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**Dr Dimitris Kavakas**  
*Executive Director for  
Enrollment Management*

# [STUDENTS AS CONSUMERS: IDENTIFYING STUDY ABROAD DESTINATION CHOICE INFLUENCES FOR MARKETING PURPOSES]

Finding the factors that influence destination choice, study abroad programs can target their marketing mix accordingly. This research aims to help not only identify the factors but also the segments the student body of US Universities and Colleges into appropriate target groups so as to facilitate marketing choices. The report is based on a survey conducted in February 2013.

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## **1. Introduction**

For many years now, the concept of study abroad in US University and College education has been developed into a service product. Supported and encouraged by the US federal government and University management, study abroad has become an educational activity for many foreign schools that compete to attract US University students for a semester, a year or a shorter study period. Research demonstrate that students who at a point in their University studies decide to go abroad and study for a period, they tend to improve their academic performance once back in the US and also tend to stay and graduate, thus improving student retention and graduation rates. These facts have driven most Universities and Colleges in the US to develop study abroad departments and centers dedicated in trying to promote the concept of study abroad to their students and increase the percentage of students who decide to take that option every year. These study abroad centers usually enter into partnership agreements with foreign schools in order to facilitate the study abroad of their students but also to guarantee the academic quality and the transfer of credits from the host institution to the sending institution.

### **1.1 Current trends**

Current statistics on study abroad are useful to see the size of the market and the choices that US study abroad students are making. According to the most recent report released by the Institute of International Education (IIE Open Doors, 2012: Fast Facts) during the 2009-2010 academic year a total of 273,996 US students studied abroad in one form or another. The percentage of them who chooses to come to Europe is 54,6%, while 3428 students chose to come to Greece. Over the last two decades, US study abroad students more than tripled and is continuing growing, according to the same report. Europe is by far the most popular destination; however, other regions increasingly compete with Latin America (14,6%) and Asia (11,7%) to attract significant numbers. The UK is by far the more popular destination receiving annually around 33000 US students. Being an obvious English speaking destination, the UK can only be compared to Australia, which is in the 6th position, receiving around 10000 students. The second and third most popular destination is Italy and Spain. These are two European Mediterranean countries that can compare to Greece. Italy attracts 30000 students annually and Spain 26000. Compared to such numbers, the 3400 US students that come to Greece appear a tiny proportion and places Greece in the 17th position of popularity.

From the above data is obvious that a significant amount of US students prefer an English speaking destination for cultural or academic (use of English for study) reasons. The second

element from these data is the large amount of students choosing Spain and Italy. This can be explained by the cultural penetration that these two cultures have had in the US as well as the large Latin and Italian communities. Studying these elements would be useful for this project since Greece shares a number of similarities with Italy and Spain; however, it has not been able to reap similar benefits.

Another interesting trend in the IEE report is the composition of the US study abroad student body in terms of majors. Social Sciences students appear to be those more likely to engage in such experience and consist of the 22,9% of the US students. In the second place, business students are the 21,5% followed by Humanities with 11,3% and Fine or Applied Arts with 8,2%. Regarding the length of study abroad, 38% of students pursue quarter or semester study abroad and around 58% engage in a shorter period from 2 weeks to a summer session.

Finally, the total of US students that study abroad is just the 14% of the total US undergraduate students, the majority of which are white female. The 64,4% of the US study abroad students are female and the 77,8% are white. This demonstrates the significant room for growth in the market.

Overall, current trends are useful in evaluating the macro drivers. These are institutional changes, the type of institutions that are likely to send more study abroad students, the type of course that are in demand, demographic changes, the profile of students that are likely to study abroad and be attracted to Greece or to other destinations, technological changes that are useful in identifying marketing tools, such as the wide use of social media and the internet to get information on study abroad options, and societal changes that are useful to evaluate choice factors. Also, current trends are useful to establish the areas of development in the design of the positioning strategy.

## **1.2 Literature Review**

The issue of marketization of Universities and the transformation of the student into consumer is discussed by Molesworth, Nixon and Scullion (2009) arguing that such a transformation has the danger of changing the nature of the student from a scholar that develops critical thinking into a consumer of vocational training prepared for the market place. The critical approach to the 'neo-liberal' marketized University claims that today most Universities have incorporated the vision of students as customers and this creates a contradiction in maintaining both academic standards and customer satisfaction. (Mills, 2007) This contradiction often goes in favor of meeting customer demands, something that

has become a form of academic orthodoxy, particularly in the USA. (Potts, 2005) Students today are driven primarily from the employability prospects and personal wealth creation that a degree can offer them rather than from the idea of immersion into a subject area that can change them as persons, as is the traditional concept of academia. (Gibbs, 2001)

The critique of viewing students as consumers derives from the works of Fromm (1976 and 1993) who criticizes the consumer attitude of 'having' and contrasts it with 'being'. He argues that seeing education as commodity reduces knowledge to the possession of an object that can be bought. (Fromm 1976) "Education as a community that can now be 'bought' is therefore reduced to just one round of consumer desire in an endless series of consumption experiences." (Fromm, 1993: 31)

Marketization is based on the system of competition between universities for the recruitment of students. Price, quality and availability become the determinants of student choice for an institution and since supply of university programs is bigger than demand of studies, there is a competition between institutions, thus creating a market. United States is often seen as the closest to the marketized system with the UK and Australia as well as other European countries to be moving towards that direction. (Brown, 2011) In the same time, the University system is becoming a market that is based on the student as a consumer of education products. Quality is assessed by student satisfaction surveys and Universities compete for a better level in rankings that would increase their reputation and market share. (Maringe, 2011)

Kotler and Fox elaborate on developing a marketing strategy for an educational institution (1995). Their book does not question the appropriateness of a market orientation to universities but purely explores the different elements of a marketing plan for such an institution. In this study, Kotler and Fox insist on the importance of planning in order to analyze the market and adapt to the changing macro environment. Demographic changes in the environment affect academic systems. In addition, a new teaching environment has been created due to increased internationalization. All these changes forces universities to turn to marketing for stay viable and relevant. (Kotler and Fox, 1995, p. 5) Hayes claims that education is a service and in service marketing he adds 3Ps to the traditional 4Ps of marketing (product, price, place and promotion). He adds physical evidence, the facilities of the institution, processes, such as financial aid, tuition arrangements etc. and people, meaning faculty and staff. (Hayes, 2008) Ivy however claims that in education the 7Ps are slightly different from other services marketing: these are the program (rather than

product), price, premium (instead of place that includes accommodation, modules, facilities, class sizes etc.), promotion, people, prospectus and prominence. (Ivy, 2008)

Ramachandran argues that marketing in the higher education sector is quite different from commercial marketing. Universities tend to engage themselves in educating the market in order to help them understand the sector and that is why quality assurance units and academic departments interact with marketing units in the process. In addition, universities more and more declare how their products are positioned against benchmarks and ratings. (Ramachandran, 2010) According to Hawkins and Frohoff (2010) the development of a curriculum that is in tune with the student can be the most important marketing asset that an organization can use.

One of the problems with designing a marketing strategy in higher education is that marketing draws its conceptualizations and empirical frameworks from service marketing, despite the differences in context between HE institutions and other service organizations. (Hemsley-Brown and Oplatka, 2006, p. 318) In early literature there has been a debate in the literature of whether students are the customers or the product. Some see them as the product and employers as the customers. (Kotler and Fox, 1985) Others see students as the customers and university programs as products. (Levitt, 1980) Later literature treats education as a service and applies service marketing, thus declaring education to be a service sector business. (Mazzarol, 1998)

Maringe and Foskett (2002) research on university marketing strategies identified four broad marketing strategies that universities tend to use. These are public relations, sales, customer satisfaction and strategic marketing approaches. They recommend that it is better for universities to develop marketing integrated long-term visions and missions. Maringe also recommends to university managers and academic the use of marketing not as a concept imported from business but as a viable philosophy and strategy that can help develop the higher education sector in fulfilling the needs of domestic and international customers. (Maringe, 2004)

### **1.3 International Student mobility**

A number of studies have been conducted trying to research on student choice in international education markets. These studies focus on the demand-side of the higher education markets evaluating the factors that influence choice. (Gomes and Murphy, 2003) An important element in determining choice factors is segmentation. Soutar and Turner (2002) argues that there are three basic segments, international students, mature students

and high school-leavers and each of these segments considers different factors when making choices.

Several authors suggest that universities need to re-position themselves in order to attract successive generations of students. (Bakewell and Gibson-Sweet, 1998) The university's learning environment, its staff, facilities and resources is one of the five main brand positioning dimensions. (Medina and Duffy, 1998) This is followed by the institution's reputation, its graduate career prospects and expected income, the destination image, which includes issues of safety, attractiveness and political stability, as well as cultural integration. (Gray et al., 2003, p.115)

In studying choice, Foskett and Hemsley-Brown (2001) argue that while choice is never a completely rational action, involves three elements: the context of choice, the key choice influencers and the choosers themselves. There are always preconceptions and background influences that filter rational choices. (Hemsley-Brown (1999) Mazzarol and Soutar (2002) identified "push and pull" factors in the international student destination choice. Push factors are those that drive students to leave their country, such as poor economic conditions, lack of quality higher education choice domestically, lack of career opportunities etc. Pull factors on the other side are prospects for future employment, high quality of education institutions, access to funding, or safe and pleasant environment.

Maringe is a research among UK students finds that traditional university promotional tools such as websites, prospectuses and other written material do not play a significant role in their choice and decision making. Maringe argues that universities should put emphasis on issues students find most important to them rather than issues that universities find important. (Maringe, 2006)

#### **1.4 Tools for analysis**

The project is going to use Ivy's 7Ps as the base for the survey research questions which would be used to elaborate on a marketing mix recommendation. Ivy's 7Ps see the program being the main product to be promoted. Obviously here the project makes a value judgment accepting the theories of marketization in University education. Since recent research have linked study abroad with increased job opportunities and higher salaries, it is the program itself and the skills and experiences gained while studying abroad that is valued in the market place. The premium sets the environment in which the transfer of skills and the gaining of the valuable experience, both cultural and academic, take place. The price of the program could be a determining factor for program and destination choice. In the same way,



people, including professors and staff who offer academic and student services, are an important part of the program/product and as such they are elements to be promoted. The identification of the appropriate promotional strategies is important in every marketing mix, including that of an educational product. The prospectus of the school is an important marketing tool that is unique in education establishments. Finally the prominence, that is academic reputation, participation in league tables etc., is a significant selling point.

Table 1: The 7Ps of University marketing mix

	The 7Ps for University marketing mix
Program	Develop the program that would appeal to the targeted segment of the market or find the segment that a given program would be appealing. Usually is a mix of both.
Price	Price is always an important consideration but not the only one, since it is associated with financial aid options as well as employability rates and salary levels upon graduation. Students are willing to get to a more expensive program as these two factors increase.
Premium	The location of the campus, the facilities offered, quality of accommodation, academic infrastructure, these are all premium to the program itself and add to the student decision.
Promotion	Awareness is important as there are extremely many choices for students to do when decide where to study. Promotional strategies vary from word of mouth/alumni relations to participation in student recruitment fairs and the more extensive below or above the line advertising campaigns.
People	Professors teaching the program are an important marketing asset since their academic activity gets them involved with publishing, consulting and generally creating a reputation for their academic quality. However, other administrative and supporting staff is also important since people in the admissions, student services and other relevant departments will come in contact with students creating a perception about the school, positive or negative.
Prospectus	Prospectuses, brochures and other informational material are

	unique to educational institutions and are important since University education is a high involvement sector. Students need to be fully informed on details before they decide where to study.
Prominence	Universities are often assessed for their qualities in different areas by rankings and other evaluation bodies, such as accreditation or validation. All these develop a reputation that can be used for promotion.

There are a number of motivations that drive students to leave their country and study abroad, either for a full degree or for a shorter period of time. The table below summarizes motivation categories derived from the 'push' and 'pull' factors that influence international education.

Table 2: Motivations for studying abroad

	Motivations for studying abroad
Exploring cultural heritage	Students from certain ethnic groups have the motivation of exploring the culture of their ancestors by spending certain time studying in their native environment.
Experience of living abroad	The experience of living in another country by itself is a strong motivator.
Willingness to travel	Young people often have a strong drive to travel and see different cultures/people. This is a strong motivation that can lead students to choose to study abroad.
Better academic offerings	A major 'pull' factor is a reputation of academic quality. Combine with a few other motivations; this can be a major motive.
Professional career boost	The ultimate goal of university studies is a good job and therefore, prospects for professional development is a major motivation, given the fact that the experience of studying abroad by itself is valued by prospect employers.

The above motivations and 'pull' factors are outlined in the key finding of the research done by Macready and Tucker (2011). The research presents the findings of the annual Open Door data of IIE on US study abroad, which is relevant to the scope of this project. The research presents the data listed in current trends, section 1.3 of this project. (Macready & Tucker, 2011: p. 21-25) On the same time, it presents some interesting data on international mobility. Greece, for example in 2010 'pushed' 35000 Greek students to study abroad but in the same time it 'pulled' 26000 foreign students to study in Greece, for a period. (pp. 13-18) Increasingly international education ceased to have clear 'pull' and 'push' countries. Instead most countries have a degree of 'pull' and 'push' factors. That includes the US that 'pulls' some 624000 students but also 'pushes' 52000 students that choose to study for a full degree abroad and 270000 students who study abroad for a smaller period during their university time. (Macready & Tucker, 2011, pp. 39-51)

The Macready & Tucker research presents a number of 'pull' factors in international student mobility (chapter 4). The table below summarizes these factors:

Table 3: 'Pull' factors

	'Pull' factors in international student mobility
High-quality study opportunities	International students are drawn by the quality universities demonstrate and the reputation they build.
Specialize study opportunities	A specialized field or a course of study that is unique in a location acts as a 'pull' factor.
Language	The offer of academic programs in a specific language is a factor that attracts international students. English language programs in non-English speaking countries can be 'pull' factors. In addition, students studying a specific language are 'pulled' to spend time in a country that this language is spoken.
Traditional links and diasporas	Countries with diasporas tend to 'pull' international students from these groups, at least for a short study term. The opportunity to visit the homeland is always a huge attraction.
Affordable cost	Since most universities charge tuition fees to international students, an affordable cost would be a determining factor for destination choice.
International	It would be a waste of time and resources if one studies for a

recognized qualifications	qualification in a country that is not recognized elsewhere, so a program that leads to an international recognized qualification would always attract attention by international students.
Good prospects of successful graduation within a predictable time	Time from start to graduation and such rates of a given school would be a factor that influences decision to study there. The longer the course takes, the larger the cost involved.
Effective marketing/ country support/ visa arrangements	The effective marketing done by destination institution or countries together with the overall commitment of countries to attract international students by creating the appropriate environment/visa regulations affects the international student numbers attracted.

## 2. Methodology

### 2.1 Aim of the Project

The project will research the following questions:

- How US University students choose a study abroad program and location?
- What are the factors that influence their choice?
- What are the segments of students likely to choose to study abroad?

### 2.2 Questionnaire

The project developed a questionnaire to US University students who express an interest in considering studying abroad. The questions are based on Ivy's 7Ps (program, price, premium, promotion, people, prospectus and prominence). The questions form an online survey and students are requested by email to complete it. Email invitations will be sent to a pool of students randomly, however, planning will take place to make sure that there is balance of student representation in the research based on the following criteria:

- male vs. female students
- students from State universities vs. students from private schools
- students from secular private schools vs. students from denominational schools

-students from urban universities vs. students from rural residential universities

-balanced number of students from the east coast, the west coast, the mid-west and the south of the US

The survey provides data and findings that help evaluate the project questions. In specific it is going to evaluate the motivation for study abroad and the factors that influence destination choice based on the consumer behavior stages:

Table 4: Motivations for study abroad

Need recognition	This would evaluate the groups of students who have recognized the need to study abroad.
Search for information	The survey will try to evaluate what type of information US students are looking for while searching for a study abroad program.
Sources of information	The survey is aiming to find where US students look for the above information.
Information processing	In this stage, the project will evaluate the way that information is processed, what factors are considered of more importance than others.
Pre-purchase alternative evaluation	The criteria used to select between alternatives is an important finding for this survey.
Purchase	The survey aims at evaluating the student groups most likely to a given program.
Post-consumption evaluation	Evaluation should be done to student expectations from a given program so as to be satisfied and transmit a positive feedback and review.

### 3. Analysis

Study abroad, according to the reports, follows a slow but steady growth year after year. There is a significant increase in study abroad to non-traditional destinations but at the same time there is a small increase in traditional destinations, with the exception of Australia. Study abroad is prone to crises and so wherever there are reports of difficult or risky situations, numbers tend to decrease. This is the case currently with North African and

Middle Eastern destinations where study abroad numbers have vanished. The recent economic crisis in Greece and the media reports on the demonstrations and troubles as a result of the austerity measures have resulted in an estimated drop in numbers in 2012 of around 30%. It is likely that this drop will not continue since the situation more or less has been stabilized following the general elections.

Consumer Behavior of US students, regarding study abroad programs, depends pretty much on the type of school they study. Students from private Universities they care less about price and they focus more on what the program is offering for them. On the other hand, for students from State Universities, particularly for those paying low fees, price is a major concern.

According to the State of Field Survey of the Forum for Education abroad (Forum on Education Abroad Survey: 2012), there has been a change in the determinants for choosing a study abroad destination. Price and cost that used to be the number one determinant is moved now to number four and issues such as cultural integration, help in maximizing study abroad experience and adequate preparation of students appear now to be more important.

It is important to note that the survey demonstrates that a significant number of schools are using social media to promote, communicate and administrate student group in study abroad. The percentage of using facebook is as high as 78% while Twitter is increasingly used (34%). It is evidence also that the vast majority of students are looking on the internet and using social media while they are researching for study abroad destinations. However, the roles of the study abroad and faculty advisors are still important as they may significantly influence student choice.

### **3.1 Student Profile**

The vast majority of US students studying abroad tend to be white (78.7%) and female (63,5%). (IIE Open Door report: student profiles) Students start considering study abroad in their freshmen year but the peak of study abroad takes place during their junior year. Talking to US study abroad advisors, we get the feedback that US students that study in another state than which they are residents, tend to study abroad more. In contrast, it is more difficult for in-state students to study abroad. To a large extend this can be explained because of costs. In-state students pay much less tuition fees in public schools. This means that study abroad for them would mean significant extra costs. On the other hand, students from other states and international students already they pay a good amount in fees and for them study abroad is not an expensive experience.

### 3.2 Market Opportunities

The US study abroad industry is steadily growing and present huge opportunities. As mentioned earlier, only the 14% of US undergraduate students decide to study abroad every year, so there is an immense room for growth. In addition, the 274000 students that do study abroad is a big enough pool to attract.

The student body that needs to be addressed in of a specific age (18-23) and is easily located in the premises of Universities and Colleges. Apart from addressing the students directly, study abroad advisors and faculty advisors that influence students as also important targets for marketing. Strategic partnerships with institutions and departments can serve as a marketing tool to recruit students.

Greece appears to be an attractive destination that can offer an interesting cultural immersion and historical experience and is yet underdeveloped as far as US study abroad is concerned.

### 3.3 Survey Findings

The survey was conducted through web in the period between 13 February and 6 March 2013. (ACT Survey, 2013) It was sent randomly to a number of US University students. The response population is 189 answers from different schools from 28 states throughout the US. The female response rate was significantly higher than the male; however, this reflects the IIE trends discussed earlier that female students tend to study abroad more than their male fellow students. In the same way, Caucasian (White) students were also more willing to reply and this in turn is in line with the findings of the IIE report.



Response	Chart	Percentage
Male		30%
Female		70%

CHART 1: GENDER






Response	Chart	Percentage
African American		7%
Caucasian		68%
Hispanic		11%
Asian		6%
other		8%

CHART 2: ETHNIC IDENTITY

Respondents were students of State or private schools in almost a balance number with slightly more students from private colleges.



Response	Chart	Percentage
State		49%
Private		51%

CHART 3: TYPE OF SCHOOL

The distribution of respondents regarding their study area is close to that of the IIE report in several fields:










Response	Chart	Percentage
Business/Economics		18%
Humanities		19%
Sciences		12%
Fine Arts		2%
Social Sciences		32%
Engineering		2%
Health Sciences		2%
Education		5%
other		7%

CHART 4: FIELD OF STUDY

Regarding price of the study abroad program, responders seem to prefer selecting the country and program of choice regardless price consideration.





Response	Chart	Percentage
I will go anywhere to get the lowest affordable price		13%
I will choose the continent first regardless of price but then I will choose the country on lowest available price		15%
I will choose the country I want to go regardless price but I will try to find the cheapest program in that country		48%
Price is not an issue since I will choose the best program for me		25%

CHART 5: PRICE SENSITIVITY

However, the majority of them claim that their major concern is not enough financial means to pay for overseas fees:



Table 5: Student concerns

	Very Important	Slightly Important	Not Important	Not Applicable
Not confident enough with the language	23 (19%)	46 (38%)	40 (33%)	11 (9%)
Difficult to live away from my family and friends	11 (9%)	34 (29%)	69 (58%)	5 (4%)
Wary of living in another culture/country	7 (6%)	29 (24%)	78 (66%)	5 (4%)
I do not want to leave my boyfriend/girlfriend	8 (7%)	18 (15%)	38 (32%)	55 (46%)
Not enough financial means to pay for overseas fees	58 (49%)	37 (31%)	16 (13%)	8 (7%)
Overseas credits not recognized by my University	26 (22%)	42 (35%)	28 (24%)	23 (19%)
I am concerned about health services/costs	16 (13%)	39 (33%)	56 (47%)	8 (7%)
Concerned about getting a student visa	11 (9%)	30 (25%)	69 (58%)	9 (8%)
Security issues in the host country	27 (23%)	45 (38%)	41 (34%)	6 (5%)

In a similar way, in the question of what influences the choice of destination and how much, it seems that price is one of the important elements:

Table 6: Important factors

	Very Important	Slightly Important	Not Important	Not Applicable
Price of the program	68 (60%)	37 (33%)	7 (6%)	1 (1%)
Attractiveness of country/city	82 (72%)	28 (25%)	4 (4%)	0 (0%)
Reputation of the host school	41 (36%)	59 (52%)	13 (12%)	0 (0%)
English speaking country	16 (14%)	18 (16%)	72 (64%)	6 (5%)
English speaking program	49 (43%)	27 (24%)	32 (28%)	5 (4%)
Host school marketing web-campaign in the US	6 (5%)	26 (23%)	66 (59%)	14 (12%)
Host school presence in study abroad fairs	7 (6%)	29 (26%)	61 (54%)	15 (13%)
Promotional materials/videos	16 (14%)	43 (38%)	48 (43%)	5 (4%)
Student reviews	38 (34%)	52 (46%)	20 (18%)	2 (2%)

<b>Study abroad advisor recommendation</b>	41 (37%)	52 (46%)	15 (13%)	4 (4%)
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Price comes second after the attractiveness of the country/city. It is worth noting that students consider not important to be in an English speaking country as long as the program itself in English speaking.

The survey concludes that the study abroad advisor in home universities is the most important influencing factor in choosing destination, seconded by host university brochures and promotional material. Student reviews that have been there are slightly important as well as participation in study abroad fairs. What is surprising is that answers claim little importance to advertising as well as recommendation from friends.

Table 7: Influential Factors

	<b>Very Important</b>	<b>Slightly Important</b>	<b>Not Important</b>	<b>Not Applicable</b>
<b>Friend who has been there</b>	14 (12%)	41 (34%)	40 (33%)	25 (21%)
<b>Friend who is going and we can go together</b>	14 (12%)	18 (15%)	58 (49%)	28 (24%)
<b>Study abroad advisor in my school</b>	30 (25%)	43 (36%)	38 (32%)	8 (7%)
<b>Reviews on the internet by students who have been there</b>	15 (13%)	55 (46%)	40 (34%)	9 (8%)
<b>Advertisements on goabroad.com or similar websites</b>	6 (5%)	17 (14%)	68 (57%)	28 (24%)
<b>University study abroad fair</b>	19 (16%)	43 (36%)	38 (32%)	19 (16%)
<b>Study abroad program brochures</b>	27 (23%)	59 (50%)	24 (20%)	9 (8%)

From the question of what is expected during the program, it seems that lifestyle and travel are major 'pull' factor. Next to these, students are concern with services and comfort provided. Finally, it seems that academic considerations are not the first priority for study abroad.

Table 8: Expectations from a program

	<b>Very Important</b>	<b>Slightly Important</b>	<b>Not Important</b>	<b>Not Applicable</b>
<b>Provision and quality of services</b>	69 (58%)	47 (39%)	3 (3%)	0 (0%)
<b>Facilities and accommodation</b>	69 (58%)	43 (36%)	5 (4%)	1 (1%)
<b>Available list of courses and relevance to my major</b>	68 (57%)	40 (34%)	11 (9%)	0 (0%)

Preference of general education/cultural/historical courses	50 (42%)	50 (42%)	18 (15%)	0 (0%)
Availability and interest of trips included in the program price	68 (58%)	37 (31%)	12 (10%)	1 (1%)
Opportunities for travel around the nearby region	86 (73%)	25 (21%)	6 (5%)	1 (1%)
Average class sizes	20 (17%)	43 (36%)	55 (47%)	0 (0%)
Reputation of teaching faculty	40 (34%)	54 (46%)	24 (20%)	0 (0%)
Life-style in destination city	78 (66%)	31 (26%)	9 (8%)	0 (0%)

The majority of students answered that while abroad they do not plan to socialize with other US students. That could mean that campus based programs (mixed with degree seeking students from different nationalities) could be preferred in comparison to island programs (US students only programs).

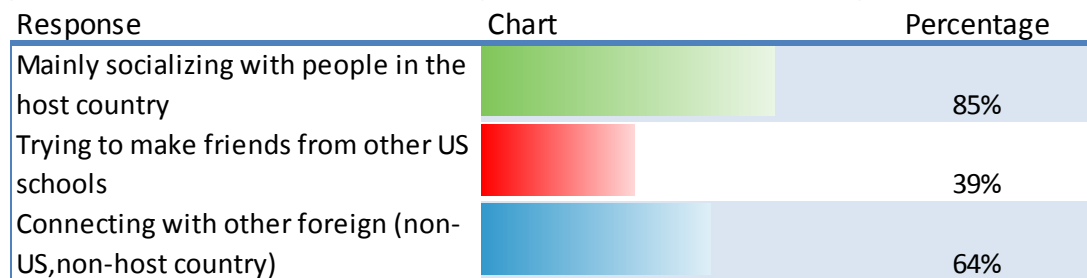


CHART 6: SOCIALIZING

### 3.3.1 Focused findings

By filtering the findings we come to some interesting data that would be useful for segmentation analysis.

#### 3.3.1.1 White vs. non-White students

Looking at the answers we receive from white only students, we see that white students are funded by their parents 37% compared to only 22% of the non-white respondents.

White ethnic identity:

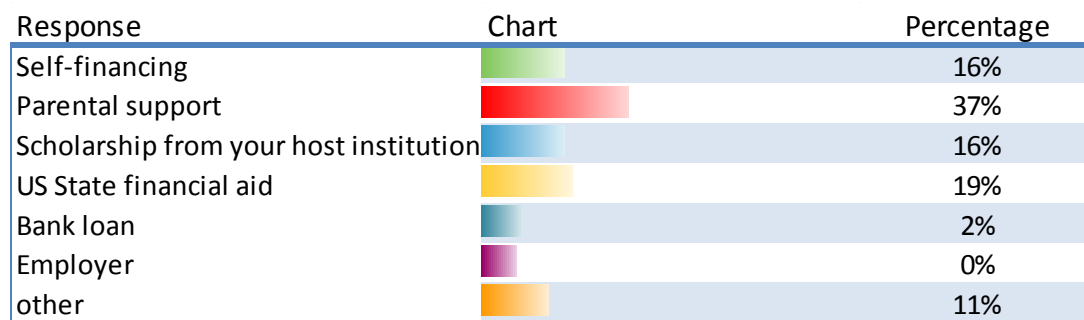


CHART 7: WHITE STUDENT FINANCING

Non-white ethnic identity:

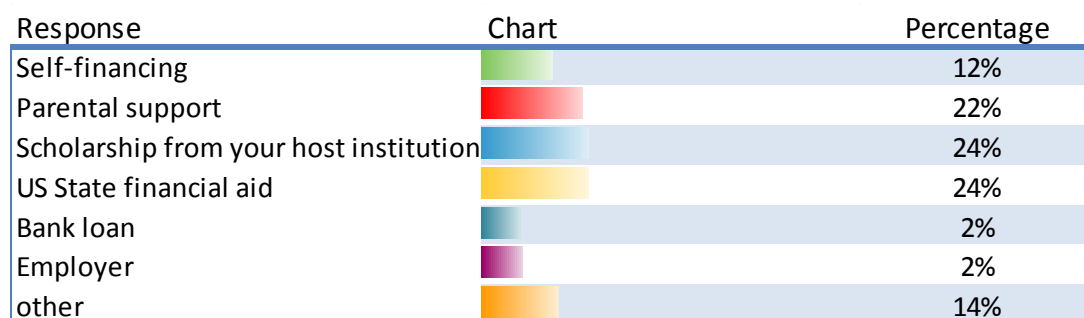


CHART 8: NON-WHITE FINANCING

In the same time we observe significant higher percentage of institutional aid (24%) in non-white students compared to 16% of white. This could partially explain the lower number of non-white study abroad students since institutional aid cannot ‘travel’ with the student abroad. It is not surprising that 76% of white students replied that they have participated in a study abroad program compared with only 50% of non-white. And even from this percentage only 48% of the non-white who have been abroad participated in a semester or year long program. In the white student statistics this is significantly higher and reaches 78%.

White students:

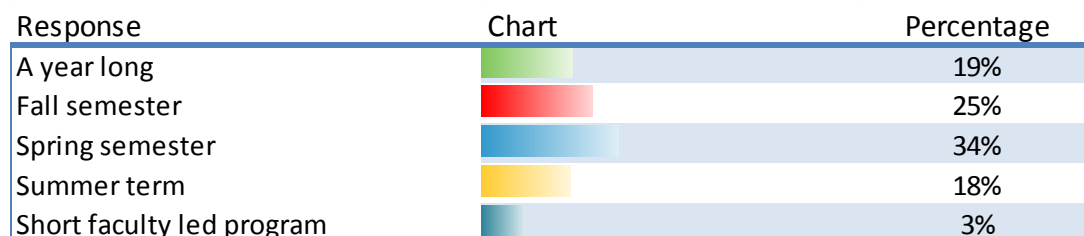


CHART 9: WHITE PROGRAM LENGTH PREFERENCE

Non-white students:






Response	Chart	Percentage
A year long		4%
Fall semester		22%
Spring semester		22%
Summer term		22%
Short faculty led program		30%

CHART 10: NON-WHITE PROGRAM LENGTH PREFERENCE

In the question which is the most appealing region to those intending to study abroad, the survey confirmed the fact that white students are attracted more to Europe and Australia, while non-white majority chooses Asia, Middle East and Latin America.

In the reasons to study abroad, white students tend to put first their drive to travel while non-white students portray the cultural reasons for study abroad. Comparing the factors that influence their destination choice decision, 64% of white students claim to pay some attention to the advice of the study abroad advisor compared with 53% of non-white.

Table 9: White student influencers

	Very Important	Slightly Important	Not Important	Not Applicable
Friend who has been there	11 (13%)	30 (36%)	24 (29%)	19 (23%)
Friend who is going and we can go together	10 (12%)	13 (16%)	40 (48%)	20 (24%)
Study abroad advisor in my school	18 (21%)	36 (43%)	25 (30%)	5 (6%)
Reviews on the internet by students who have been there	8 (10%)	42 (50%)	28 (33%)	6 (7%)
Advertisements on goabroad.com or similar websites	5 (6%)	12 (14%)	48 (57%)	19 (23%)
University study abroad fair	14 (17%)	32 (38%)	23 (27%)	15 (18%)
Study abroad program brochures	20 (24%)	41 (49%)	15 (18%)	8 (10%)

Table 10: Non-white student influencers

	Very Important	Slightly Important	Not Important	Not Applicable
Friend who has been there	3 (9%)	11 (31%)	16 (46%)	5 (14%)
Friend who is going and we can go together	4 (12%)	5 (15%)	18 (53%)	7 (21%)
Study abroad advisor in my school	12 (35%)	6 (18%)	13 (38%)	3 (9%)
Reviews on the internet by students who have been there	7 (21%)	12 (35%)	12 (35%)	3 (9%)
Advertisements on goabroad.com or similar websites	1 (3%)	5 (15%)	19 (56%)	9 (26%)
University study abroad fair	5 (15%)	10 (29%)	15 (44%)	4 (12%)
Study abroad program brochures	7 (21%)	17 (50%)	9 (26%)	1 (3%)

### 3.3.1.2 Male vs. Female students

The IIE reports present a significantly higher number of female study abroad students. Evaluating the survey data we could draw some useful conclusions on another possible segment. A difference that appears from the survey is that females tend to be less risky and adventurous concerning study abroad destinations. The data shows that male students are considering destinations in East Asia by 39% while the female student percentage is just 19%. In contrast, females choose Southern Europe by 29% while the male percentage is only 18%. This is also evident in the question on factors where 60% of male students claim that they do not concern about security in the host country, compared to only 28% of female students.

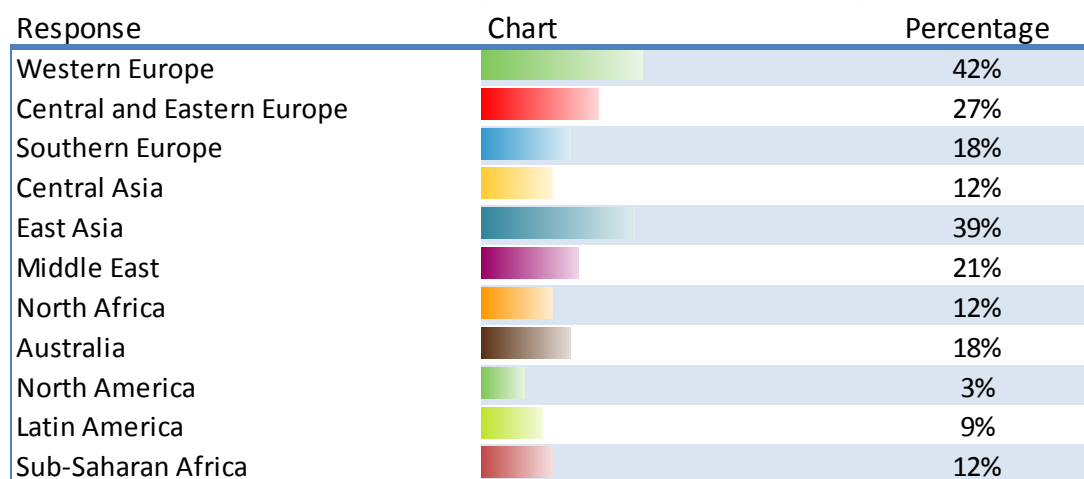


CHART 11: MALE PREFERENCES OF DESTINATION

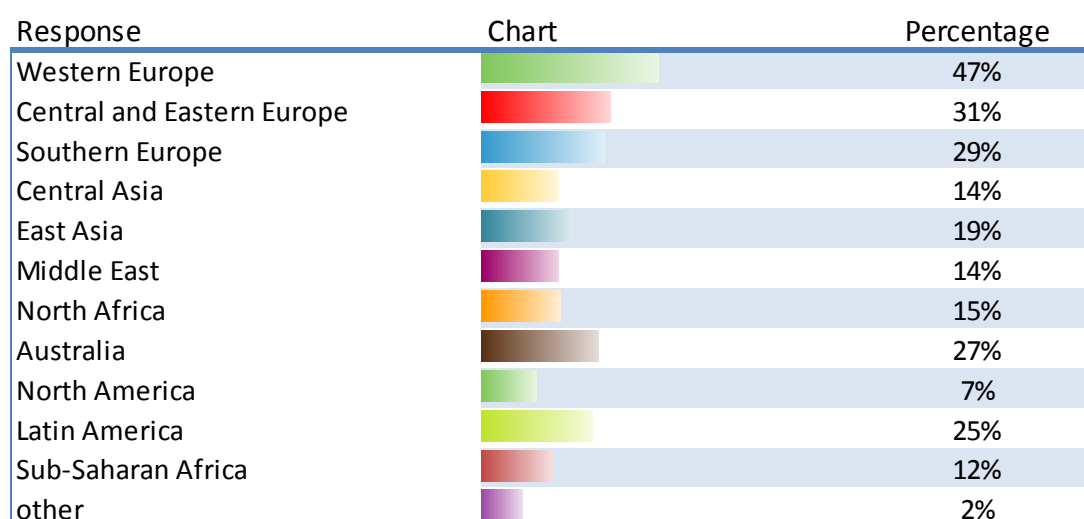


CHART 12: FEMALE PREFERENCES OF DESTINATION

In addition male students appear to be more price sensitive, while female students seem to be less driven by cost.

Table 11: Male students

Response	Chart	Percentage
<b>I will go anywhere to get the lowest affordable price</b>		21%
<b>I will choose the continent first regardless of price but then</b>		18%
<b>I will choose the country on lowest available price</b>		
<b>I will choose the country I want to go regardless price but I will try to find the cheapest program in that country</b>		33%
<b>Price is not an issue since I will choose the best program for</b>		27%

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Table 12: Female students

Response	Chart	Percentage
I will go anywhere to get the lowest affordable price		9%
I will choose the continent first regardless of price but then I will choose the country on lowest available price		14%
I will choose the country I want to go regardless price but I will try to find the cheapest program in that country		53%
Price is not an issue since I will choose the best program for me		23%

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### *3.3.1.3 Out-of-state vs. In-state students*

Out-of-state students have a larger percentage of longer term study abroad (semester or whole year), 76%, while 32% of in-state students prefer short-term programs (summer or faculty led). This can be explained by the fact that out-of-state students tend to study at a private institution (89%) while in-state ones prefer the public schools (65%). For the first, a semester study abroad would not cost more than what they normally pay at their school while a short term program would impose extra costs to the already high fees paid. In contrast, in-state students who in their majority study in public schools pay very small fees and for them the cost of a semester or a year abroad is expensive, so they prefer shorter programs.

Concerning choice of destination, in-state students tend to prefer Western Europe (53%) while out-of-state students seem to have stronger choices outside Europe. However, it seems that out-of-state students have a higher preference to Southern Europe.



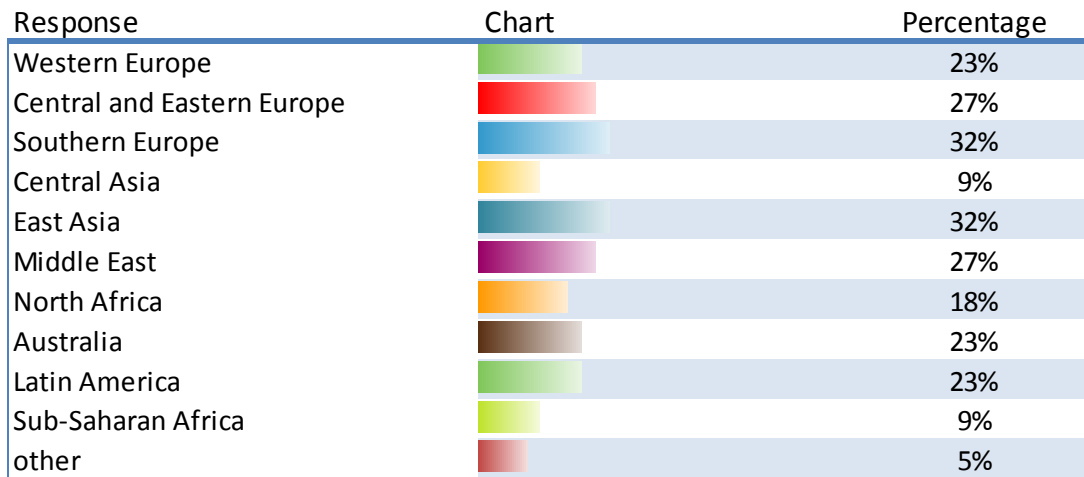


CHART 13: OUT-OF-STATE STUDENT PREFERENCES

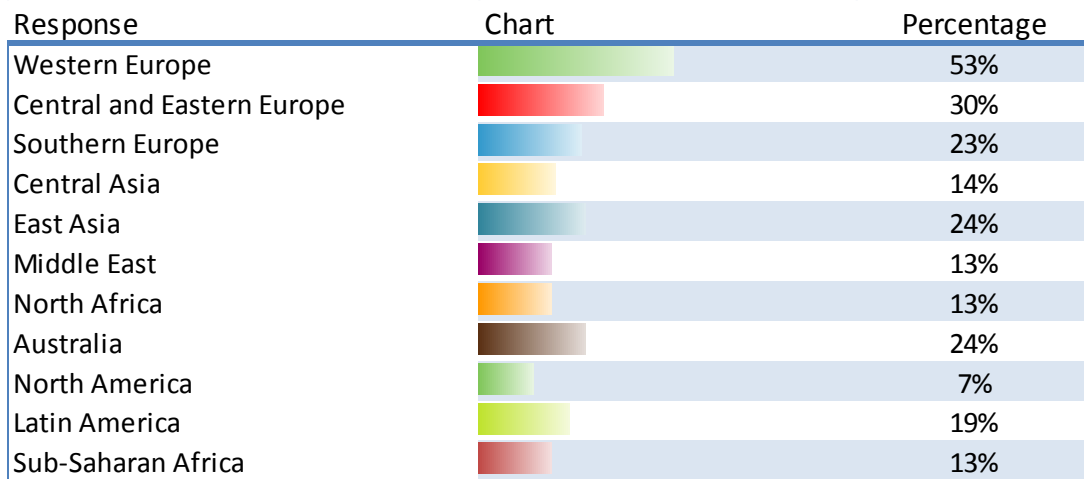


CHART 14: IN-STATE STUDENT PREFERENCES

#### 4. Segmentation of the US study abroad market

According to the segmentation criteria, one possible way to segment the US study abroad market is demographics. Based on the IIE report, the majority of US students that study abroad every year are white females. Looking at the survey, we can identify answers of this segment. Another possible segment would be out-of-state students. These students share the characteristic that they have already moved away from their family to another US state for university studies. They also pay a higher level of tuition fees and living expenses so for them study abroad would not be an expensive endeavor.

Filtering our survey to see answers from the specific segment of white out-of-state female students, we come across to the following trends:

- Students in private schools

It appears from the survey that this specific segment is concentrated in private Universities and Colleges.



Response	Chart	Percentage
State		15%
Private		85%

CHART 15: TYPE OF SCHOOL

- This segment is more likely to study for a semester or a full year





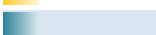
Response	Chart	Percentage
A year long		30%
Fall semester		40%
Spring semester		30%
Summer term		0%
Short faculty led program		0%

CHART 16: LENGTH OF PROGRAM

- Price is not an important factor for them instead they need to be attracted on cultural and academic experience qualities



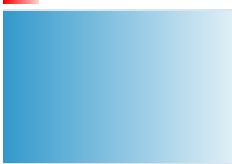

Response	Chart	Percentage
I will go anywhere to get the lowest affordable price		0%
I will choose the continent first regardless of price but then I will choose the country on lowest available price		0%
I will choose the country I want to go regardless price but I will try to find the cheapest program in that country		64%
Price is not an issue since I will choose the best program for me		36%

CHART 17: PRICE SENSITIVITY

- Travel and lifestyle attractiveness are in the top of their demand list

	Very Important	Slightly Important	Not Important	Not Applicable
Provision and quality of services	30%	70%	0%	0%
Facilities and accommodation	50%	40%	10%	0%
Available list of courses and relevance to my major	60%	30%	10%	0%
Preference of general education/cultural/ historical courses	20%	50%	30%	0%
Availability and interest of trips included in the program price	40%	50%	10%	0%
Opportunities for travel around the nearby region	70%	30%	0%	0%
Average class sizes	20%	20%	60%	0%
Reputation of teaching faculty	10%	60%	30%	0%
Life-style in destination city	50%	20%	30%	0%

CHART 18: EXPECTATIONS

Another possible segment is the price minded students.

Price-minded students (students answered in the survey that they would go anywhere to get the lowest price) seem to be those heavily depended upon institutional aid. This form of aid does not ‘travel’ with the student abroad and thus it forces students to look for low-cost options.

Response	Chart	Percentage
Self-financing		20%
Parental support		27%
Scholarship from your host institution		33%
US State financial aid		20%
Bank loan		0%
Employer		0%
other		0%

CHART 19: FUNDING SOURCES

Such price-minded students, if they are from a State school, they are exclusively in-state students, paying very low fees. To their majority, they are looking for short-term programs abroad.







Response	Chart	Percentage
A year long		0%
Fall semester		29%
Spring semester		14%
Summer term		43%
Short faculty led program		14%
		0%

CHART 20: LENGTH FROM STATE SCHOOLS

Those from private schools are mainly students on institutional aid, however, these are more interested in a semester program rather than short-term.






Response	Chart	Percentage
A year long		25%
Fall semester		50%
Spring semester		0%
Summer term		25%
Short faculty led program		0%

CHART 21: LENGTH FROM PRIVATE SCHOOLS

These are also students who would be more attractive to Greece that combine an attractive destination in a secure context and affordable prices.











Response	Chart	Percentage
Western Europe		29%
Central and Eastern Europe		57%
Southern Europe		57%
Central Asia		14%
East Asia		29%
Middle East		29%
North Africa		29%
Australia		14%
Latin America		43%
Sub-Saharan Africa		29%

CHART 22: DESTINATION PREFERENCE

#### 4.1 Segment groups

To conclude, the survey has provided useful data for any study abroad program provider to position itself in the US study abroad market. The table below illustrates the different segment groups:

Table 14: Segment groups

Segment groups	Where can be found	Characteristics
White female students	<ul style="list-style-type: none"> <li>• Social sciences and Humanities majors</li> <li>• They visit the study abroad office, study abroad fairs, collect brochures and promotional materials and read reviews by other students on the internet</li> </ul>	<ul style="list-style-type: none"> <li>• Funded mainly by parental support and US State aid</li> <li>• They prefer safe European destinations</li> <li>• Travel abroad and cultural experience are their motivations</li> <li>• They value the advice of their study abroad advisor</li> </ul>
Out-of-State students	<ul style="list-style-type: none"> <li>• Private schools</li> <li>• Internet search for brochures and other information on programs</li> <li>• Visit study abroad office</li> </ul>	<ul style="list-style-type: none"> <li>• Mainly supported by parents, some have increased institutional aid</li> <li>• Prefer long-term study abroad</li> <li>• Greater importance to academic and professional experience</li> <li>• Price normally is not an issue</li> </ul>
Price-minded students	<ul style="list-style-type: none"> <li>• Public schools, In-state students</li> </ul>	<ul style="list-style-type: none"> <li>• Mostly looking for short-term programs</li> </ul>
	<ul style="list-style-type: none"> <li>• Private schools, students on institutional aid</li> </ul>	<ul style="list-style-type: none"> <li>• Mostly looking for semester programs</li> </ul>

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## ANNEX: Survey data

### 1. Your current study area:

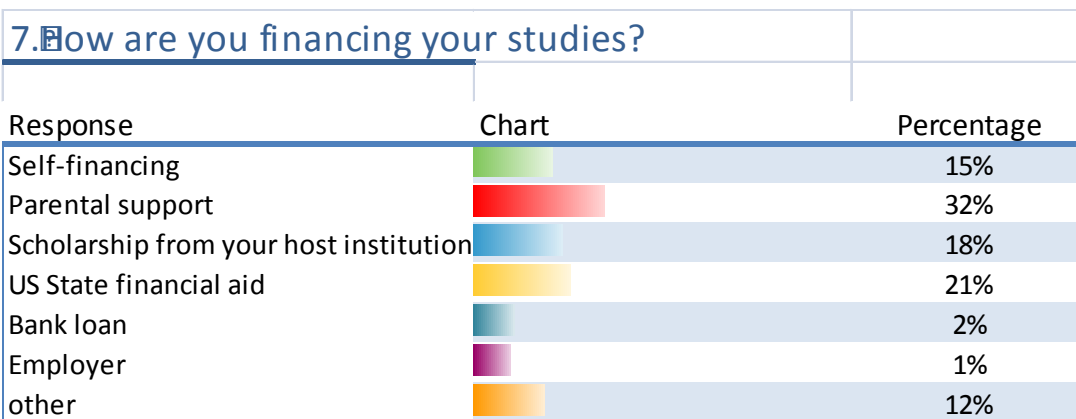
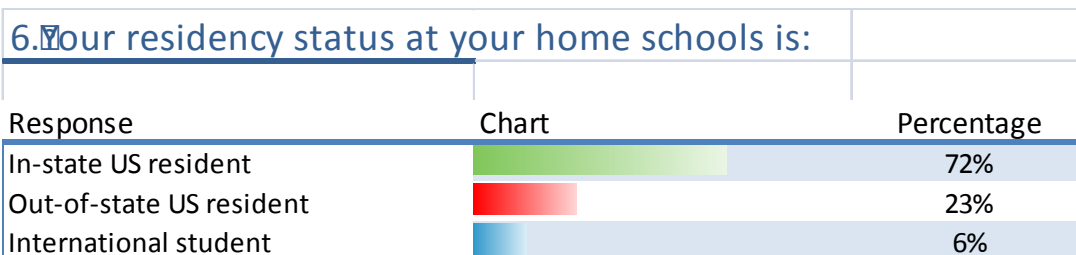
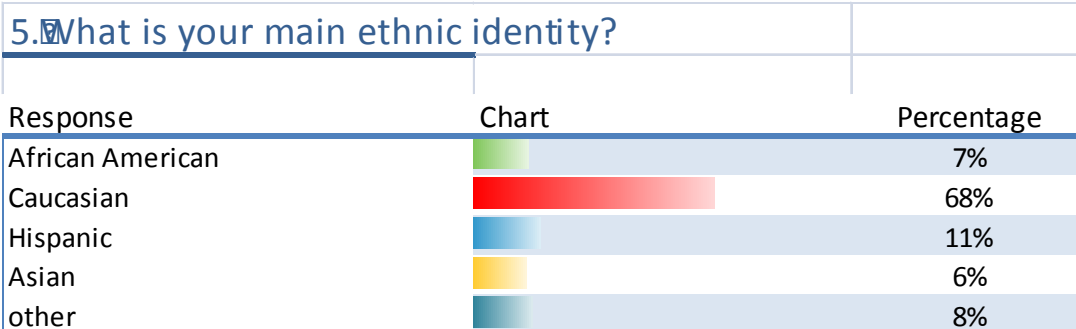
Response	Chart	Percentage
Business/Economics		18%
Humanities		19%
Sciences		12%
Fine Arts		2%
Social Sciences		32%
Engineering		2%
Health Sciences		2%
Education		5%
other		7%

### 3. What is your gender?

Response	Chart	Percentage
Male		30%
Female		70%

### 4. What is your age?



Response	Chart	Percentage
18		4%
19		13%
20		18%
21		25%
22		17%
23		5%
24		4%
25		3%
26		5%
27		3%
28		1%
30		1%
other		3%



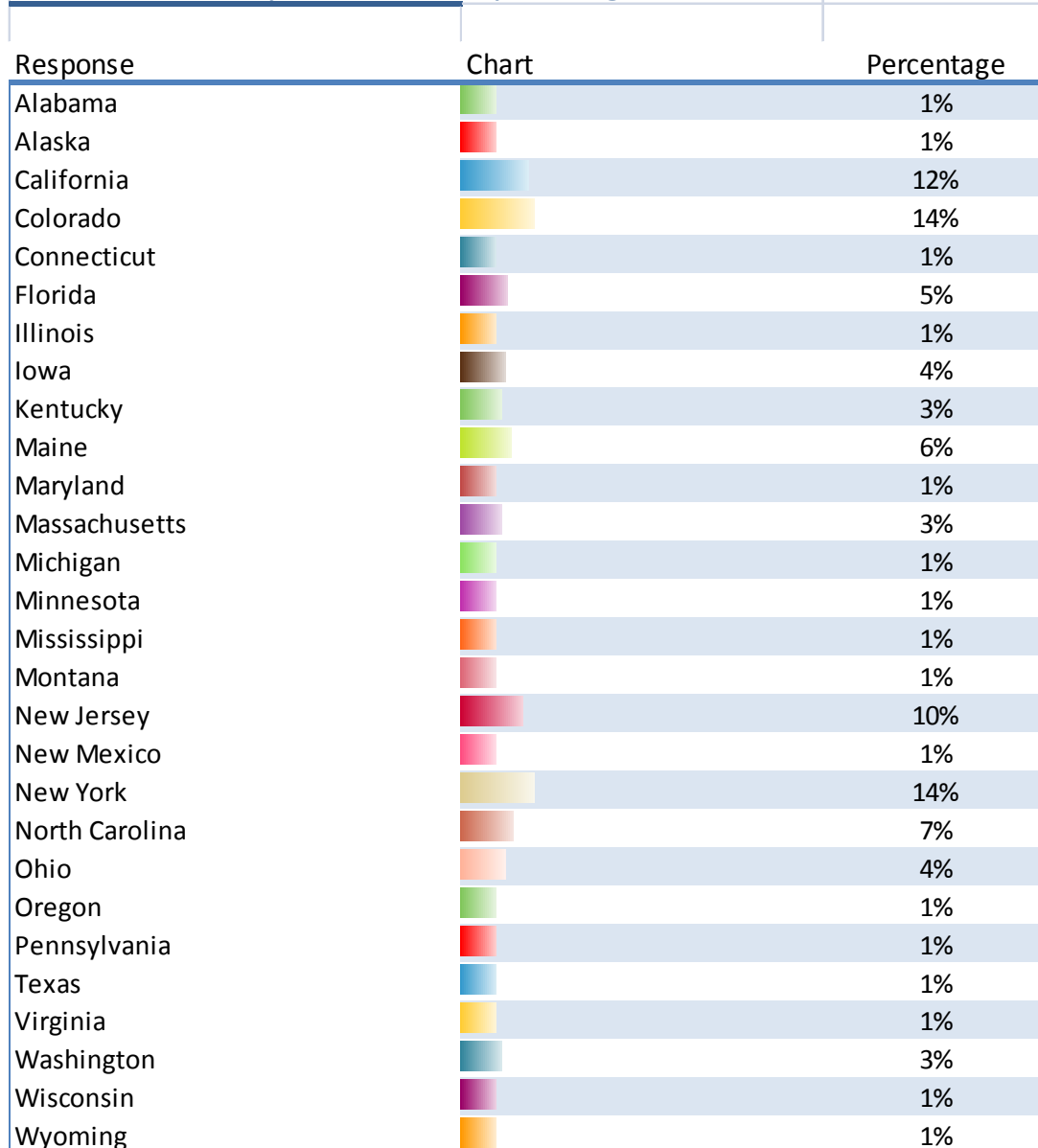
### 7. How are you financing your studies? (other)

#	Response
1	self and parents
2	All of three above, except Employer
3	self, parents, scholarship from host institution and loans
4	tuition waiver
5	I am receiving grants, taking out loans, and working to pay off the rest.
6	Grants from my host institution, parental support, and self-financing through work study and loans
7	Parental support, state scholarship, and school scholarship
8	GI Bill + Scholarship
9	Finaid, scholarship & self-financing
10	Self financing, Scholarship from your host institution, US State financial aid
11	Financial Aid from the college

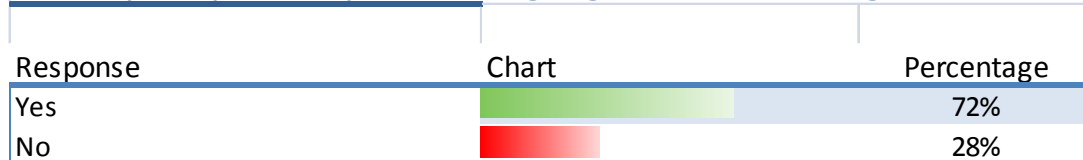
<b>12</b>	financial aid
<b>13</b>	Parental support, scholarship, US state fin aid/ loans
<b>14</b>	combination of parental support, scholarship from school, and bank loans
<b>15</b>	Grants, scholarships, loans
<b>16</b>	parental support and scholarship
<b>17</b>	Post 9/11 GI Bill
<b>18</b>	Self, parents, and scholarship

8. Is your school public or private		
Response	Chart	Percentage
State		49%
Private		51%

### 10. State where your University/College is located



### 12. Do you speak any other language other than English?



### 13. b) If yes, specify level

	Fluent	Intermediate	Basic
<b>Language 1</b>	40 (37%)	42 (39%)	26 (24%)
<b>Language 2</b>	6 (14%)	14 (33%)	23 (53%)
<b>Language 3</b>	2 (12%)	5 (29%)	10 (59%)

#### 14. Have you attended a study abroad program before

Response	Chart	Percentage
Yes		68%
No		32%

#### 16. If yes, for how long?

Response	Chart	Percentage
A year long		15%
Fall semester		24%
Spring semester		31%
Summer term		21%
Short faculty led program		9%

#### 17. If not, are you considering going on a study abroad program?

Response	Chart	Percentage
Yes		81%
No		19%

#### 18. If yes, which region is more appealing to you?



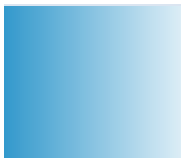

Response	Chart	Percentage
Western Europe		46%
Central and Eastern Europe		29%
Southern Europe		25%
Central Asia		13%
East Asia		26%
Middle East		16%
North Africa		14%
Australia		24%
North America		5%
Latin America		20%
Sub-Saharan Africa		12%
other		1%

#### 20. What are the main reasons that lead you to study abroad?

	Very Important	Slightly Important	Not Important	Not Applicable
<b>Cultural</b>	92 (76%)	25 (21%)	3 (2%)	1 (1%)
<b>Live-Abroad</b>	84 (71%)	26 (22%)	9 (8%)	0 (0%)
<b>Travel</b>	88 (74%)	26 (22%)	5 (4%)	0 (0%)

<b>Academic</b>	50 (42%)	51 (43%)	17 (14%)	0 (0%)
<b>Professional/CV Booster</b>	34 (29%)	48 (41%)	26 (22%)	9 (8%)

## 21. How far does the price of the program influence your choice?

Response	Chart	Percentage
I will go anywhere to get the lowest affordable price		12%
I will choose the continent first regardless of price but then I will choose the country on lowest available price		15%
I will choose the country I want to go regardless price but I will try to find the cheapest program in that country		48%
Price is not an issue since I will choose the best program for me		25%

## 22. What are the factors that concern you about study abroad?

	Very Important	Slightly Important	Not Important	Not Applicable
<b>Not confident enough with the language</b>	23 (19%)	46 (38%)	40 (33%)	11 (9%)
<b>Difficult to live away from my family and friends</b>	11 (9%)	34 (29%)	69 (58%)	5 (4%)
<b>Wary of living in another culture/country</b>	7 (6%)	29 (24%)	78 (66%)	5 (4%)
<b>I do not want to leave my boyfriend/girlfriend</b>	8 (7%)	18 (15%)	38 (32%)	55 (46%)
<b>Not enough financial means to pay for overseas fees</b>	58 (49%)	37 (31%)	16 (13%)	8 (7%)
<b>Overseas credits not recognized by my University</b>	26 (22%)	42 (35%)	28 (24%)	23 (19%)
<b>I am concerned about health services/costs</b>	16 (13%)	39 (33%)	56 (47%)	8 (7%)
<b>Concerned about getting a student visa</b>	11 (9%)	30 (25%)	69 (58%)	9 (8%)
<b>Security issues in the host country</b>	27 (23%)	45 (38%)	41 (34%)	6 (5%)

**23. Once you decide to study abroad, what key factors influenced your choice of one country/program?**

	Very Important	Slightly Important	Not Important	Not Applicable
Friend who has been there	14 (12%)	41 (34%)	40 (33%)	25 (21%)
Friend who is going and we can go together	14 (12%)	18 (15%)	58 (49%)	28 (24%)
Study abroad advisor in my school	30 (25%)	43 (36%)	38 (32%)	8 (7%)
Reviews on the internet by students who have been there	15 (13%)	55 (46%)	40 (34%)	9 (8%)
Advertisements on goabroad.com or similar websites	6 (5%)	17 (14%)	68 (57%)	28 (24%)
University study abroad fair	19 (16%)	43 (36%)	38 (32%)	19 (16%)
Study abroad program brochures	27 (23%)	59 (50%)	24 (20%)	9 (8%)

**other 1 |**

#	Response
1	At the core are my professional and academic goals, not those of my friends, family, advisor, or some company's opinion. Shocked that isn't a choice.
2	I wanted to go to a smaller Italian city, live in a home-stay, and take particular classes. The program I chose had these.
3	The classes available to study
4	I'd like to have an idea of whether or not I will truly enjoy a particular program from beginning to end.
5	I have already lived abroad in France, so my experiences in high school shaped my decision as to where I chose to study abroad in college.
6	My own research and desire to go to the country/program
7	Previous knowledge about the country, fluency in the host country language
8	Mainly I pick where and then which program
9	rigor and environment of the school
10	I knew very little about the program. I didn't even know I was going to be grocery shopping for instance. I just put a lot of faith in my Study Abroad Adviser.
11	Where I wanted to go, I didn't want to go to a place that is the 'norm'
12	I have long held a strong desire to study abroad for one semester. I do not remember a single key factor other than an overall desire to travel the world.
13	The course of study seemed better suited to my interests.
14	Friends in country that are natives.
15	Personal preference; I've been to Italy before
16	Really, for me, I knew I wanted to do a program through my University,

	and the program I chose was basically my only choice as far as country, language level, and semester I wanted to go abroad.
17	I went there because they were in Asia and they spoke English (mostly).
18	I simply want to broaden my view of the world and learn the lives of other people and try to walk in their shoes from their day to day life.
19	Program's website and class offerings. Also their unique teaching style.
20	Best friend from another university studied abroad in France, and I thought if she could do it why couldn't I. Granted I didn't want to go to France as I had no language skills.
21	I selected a country and then I decided based on how long I wanted to be there (didn't want to leave my fiancée for very long) and how much I was willing to spend.

#### other 2 |

#	Response
1	The outside activities I can do/places I can travel to
2	Religious/Spiritual reasons.
3	Through UCEAP, my regular financial aid applied to study abroad so I knew to choose an EAP program.

#### 24. What services are most important to you when choosing a study abroad destination?

	Very Important	Slightly Important	Not Important	Not Applicable
<b>Provision and quality of services</b>	69 (58%)	47 (39%)	3 (3%)	0 (0%)
<b>Facilities and accommodation</b>	69 (58%)	43 (36%)	5 (4%)	1 (1%)
<b>Available list of courses and relevance to my major</b>	68 (57%)	40 (34%)	11 (9%)	0 (0%)
<b>Preference of general education/cultural/ historical courses</b>	50 (42%)	50 (42%)	18 (15%)	0 (0%)
<b>Availability and interest of trips included in the program price</b>	68 (58%)	37 (31%)	12 (10%)	1 (1%)
<b>Opportunities for travel around the nearby region</b>	86 (73%)	25 (21%)	6 (5%)	1 (1%)
<b>Average class sizes</b>	20 (17%)	43 (36%)	55 (47%)	0 (0%)
<b>Reputation of teaching faculty</b>	40 (34%)	54 (46%)	24 (20%)	0 (0%)
<b>Life-style in destination city</b>	78 (66%)	31 (26%)	9 (8%)	0 (0%)



**25. Which of the following influences your choice of study abroad destination and how much?**

	Very Important	Slightly Important	Not Important	Not Applicable
<b>Price of the program</b>	68 (60%)	37 (33%)	7 (6%)	1 (1%)
<b>Attractiveness of country/city</b>	82 (72%)	28 (25%)	4 (4%)	0 (0%)
<b>Reputation of the host school</b>	41 (36%)	59 (52%)	13 (12%)	0 (0%)
<b>English speaking country</b>	16 (14%)	18 (16%)	72 (64%)	6 (5%)
<b>English speaking program</b>	49 (43%)	27 (24%)	32 (28%)	5 (4%)
<b>Host school marketing web-campaign in the US</b>	6 (5%)	26 (23%)	66 (59%)	14 (12%)
<b>Host school presence in study abroad fairs</b>	7 (6%)	29 (26%)	61 (54%)	15 (13%)
<b>Promotional materials/videos</b>	16 (14%)	43 (38%)	48 (43%)	5 (4%)
<b>Student reviews</b>	38 (34%)	52 (46%)	20 (18%)	2 (2%)
<b>Study abroad advisor recommendation</b>	41 (37%)	52 (46%)	15 (13%)	4 (4%)

**26. How do you plan to spend your time while studying abroad?**

Response	Chart	Percentage
Mainly socializing with people in the host country		85%
Trying to make friends from other US schools		39%
Connecting with other foreign (non-US, non-host country)		64%