

Perceptions of European Higher Education in Third Countries Outcomes of a Study by the Academic Cooperation Association (ACA)

I. Introduction

Between November 2004 and December 2005, following a call for tender issued by the European Commission, the Academic Cooperation Association (ACA) carried out a major study the purpose of which was to investigate the perception of European higher education in other parts of the world, and on this basis to identify some key messages for a "European brand" in the field of higher education and to reflect on possible instruments and mechanisms for its delivery.

To this end, the study sought to acquire an in-depth understanding of how European higher education is viewed by students and other stakeholders in "third countries", its perceived strengths and weaknesses, and its standing relative to that of other major destinations. This also entailed an assessment of the degree of information available to potential international students and the sources they typically use.

The study was based on large-scale surveys in six target countries: China, India, Mexico, Brazil, Russia, and Thailand, as well as on interviews (with individuals and groups) and on desk research. For comparative purposes, it also included international students in the USA. Altogether, 11,471 students from the target countries filled in the paper questionnaires distributed at schools and higher education institutions in the six target countries; 1,235 staff members filled in the paper questionnaires distributed at the same institutions; almost 9,000 students filled in the online questionnaire (a slight majority came from the six target countries,

the rest was spread over different countries around the world); over 400 international students in the United States participated in the US survey. This was this by far the largest survey of worldwide perceptions of European higher education ever conducted.

II. Key findings regarding the perception of European higher education as a destination for international students

The study came to the following main conclusions regarding the way Europe is perceived worldwide as a destination of international study:

1. What is Europe's share of international students worldwide?

- Europe has a reasonable share of non-European foreign students, but the United States are still the leading destination and the performance of Australia in attracting foreign students is remarkable, relative to its size;
- Despite considerable growth in recent years, Europe's relative disadvantage with regard to the USA and Australia as a destination for foreign students is predominantly with Asian students;
- Foreign students in Europe are unevenly spread, with the UK, Germany and France hosting the lion's share. Other countries, particularly the new member states and Southern Europe, are under-represented.

2. What is the worldwide perception of Europe and its higher education?

While there is a perception of Europe as an "entity" in general terms and as an economic union, when it comes to cultural aspects and higher education, most international students rather see Europe as a range of very different countries. The perceived differences relate to the quality of education provided in individual EU member states, and to some extent to costs (tuition fees and living costs) and the availability of student support).

Knowledge of Europe is limited to a very few countries, namely the UK, Germany and France. The number of students who were well informed about other countries was negligible. Especially knowledge of higher education opportunities in the new member states was extremely limited. The interviews revealed little or no interest in cooperating with or going to the new member states or less "prominent" countries, though with regard to the Nordic countries and the Netherlands this appears to be starting to change.

Comparing perceptions of Europe with those of other destinations:

- Students rank the US first for issues linked to innovation, competition and dynamism (both in HE and society in general);

- Europe is seen as the destination with the most traditional universities, the most interesting cultural heritage and traditions, and the most attractive arts, music and cultural offering;
- Europe is seen as lacking innovation, tolerance and *joie de vivre*, thus reinforcing the picture of a "traditional" Europe lacking dynamism;
- Students who have chosen a particular destination, generally see this destination as the best choice, wherever it may be;
- Europe has a better standing in Russia and Latin America, while the US and Australia are favoured by students in the Asian target countries (which represent a considerably bigger share of the total international student population world-wide;
- Asian students rank the US above Europe in most academic and labour-market related issues (quality of laboratories, libraries and other facilities; quality of education; most prestigious universities; reputation of degrees; chances of getting a job and staying on after graduation; work opportunities during studies);
- Specific US universities seem to have higher visibility than those of other countries (for students aiming to study in the US, the choice of university came before the choice of country in more instances than among foreign students in Europe);
- Europe and Australia are perceived as safe destinations, but not the US;
- Europe and Australia are regarded as more accessible than the US at least as far as visas are concerned.
- Free tuition is regarded as an asset, and in overall terms Europe is perceived as more affordable than the US, though less affordable than Australia. Especially Asian students thought that it was easier to obtain a scholarship in the United States.
- Cultural and linguistic diversity is mainly seen as attractive, especially in Latin America. However, a significant group of Asians see diversity of languages as a barrier to communication and diversity of cultures as confusing;
- Europe's single major disadvantage in the eyes of Asian students is that English is not the universal mother tongue. Interviews also showed that information about English-taught programmes in non-English speaking countries was not widespread;
- Europe is generally seen as being elegant, clean, organised and modern;
- The emergent reform measures in Europe (Bachelor-Master system, credit system to facilitate recognition, innovative study models such as joint Masters programmes in two different European countries) are seen positively, but are not (yet?) a key factor in determining the attractiveness of European higher education;
- More important would be a single, well-publicised and effectively functioning web portal, Europe-wide rankings, and enhanced financial support for non-European students.

3. Which factors give rise to study abroad, and what determines students' choice of destination?

The most important reasons to go abroad are career-oriented, but aspects related to personal and professional growth also play a significant role. Among respondents to the survey, the most frequent motivations to pursue an international education were:

- to experience new ways of thinking and acting in the field of study
- o to improve chances for an international career or a career in the home country
- o to improve foreign language skills
- o to get the opportunity for personal development.

Socio-cultural motivations and cultural and lifestyle-related criteria were of minor importance for the biggest student cohorts.

The most important criteria in the decision for a destination country and university are prestige, quality of education and the reputation of degrees. Other important criteria are the suitability of programmes on offer, affordability of living and tuition, modernity of teaching methods, accessibility (acceptance of home qualification, student support, transparent admission structures) and safety.

Overall, students surveyed were predominantly looking for a specific and high-quality offer in their area of specialisation, at an up-to-date and well-managed institution of high standing which they can afford.

4. What type of studies do most students want to pursue?

Survey respondents showed a preference for studying a Masters degree abroad. In China and India, for example, the undergraduate offer at prestigious institutions was considered of equivalent quality to what students could find abroad, or even better, while the offer at Master and Doctoral level was still seen as limited.

Overall, it was also considered a better option to do the first degree at home in order to ensure recognition by employers and academia, and to be able to build up a network of professional contacts at home.

The target countries can clearly be divided into two groups: while studying for a Masters degree was most attractive for Asians and Mexicans, short-term mobility was the most popular option for students from Brazil and Russia.

5. What can hamper the student' plans to study in another country?

Obstacles encountered by international students are often related to matters outside higher education as such and concern finances, immigration policy and language preparation. A high number of students going to the US had difficulties with obtaining a visa, while limited language proficiency and a lack of work opportunities during and after studies were among the significant obstacles mentioned in relation to study in Europe.

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

6. What sources of information are used when deciding on study abroad, and how well does information on higher education in Europe function?

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

However, workshop participants, interviewees and survey respondents agreed upon one major message: information on Europe and its higher education is missing or hard to access. This was especially true among students from Asian countries. In particular, respondents to the survey had difficulties in finding information on scholarship opportunities, living costs and tuition fees. They also underlined a lack of university rankings and of information on suitable programmes. There was felt to be a general lack of a "clear sender" of information on study in Europe as a whole.

III. Recommendations for the promotion of European higher education

Against the background of the analysis of worldwide perceptions of Europe as a study destination, the mandate of the study was also to make recommendations to the European Commission on the promotion of European higher education as a distinct "brand": its core elements should be defined and suggestions made on how to communicate the brand in the framework of a worldwide campaign. The study resulted in the following conclusions and recommendations:

1. There is a clear potential for a European brand. The challenge is to create a perception of Europe as a whole.

A European "brand" can only cover elements which are common to all European countries. The three main selling points for European education should be its quality education, its tradition and

the offer of internationally compatible degrees. Other attributes – safety, accessibility, etc. - should be used in the context of specific campaigns.

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

2. A clearly identifiable European "sender" is essential in order reinforce Europe's identity on the global education market and coordinate campaigns carried out under the European umbrella.

All country reports conducted in the framework of the study underlined the lack of a coherent information policy regarding study opportunities in Europe, and emphasised the importance of having a strong information campaign with a clear sender and message. Key features of such a strategy would need to be:

- A widely promoted and carefully administered Internet portal;
- A European office with coordinating functions to look after the brand and run the Internet portal;
- o Cooperation with member states in the implementation of marketing campaigns.

3. To create and promote a European brand is necessary but not enough. To enhance its international attractiveness, improvements must also be made with regard to European higher education itself

The study concluded that although vital, an effective marketing campaign alone would not be sufficient to enhance the attractiveness of European higher education. Four other key factors emerged as being necessary components of an overall strategy:

- European higher education itself must be of high quality if it is to be successfully promoted. In the context of international study, the main factors were identified as providing higher education institutions with the necessary autonomy to:
 - > select their international students;
 - provide institutional scholarships for highly qualified international applicants;
 - > enable international students to access alternative sources of funding;
 - recruit high quality teaching and research staff.
- It is vital to implement flexible immigration and visa policies allowing international students to stay on and work after graduation and to provide them with work opportunities.
- Especially in the less popular destination countries, the development of English-taught programmes are the only way to attract significant numbers of non-European students;

| 0 | The long-term success of a European marketing strategy will not only depend on the |
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| | overall quality of European higher education, but also on its capacity to diversify. While |
| | the overall aim should be to achieve solid quality across the board, European countries |
| | and higher education institutions should attempt to find their niche and invest in |
| | developing their specific strengths. |
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