

DAAD

Deutscher Akademischer Austausch Dienst
German Academic Exchange Service

Survey on European Higher Education Area Promotion and Marketing Activities -Results and Recommendations-

Dr. Siegbert Wuttig, DAAD
IPN Meeting, Brussels, 10/11 March 2011





KEY INFORMATION ON THE SURVEY

- (1) Carried out by DAAD (as agreed in Vienna , May 2010)**
- (2) Questionnaire (including 12 groups of questions) sent out by the Bologna Secretariat to 47 Bologna countries in November 2010**
- (3) 37 responses received from Bologna countries**
- (4) Presentations of preliminary results in Bonn (17-12-2010) and in Vienna (17-1-2011)**



PARTICIPANTS OF THE SURVEY

Andorra
Armenia
Austria
Belgium*
Bosnia & Herzegovina
Bulgaria
Cyprus
Czech Republic
Denmark
Estonia
France
Georgia
Germany
Holy See
Hungary
Iceland
Ireland
Italy

Latvia
Lithuania
Luxembourg
Malta
Moldova
Montenegro
Netherlands
Norway
Poland
Portugal
Romania
Scotland
Slovak Republic
Slovenia
Spain
Sweden
Turkey
United Kingdom



Bologna H.E. Area

* both Flemish and French communities



INTERNATIONAL MARKETING OF HEIs

Q 1.1: *Do HEIs in your country actively market themselves internationally? If yes, to what extent do HEIs in your country actively market themselves internationally?*

- **All respondents but one said that their HEIs do market themselves internationally.**
- **A slight majority answered that all or most of their HEIs do international marketing.**



INTERNATIONAL/REGIONAL MARKETING OF HEIs

Q 1.2 *Which countries/regions do your HEIs focus on when promoting themselves internationally?*

Selected answers:

Armenia: Middle East, India, some European countries

Belgium (French Community): Since 2007, a coordination group of experts, comprising representatives of the Ministers' cabinets, the Ministry of the French Community, Wallonia-Brussels International and all types of HEIs, has been working on developing a common to promote the HE system of the French Community Wallonia-Brussels of Belgium internationally. In this framework, under the coordination of Wallonia-Brussels International, HEIs have been participating in specific attractiveness missions (HE fairs and academic, ministerial and economic missions) in North-America (Canada, Mexico, USA, NAFSA), South America (Brazil and Chile), Asia (China, India and Vietnam) and Europe (through the EAIE and particularly with Sweden). At the same time, HEIs individually, or through the institutional councils, are naturally defining, developing and implementing their own attractiveness strategies. It should be mentioned that the university sector (through the French-speaking Interuniversity Council and its two commissions "International Relations" and "Development Cooperation") has been very active over the last years. However, we can note that the regions/countries targeted are usually identical to those indicated above.

Norway: Norwegian institution mainly focus on Europe when marketing themselves abroad. However, there is a an overarching goal, partly supported by the government, to focus on North America and Latin America. The "marketing" in these regions so far mainly takes place through academic cooperation initiatives.

Poland: Europe (EU), Eastern European countries outside EU

Slovakia: Western Balkan, Eastern Partnership (Ukraine, Belarus, Russia), Israel, Arabic countries, Norway

United Kingdom: UK HEIs have their priority target areas for a number of reasons. They do not focus on any particular region or country

Scotland: This will vary by institution, although the Scottish Government has identified its top priorities as China, India, USA/Canada as well as the EHEA. British Council in Scotland prioritises its promotion on HE engagement with China and India. At a UK level this list can be extended to include promotion in the Middle East and South East Asia. In addition, through the rectors' conference (Universities Scotland) the sector works with Rwanda.



INTERNATIONAL/REGIONAL MARKETING OF HEIs– FOCUS COUNTRIES

Arabic countries

Asia

Azerbaijan

Baltic countries

Belarus

Bosnia and Herzegovina

Brazil

Bulgaria

Canada

Chile

China (# 1)



Columbia

Croatia

Eastern Europe

Eastern European countries outside EU

Eastern Partnership (Ukraine, Belarus, Russia)

Egypt

EU

Georgia

Germany

Greece

India (# 2)



Israel

Kazakhstan

Latin America

Macedonia

Mediterranean Countries

Mexico

Middle East

NAFSA

North America

Norway

Pakistan

Poland

Post-Soviet-Union Countries

Romania

Russia

SEE Region

Serbia

Scandinavia

South America

South-East Asia

Sweden

Turkey

UK

Ukraine

USA (# 3)



Uzbekistan

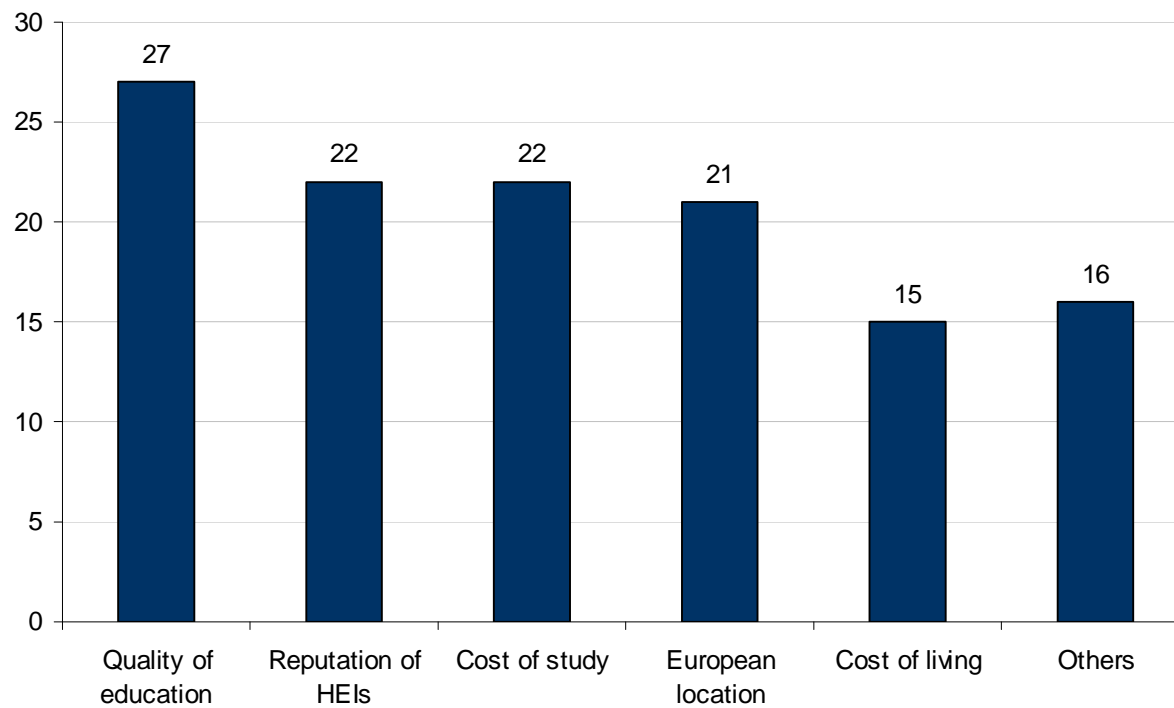
Vietnam

Western Balkan



SELLING POINTS OF INTERNATIONAL/REGIONAL MARKETING

Q 1.4 Which parameters play an important role in your country's international marketing endeavors? (Multiple answers possible, n = 35)

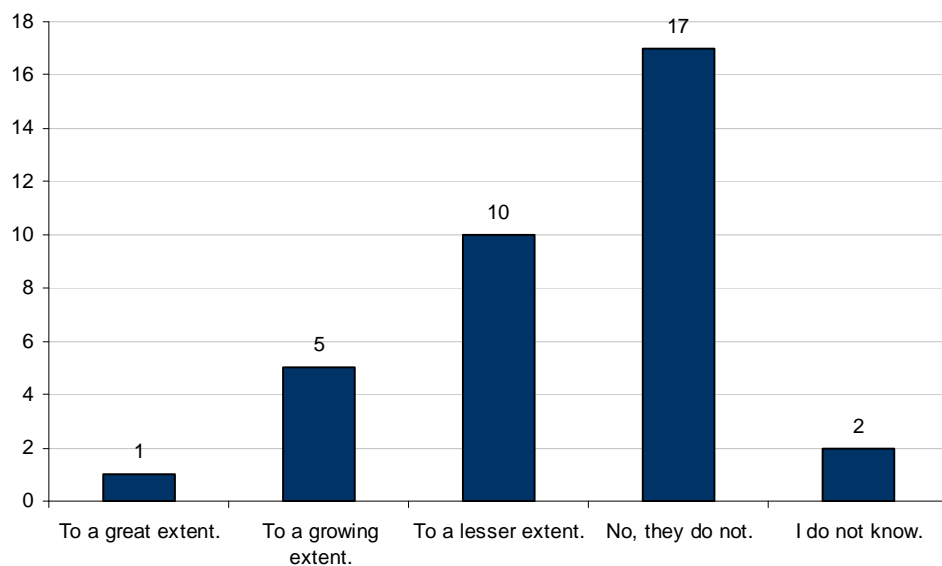




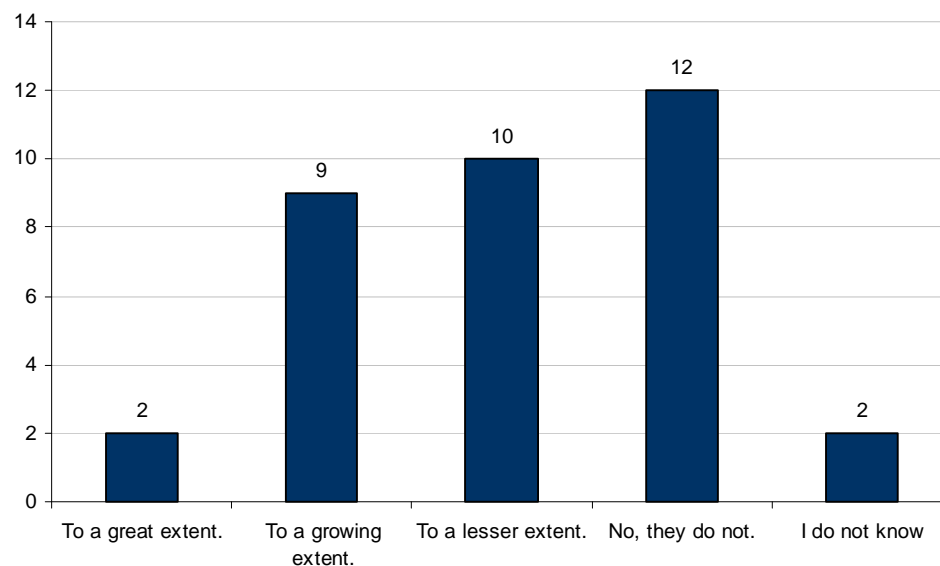
WHO IS INVOLVED IN INTERNATIONAL MARKETING OF HEIs?

Two-thirds of the respondents said that they have at least one government-funded NGO that helps HEIs with international marketing.

Q 2.3 Do commercial agencies play a role in marketing efforts of HEIs?
(n = 35)



Q 2.4 Do HEIs in your country form consortia in order to market themselves?
(n = 35)





PARTICIPATION IN EUROPEAN HIGHER EDUCATION FAIRS

Q 3.1 *Have HEIs in your country participated in European Higher Educations Fairs (EHEFs) within the last five years?*

24 Yes, more than once

3 No, never

Q 3.2 *Have you as an individual participated in EHEFs as a speaker, panellist or organiser?*

4 Yes, once

18 Yes, more than once

12 No, never

Q 3.3 *Have you as an individual participated in EHEFs as a visitor?*

17 Yes, more than once

13 No, never



PARTICIPATION IN FAIRS WITHIN CONSORTIA

Q 3.4 *Have HEIs from your country participated in Fairs (EHEFs) within a consortium?*

11 **Yes, more than once**

8 **No, never**

Which partners formed the consortium?

- DAAD, Nuffic, CampusFrance, British Council
- Erasmus Mundus (Sweden, Norway)
- Europosgrados (Belgium – French and Flemish Community)



MARKETING INTELLIGENCE

Q 4.1 *Have your HEIs participated in conferences to promote the EHEA?*

more than once: 31, once: 1, never: 1

For example: EAIE, ERACON, Erasmus Mundus, Utrecht Network Universities, i-student advisor, ...

Q 4.2 *Do HEIs in your country offer further training in international marketing?*

to a great extent: 3, to a growing extent: 8, to a lesser extent: 10

For example: Erasmus Mundus Action 4 project, University of the Academy of Sciences of Moldova, IROs Forum (Poland)

Q 4.3 *Do HEIs in your country offer further training in marketing themselves on a European level?*

they don't: 9, they do to a great extent: 0, they do to a growing extent: 5, they do to a lesser extent: 6

For example: CEEPUS, Erasmus Mundus, Mediterranean Office for Youth (Montenegro)

Q 4.4 *Do national or commercial agencies organize/offer seminars on international marketing of HEIs?*

they don't: 6, they do to a great extent: 2, they do to a growing extent: 7, they do to a lesser extent: 7

Q 4.5 *Do HEIs send representatives to seminars set up to teach marketing know-how with relevance to promoting the EHEA?*

often: 1, sometimes: 11, never: 8



MARKETING TOOLS TO PROMOTE THE EHEA

2 5.1 Which marketing tools have your HEIs employed to promote the EHEA?

Total number of participants who use this tool (very often, often, sometimes) - RANKING

Leaflets and brochures	29
Websites	28
Fairs and road shows	27
University directories	27
Advertisements (print)	24
Advertisements (multi-media)	24
Event marketing	24
Advertisements (online)	22
Outdoor advertising	22
Press relations	21
Social media engagement	21
Advertisements (broadcast)	18
Advertising mail (direct mail)	18

Sponsoring	18
Advertising mail (email marketing)	16
Broadcast	16
Search engine advertising	16
Merchandising and give-aways	15
Postcards	15
Blogs, chats or discussion boards	14
Telephone help-lines	11
Co-branding	7
Social network building	7
Webinars	5
Advertisements (cinema commercials)	3



MESSAGES WHEN PROMOTING THE EHEA

Q 6 *When promoting the EHEA, what messages should be sent out?*

Belgium (French Community): _____ The main message should focus on the **diversity, the richness and the inclusive dimension** of the EHEA.

Cyprus: _____ **Quality** in education, friendly, multicultural environment

Czech Republic: _____ International cooperation/environment, **structured study system** comparable to other EHEA countries (ECTS, Diploma Supplement) – opportunities for mobility, good quality education, great variety of education opportunities, cultural experience.

Germany: _____ Europe stands for: cultural richness, excellent learning and research opportunities, high-quality education and interesting study opportunities at BA -, MA - and doctoral level, attractive European **funding schemes** for attracting students, graduates and staff for studying, teaching or research in the EU.

Ireland: _____ High levels of choice available to students within each country and across Europe, Europe as a place to travel and work, **Europe as a key world market** for future contacts, Richness of cultural diversity.

Montenegro: _____ EHEA ensures more comparable, compatible and coherent systems of higher education in Europe. It is an extraordinary tool to strengthen the competitiveness and attractiveness of the European higher education and to foster student mobility and employability through the introduction of a system based on undergraduate and postgraduate studies with **easily readable programmes and degrees**.

Poland: _____ Excellence of teaching and research. Popularity of joint study programmes. Opportunities for intra-European mobility. Richness of cultural heritage. Diversity of cultures. Good **student services**.



EU-FUNDED COOPERATION

Q 7. Do HEIs in your country have EU-funded co-operation or promotion projects?

to a great extent: 6, **to a growing extent: 18**, to a lesser extent: 8

Additional comments:

Belgium (French Community): _____ As mentioned in questions 2.1 and 2.2, Wallonia-Brussels Campus has just been established. If its primary goal is to inform and promote the HE of the French Community of Wallonia-Brussels, there is no doubt that there will be a focus on the European dimension and its integration within the EHEA, especially since Brussels is the capital of the EU.

Czech Republic: _____ The Centre for the International Services actively market the Czech higher education under the brand Study in the Czech Republic and this initiative is closely linked to the promotion of the European Erasmus Mundus programme in the Czech Republic (i.e. joint budget from the Ministry of Education for both activities). There is no active marketing of EHEA as such.

Ireland: _____ The Irish agency, Enterprise Ireland, is in its early days of operations in terms of marketing for HEIs. Ireland's position in EHEA is a key message in this marketing. I expect this to remain so over the coming period.

Norway: _____ Norwegian institutions have been fairly active in Erasmus Mundus, and also in a Nordic initiative, called Nordic Masters, which has much the same overall goals as Erasmus Mundus.

Poland: _____ Foundation for the Development of Education System to certain extent plays such a role – organisation of Polish stand promoting Polish higher education and regional HEIs consortia at EAIE fairs.

Sweden: _____ It would be hard to motivate using our limited funding for promotion of Sweden as a study destination to promote the EHEA.



AGENCIES THAT MARKET THE EHEA

Q 9. *If your country has an agency, does this agency actively market EHEA?*

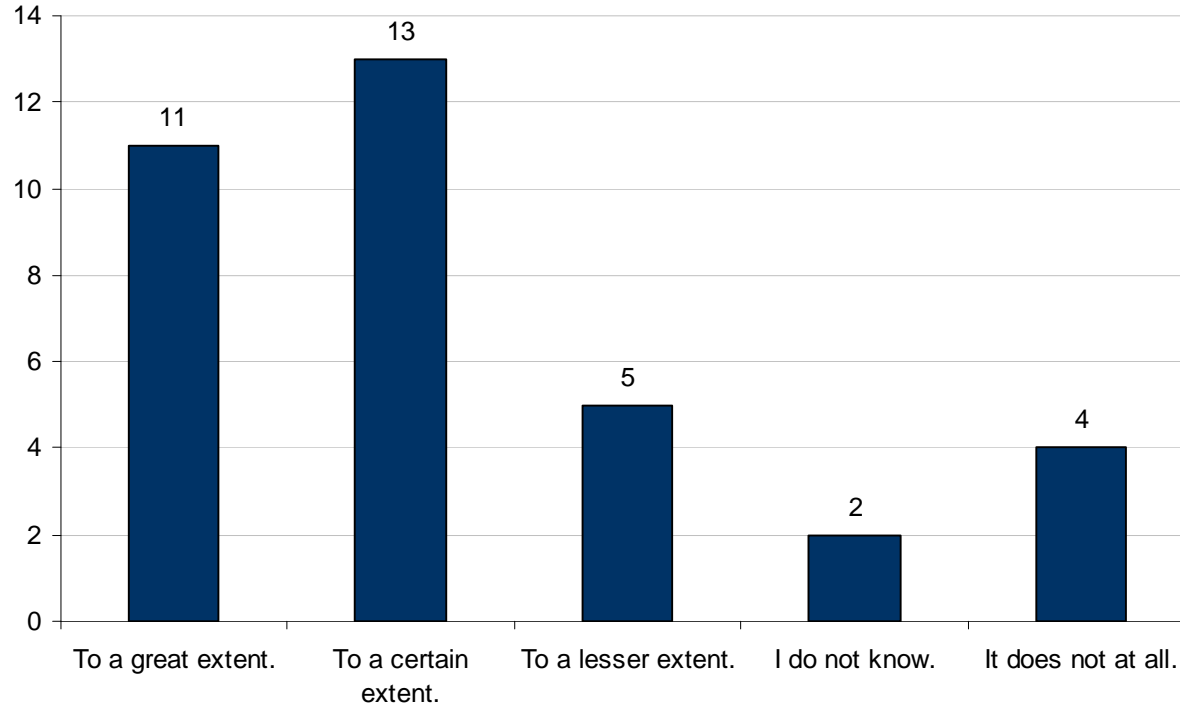
to a great extent: 1, **to a certain extent: 12**, to a lesser extent: 6

- Belgium (French Community): _____ As mentioned in questions 2.1 and 2.2, Wallonia-Brussels Campus has just been established. If its primary goal is to inform and promote the HE of the French Community of Wallonia-Brussels, there is no doubt that **there will be a focus on the European dimension** and its integration within the EHEA, especially since Brussels is the capital of the EU.
- Czech Republic: _____ The Centre for the International Services actively market the Czech higher education under the brand Study in the Czech Republic and this initiative is closely linked to the promotion of the European Erasmus Mundus programme in the Czech Republic (i.e. **joint budget from the Ministry of Education for both activities**). There is no active marketing of EHEA as such.
- France: _____ The latest brochure by CampusFrance, entitled „Choose France“, although emphasizing first „Choose France for your higher education“, also clearly puts forward the following comment: „Thoroughly European, distinctively French“.
- Ireland: _____ The Irish agency, Enterprise Ireland, is in its early days of operations in terms of marketing for HEIs. **Ireland's position in EHEA is a key message** in this marketing. I expect this to remain so over the coming period.
- Poland: _____ Foundation for the Development of Education System **to certain extent** plays such a role – organisation of Polish stand promoting Polish higher education and regional HEIs consortia at EAIE fairs.
- Scotland: _____ British Council and ECOTEC both do so for (different parts of) the lifelong learning programme.
- Sweden: _____ It would be hard to motivate using our **limited funding for promotion of Sweden** as a study destination to promote the EHEA.



ROLE OF EU FUNDING

Q 10. To which extent does EU funding play a role in marketing EHEA? (n = 35)





INFORMATION GAPS IN EHEA INFORMATION

Q 11. *Which information gaps would you want to have filled by EHEA sourced information?*

Belgium (French Community): _____ ... there is still a need to **discuss the meaning of the 'European' HEA at a ministerial level.**

Czech Republic: _____ The **information** should be **easily accessible** and complex (in **several languages** if possible).

Germany: _____ What is the added value when studying or doing research in Europe (irrespective of the opportunities in a given country)?
What are specific European study opportunities? (e.g. double or joint degree programmes with various European countries, European study programmes)
What kind of funding schemes are available for study or research in Europe?
What are the **legal framework** conditions (e.g. visa, insurance) for study and research in Europe?

Moldova: _____ organization of information trainings and seminars for the HEIs, theoretic support in marketing strategies, **sharing the best experience** and practices

Netherlands: _____ None, the **information will be out of date** before it is published.
Links to national information sets, for NL to the Nuffic and/or to the national information website studiekeuze123.nl or studychoice123.nl

Poland: _____ **Recognition of diplomas in Europe**
Joint study programmes in Europe

United Kingdom: _____ As mentioned at the May IPN meeting, it would be helpful to have **more up-to-date system information** of all Bologna participating countries.



KEY FINDINGS OF THE SURVEY

- (1) International marketing is widespread across the EHEA, but takes different forms, has different focuses, and varying degrees of intensity from country to country.**
- (2) Most HEIs or countries focus on a limited number of geographic targets for their international marketing efforts.**
- (3) Many EHEA countries have national agencies or ministries dealing with higher education marketing.**
- (4) A broad range of marketing tools are used by HEIs.**
- (5) Large degree of participation in pan-European marketing and promotional efforts.**
- (6) Broad agreement on key messages about the EHEA.**
- (7) Less agreement about the benefit of EHEA-wide vs. national/institutional marketing efforts.**
- (8) No common language about marketing within the EHEA.**



RECOMMENDATIONS

- (1) Create a **website** about the EHEA (targeted towards potential students from outside of Europe)
- (2) Develop **information “packages”** about the EHEA (to be used on other websites, press etc)
- (3) Distribute **information with key messages** (on how to market EHEA HEIs) to National Agencies and HEIs.
- (4) **Conduct research** in key markets about perception of Europe (perceived benefits, obstacles to studying in the EHEA ...).
- (5) **Build ties** across borders and organisations dealing with higher education marketing (e.g. “hot topic” conferences, marketing networks, international fairs).
- (6) **Provide funds** for these activities by accessing existing funding sources (e.g. Erasmus Mundus A 3, national/regional resources).