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
In This Session

About AFS Intercultural Programs
Research at a Glance
Methodology
Global Outcomes
GenZ – motivations, attitudes, concerns
Summary – What does this mean for the industry?
Q & A
AFS Intercultural Programs

International, voluntary, non-governmental, non-profit education organization

Core offering: school-level academic programs

Provider of intercultural learning opportunities
Mapping Generation Z

Shifts in the industry
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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%
Methodology

- **Resumé Packers**: High Resumé Packers focus on financial resources and primary focus on scholastics and education.
- **Cultural Floaters**: High Cultural Floaters focus on cultural experiences and primary focus on scholastics and education.
- **Academic Achievers**: Low Academic Achievers focus on scholastics and education and primary focus on scholastics and education.
- **Cultural Hitchhikers**: Low Cultural Hitchhikers focus on cultural experiences and primary focus on scholastics and education.
Economic standing: significant financial resources, expected to be less price sensitive. Primary focus: obtaining quality education abroad preferably at a reputable institution and enhancing their academic profile and eventually their job prospects.
Economic standing: restricted financial resources, expected to seek merit-based scholarship opportunities for academic mobility. Primary focus: obtaining quality education abroad at a reputable institution and enhancing their academic profile and eventually job prospects.
CULTURAL FLOATERS

**Economic standing:** significant financial resources, expected to be less price sensitive. **Primary focus:** to have an intercultural experience while on an exchange program. Less likely to be focused on academics, more likely to be inclined towards “exotic” languages and destinations.
CULTURAL HITCHHIKERS

**Economic standing**: restricted financial resources, expected to be very price sensitive. **Primary focus**: to have an intercultural experience while on an exchange program, expected to value the opportunity to go abroad regardless of destination type or language.
Segmentation Outcomes

- **Resumé Packers**: High Financial Resources, 12%
- **Cultural Floaters**: Low Financial Resources, 31%
- **Academic Achievers**: Medium Financial Resources, 21%
- **Cultural Hitchhikers**: High Financial Resources, 36%
Segmentation Results by Country

- **HIGH** FINANCIAL RESOURCES
- **LOW** FINANCIAL RESOURCES

- **RESUMÉ PACKERS**
  - Denmark
  - Iceland
  - Austria
  - Germany
  - France
  - Canada
  - USA
  - Italy
  - Portugal
  - Chile
  - Hong Kong

- **ACADEMIC ACHIEVERS**
  - Dominican Republic
  - China
  - Brazil
  - Uruguay
  - Czech Republic
  - Russia
  - Argentina
  - Poland
  - Turkey
  - Hungary
  - Latvia
  - India
  - Ecuador
  - Thailand
  - Philippines

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  - Ecuador
  - Thailand
  - Philippines

**PRIMARY FOCUS & OBJECTIVES**
- Scholastics & Education
- Cultural Experiences
Underlying Motivators

Motivating:
- Language Learning: 95
- Know a New Edu Sys: 90
- Make Future Plans: 86
- Important for Parents: 77
- Exciting Experience: 74
- Make New Friends: 62
- Experience Culture: 26

Not Motivating:
- Languages Learning: 65
- Know a New Edu Sys: 87
- Make Future Plans: 76
- Important for Parents: 93
- Exciting Experience: 93
- Make New Friends: 76
- Experience Culture: 93
Language learning unanimously emerges as a key motivator for both academically and culturally-driven mobility considerations.
A fair share of culturally driven students go abroad not because it is important for their parents, but because of individual interest.
Attitudes Toward Countries

- Australia
- Brazil
- China
- France
- UK
- Germany
- Italy
- USA
Altogether, English-speaking destinations (the United States, the United Kingdom, and Australia) retain the highest rates of positive attitudes.
Western European countries (Italy, France, and Germany) fare quite well.
The two developing countries featured in the survey (Brazil and China) achieve a relatively low favorability rating.
Price Sensitivity

- 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
Price Sensitivity

Driven mostly by respondents in Western countries

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33% of respondents in developing economies indicate they would not be able to afford an exchange abroad without receiving a scholarship.
Factors Influencing Decision

PROGRAM PRICE  HOST COUNTRY  HOST SCHOOL  ENGLISH LANG.  PROMOTIONS  STUDENT FAIRS
Students respond that they are influenced primarily by various program aspects such as: the reputation of the host country, English as the language of instruction and the reputation of the host school.
Factors Influencing Decision

Respondents show lesser sensitivity to the influence of traditional advertising
Actors Influencing Decision

- Myself
- My Parents
- School
- Friends
- Other Family
- Exchange Organization
- Social Media
In the majority of countries, schools and teachers have limited influence on the choices students make regarding international mobility opportunities.
The influence of a local exchange organization appears to display a decent degree of influence in the initial decision process.
## Personal Concerns

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Significant increase in mindfulness of GenZ toward risk and security issues

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In Summary

- English-speaking destinations dominate in popularity
- Affordability remains a barrier to student mobility
- Program specifics emerge as the main choice influencer
- Uncertainty about security tops the list of concerns
- Cultural exploration as a goal prevails in all global regions
Visit our Research Website & Download the Complete Study: Research.afs.org
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- **FINANCIAL RESOURCES**: HIGH to LOW
- **SCHOLASTICS & EDUCATION** to **CULTURAL EXPERIENCES**: PRIMARY FOCUS & OBJECTIVES
Segmentation Results by Country

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Financial Resources:
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- LOW

Primary Focus & Objectives:
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Academic and Cultural Motivators
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Factors Influencing Decision

- Program Price
- Host Country
- Host School
- English Language
- Promotions
- Student Fairs
Actors Influencing Decision

- MYSELF
- MY PARENTS
- SCHOOL
- FRIENDS
- OTHER FAM.
- EXCH. ORG.
- SOCIAL MED.
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