger groups are most active on social media channels and more likely to use them to research their options about universities and courses.

Table 12: Social Media channels used to research HE option – breakdown by age					
Age	Twitter	Facebook	LinkedIn	G+	Youtube
17 or under	14.3%	57.1%	2.9%	14.3%	22.9%
18 - 21	13.9%	54.9%	17.7%	13.4%	21.0%
22 - 25	12.9%	58.5%	24.8%	13.7%	20.0%
26 - 29	10.6%	51.8%	32.5%	14.1%	19.9%
30+	10.1%	38.3%	35.7%	15.9%	18.9%

And comparing results to total number of responses collected per each age group, the trends are easier to spot. The most popular social network among all age groups is Facebook, while the only social network which usage is growing with age is LinkedIn; Twitter and YouTube are more popular among younger groups, while G+ usage is quite equally distributed.

Chart 36: Social Networks usage when researching HE options -
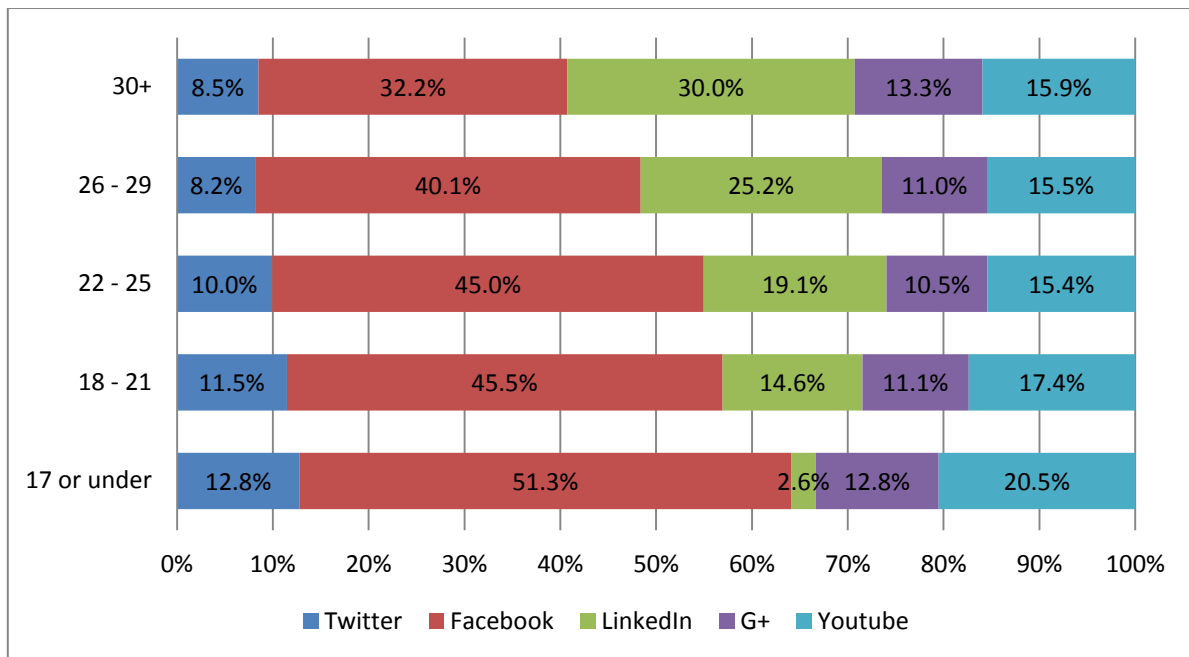
2.2.3 What are students searching for?

In this section of the survey respondents were asked to identify which elements of their research were most likely to enter into an online search during their higher education research and which was the hardest information to find instead.

Survey respondents were asked *'When researching educational options online, which of the following would you search for? (Select as many as apply)'*

According to results represented in *Chart 37*, the first element prospective students said they are most likely to research about is the subject of study, followed by the type of course and location.

Chart 37: Options searched for during an online research
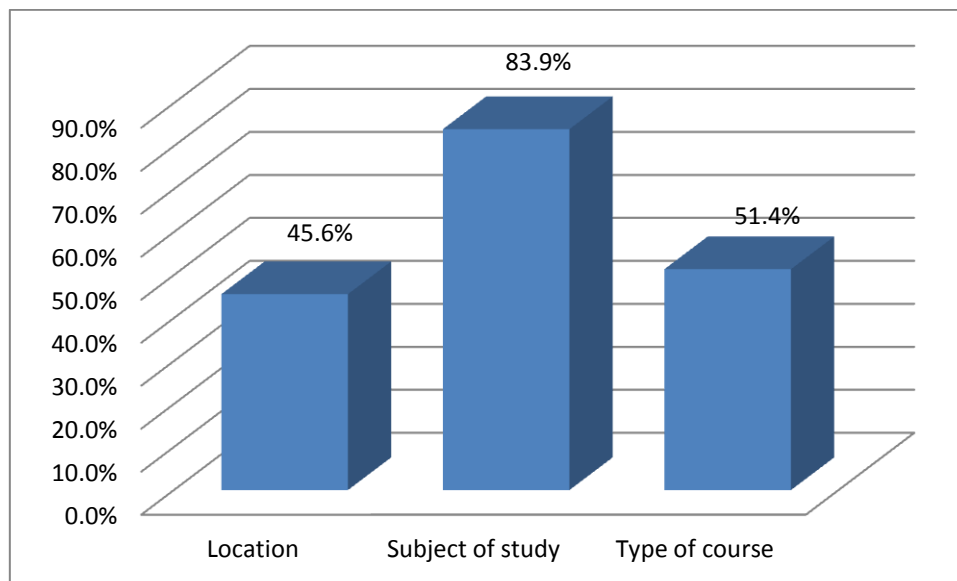
More than 80% of survey respondents said they started their search by researching about the subject of study they were interested in, more than 50% looked for the type of course and more than 45% searched about the location. On average each respondent searched for 1.8 out of the 3 options.

Observing the results broken down by expressed course of interest [*Chart 38*], there were no trends emerging. Master's and PhD's prospective candidates presented nearly the same attitude when it comes to research information about their course of interest online.

Those interested in an undergraduate course instead were slightly more likely to search for location options, though the most researched element remained the subject of study.

Chart 38: Options searched for during an online research - by course of interest

Master's: Location 24.9%, Subject of study 46.7%, Type of course 28.4%
PhD: Location 25.2%, Subject of study 46.2%, Type of course 28.7%
Undergraduate: Location 29.2%, Subject of study 44.5%, Type of course 26.3%

■ Location ■ Subject of study ■ Type of course
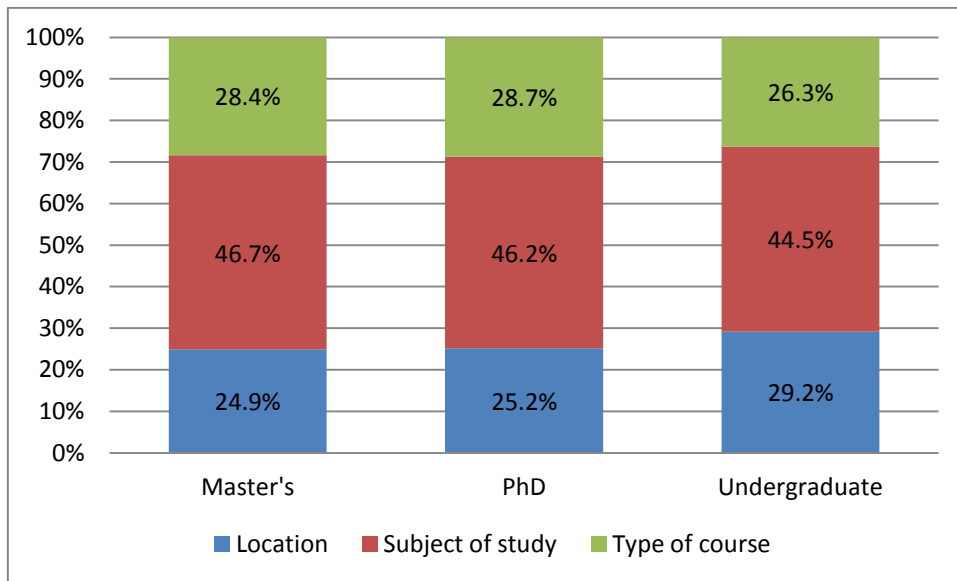
The next question instead asked survey respondents *'Which of the following have you had difficulty finding information when searching online? (Select as many as apply)'* [*Chart 39*].

Chart 39: Hardest information to find online

Visas 28.9%
Course content 25.3%
Application 26.9%
Location 5.6%
Scholarships & Funding 56.7%
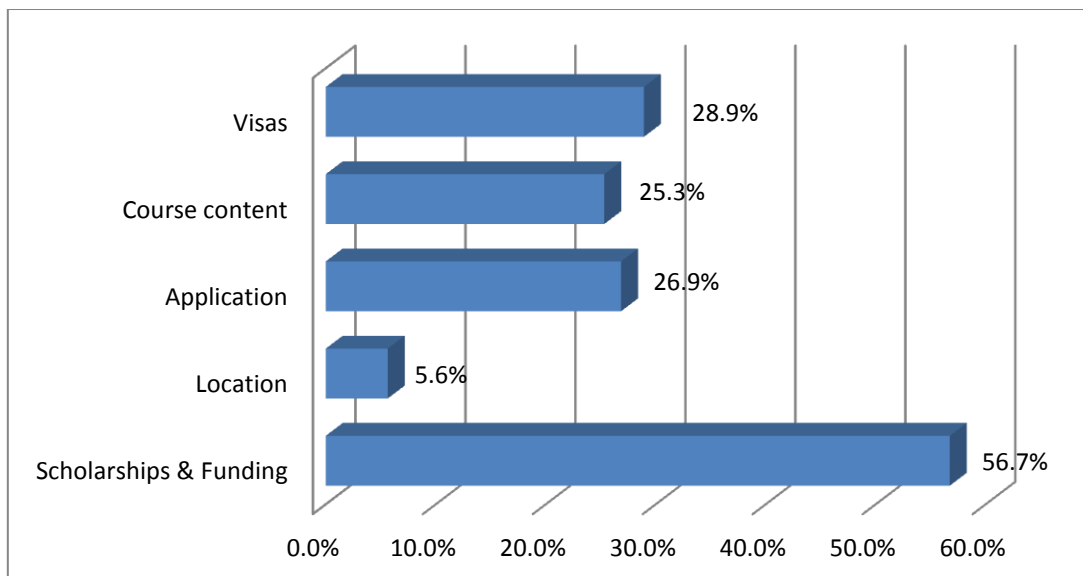
Scholarships and funding are the most challenging information to find online: more than half of the total respondents said they had difficulties when looking for this

element of the research. Information about student visas, course content and application to universities seem of the same difficulty to find, as between 25% and 29% of respondents selected those options; while location seems to be fairly easy to search for.

Again, considering responses by level of course [*Chart 40*] respondents are interested in applying for, scholarships and funding remain the biggest challenge for all group, but particularly among those applying for PhD programs.

Those applying for undergraduate studies were most likely to report difficulty finding information about study locations, with this representing a larger challenge for them than information about course content or applications.

Chart 40: Hardest information to find online - by course of interest
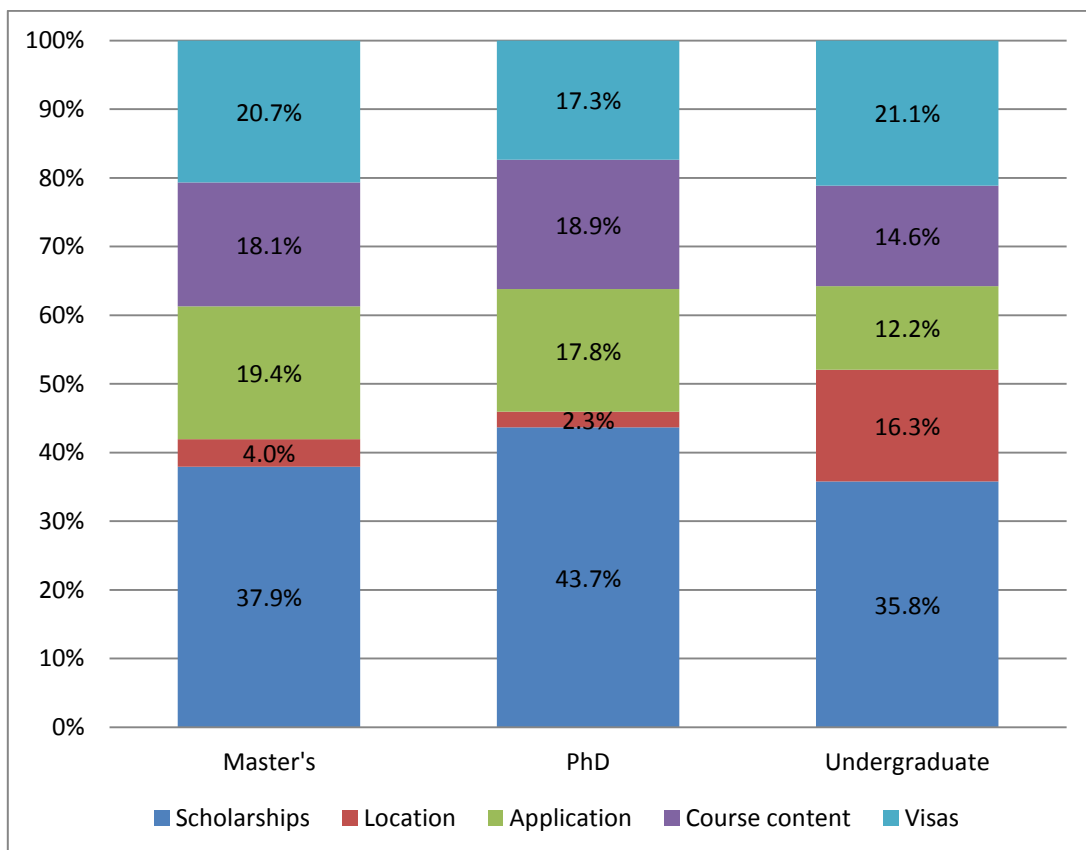
2.2.4 Making contact

The survey asked prospective students how they had previously contacted universities, how they would prefer to contact universities and how they would prefer to be contacted in turn.

The following *Chart 41* gives an overview of results of the three questions asked.

Chart 41: Methods used and preferred for making contact
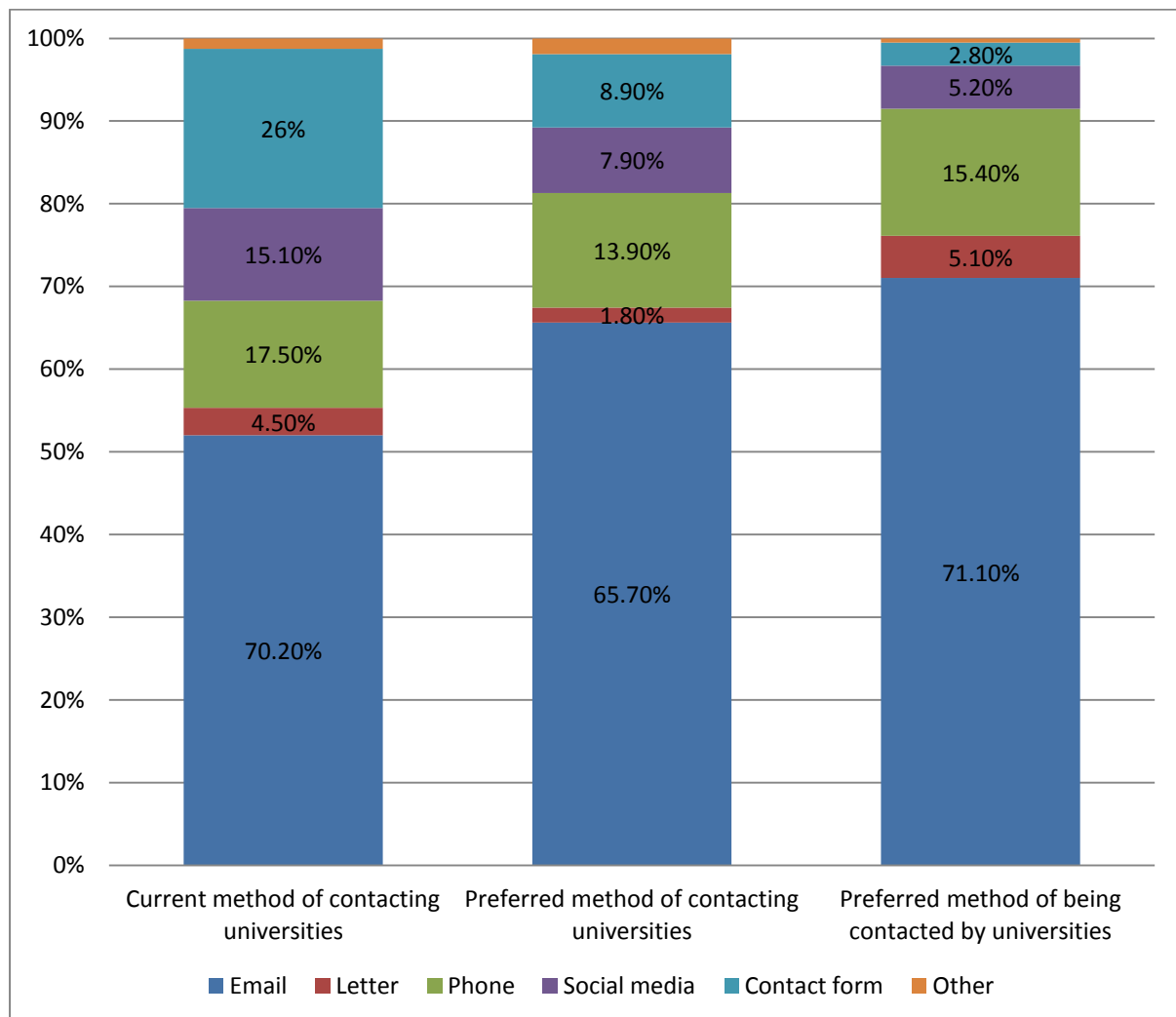
Email was the most popular choice of respondents, both as a method of contacting universities and being contacted in return and even more popular as preferred method of being contacted by universities.

While online contact forms and social media are both currently used by significant percentages of prospective students to contact universities (by 26% the former and

by 15% the latter), far fewer identify these as their preferred methods (the percentages goes down respectively to nearly 9% and 8% as methods for contacting universities and to nearly 3% and just above 5% as methods of being contacted by universities). Conversely, there remains demand for more traditional and offline forms of communication, including phone calls and letters. Respondents seems to have used one of the 2 methods for contacting universities and they indicate them as preferred method of being contacted by universities with similar percentages.

Survey respondents were firstly asked *'Which of the following have you used to contact a university? (Please tick as many as apply)'*[Chart 42]

Chart 42: Current methods used to contact universities - by age
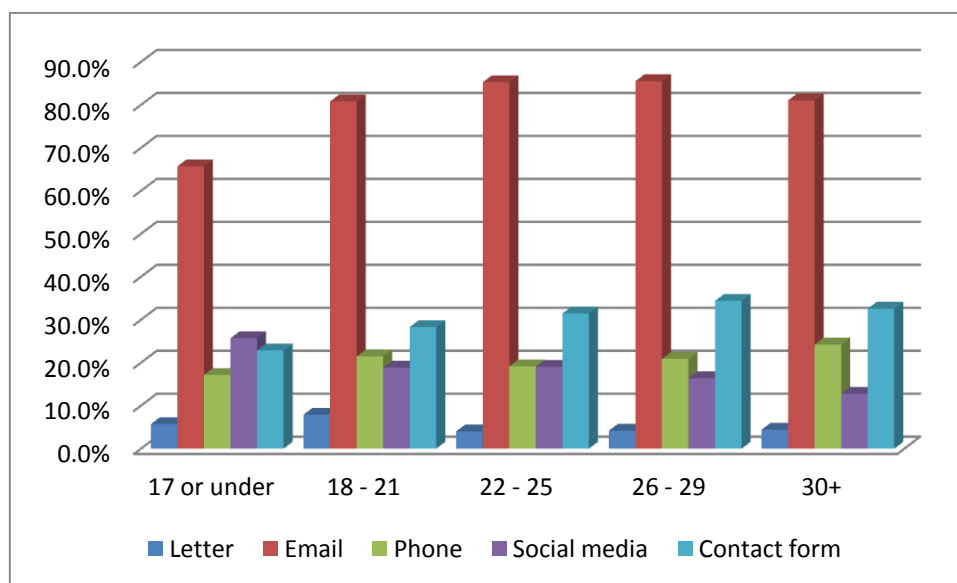
Email is by far the most popular current method used to contact universities, indicated by at least 60% of respondents of all age groups. The highest percentage of those who said they used social media as a method for contacting universities is from the younger groups (25.7% of them). Surprisingly, they are also the ones who were most likely to have used the letter (5.7%). Phone and contact form were more popular among older groups instead, being selected by more than 20% the former and more than 30% the latter.

Considering responses by region [*Chart 43*], those in Latin America were more likely to have contacted universities by social media channels (20% of total respondents in this region), while those in US & Canada were most likely to have used email or phone. Respondents in Africa and Latin America were also more likely to use website contact forms to reach for universities.

Chart 43: Current method used to contact universities - by region
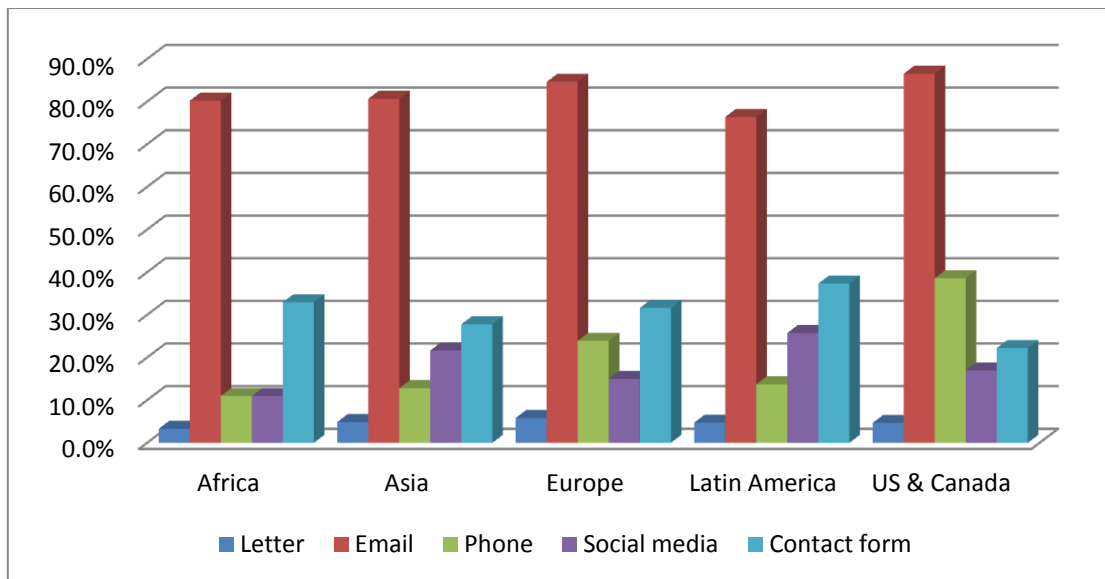
Secondly, survey respondents were asked *'Which one method would be your preferred way of contacting universities?'*

Chart 44: Ideal method to contact universities - by gender
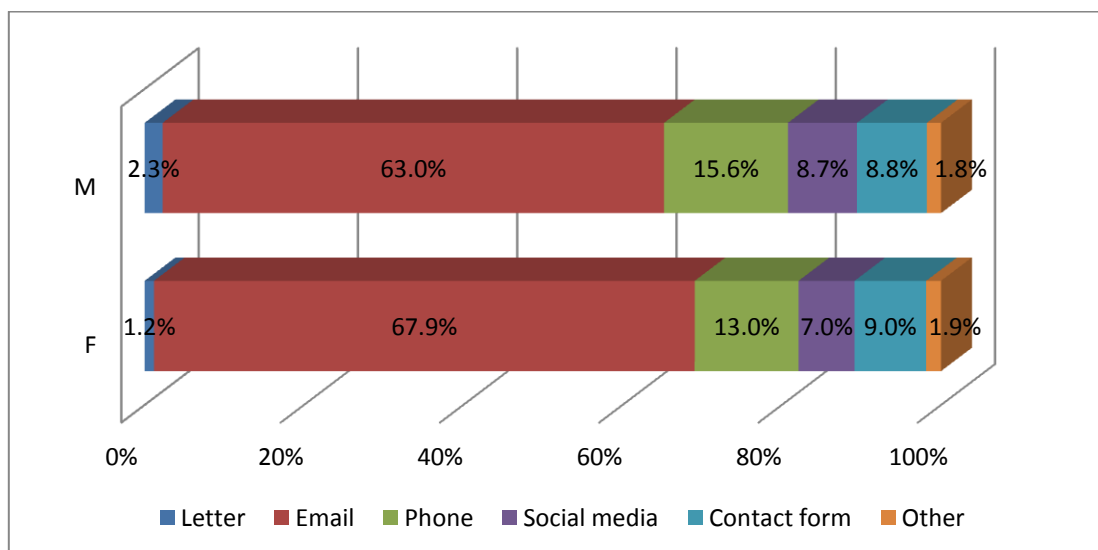
There are mostly similarities between choices of male and female respondents, as shown in *Chart 44*. Email remains the ideal methods of contacting universities for both gender, followed by phone, contact form and social media. Female candidates are more likely to choose online methods as their ideal way of contacting universities, such as email and social media, while male respondents are more likely to opt in for offline methods, as phone or letter.

Even by region breakdown, email is still the most popular method, chosen by at least 55% of respondents in each region [*Chart 45*]. Phone remains the ideal method mostly for those in Us & Canada: more than 20% of survey respondents identified it as the ideal method of contacting universities. Those in Latin America were more likely to choose social media as preferred method, while the highest percentage of those who identified the website contact form as ideal method is among those from Africa.

Chart 45: Ideal method of contacting universities - by region
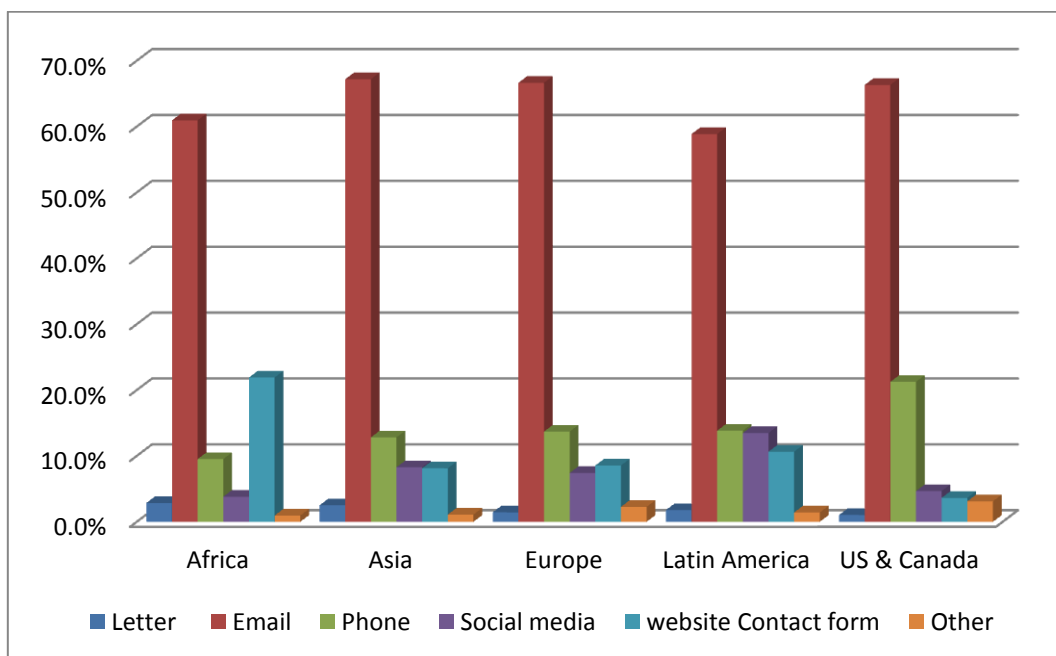
The last question of the section asked '*Which one method would be your preferred way of being contacted by universities?*'

Chart 46: Preferred method of being contacted by universities - by gender
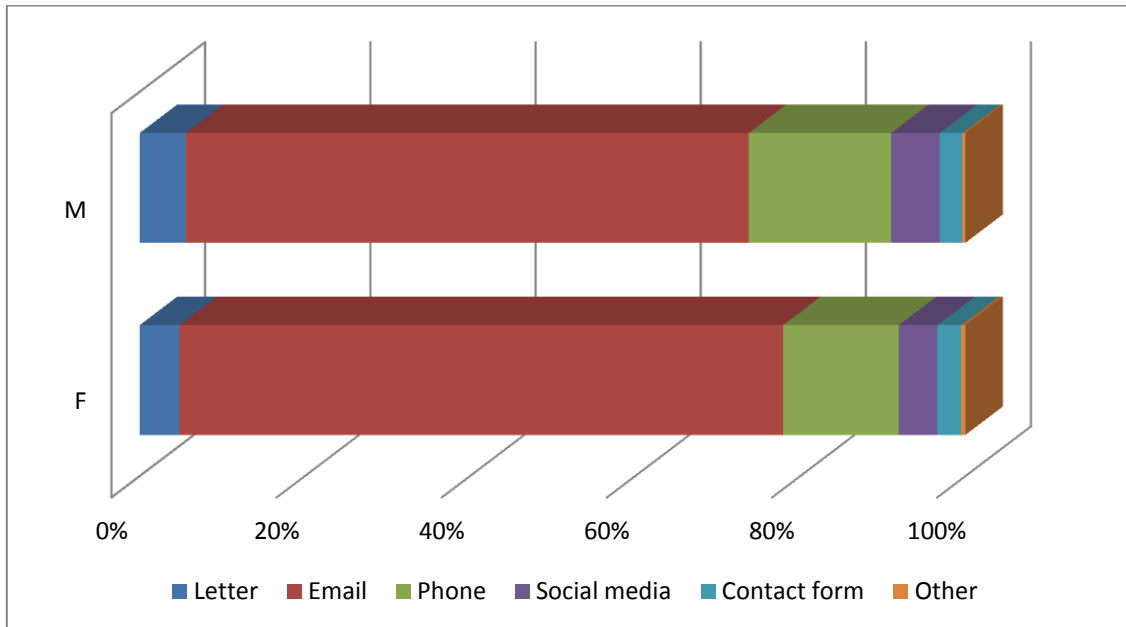
Again, there are not massive differences in the trend shown by both gender [*Chart 46*]. The main choice of method for being contacted by universities was email for both male and female respondents. Again, male candidates seemed keener on using offline ways to get in touch with universities: those are more likely to prefer phone and letter when asked how they would like to be contacted.

Considering the breakdown of results by region[Chart 47], still email is the dominant method through which respondents from every region would like to be contacted. This method was chosen mainly in US & Canada and Europe to follow.

The percentage of those who would like to be contacted by phone is fairly consistent among the regions, while those in Africa and Latin America where more likely to choose social media as ideal method if being contacted by universities

Chart 47: Preferred way of being contacted by universities - by region

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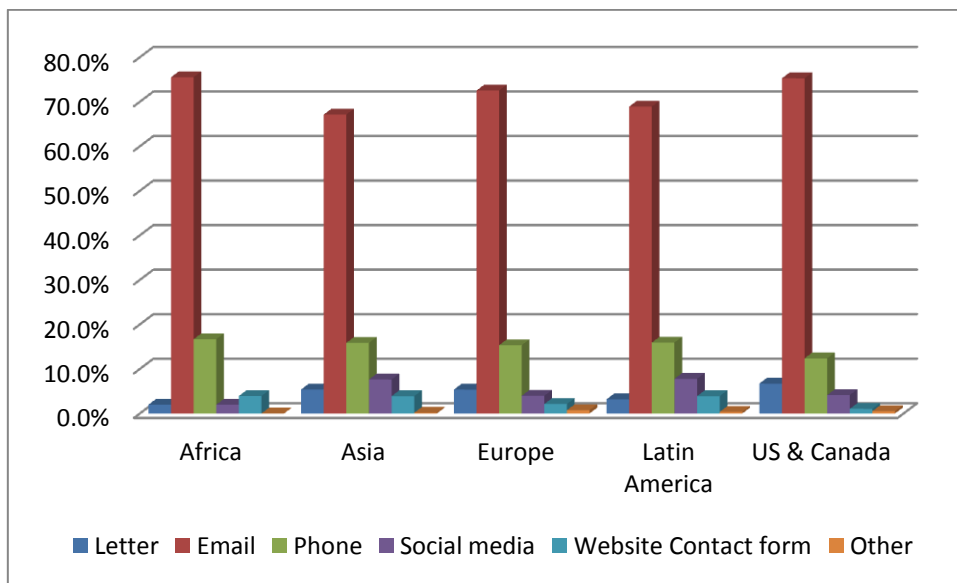
Chapter 3: conclusions and recommendations

3.1 Conclusions

This work adds to the body of knowledge available about international students' preferences, expectations and online behaviour specifically at graduate level, providing further confirmation of the rapidly accelerating competitiveness of the international student recruitment market.

The outputs of the research allow to describe characteristics of the population being studied and to answer to the research questions set in the initial phase of the research. (*see Chapter 1, page 8*)

The findings should help those engaged in international student recruitment to ensure the messages and resources they provide are tailored to match applicants' driving concerns and priorities. But also the findings should provide a window into the continued evolution of the role played by the online sphere in all kinds of communications, information-seeking and -sharing, and major decision-making and a further stimulus for universities already engaged in expanding and optimizing their online presence. In this context, the following messages stand out among the strongest for higher education institutions:

1 **There is a growing popularity of a wider selection of study destinations and broader set of motivations which prospective students consider when applying at graduate level**

Comparing responses from the 2009 and 2013 surveys, one of the most significant trends is the <u>decline in popularity of the big four Anglophone destinations</u>. While the US, UK, Australia and Canada remain among the most popular countries, all received fewer responses in 2013 compared to 2009. Hence, the changing preferences of survey respondents over the period reflects the already observed decline in the overall market share of the leading Anglophone destinations, and the <u>rise in popularity of a much broader selection of destinations</u> – with well-established study

destination Germany enjoying a surge in popularity, and emerging hubs such as the United Arab Emirates gaining prominence both within their own world region and globally. The rise of a broader range of destinations is partly linked to the acceleration of <u>regionalized international student mobility</u>. Most study destinations enjoy strongest popularity among respondents within their own world region – and in some cases the impact of regionalization is particularly evident.

Underlying these changing and diversifying study destination preferences are gradual shifts in the priorities of our surveyed international graduate school applicants. While <u>international recognition of qualifications remains by far the most important consideration</u> for them when choosing a study destination, this appears to be slightly declining in importance, as it also becomes more widespread.

This decline parallels the diversification of the sector, with a larger selection of countries establishing strong international reputations in higher education. As a result, this may gradually become less of a critical factor for students, not because it is less important, but because it's more widely available and therefore less of a distinguishing element. With a much wider range of internationally recognized study destinations to choose between, <u>students are focusing more on other factors</u>, notably study costs, financial aid availability and career prospects (both in terms of immediate employment opportunities, and general employability prospects).

A possibly related trend is the increase in students who said the location of their '<u>target school</u>' was a key factor in their choice of country, which suggests more applicants are choosing a specific institution, rather than deciding on a general destination first. This reflects the growing global visibility being attained by more individual universities; thanks to the acceleration in the availability of and access to online information, combined with international marketing and recruitment campaigns, it's no longer the case that only a handful of prestigious institutions can claim international stature.

It's hardly surprising to find that <u>study costs and financial aid availability</u> are becoming increasingly important factors for students when choosing both a country and a specific institution/program. This corresponds to the relative decline in popularity of the leading Anglophone study destinations: HSBC's 2013 analysis of publicly[60] available data confirmed that Australia, the US, the UK and Canada are the world's first, second, third and fifth most expensive destinations for international students respectively (fourth was the United Arab Emirates). Meanwhile Germany, with average annual fees of just US$635, was by far the cheapest of the 13 countries assessed – and the country's rapidly increasing popularity among our survey respondents suggests that prospective international students are well aware of fees differences, and that this is impacting on their choices.

Our surveys also suggest that students are increasingly considering <u>post-graduation employment prospects</u> when deciding where to study: in most regions, the percentage of respondents selecting 'would like to work there afterwards' as a factor when choosing a country increased. This again helps explain the growing popularity of Germany. While, in the continued wake of the 2008 financial crisis many European countries are still reporting high levels of unemployment, Germany has retained a relatively strong economy and labour market. As of 2012, Germany has also made it easier for international students to stay on and seek work after graduating. Survey respondents within Europe were most likely to be motivated by post-graduation work prospects when choosing a destination country; between the two survey years, the percentage of European students citing this factor increased from 47% to 57%, more than in any other region.

2   Postgraduate expectations reflect the gender gap existing in salaries and working hours

Those who are applying for a graduate level degree have high expectations about the career development and salary increase their degree will help them achieve. But

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[60] *http://www.hsbc.com/news-and-insight/2013/study-costs-most-in-australia*

those <u>postgraduate career expectations change substantially between the two genders.</u>

From our survey conducted in 2013, the main option respondents chose when asked when they see themselves in 10 years' time was "running my own business", and the option was chosen predominantly by women. Inversely, male prospective students were more likely to see themselves as directors or CEO of a large company, earning a higher salary and work for longer hours. This reflect the actual worldwide employment state: according to an analysis of executive pay by the Wall Street Journal[61], just 14 companies out of the 300 that the Journal looked at in the United States had women as chief executives and the highest-paid female CEO still made less than half of what was given to the highest-paid male CEOs. The Institute for Women's Policy Research found that female CEOs made less than 80% of what male ones made in 2013, although that's up from 69% in 2011[62].

The topic is worldwide discussed and, despite education being generally available to both male and female today, gender gaps still persists, especially in the job arena. Facebook Inc.'s chief operating officer, Sheryl Sandberg, advises female graduate students in her best-selling book "Lean in for graduates" not to squelch their ambitions, to "put themselves out there", negotiate their own salary wisely from the first job and never underestimate themselves. "*There's a real need for assistance at the end-of-college process to launch jobs and careers*," says Tira Harpaz, founder of Larchmont (N.Y.)-based College Bound Advice, a college counselling firm. "*Lower salary and benefits, if not negotiated properly at the first job, can follow you around for your entire career*." Universities and institutions should foster postgraduate job opportunities for the students, ensuring that gender equality is sustained. They should assist female graduates in their first job hunt and support their value and rights.

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[61] *http://graphics.wsj.com/executive-salary-compensation-2014/?mod=ceo*
[62] *'The gender wage gap by occupation 2013' A, Hegewisch, S. K. Hudiburg (2013)*

3   Online resources are essential, but offline aspects shouldn't be forgotten

While no higher education institution can afford to fall behind in the online world, <u>offline communication channels should not be neglected</u>. The majority of respondents rated online and offline resources as equally important components of their research, and many also expressed a preference for phone calls or even letters when communicating with universities. This continuing demand for offline channels was clear even among the <u>younger survey respondents</u>, highlighting the importance of opportunities to speak to university representatives directly, whether in person or by phone. Hence, universities and organizations should not be too quick to make assumptions about the younger 'digital native' generation. The trends by age group revealed by the second survey are sometimes surprising, suggesting that universities may benefit from spending more time considering what applicants really want before they make drastic changes to their communication strategies. For example, an increase in queries received via social media may reflect frustration over slow response times to emails or phone calls, rather than a real preference for communicating with institutions using social networks. Universities recruiting internationally may benefit from a more targeted understanding of how different segments of their audience use and perceive online resources. For example, survey responses suggest prospective students in the US and Canada are more likely to be using LinkedIn to research universities, while those in Africa, Asia and Latin America place a higher value on online forums than North Americans or Europeans.

The survey findings confirm that prospective students draw on a <u>wide range of online resources</u> at each stage of their higher education research, using multiple types of device. While it's essential to have a user-friendly, adaptive and engaging official website, universities also need to consider that prospective students are almost certain to be complementing the official information provided with additional research conducted using rankings sites, other websites about universities, online forums and social media.

Prospective applicants prioritize information about fees and financial aid, alongside information about course structure and content, and international application requirements and processes. For many of them, finding the information they needed to make their decisions and submit applications was not always easy. And despite the vast range of online information available, online resources may be often perceived as unclear, confusing, incomplete or unreliable. Many applicants stress the importance of <u>making top-priority information easier to find</u>, and speak about the usefulness of combining online and offline sources of information – with the latter including recommendations from personal contacts, as well as opportunities to speak to university staff and alumni.

The research intents to provide insights of practical relevance and value for universities striving to improve their communications with prospective students. The above findings suggest that the most effective recruitment messages to address to prospective students (either offline or online) should include:

- a reference to the internationally recognized status of both the institution and the wider study destination – but with awareness that this is a prerequisite, rather than a Unique Selling Proposition;
- clear information about study costs and financial aid availability;
- information about post-graduation employment prospects in the study destination, including general job availability as well as information on employment rights and visas for international graduates;
- encouragement for gender equality by fostering female to stand up for job opportunities and career achievements
- reference to the program/department's success in helping students achieve their career goals, if possible including supporting information such as employment rates, salary levels, employers, job titles and career networking opportunities;
- possibilities to communicate with university staff and alumni directly.

3.2 Recommendations to QS

Being an educational service provider, Qs Quacquarelli Symonds is in constant touch with both sides of the coin, universities and students. The company provides valuable research information to universities about the different students markets' behaviour, connects the universities with students in their local areas organising educational fairs worldwide and challenges the universities to improve their performances by publishing the World University Rankings once a year.

The company is also a valuable source of information for worldwide students, who can, via *topuniversities.com* website, learn about the different universities, courses and study destinations, and being part of a worldwide student community, but also, via educational fair in the own hometown, meet face to face with admission directors of universities from abroad.

The next step following this work could be then to direct a research towards universities, in order to compare the outcomes. This will enable students to understand if their expectations and preferences are in line with what universities and institutions are looking for. Such data will generate interests among students and will prove QS as market leader in the educational sector and grow its student community.

Additional valuable information could be produced for universities and institutions instead. Eventual topics they could be interested in are:

- Is the offer of scholarships influencing the decision of a candidate to apply at graduate level? Does the opportunity of a scholarship make opt in for a certain institution rather than another one?
- Are there geographical differences in what students are looking for and mostly in their motivations and decision process that can influence the recruitment in the different countries and region?

- Does the subjects of courses available at a certain universities influence and predict the average ratio of male and female that will apply?

There are also practical recommendations regarding the methods of conducting this research that could be improved for future researches:

- The paper-questionnaire given to candidates in-hand at each educational fairs are not logistically easy to deal with. They might get lost on the way back to the headquarters; they might have not being fully completed and the questions, all squeezed in one page, are not easy to read. Also, an introductory message and could be included explaining what is the survey about and what is the candidates helping to achieve. An alternative option could be to include the questionnaire in an email which will reach all attendees of the events after attending.
- The online questionnaire takes 15 minutes to complete. Some questions are redundant and some options of answers sound obsolete and should be reviewed or better explained and diversified.
- Qualitative research would help to go more in depth in understanding the actual preferences, motivations and behaviours of students and to find out differences among the different cultures and regions.

Indexes

Subjects of Study

STEM:

Agriculture

Architecture

Area Studies

Biological Studies

Built Environment

Chemical Engineering

Chemistry

Civil/Structural Engineering

Computing / IT

Dentistry

Earth Sciences

Electronic/Electrical Engineering

Environmental Studies

General Engineering/Other Engineering

Health/Para-medical studies

Manufacturing/Production Engineering

Mathematics

Mechanical Engineering

Medicine/Medical Sciences

Pharmacy/Pharmaceutical Sciences

Physics

Urban planning

Veterinary Science

Zoology

FAME:

Administration

Business/Management

Economics

Finance/Accounting

OTHER SUBJECTS:

Anthropology

Communication & Media

Creative/Performing Arts

Design

Education/Training

Ethnicity/Gender and Diversity

Geography

History/Archaeology

Humanities

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Law/Legal Studies

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Philosophy

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Sociology/Social Studies

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Nationality of respondents

United States

Canada

Australia

New Zealand

EUROPE:

Albania

Andorra

Austria

Belarus

Belgium

Bosnia and Herzegovina

Bulgaria

Croatia

Cyprus

Czech Republic

Estonia

Finland

France

Germany

Greece

Hungary

Ireland

Italy

Latvia

Lithuania

Macedonia

Moldova

Netherlands

Norway

Poland

Portugal

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AFRICA AND MIDDLE EAST:

Afghanistan

Algeria

Armenia

Azerbaijan

Botswana

Cameroon

Central African Republic

Chad

Congo

Côte d'Ivoire

Egypt	Sierra Leone
Eritrea	Somalia
Ethiopia	South Africa
Gabon	Sudan
Gambia	Swaziland
Georgia	Syria
Ghana	Tajikistan
Guyana	Tanzania
Iran	Togo
Iraq	Tunisia
Israel	Turkey
Jordan	Turkmenistan
Kazakhstan	Uganda
Kenya	United Arab Emirates
Kyrgyzstan	Uzbekistan
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Mali	**LATIN AMERICA:**
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Senegal	Costa Rica

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Dominican Republic	Malaysia
Ecuador	Maldives
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Haiti	Mongolia
Honduras	Nepal
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Nicaragua	South Korea
Panama	Sri Lanka
Paraguay	Taiwan
Peru	Thailand
Trinidad and Tobago	Timor-Leste
Uruguay	Vietnam
Venezuela	

ASIA:

Bangladesh

Brunei

Cambodia

China

India

Indonesia

Japan

Study Destinations

United States

Canada

Australia

New Zealand

EUROPE:

Albania

Andorra

Austria

Belarus

Belgium

Bosnia and Herzegovina

Bulgaria

Croatia

Cyprus

Czech Republic

Denmark

Estonia

Finland

France

Germany

Greece

Hungary

Ireland

Italy

Latvia

Lithuania

Macedonia

Moldova

Netherlands

Norway

Poland

Portugal

Romania

Russian Federation

Serbia

Slovenia

Spain

Sweden

Switzerland

Ukraine

United Kingdom

AFRICA AND MIDDLE EAST:

Afghanistan

Algeria

Armenia

Azerbaijan

Benin

Botswana

Burkina Faso

Cameroon

Central African Republic

Chad

Congo

Côte d'Ivoire

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Eritrea

Ethiopia

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Kazakhstan

Kenya

Kyrgyzstan

Lebanon

Liberia

Libya

Malawi

Mali

Morocco

Niger

Nigeria

Oman

Pakistan

Qatar

Rwanda

Saudi Arabia

Senegal

Sierra Leone

Somalia

South Africa

Sudan

Swaziland

Syria

Tajikistan

Tanzania

Togo

Tunisia

Turkey

Turkmenistan

Uganda

United Arab Emirates

Uzbekistan

Yemen

Zambia

Zimbabwe

LATIN AMERICA:	ASIA:
Argentina	Bangladesh
Bahamas	Bahrain
Bolivia	Brunei
Brazil	Cambodia
Chile	China
Colombia	India
Costa Rica	Indonesia
Cuba	Japan
Dominican Republic	Laos
Ecuador	Malaysia
El Salvador	Maldives
Haiti	Mauritius
Honduras	Mongolia
Jamaica	Nepal
Mexico	North Korea
Myanmar	Papua New Guinea
Nicaragua	Philippines
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Peru	Sri Lanka
Trinidad and Tobago	Taiwan
Uruguay	Thailand
Venezuela	Timor-Leste
	Vietnam

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Attachments

The online survey can we viewed via the following link:

http://qsnetwork.az1.qualtrics.com/SE/?SID=SV_eJoMlI5LfcsaiPP

Only relevant parts of it have been used in the research.

The one page questionnaire had the following layout:

QS World Grad School Tour 2013   City_____

<u>**PERSONAL INFO**</u>
Gender: Male   ☐   Female   ☐
Age: 17 or under ☐   18 - 21 ☐   22 - 25 ☐   26 - 29 ☐   30 ☐
+Nationality_____

Which is the highest level of education you have completed so far?
High School ☐   Undergraduate ☐   Master's ☐   PhD ☐   Other _____

Which level of course are you interested in applying for? (Tick all that apply)
Undergraduate ☐   Master's (or postgraduate equivalent) ☐   PhD ☐   Other _____

<u>**HOW YOU RESEARCH UNIVERSITIES**</u>
How important are the following resources when researching universities and courses? (Please tick **one** for each resource)

	It's Essential	Very important	Quite important	Not so important	I don't use it
Universities' official websites					
University rankings websites					
Other websites about universities					
Online student forums/chat rooms					
Social media (Facebook, Twitter etc)					

What do you use the following resources for? (Tick all the activities that apply)

	Research courses	Compare universities	Research locations	Get ideas/ inspiration	Research applications & funding	I don't use it
Universities' official websites						
University rankings websites						
Other websites about universities						
Online student forums/chat rooms						
Social media (Facebook, Twitter etc)						

Which of the following social networks have you used to find information about universities and courses?

Twitter ☐   Facebook ☐   LinkedIn ☐   Tumblr ☐   G+ ☐   YouTube ☐
Other_____

Would you say online or offline resources are more important in helping you make decisions about your education?
Online is more important   ☐   Online & offline are equally important ☐   Offline is more   ☐
important

HOW YOU RESEARCH EDUCATION ONLINE
When researching educational options online, which of the following would you search for? (Select as many as apply)   ☐   ☐   ☐
Location   Subject of study   Type of course   Other
_____

Which of the following have you had difficulty finding information about when searching online?
Scholarships & funding   ☐   Location ☐   Application/Admission Process &   ☐
requirements
Course content   ☐   Student visas ☐   Other
_____

Which of the following have you used to contact a university? (Tick as many as apply)
Letter ☐   Email ☐   Phone ☐   Social media ☐   Contact form on website ☐   Other
_____

Which ONE METHOD would be your ideal way of contacting universities? (Tick ONE)
Letter ☐   Email ☐   Phone ☐   Social media ☐   Contact form on website ☐   Other
_____

How would you prefer to be contacted by universities? (Tick ONE)
Letter ☐   Email ☐   Phone ☐   Social media ☐   Contact form on website ☐   Other
_____

Which internet devices do you use when researching universities and courses? (Tick all that apply)
Laptop ☐   Desktop ☐   Tablet ☐   Smartphone ☐