



Mapping Generation Z in Indonesia

Attitudes Toward International Education Programs

An AFS Global Research Study
of over 5,500 high school students ages 13 - 18

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Welcome to **Mapping Generation Z in Indonesia**—the first local version of our previous global report exploring the motivations for and hindrances to international study among the mysterious youngest generation. We are grateful for the efforts of AFS Indonesia, whose collaboration in this important effort extended our reach to more than 5,500 Indonesian teenagers.

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 study abroad and intercultural learning represented in this report. Moreover, we recognize our responsibility and that of the 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: Indonesia

Attitudes Toward International Education Programs



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



Scope

Number of responses: **5,502**



Data Collection

Timeline: **MAR' 17 - APR' 17**



Survey

Distribution: **ONLINE**

Translation: **INDONESIAN**



Respondents

Ages: **13 - 18**

Been on exchange: **0%**

Considered exchange before: **81%**

Executive Summary



Heightened affinity towards scholastic objectives

56% of all Indonesian students expressed that their prevalent motivations to study abroad revolve around academic advancement as opposed to cultural exploration (**44%**). Even some culturally driven respondents sway towards purely educational motivators so one can conclude, that the traditionally observed focus on academics in the developing regions is still prevalent in Indonesia.



Security in the host country tops the list of concerns

When it comes to personal concerns around studying abroad, respondents in Indonesia show a safety concern rate of **47%**, which points to increased awareness of the global security situation due to the widely publicized threats to security worldwide. Security concerns supersede the fear of being homesick (**46%**), school re-entry requirements (**41%**), and having a favorable school/life balance (**37%**).



Program specifics emerge as the main choice influencers

Students in Indonesia are influenced primarily by program aspects when considering a study abroad opportunity, such as the reputation of the host country (**84%**), English as the language of instruction (**78%**), and the reputation of the host school (**71%**). By contrast, respondents assign lesser weight to the influence of social media and traditional advertising, accounting for **59%** and **58%** respectively.



Affordability remains a barrier to student mobility

Due to Indonesia's socio-economic status, affordability remains a significant hurdle to school-level mobility. **45%** of all respondents from Indonesia indicate that they would not be able to afford an exchange abroad without receiving a full scholarship. By contrast only **11%** of students report price not being an issue when considering an exchange. Still, **81%** of respondents indicated they have considered studying abroad.



English speaking destinations dominate in popularity

In terms of destinations for study abroad, with **86%**, English-speaking countries including the USA, UK, and Australia retain the highest attraction. By contrast, the two emerging markets featured in the survey, Brazil and China show a lower favorability rating: **39%**. This signals that today's high school students in Indonesia have destination preferences similar to preceding generations.

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 their financial standing is estimated based on education, profession, and employment status of the parents, as well as the national wage average. Finally, the average annual wage is weighted against the average market price of a school year abroad program.

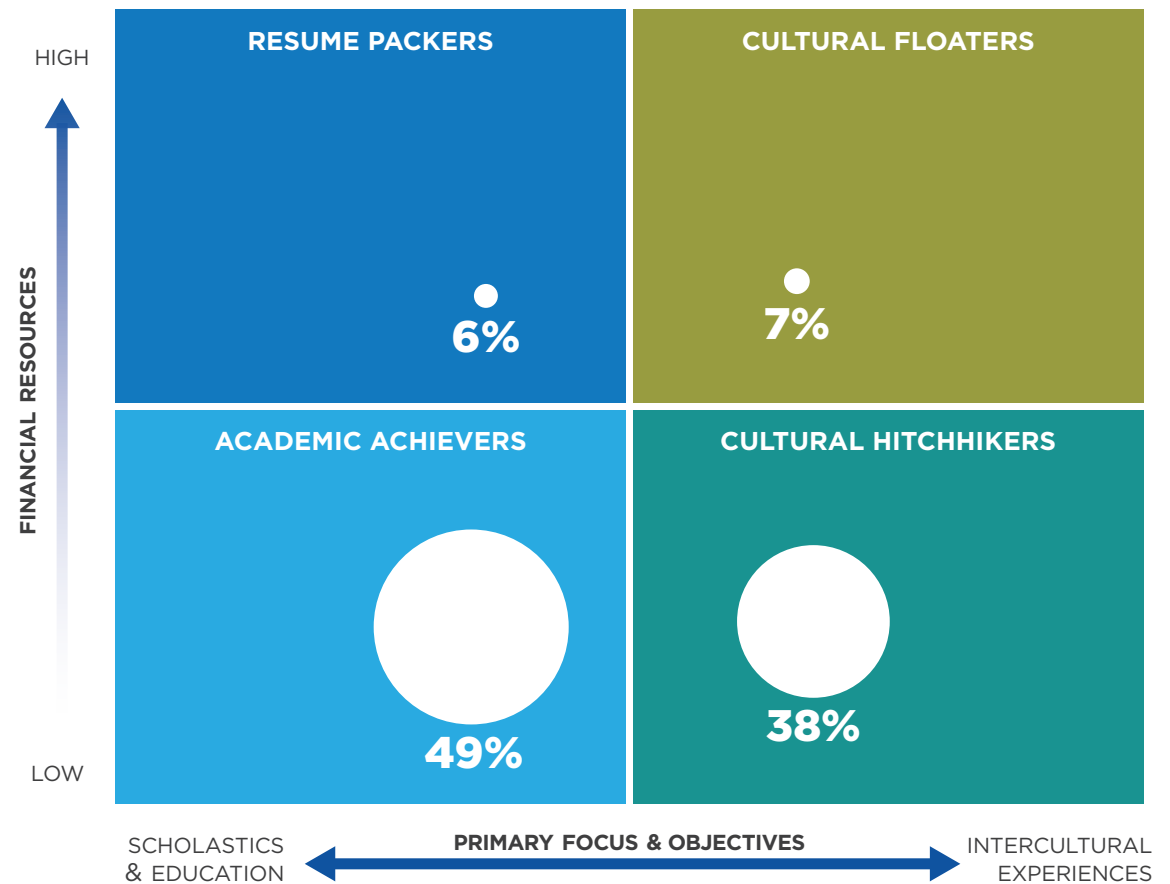
In addition to segmenting the market into four sectors as shown hereby, the study examines various aspects that potentially play a role in a prospective participant's decision to undertake study abroad. These include existing perceptions of destination countries, price sensitivity, a variety of influencing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

Segmentation Outcomes

(Academic Achievers emerge as the leading segment, followed by Cultural Hitchhikers)

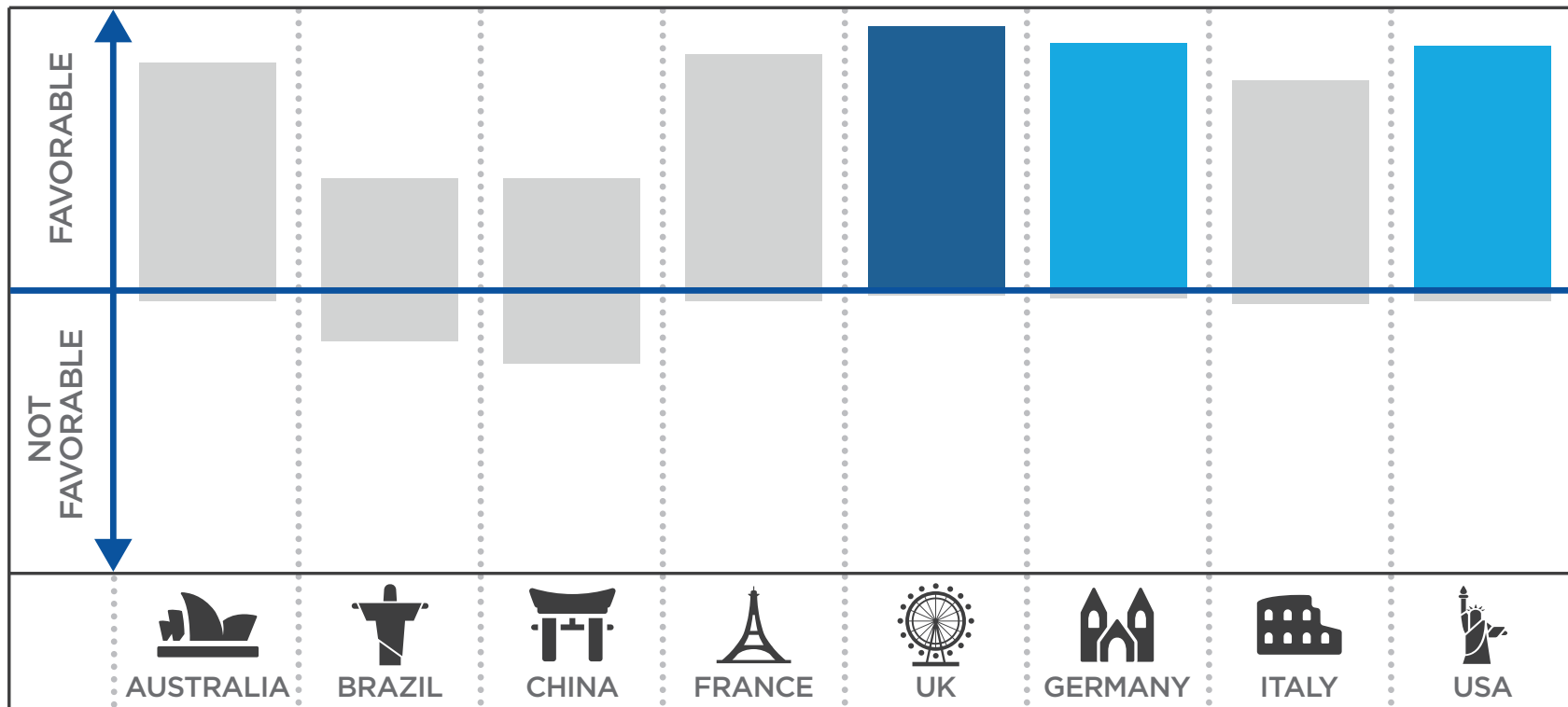
The analysis of the segmentation results of Indonesian respondents shows a stronger representation of the groups inclined toward academic advancement. With 49%, *Academic Achievers* emerge as the dominant segment. *Cultural Hitchhikers* follow with 38%. *Cultural Floaters* and *Resumé Packers* fare significantly lower with 7% and 6% respectively.

While the high school audiences profiled in our previous global research indicated to be more ready to embrace objectives related to intercultural understanding and tolerance, a heightened affinity towards scholastics can be seen among respondents from Indonesia. This is further affirmed by the way that the *Cultural Hitchhikers* (the second largest segment in Indonesia) sway towards some purely educational motivators.



Attitudes Toward Countries

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



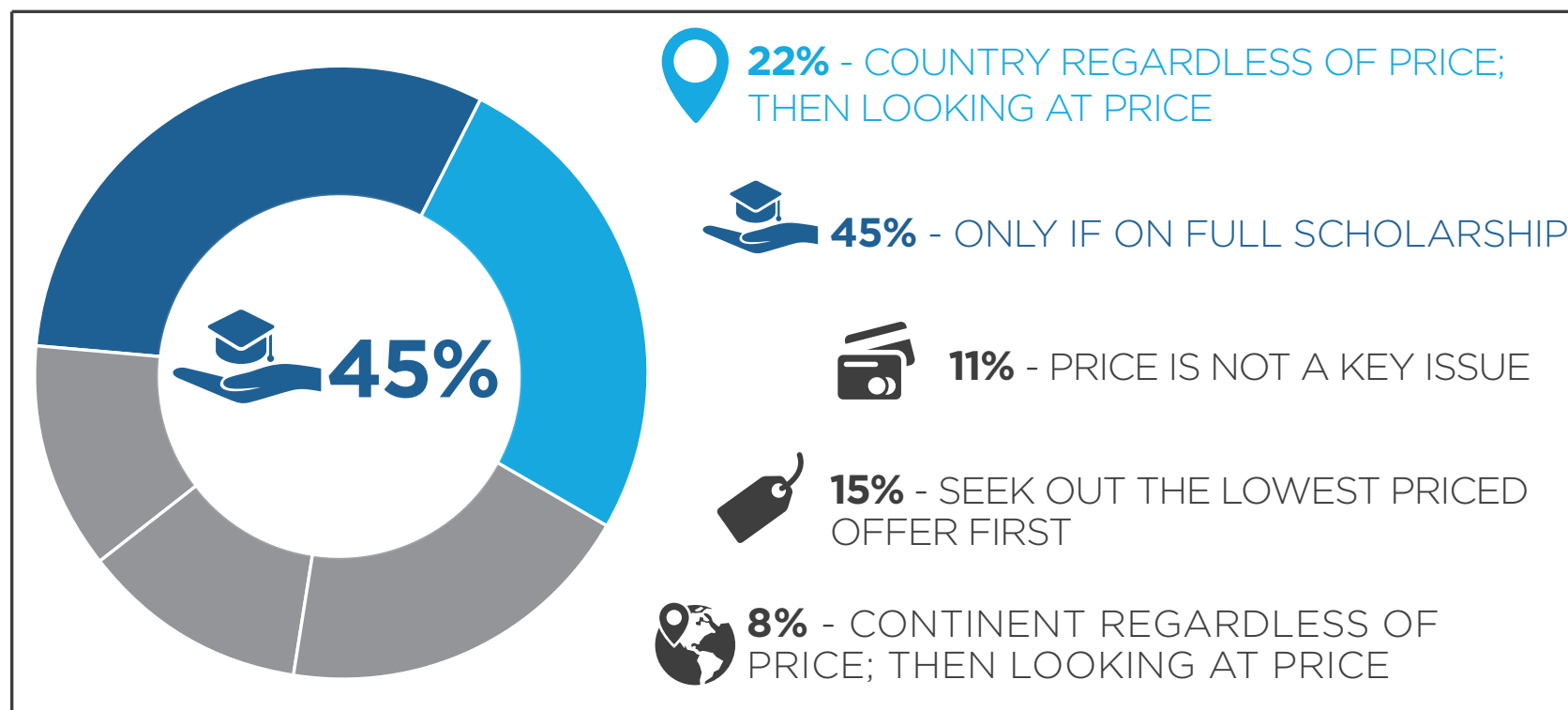
Respondents in Indonesia indicate country impressions very similar to overall global attitudes towards different study destinations. Despite the deepened economic and cultural ties between all world regions, today's secondary students have destination preferences similar to those of preceding generations when it comes to education abroad. Altogether, English-speaking destinations (the United States, the United Kingdom, and to a smaller degree Australia) retain the highest

rates of positive attitudes (**86%**) among Indonesian students. Western European countries (Italy, France, and Germany) fare nearly as well (**82%**). In contrast, the two developing countries featured in the survey (Brazil and China) achieve a relatively low favorability rating (**39%**). 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 majority of students indicate their need for financial assistance)



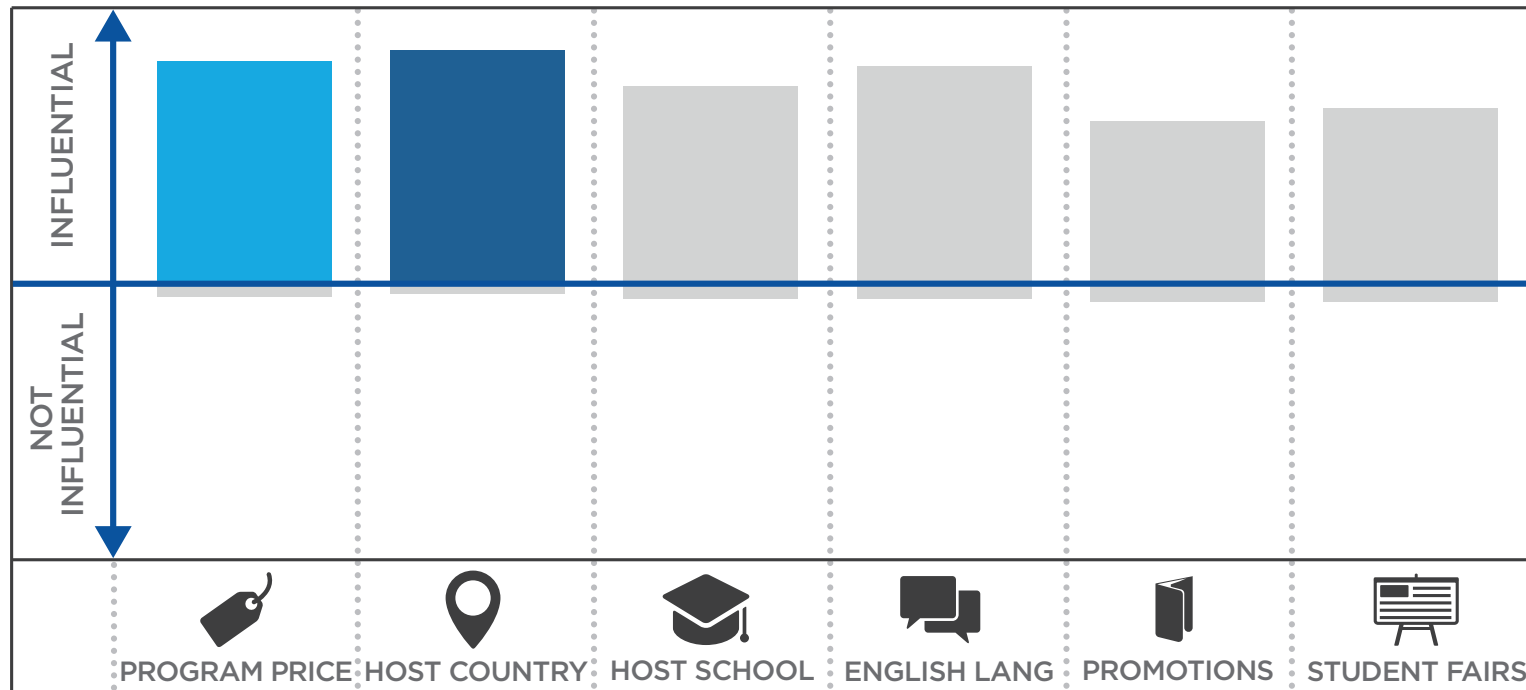
In line with the overall socio-economic conditions in Indonesia, a great number of respondents indicate the availability of full scholarships as a crucial factor. **45%** of all respondents said they would only consider going on a school exchange if they received a full scholarship. Such outcome makes fundraising and scholarship allocation pivotal for the study abroad program providers. Additionally, **15%** of respondents said they would select the lowest priced offering when looking for study abroad opportunities.

Furthermore, **22%** of students expressed they would select the host country first and then choose the lowest priced offering in that country. Additionally, a mere **8%** of respondents indicated they would select the hosting continent first after which they would consider the pricing of the programs on that continent. Finally, only **11%** of respondents indicated that price is not an issue when considering studying abroad. Overall, these values represent a high price sensitivity in line with the bottom-leaning financial segmentation of Indonesia.

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)



Similarly to overall global results, students in Indonesia respond that they are influenced primarily by various program aspects such as: the reputation of the host country (**84%**), English as the language of instruction (**78%**), and the reputation of the host school (**71%**). 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 emerging markets' competitiveness against the traditionally popular countries like USA, Canada, and Australia.

Beyond the program-specific characteristics, program

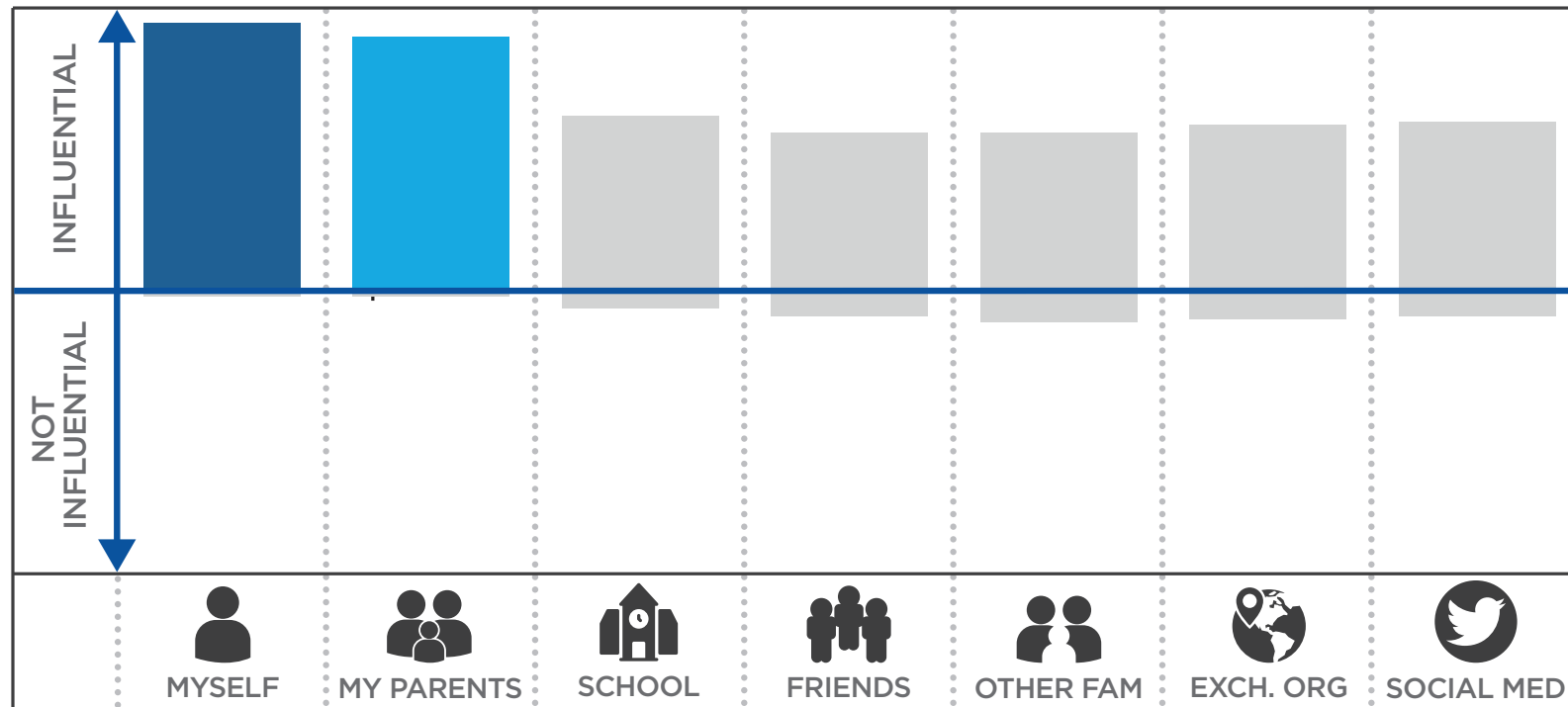
price appears to play a major role (**80%**) due to the bottom-leaning financial segmentation of respondents in Indonesia. High price sensitivity paired with the significance of motivations around academic advancement makes proving the advantageous price-value ratio one of the main goals of marketing efforts.

Finally, respondents show lesser sensitivity to the influence of traditional advertising (**59%** and **58%** for promotional materials and testimonials respectively). In addition to the importance of quality educational experiences abroad, this also supports the notional

significance of product authenticity for Generation Z in Indonesia, demonstrated in their willingness to go beyond initial impressions to gain a better understanding of substantive 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 (**94%**), followed closely by their parents (**89%**), emerge in Indonesia as the leading actors influencing decisions when it comes to an exchange abroad. Due to the strong patrilineal social structure of Indonesia, parents come very close to the level of influence students attribute to themselves. However, the clear importance of individual motivations shows the perceived independence of students in the region.

Furthermore, the influence of local schools appears to display a decent degree of influence suggesting that Indonesian students are likely to be open and impressionable to suggestions and ideas by school officials and affiliates.

The results in this section also show local exchange organizations playing the influencer role for some students when it comes to considering study abroad opportunities. At the same time, friends and other family members are less influential. Finally, the cloud of social

media seems relatively important across all groups of respondents in Indonesia, which should inform the marketing activities of local exchange organizations, especially in light of the relatively lower popularity of traditional promotional channels seen in the previous section.

(apprehensiveness about security tops the list of personal concerns)

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In comparison to respondents from other countries, students from Indonesia appear preoccupied with a relatively low number of concerns, which is a strong affirmation for lesser apprehensiveness towards exchanges abroad altogether. Sensitivity towards security issues tops the list of concerns among Indonesian students (**47%**), which is a likely reflection of the ongoing and widely publicized threats to security worldwide.

We posit that this observation is an accurate picture of the mindset of GenZ toward security overall 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 2018, we expect that security fears will remain a key concern for prospective students and will continue to affect demand significantly.

In addition to concerns around security, students in Indonesia expressed their fear around being homesick (**46%**), having trouble with school re-entry requirements once back home (**41%**), balancing life and studying while abroad (**37%**), and facing discrimination in the host country (**36%**). Students in Indonesia were less concerned about fitting in culturally (**30%**) and meeting new friends (**26%**) while on their exchange.



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 an 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 an experienced data analyst.



**Intercultural
Programs**

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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.