

Mapping Generation Z: Attitudes Toward International Education Programs

An AFS Global Research Study
of over 5,000 high school students ages 13 - 18

• • • • Hristo Banov, Andrea Kammerer, Indre Salciute | February 2017





Welcome to **Mapping Generation Z**—an expansive, first-of-its-kind report exploring the motivations for and hindrances to international study among the mysterious youngest generation. We are grateful for the efforts of AFS member organizations across the globe, whose collaboration in this important effort extended our reach to more than 5,000 teenagers in 27 countries.

AFS has served a great number of generations across our first 102 years, and while we've witnessed many changes—in attitudes, in behaviors and in influencers—one constant has been a demonstrated hunger for student exchange as a means of cultural exploration.

Simply put, cultural exploration creates global citizens. Today and every day, it is essential. We're encouraged by Generation Z's continued enthusiasm for intercultural learning represented in this report. Moreover, we recognize our responsibility and that of the study abroad/exchange provider community to help this generation overcome the barriers—some perceived, some real—that keep them from engaging in this ever-important, life-changing program.

—**Daniel Obst**, President & CEO, AFS Intercultural Programs, Inc.

Mapping Generation Z: Attitudes Toward International Education Programs



The goal of this research study is to reveal the attitudes and perceptions of high school students from Generation Z on studying abroad, experiencing new ideas and immersing themselves in drastically different cultures than their own.



Scope

Reach: **27 COUNTRIES**

Number of responses: **5,255**



Data Collection

Online: **89%**

Paper-based: **11%**

Timeline: **MAR' 16 - DEC' 16**



Surveys

Translations: **16 LANGUAGES**

Content was kept the **SAME** across countries



Respondents

Ages: **13 - 18**

Been on exchange: **0%**

Considered exchange before: **60%**

Geographic Scope



Argentina (103)
Austria (117)
Brazil (159)
Bulgaria (145)
Canada (146)
Chile (242)

China (180)
Czech Rep. (431)
Denmark (160)
Dominican Rep. (368)
Ecuador (180)
France (130)

Germany (267)
Hong Kong (100)
Hungary (186)
India (127)
Iceland (88)
Italy (99)

Latvia (372)
Philippines (306)
Poland (260)
Portugal (168)
Russia (260)
Thailand (102)

Turkey (303)
United States (150)
Uruguay (106)

Executive Summary

English-speaking destinations dominate in popularity



Affordability remains a barrier to student mobility



Program specifics emerge as the main choice influencers



Apprehensiveness about security tops the list of concerns



Cultural exploration as a goal prevails in all global regions



With **77%**, English-speaking destinations (USA, UK, Australia) retain the highest attraction. By contrast, the two emerging markets featured in the survey (Brazil and China) show a lower favorability rating: **38%**. This signals that today's high school students have destination preferences similar to preceding generations in terms of education abroad.

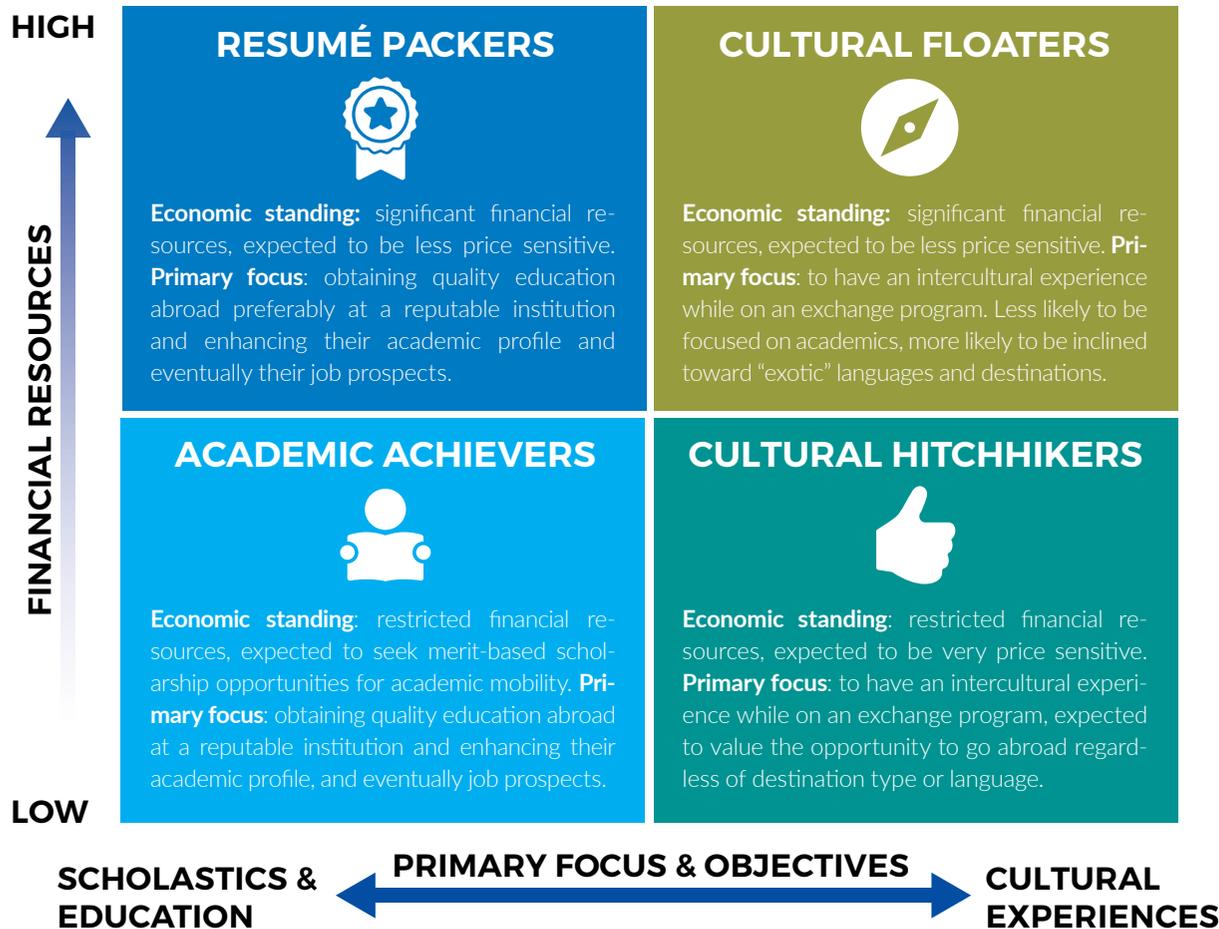
33% of all respondents from emerging or developing economies indicate that they would not be able to afford an exchange abroad without receiving a scholarship. By contrast only **15%** of students in Western countries report similar financial circumstances. This reveals that affordability remains a significant hurdle to school-level mobility in major parts of the world.

Students worldwide respond that they are influenced primarily by program aspects, such as the reputation of the host country (**77%**), English as the language of instruction (**69%**), and the reputation of the host school (**64%**). By contrast, respondents assign lesser weight to the influence of traditional advertising (**51%**) and social media (**42%**).

Countries where the research was conducted before May 2016 show a personal safety concern rate of **36%**, while the following months (when acts of terrorism became frequent) yield a rate of **52%**, which points to increased awareness of the global security situation. Security concerns supersede fear of social isolation (**50%**), homesickness (**48%**), and discrimination (**34%**).

57% of Latin American, **58%** Southeast Asian, **72%** North American, and **75%** of European respondents expressed that their prevalent motivations to study abroad revolve around cultural exploration as opposed to academic advancement. Therefore, one could imply that the traditionally observed focus on academics in the developing regions is shifting closer to the attitudes of the West.

Research Methodology



To understand the attitudes of Generation Z toward a school year or semester abroad, this report segments the respondents (ages 13-18) of a short survey on the basis of their economic standing and underlying motivations and aims. Financial resources and primary objectives act as the main dimensions throughout this research, as these play a key role in the students' decision-making process. The motivational attitudes of the students are inferred directly from their responses, while financial standing is estimated based on education, profession, and employment status of the parents, as well as the respective national wage averages. Finally, for each country, the average annual wage is weighted against the average market price of a school year abroad program, which allows us to equalize the financial standing of families internationally.

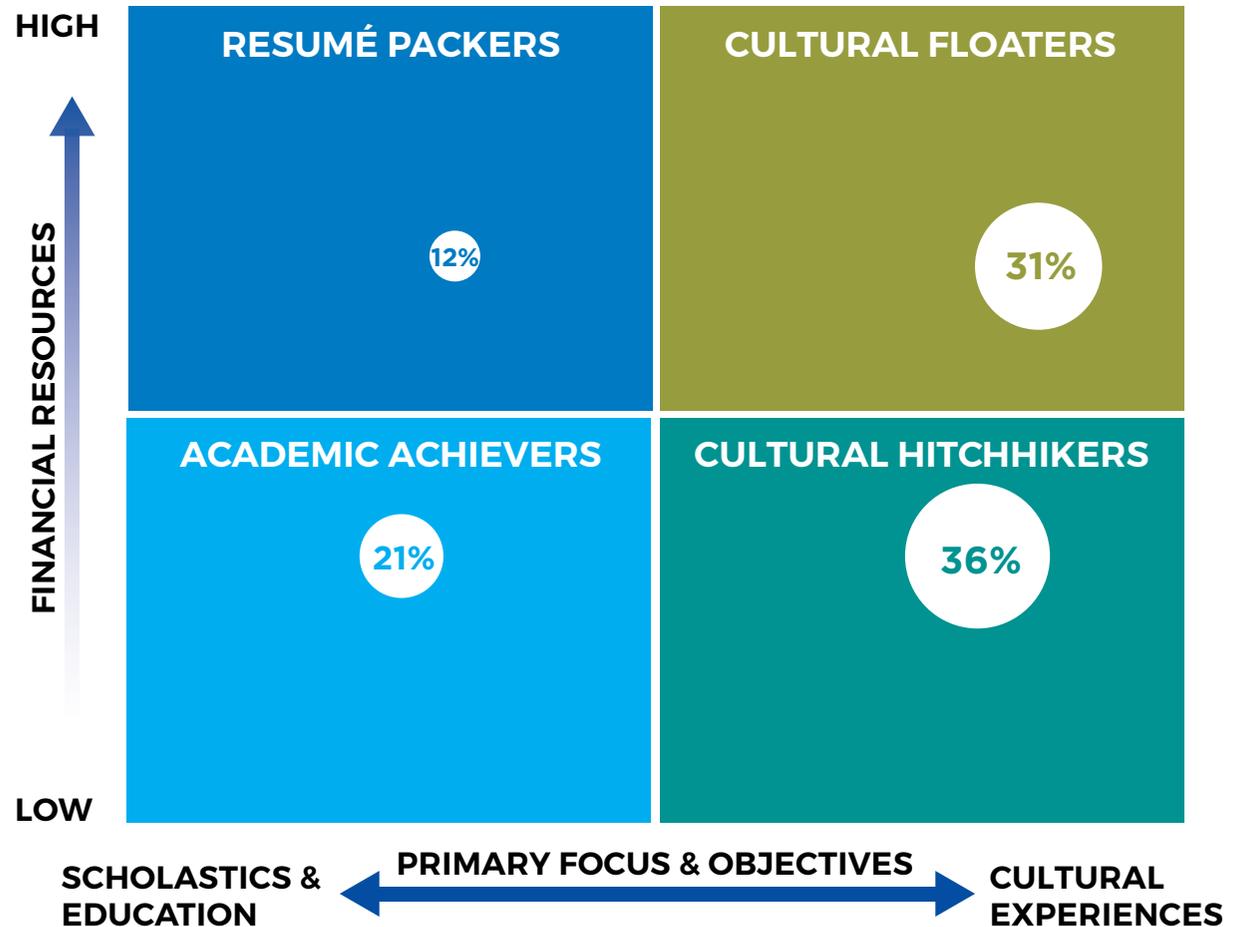
In addition to segmenting the market into four sectors as shown hereby, the study examines various aspects that potentially play a role in a prospective participant's decision to undertake study abroad. These include existing perceptions of destination countries, price sensitivity, a variety of influencing factors and actors, and personal concerns.

Segmentation Outcomes

(Cultural Hitchhikers emerge as the leading segment worldwide, followed by Cultural Floaters)

The analysis of the global segmentation results shows a stronger representation of the groups inclined toward intercultural learning and exploration. With 36%, Cultural Hitchhikers emerge as the dominant segment. Cultural Floaters follow with 31%. Resumé Packers and Academic Achievers fare lower with 21% and 12% respectively.

While existing tertiary level research unambiguously indicates that prospective university students are motivated by academic and professional development factors at much higher rates (in the 55%-65% range), the high school audiences profiled in our research emerge as more ready to embrace objectives related to intercultural understanding and tolerance. This observation makes a strong case that public diplomacy initiatives linked to educational mobility as a tool to promote global peace and understanding should put a strong emphasis on the high-school-level cohort.

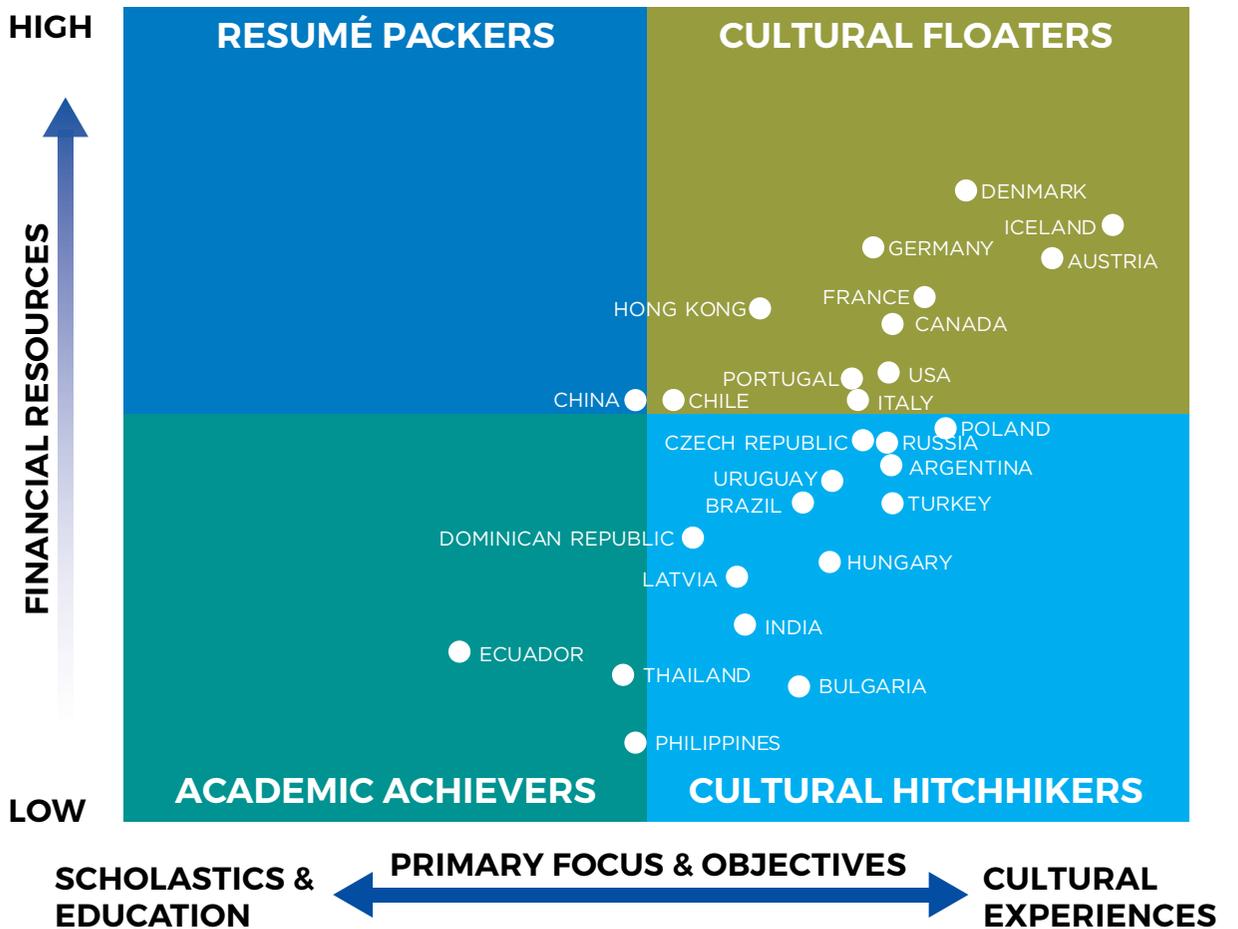


Segmentation Results by Country

(the overwhelming majority of countries display affinity toward cultural exploration)

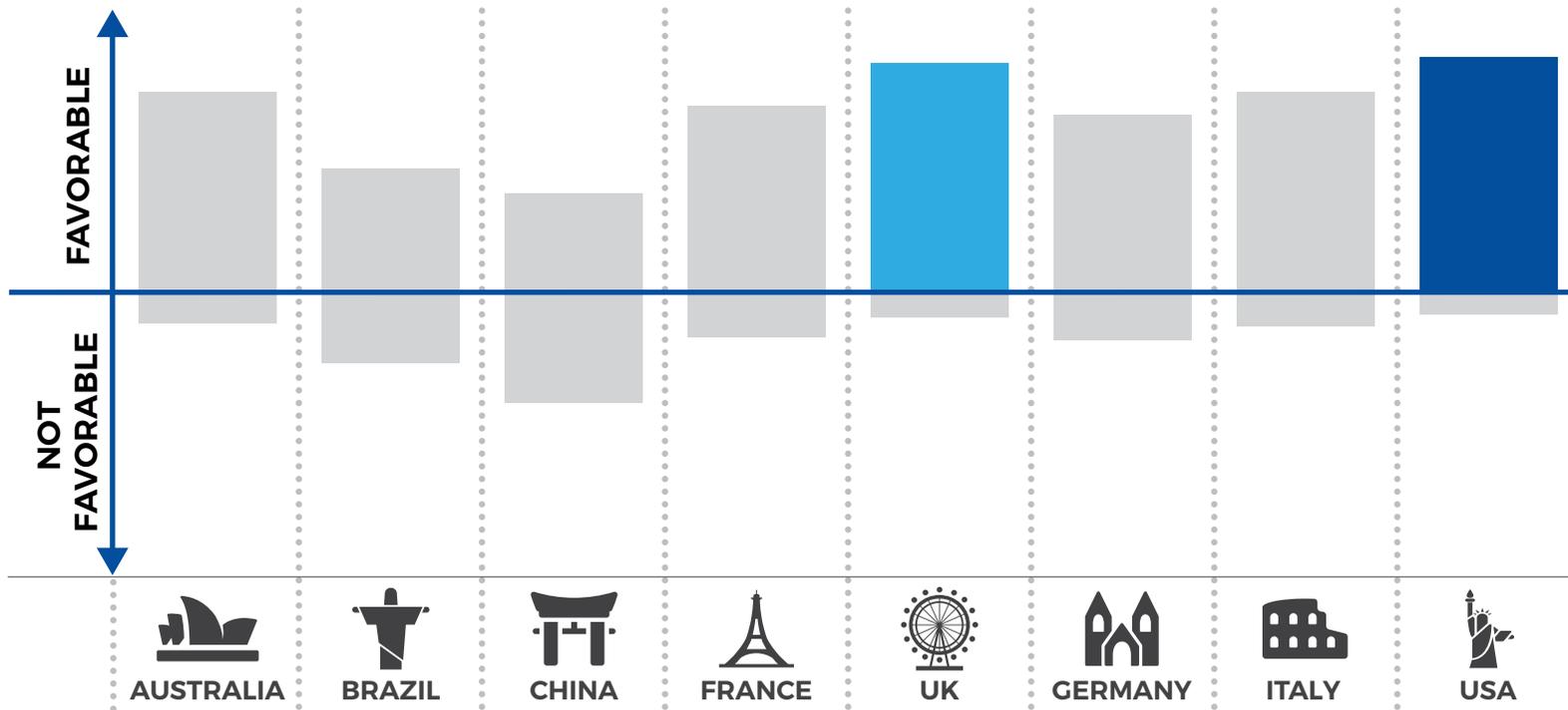
This graph visualizes the results for each country researched. We observe the majority of countries leaning toward motivations around cultural exploration and learning (i.e. making new friends, experiencing the family lifestyle in a different country, learning about local cultures and customs). The only country displaying a response sample clearly geared toward academic and career advancement as main motivators to undertake a high school program abroad is Ecuador. While three more countries (China, Philippines, and Thailand) display a preference for scholastic motivators, the attitudes of respondents there do not deviate largely from the more culturally motivated outcomes in the majority of the countries. With this it becomes clear that in each of the regions represented in the study, the respondents who express that their prevalent motivations revolve around cultural exploration as opposed to academic advancement are a majority: 57% of Latin Americans, 58% of Southeast Asians, 72% of North Americans, and 75% of Europeans. Therefore, one could infer that the focus on academics traditionally observed in developing regions in fact is closer to the attitudes of the West, at least in terms of the high-school-aged populations.

Overall, this segmentation outcome depicts a strong market demand for educational exchange programs that feature the appropriate mix of intercultural and academic aspects.



Attitudes Toward Countries

(the USA and the UK lead in popularity; impressions on China and Brazil are mixed-to-negative)



Despite the deepened economic and cultural ties between all world regions (i.e. there is about a five-fold increase in the value of global export flows from Brazil and China in the last 15 years alone), today's secondary students have destination preferences similar to those of preceding generations when it comes to education abroad. Altogether, English-speaking destinations (the United States, the United Kingdom, and Australia) retain the highest rates of positive attitudes (77%). Western

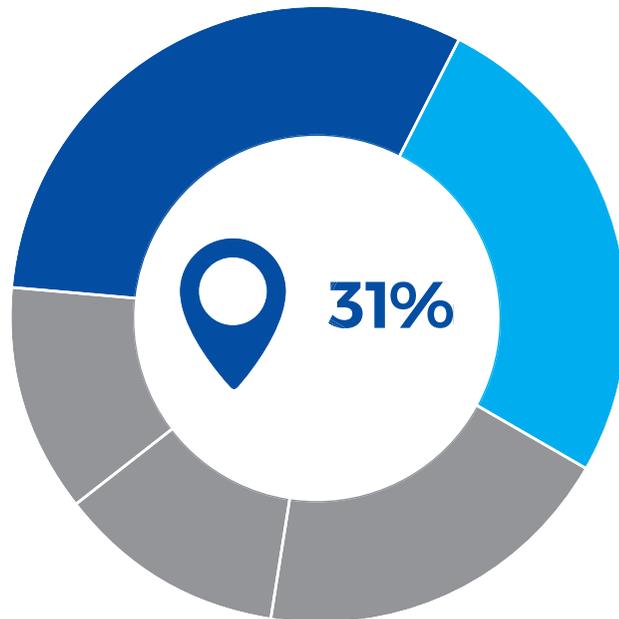
European countries (Italy, France, and Germany) fare nearly as well (65%). In contrast, the two developing countries featured in the survey (Brazil and China) achieve a relatively low favorability rating (38%).

These findings paint a picture of large growth potential for the traditionally popular English destinations and set the tone for increasing competitive pressures among them. As the outlook for continued growth in the

market of school-level mobility remains strong, these countries will likely undertake intensified efforts on promotion and capacity building, and witness frequent industry-led calls for policy implementations aimed to attract a greater number of mobile pupils.

Price Sensitivity

(the overall attitudes toward program price vary)



 **31% - COUNTRY REGARDLESS OF PRICE; THEN LOOKING AT PRICE**

 **26% - ONLY IF ON FULL SCHOLARSHIP**

 **19% - PRICE IS NOT A KEY ISSUE**

 **12% - SEEK OUT THE LOWEST-PRICED OFFER FIRST**

 **12% - CONTINENT REGARDLESS OF PRICE; THEN LOOKING AT PRICE**

When confronted with a question strictly around price attitudes, around 31% of all respondents affirm that they would choose the host country first regardless of price, then find the lowest-priced offer for that destination, with Western economies clearly driving this preference to the front of the list. At first look, this could appear as a manifestation of moderate price sensitivity, since the majority of respondents signal choice of destination as more relevant than the price of the program. However, in interpreting these outcomes, one has to factor in

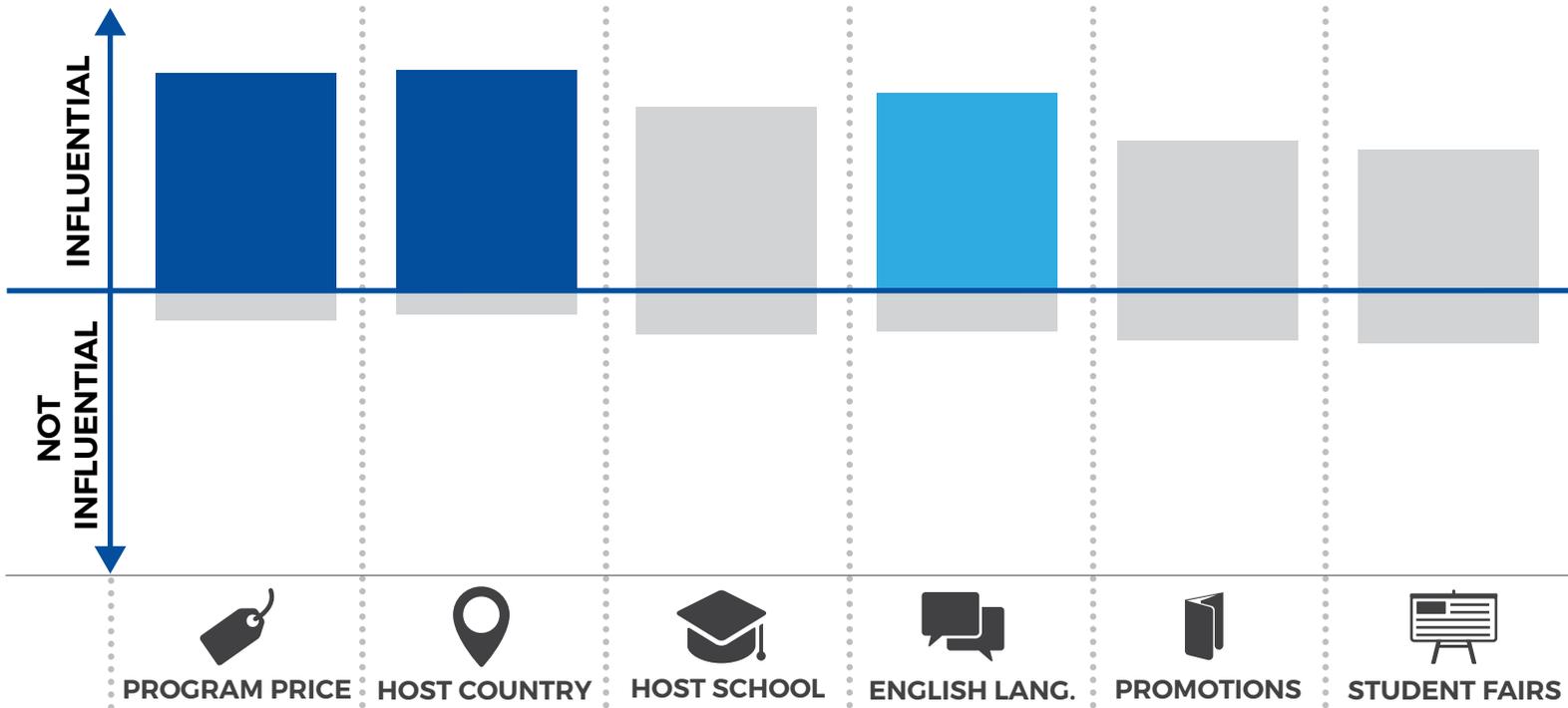
the make-up of the outbound market for school-level mobility, where the majority of students come from developing countries such as China, Brazil, Vietnam, and Mexico. Therefore, the data from countries of similar socioeconomics bears more weight in accurately representing the predominant attitudes toward price. With this in mind, for this section we turn our attention mainly to the emerging or developing economies where 33% of respondents indicate they would not be able to afford an exchange abroad without receiving

a scholarship. By contrast, only 15% of students in Western countries report similar price sensitivity. This reveals that affordability remains a significant hurdle to school-level mobility and, most importantly, that it affects namely the parts of the world that supply the largest numbers of international secondary students.

Please note that, since the key decision-making party with regard to cost is usually the parents, caution is appropriate in reading this section; the findings could turn out differently if the opinions of the parents were sought.

Factors Influencing Decision

(the hosting country reputation emerges as most important, followed closely by price)



Students respond that they are influenced primarily by various program aspects such as: the reputation of the host country (77%), English as the language of instruction (69%), and the reputation of the host school (64%). The order of these priorities proves important for countries such as the Philippines, Ghana, and Malaysia that may be seeking to attract international students based on their own capacity to provide educational instruction in English. As the focus on host country reputation supersedes the language of instruction factor, destination marketing and promotion is poised to play a

crucial role for these countries' competitiveness against the traditionally popular markets like USA, Canada, and Australia.

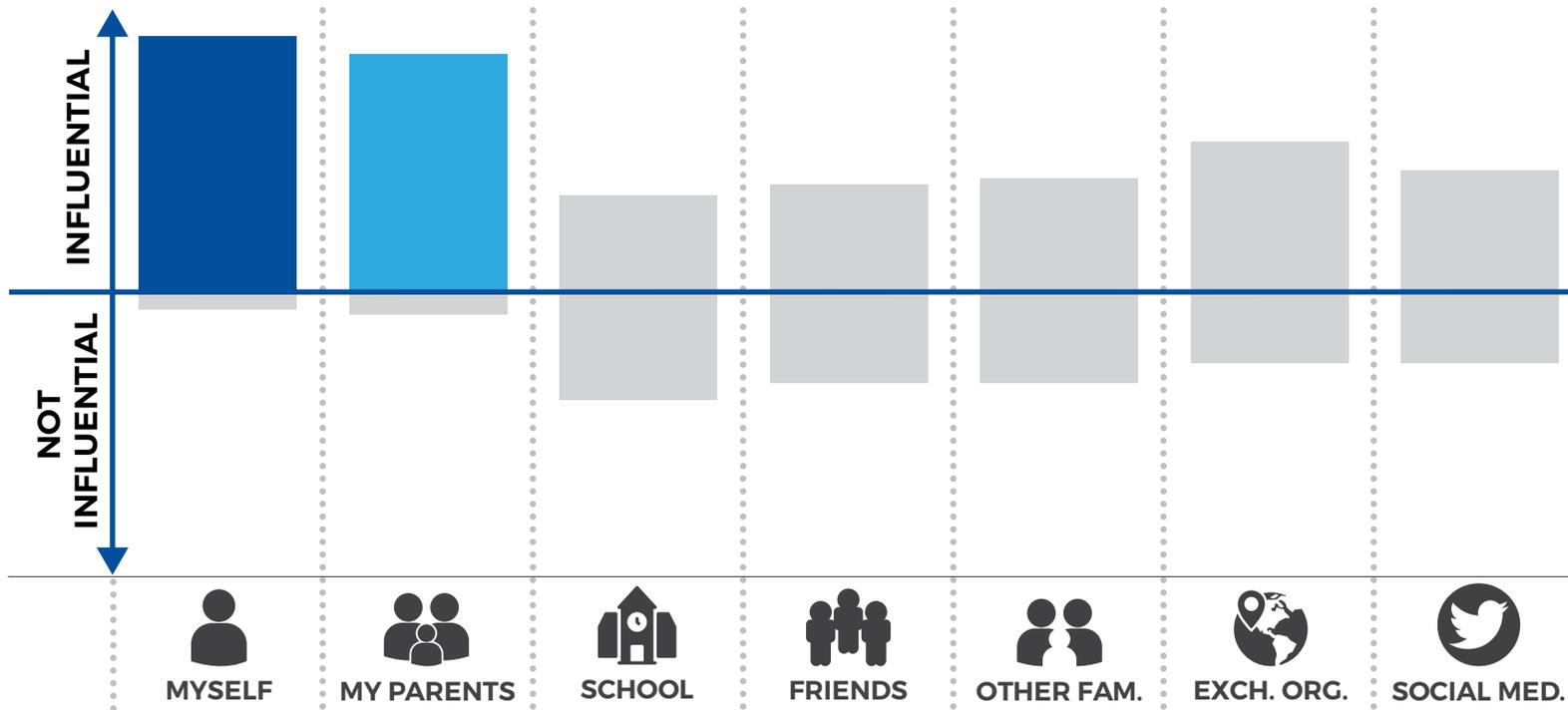
Beyond the program-specific characteristics, the price appears to play a major role globally (76%) but especially in Latin America (87%) where significant currency devaluations against the USD have made exchange abroad less affordable for many families lately. Although still important, program price does not have as prominent an influence in Southeast Asia (61%) as in Latin America despite our bottom-leaning financial segmentation for

both regions; we speculate that this is in line with the proclivity of Southeast Asian families to place a high value on education in hopes of building a better life for their children.

Finally, respondents show lesser sensitivity to the influence of traditional advertising (51% promotions and student fairs combined). This supports the notional significance of product authenticity for Generation Z, demonstrated in their willingness to go beyond initial impressions to gain a better understanding of substantive specifics and characteristics before making decisions.

Actors Influencing Decision

(the considerations of the students and their parents naturally have the greatest influence)



Unsurprisingly, the interests and considerations of prospective participants themselves (89%), followed closely by their parents (83%), emerge as the leading factors influencing decisions when it comes to an exchange abroad. This pattern is broken only in countries with strong patrilineal social structures (such as India and Thailand) where parents (88%) appear to play a more crucial role than students attribute to themselves (85%). By contrast, in Western countries with longstanding tradition of outbound school-level mobility (Germany and France), respondents

demonstrate a strong trait of individualism by assigning themselves a substantially higher decision-making weight (91% vs. 66%).

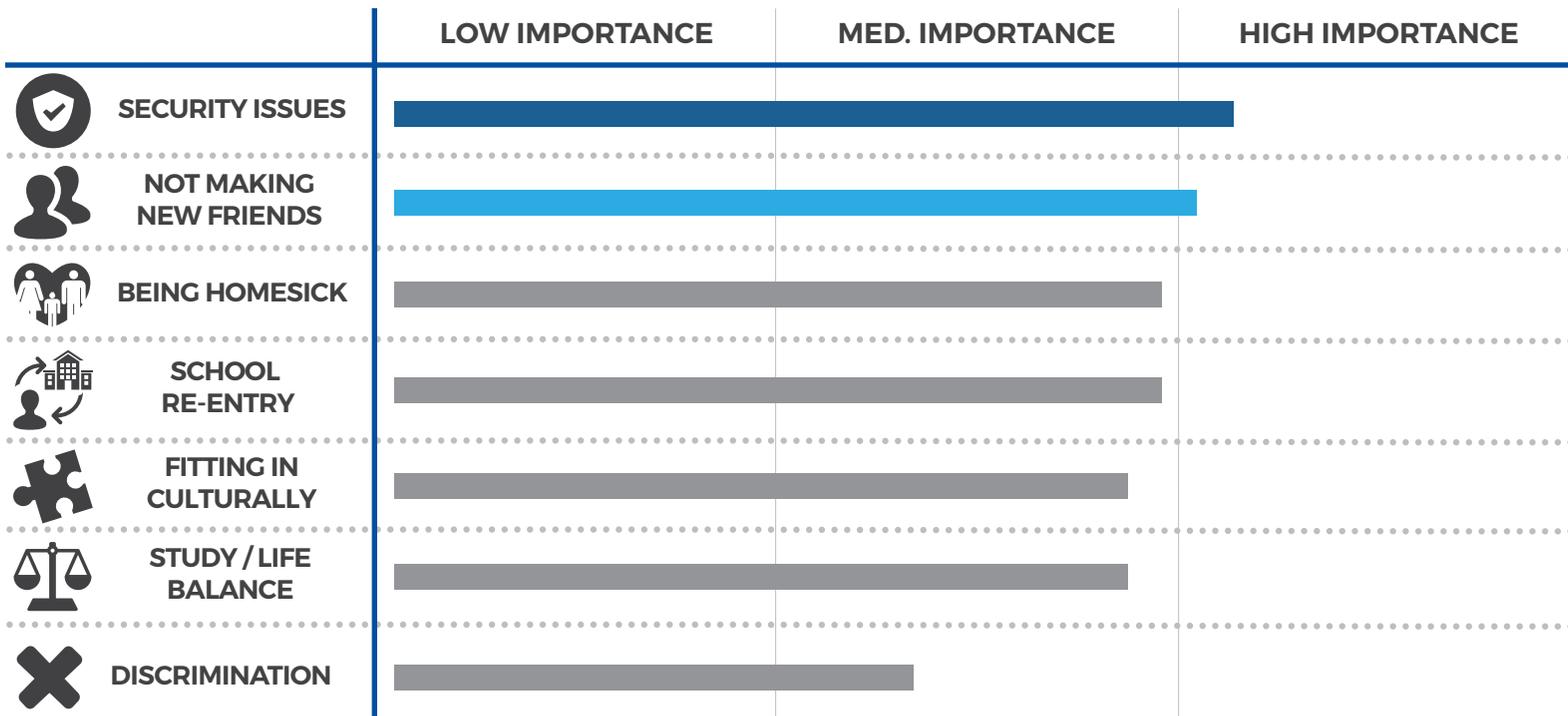
Furthermore, the influence of a local exchange organization appears to display a decent degree of influence in the initial decision process (52%) which affirms the persistent relevance of program providers in accessing, motivating, and recruiting students.

The results in this section also show that in the majority of countries, schools and teachers have limited influence

on the choices students make regarding international mobility opportunities (33%). This suggests that at least in the initial stages of consideration, today's youth is likely to view an option for a year/semester abroad as a choice related to personal development. A further look into the study, however, reveals that the attitudes toward the influence of schools change drastically once students start factoring in the trade-offs they would face by undertaking an exchange program (see school re-entry in Personal Concerns section).

Personal Concerns

(apprehensiveness about security tops the list of personal concerns)



With 52%, apprehensiveness about security and safety tops the list personal concerns arising from an exchange abroad program. Besides this, students worry most about social aspects such as making new friends (50%), being homesick (48%), study/life balance (47%), and fitting in culturally (46%) while abroad. Similarly, school re-entry requirements (48%) are reason for concern once back home. By contrast, fear of discrimination (34%) emerges as the least frequent worry around studying abroad.

As the research progressed, we observed an interesting trend toward increased awareness of the global security situation: Respondents who participated in the research before May 2016 average a security concern rate of 36%. During the months after repeated terrorist attacks became highly publicized worldwide, we noted a concern rate of 52% for the same issue. This large fluctuation reveals a significant increase in mindfulness of GenZ toward risk and security, which appear to increase in response to current events.

We posit that this comparative observation is an accurate picture of the mindset of GenZ toward security since the nature of terrorism nowadays is almost always global, largely normalizing any differences stemming from country-specific realities. As the situation around terrorism is poised to remain complicated in 2017, we expect that security fears will remain a key concern for prospective students (as shown in our overall results above) and will continue to affect demand significantly.



Notice and Citations

This report contains information sourced either by AFS International itself or in collaboration with its Partner Organizations around the world. The research methodology has been developed by the Management Information Unit at AFS International and is in part based on similar research undertakings performed in the past mostly on university-level students. Some of the graphic sources and imagery have been obtained under a royalty-free business model from a variety of graphic design databases. All sources (research and graphic) are cited and credited hereby.

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The AFS Research Team



Hristo Banov was born and raised in Bulgaria and moved to the USA to attain his university degree in International Studies and Economics. His academic and professional background is bolstered by several specialized certifications in the areas of market research, customer analytics, data analysis, and data-driven visualization. He is responsible for the overall project planning, research methodology, and visual design of *Mapping Generation Z*.



Andrea Kammerer is originally from Hungary where she received a degree in Media and Communications. She gained experience in online marketing and market research at H2Online Ltd. in Hungary before moving to New York to join AFS. During the *Mapping Generation Z*, she coordinated the data collection process in close collaboration with AFS Partners and executed the data visualization of global and country-specific findings.



Indre Salciute is originally from Lithuania. After receiving her Bachelor's degree in Statistics, she moved to the UK to obtain experience in econometric consultancy with a focus on marketing and communications. Later she moved to Denmark to pursue a Master's in Culture, Communication and Globalization which led her to join AFS International in New York. Indre has contributed to the *Mapping Generation Z* in her capacity of experienced data analyst.



AFS Intercultural Programs is an international, voluntary, non-governmental, non-profit organization that provides intercultural learning opportunities to help people develop the knowledge, skills and understanding needed to create a more just and peaceful world.

AFS enables people to act as responsible global citizens working for peace and understanding in a diverse world. It acknowledges that peace is a dynamic concept threatened by injustice, inequity, and intolerance.

AFS seeks to affirm faith in the dignity and worth of every human being and of all nations and cultures. It encourages respect for human rights and fundamental freedoms without distinction as to race, sex, language, religion, or social status.

AFS activities are based on our core values of dignity, respect for differences, harmony, sensitivity, and tolerance.