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Master in International Tourism

**Marketing Higher Education
Based on Location Attributes**

The Case of Master Programs in Tourism

Master thesis

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“A tough market is not an excuse for poor performance but an opportunity to innovate and rise above the competition”

John Koten

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Marketing tourism programs based on location attractiveness

Abstract

In higher education today there are 7578 Universities in 186 countries (October 26th, 2006) and over a hundred programs that offer advanced degrees in travel or tourism. Among these programs there is a great deal of diversity in intent, content, curriculum, etc. Significant among the differences in all these is the approach taken to market the offerings to prospective students. Many of these programs seem to have ignored a key asset available to them in attracting students interested in tourism – the touristic characteristics of the school's location.

The hypothesis advanced here is that the touristic characteristics of the location of an educational program in tourism can provide a powerful opportunity to enhance program marketing. Among the 113 programs examined, the evidence suggests that few use the touristic attributes of their locations in their marketing efforts. The traditionally successful universities have the quality of the program as their most powerful tool for attracting students but for the new entrants or for smaller programs, the touristic attributes of their locations could become a factor for success in attracting students and establishing the quality of their programs. The data not only suggest the validity of this hypothesis, but also suggest practical strategies for enhancing the marketing for many existing programs.

Chapter 1 . Executive Summary

Until now, research on student choice of higher education has centred on partial aspects of the process. Existing literature (see Chapter 2) has concentrated on identifying those elements which play a part in the decision of the prospective student and establishing priorities across those elements.

These studies analyze the influence of the elements related to either the image of the institution, the evaluation of the programs, personal tastes of the individual students and only to a lesser degree the image of the country and the destination. Therefore, in marketing their programs, the High Education (HE) institutions have tended to concentrate more on their image, reputation, rank, etc. ignoring or neglecting the importance of the image of the country and of the destination. This study aims to examine how and why the destination, i.e., location of the program and its host institution, can be a very important factor in student choice of a program, especially in the case of new entrants or smaller institutions. This paper focuses on Master degree programs in tourism and hospitality that might benefit from using the touristic attributes of their destinations to influence the decision making process of prospective students and on how competent they are in marketing their educational destination.

In Chapter III, an empirical model is presented to analyse different groups of factors, identified by existing literature (José María Cubillo, Joaquín Sánchez, Julio Cerviño -International students' decision-making process), which influence in the program choice decision of the international student.

The model analyses five factors: rank of the university; the touristic value of the country, the touristic value of the location, the life quality of the country and the language of study. Regarding the marketing tools of the programs was analyzed if/which of the programs are using the destination/country as an attraction pull factor. The analysis shows that there more than a half of the programs don't use at all or just very little the attributes of their destination/country in their marketing efforts (see Chapter IV).

Thus, there seems to be an opportunity for programs in travel and tourism to improve the results of their marketing efforts by including the touristic characteristics of their destinations that is presented in Chapter V. Future research might productively examine further the effect that country /destination image has on the decision making process of prospective students, and analyze

in which situations country/destination image can influence the choice of educational destination.

The weight of the location attractiveness factor on the purchase intention of students has to become a topic for marketers in international educational marketing and they must find ways to take advantage of this factor. In the same line, future work should analyze to what degree cultural distances and ethnocentrism influence the choice of country as a destination (Hofstede, 1983). Further analysis of consumer behaviour and determining factors in the decision making process of the international student would allow educational institutions, as well as national, regional and local governments interested in attracting international students, to strengthen their image, try to eliminate weaknesses and thus increase their possibilities of being chosen as a destination for consumption of higher education services.

Chapter 2. The nature of higher education marketing in an international context. A literature review

2. 1 Education as a global industry

Over the past few decades, higher education has become a global phenomenon available around the world to a degree unimaginable to earlier generations. Once the exclusive preserve of elites, the "massification" of higher education has provided opportunities to people from a larger numbers of countries, especially in the major English speaking countries and Western Europe. With the political changes in Europe, in Asia, and the Bologna reforms that intend to unify the models of HE programs (The Bologna Declaration of 19 June 1999) the world becomes much more competitive for institutions of higher education. In this environment of international competition, many universities face a more severe challenge to market themselves to students in a global marketplace. The marketing theories and concepts that have primarily been applied in the business world are now gradually being applied by many universities in order to gain a competitive edge, a larger share of the international market, and a clear positioning in the eyes of the academic world.

Competence for attracting international students has expanded to regional and national Governments. The UK Government has sponsored several initiatives to attract more international students with the purpose of becoming the world's leading nation in international education. Likewise, the USA and Australia have been applying aggressive international marketing strategies for education. Recently, due to the increasing number of Latin American students, the Regional Government of the Community of Madrid (Spain) has studied the possibility of opening a specific office for the management of this international demand from Latin countries and to increase the capacity of existing facilities.

Exporting international education

Although precise estimates are difficult to obtain, it is estimated that today, there are more than 2.456.000 international students studying outside their country of origin (UNESCO, 2004) and estimates of growth in international education suggest that 'by 2025 there will be 4.9 million international students studying outside their country of origin' (Blight, 1995, p. 4).

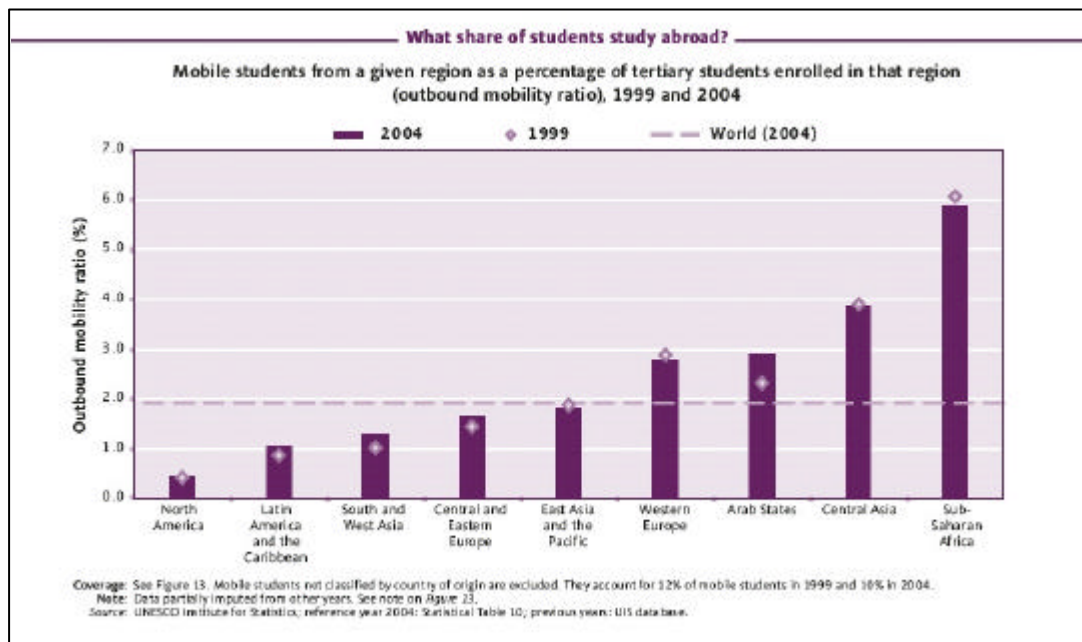


Figure 1 "What share of students study abroad?" Source UNESCO Institute for statistics

- ♦ Out of every ten tertiary students studying abroad, four are Asians, three are Europeans and one is African.
- ♦ Half of all foreign students study in Europe and almost one-third in the United States.

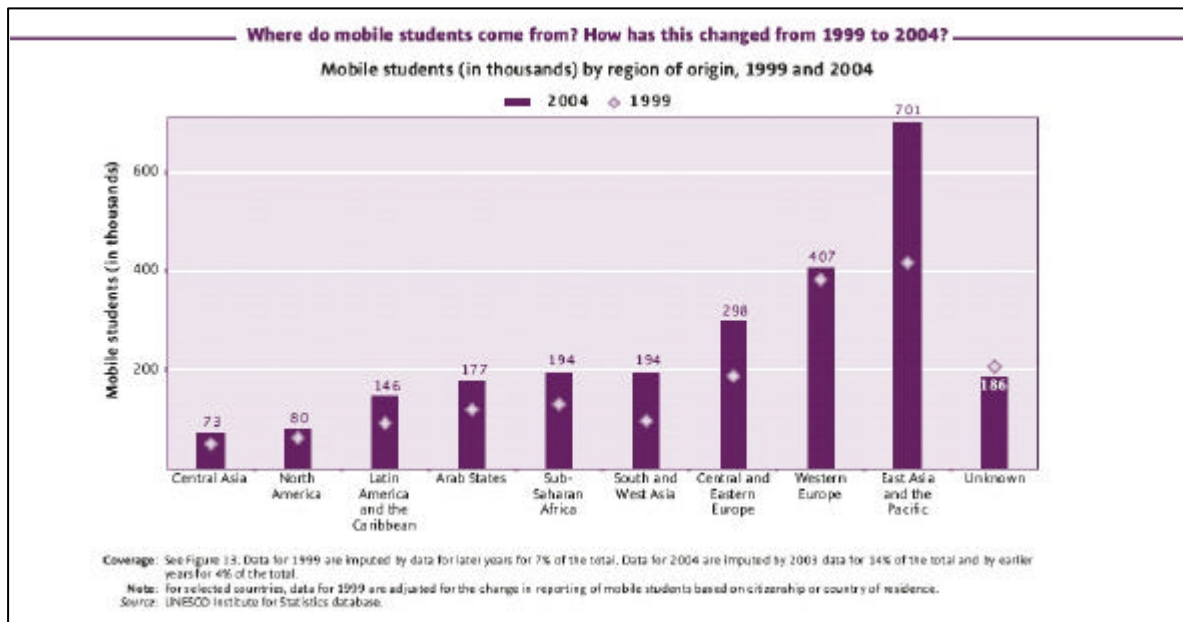


Figure 2 “Where do mobile students come from?” Source UNESCO Institute for statistics

- ♦ Three countries host half of the world’s foreign students (United States, United Kingdom, and Germany). Add the next two highest hosting countries (France and Australia), and these five countries serve two-thirds of the world’s foreign students.

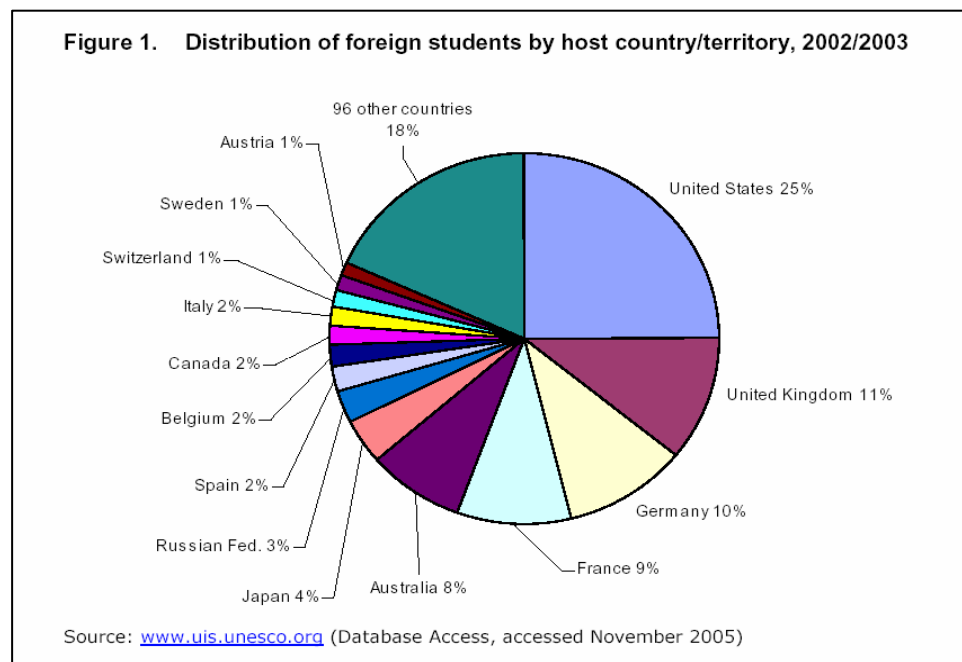


Figure 3 Distribution of foreign students by host country/territory 2002/2003, Source UNESO Institute for Statistics

- ♦ While 30% of all foreign students are in the United States, they represent only 4% of the country’s tertiary students. In the United Kingdom and in

Germany, foreign students make up one in ten total tertiary enrolments, in Australia almost one in seven.

- ♦ The United States hosts the largest number of foreign students, welcoming 583.000 students in 2001/02. Sixty-three percent of these students come from Asia.

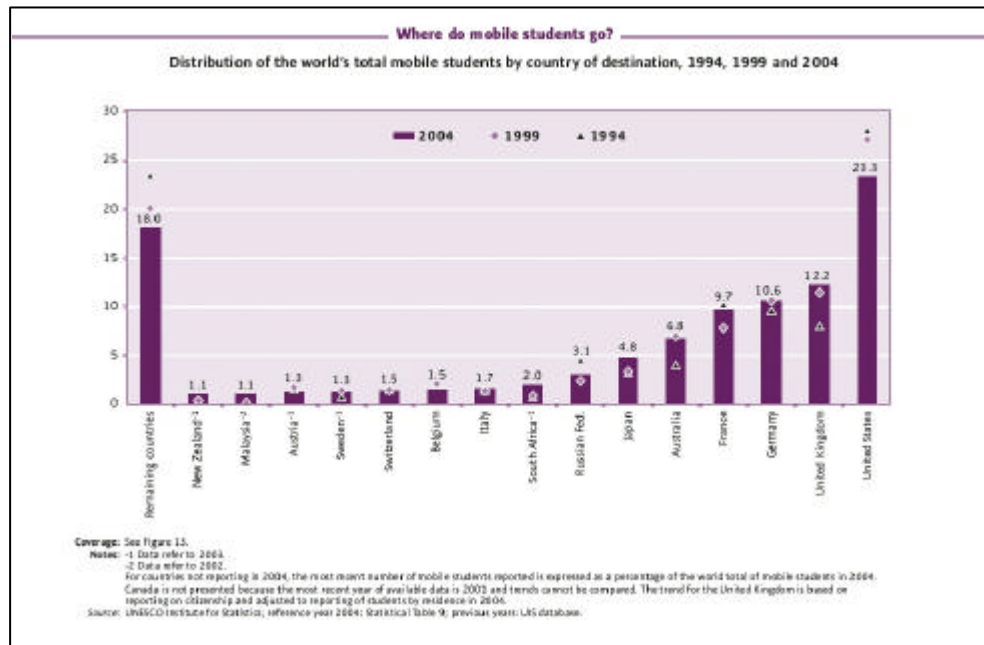


Figure 4 "Where do mobile students go? Source UNESCO Institute for statistics

- ♦ South America is the least common destination for foreign students (hosting only 0.4% of the global foreign student population), followed by Africa (1.2%).
- ♦ Eight out of ten foreign European students study in another European country.
- ♦ North American students make up only a small part of those who study abroad (less than 2% of the total number of foreign students).
- ♦ Three out of five foreign students in Europe are studying in either in the United Kingdom, Germany or France.
- ♦ The percentage of foreign students per country varies considerably throughout the world. Some of the highest percentages are found in Macao (China), where foreign students make up 64% of tertiary enrolments, in Qatar and Cyprus with 21% each, in Switzerland (17%), Australia (14%), and Austria (13%).

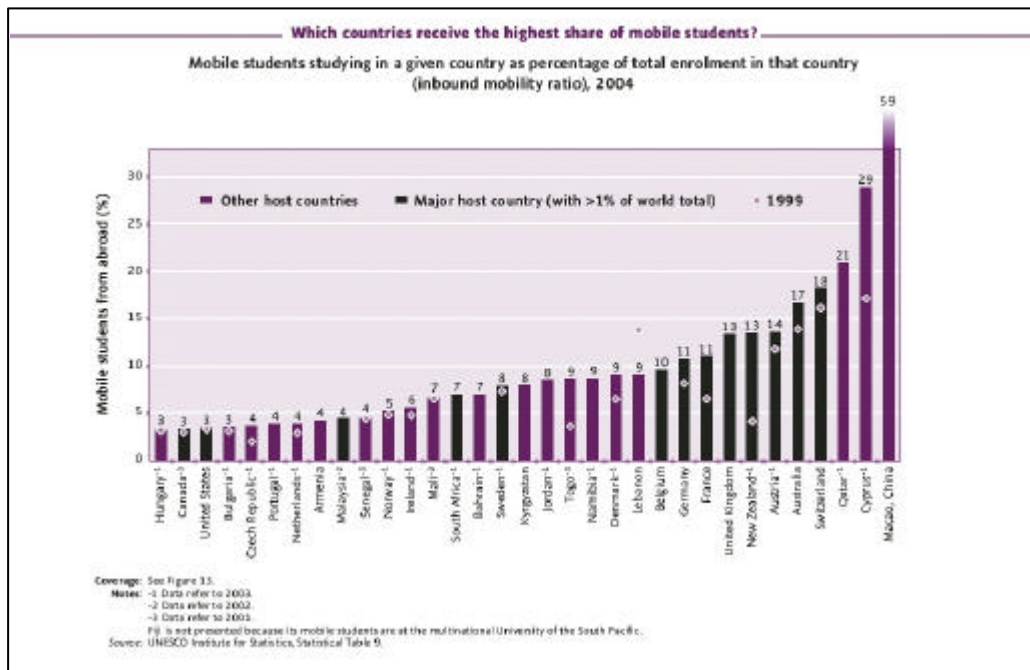


Figure 5 “Which countries receive the highest share of mobile students?” Source UNESCO Institute for statistics

The economic value of international education to the countries that supply such services is difficult to estimate reliably. However, in 1992 approximately 83,000 international students contributed about \$C1.5 billion to Canada’s economy and created some 19,000 jobs (MSS, 1993, p. 3). The United States, which is host to the majority of the world’s international students, has estimated that its universities and colleges generated \$6 billion in 1993, about 10% of the total US services (Evans, 1995). In the United Kingdom, higher education alone contributed an estimated £716 million in 1992/93, which was over twice the value of coal and gas exports (Greenaway & Tuck, 1996). The Australian economy benefits by an estimated \$US400-677 million each year from spending by overseas students (Bureau of Immigration, Multicultural and Population Research BIMPR, 1996).

In many ways, accessible mass higher education is the foundation of the modern knowledge economy, and without it, the future of many young people around the world would be dimmed. Preserving and enhancing the accessibility of higher education – that is, the ability of people from all backgrounds to access higher education on a reasonably equal basis – is an issue that confronts governments and stakeholders all over the world (Alex Usher, Global Higher Education Report 2005).

2. 2 The concept of marketing education

Although there is a vast literature on marketing in the business world, the literature, the domain of educational marketing is much narrower. Philip Koetler is probably the pre-eminent reference in the area. He defined educational marketing as the analysis, planning, implementation and control of carefully formulated programs designed to bring voluntary exchanges of values with target markets to achieve institutional objectives. Marketing involves designing the institution's offerings to meet the target markets' needs and desires and using effective pricing, communication and distribution to inform, motivate and service these markets.

2 .2. 1 The evolution of educational marketing

The evolution of the educational system in the last decades brought also changes in the marketing of educational institutions. Due to new challenges, increasing demand and higher competition the institutions had to implement new policies and to adopt new tools in order to increase the effectiveness of their programs. Due to the intangibility of the services offered marketing was neglected by marketers for a long time.

According to Koetler there are six stages in the evolution of marketing applied to enrolment.

1. Marketing is unnecessary.
 - Many educational institutions assumed that the value of their education was obvious and those who valued their education would make their way to the school's door anyway
2. Marketing is promotion
 - Schools found that they were not enrolling enough students or enough of the students they wanted to attract. These schools started recruiting and had the first sales departments.
3. Marketing is segmentation and marketing research.
 - The more advanced schools began to realize that the admissions office's resources could be more effective if they could understand

who they enrolled, how the decision was made, etc. They started to conduct, analyze and draw conclusions from marketing research.

4. Marketing is positioning

- As more schools intensified their recruiting and promotion activities some schools sought a new basis for competition. Because not all can offer the same programs and be the best schools they decided to take a "position". Positioning goes beyond image making. It is an attempt to distinguish the school from its competitors and be the best match for the needs of a specific segment of students.

5. Marketing is strategic planning

- Some schools adapted not only to the changes brought by competitors but also to major changes in the economy, demographics, values, etc. They understood the interconnection between these external changes and the school's image, its positioning, its programs, etc., they tried to identify major trends and they put efforts into how to respond to these trends, by revising programs, procedures and other activities.

6. Marketing is enrolment management

- A few schools realized that the admission office cannot do everything and they started asking themselves what it would take to optimize the student's experience in the school. The answer was to view each student admission as the beginning of a relationship with the school that would continue through the period of enrolment to graduation and extend as alumni or hopefully donor/ supporter of the school. The relationship with the students begins to be built even before the students are enrolled and continues in time. Students are future alumni and their experience as under/graduates, is very important.

As the results proved later on, marketing brought greater success in fulfilling the institution's mission and improved satisfaction of the institution's public and markets. As an example of the importance of marketing for HE, the third annual independent Heist report for UK, (a pioneer in HE politics) reveals that annual spending on marketing in the sector has risen to an estimated £136m! The Heist report found that the average university and college now spend two per cent of

its annual income on marketing. The report also highlights a move in spending away from advertising and print towards direct and relationship marketing, branding, web based promotions and marketing research.

In general the literature in the field of higher education is still incoherent, lacks theoretical models and is on a pioneer stage. It originated in UK&US in the 1980s and was based on models developed for use by the business sector (Oplatka& Hemsley-Brown). The following pages will present the most relevant concepts for this research and is sustained by the next Chapter, 3, that will present the main factors responsible for the students' decision in choosing a program.

2.2.2. Main concepts

Educational marketing

In the '90s educational marketing was interpreted as a form of marketing communication and was based on the assumption that in order for any HE institution to market itself successfully managers would need to examine the decision-making process and potential students' search for information. The research was merely based on content analysis of brochures available for applicants (Mortimer, 1997; Gartfield et al., 1999; Hesketh&Knight, 1999).

There were many contradictions also on the use of marketing in HE institutions and the use of business terminology. Some opponents of the introduction of market forces in education believed that the business world morally contradicts the value of education and therefore should not be accepted or even welcomed. Moreover, trying to sell a university as if it was an ordinary consuming product was thought to be financially suspect, not to mention unseemly. Things have changed in the last decade though. Andrea M. Naddaff, vice president for business development at Corey McPherson Nash, a marketing company, recalls a time not long ago when educators would take offence at the suggestion that their institutions could benefit from marketing. Fifteen years ago marketing was considered by many in the sector of education to be a 'dark commercial force' and 'public relations' a term uttered in hushed tones. Now, she says, those

people call her; "Branding is not a dirty word anymore." (Romancing the Brand *The Chronicle of Higher Education* October 24, 2003)

Product or service?

The debate continued with the question on who are the customers of HE. The students were considered either customers with the courses as HE product or products and the employers the customers. Koetler & Fox considered that the students were the "product" and the employers were the customers whilst Levitt (1980) also viewed a university's offerings as products (cited by Binsardi & Ekwulugo, 2003).

Later was recognized that higher education was not a product but a service. Mazzarol (1998) focused on the nature of services and he emphasized the importance of relationship with customers since the education is a "people based" activity.

The marketing mix

Research on **the marketing mix** in HE started in the 50's but later was criticized for lacking relevance for services since the 4 traditional P's are oriented more towards tangible products.

In the 80's the 4 Ps, (product, price, place and promotion) of the marketing mix gain 3 more Ps thanks to Booms and Bitner (1981):

- People – because of the importance of the front line employees in services;
- Process – because of the need for well trained service workers included in a customer friendly system;
- Physical evidence – because of the importance of the physical aspects in communicating the quality or efficiency of services.

The globalization brought also the concept of export of higher education and along a new approach for the 4Ps. Kinnel (1989) suggested 5 variables:

- Product design – education programs
- Pricing
- Distribution – availability and accessibility

- Communication and advertising
- Environmental structure, that takes account of student needs in target markets

Relevant for this research are two of the P's in the marketing mix, the product and promotion.

The product

Talking about product Koetler distinguish three elements:

- a) the core product- the benefits or the utility of the product transfers to the customers
- b) the actual product- the tangible elements of the product
- c) the augmented product- the intangible elements of the product

a) The core product - Benefits

The benefits of international education in students' perception are: superior employment, income opportunities, social benefits, etc.

b) The actual product – Courses and Programs

International trade in education services covers a large range of courses and programs offered in different disciplines and education levels. In HE the offer covers many segments: technical and vocational education, undergraduate and post-graduate degrees, adult education, foreign language programs, international training in sport and recreation, etc.

c) The augmented product – Reputation and brand image

When purchasing an educational program abroad the students want to get more than their course. The reputation of the country or of the institution is a critical factor that can motivate a student to select the given course. But as will be shown later on the factors influencing the decision making go beyond the actual product and the students will also look for other important issues in the chosen educational destination. If the core product is the principal motivation in attracting students to study, the actual product may not be as powerful because of at least two reasons. The difficulty of evaluating the merits of the courses and programs offered and the similarity between the products. For example, a

market that offers more than 70 very similar Masters in International Tourism can have confused customers in the decision making process. In contrast the augmented product helps the institution to differentiate itself in its offer.

The development of a strong brand equity or image, reputation is a very difficult, long time process and educational institutions seeking to develop such a concept must have first a strong and positive profile.

2. 3 The decision making process

The growing number of students in search of HE outside their home (more than 2.400.000 students), the high competition between programs and the emerging of new countries as educational destinations created the need of understanding the behaviour of the students.

The consumer behaviour of students was only recently considered as an important component of the marketing process. According to Baldwin & James, 2000, the attempts by governments to enhance the quality of higher education through the encouragement of market forces is based on an assumption that students are or will become informed consumers making rational choices of higher education courses and institutions.

The universities need to anticipate the long terms implications of choice and to understand the key factors involved in the student choice.

Studies of international marketing focusing on students who sought higher education abroad has been a topic of empirical research (Mazzarol, 1998) and theoretical (Mazzarol & Hossie, 1996, Nicholls 1995).

Authors have suggested that universities might need to re-position themselves in order to attract successive generations of students (Bakewell & Gibson-Sweet, 1998) which may involve carrying out a situation analysis to ensure that market positioning is established and strategies are put in place to effectively present the institutional image and develop their position in the minds of the public (Ivy, 2001).

Gray *et al.*, (2003) recognized that little research had been conducted on market positioning in international HE markets even though the overseas market is highly competitive and there is an increasing emphasis on branding. Medina and Duffy (1998) identified five main brand positioning dimensions: a university's learning environment (including excellent staff, facilities and resources);

reputations (including brand name, achievements and high standard of education); graduate career prospects (including graduates' employment prospects, expected income and employers' views of graduates); destination image (including political stability, safety and hospitality) and cultural integration (including religious freedom and cultural diversity)" (Gray et al., 2003 p.115). They also recommended that future research could investigate the media and brand preferences of parents since they were found to be an important secondary group of decision-makers for choice of undergraduate programs.

2.3. 1 Factors influencing overseas study

The decision to study abroad is for a student one of the most important decision he/she and their family have to make and in order to be successful in our global environment the students must develop some key cultural skills (Cant,2004).

In addition to all the costs of the program he/she has to support the living costs as well and he will be away from home for a few years. Studying abroad is the first most expensive and significant decision a student and his family has to take. By deciding where she/he will study, the student not only buys the education but also a package of services that come with the core service.

The choices of international education can be classified into the decision to study abroad, choice of country, city, academic program, and of university. José María Cubillo, Joaquín Sánchez, Julio Cerviño (International students' decision-making process, *International Journal of Educational Management*, Volume 20 Number 2 2006 pp. 101-115) identified 4 groups of factors which influence the decision-making process of international students, analyzing different dimensions of this process and explaining those factors which determine students' choice.

The factors, items and variables identified in the choice process:

a. Personal reasons

1. personal improvement
 - i. career prospects
 - ii. future job prospects
 - iii. future earnings prospects
 - iv. higher status
 - v. live in a different culture
 - vi. make international contacts
 - vii. improve language skills
2. advice
 - i. family recommendations
 - ii. friends recommendations
 - iii. professors recommendations

b. Country image effect

1. country image
 - i. cultural distance
 - ii. social reputation
 - iii. academic reputation
 - iv. development level
 - v. cost of living
 - vi. immigration procedures
 - vii. opportunity of working during the course
 - viii. time to get the degree

2. city image

- i. city dimension
- ii. cost of living
- iii. linguistic proximity distance
- iv. safety and security
- v. social facilities
- vi. international environment
- vii. university environment

c. institution image

1. corporate image
 - i. institution prestige
 - ii. ranking position
 - iii. brand reputation
 - iv. academic reputation
 - v. researcher reputation
 - vi. quality reputation
2. faculty
 - i. expertise of research staff
 - ii. professional expertise of research staff
3. facilities
 - i. campus atmosphere
 - ii. social life at the university
 - iii. safety and security
 - iv. library facilities
 - v. availability of computers
 - vi. availability of quiet areas
 - vii. availability of areas for self study
 - viii. sport facilities

d. program evaluation

- i. international recognition
- ii. program suitability
- iii. programs specialization
- iv. quality programs
- v. recognition by future employers
- vi. total cost and finance

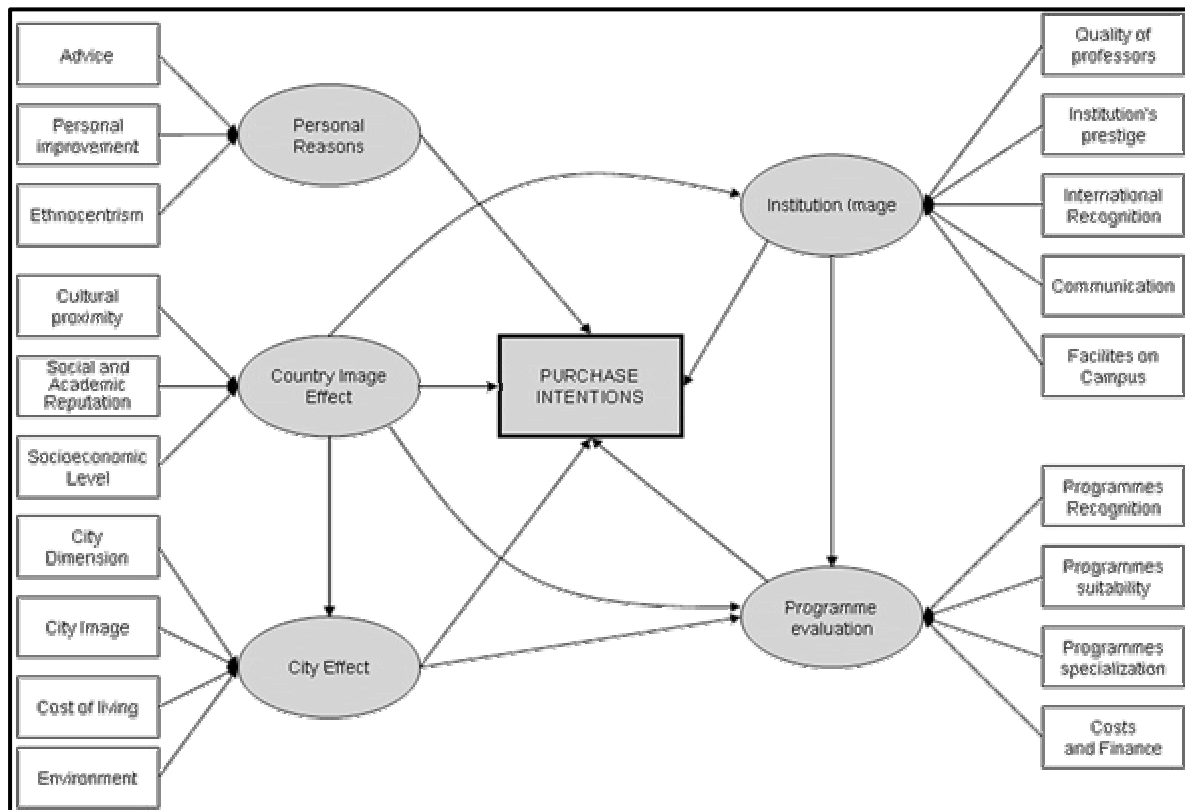


Figure 6 A model of international students' preferences José María Cubillo, Joaquín Sánchez, Julio Cerviño (International students' decision-making process; International Journal of Educational Management Volume 20 Number 2 2006 pp. 101-115)

Relevant for our study are the following conclusions:

- ♦ Country image has a direct and positive relationship with the purchase intention.
- ♦ Country image positively affects program evaluation, institution image and city image.

In this case the universities should be aware of the impact of the country's image and exploit it, especially in the case of programs in tourism in highly touristic countries, where the association of the image of the country to the one of the program can increase the participation of the students and give credibility to the program. For example, a country like Switzerland that has a strong image as a touristic country will have a positive association impact on the programs in tourism.

- ♦ City of destination plays an important role in the configuration of the purchase intention.

Due to this aspect, for programs in tourism and hospitality the programs located in highly touristic cities will be perceived as a receipt of success and the presence of the program will again have more credibility.

- ♦ The ranking position and the brand reputation are a very important factor. Since this factor has such a high impact, for the universities located in less attractive destinations the main promotion tool should be the rank or the brand reputation. The location should be less present in their marketing and the image/rank/brand should prevail.

a. Country image effect

The decision of acquiring a product or a service can be positively influenced by the country image. This factor has great influence on the purchase intention and the quality perception and even more so when the consumer must evaluate an unfamiliar brand. In fact, the country image is assumed to be the first source that consumers consider in product evaluation since the attitude of consumers towards the products or services are related to their stereotypes about the country of origin (Peng et al., 2000). Some studies show that the country image influences the evaluation of a product or service much more than other variables (Wall et al., 1991). As the *Made-in* label raised consumers' awareness of sourcing, it also came to stand for attractive features of products from certain countries. *Made in Germany* became a sign of high quality not long after World War I, and in today's marketplace, Swiss quality, Japanese workmanship, Swedish design and French fashion have become world famous. Country image refers to the picture, the reputation, the stereotype that consumers attach to products or services of a specific country and it is directly linked to the brand image. Up to now, most publications related to country image focus on products (Phau and Prendergast, 1999) and just a few studies analysed the effects of the country image on services (Javalgi et al., 2001).

Due to the intangibility of services, associations between the country image and the service are very important. The literature shows that the relationship between country image and services seems to be similar to the one between country image and goods. In this way, Harrison-Walker (1995) found that the country image plays an important role in the choice of a service provider.

Consumers prefer service providers from developed countries to those from developing countries, except when lower prices are considered.

Studies done by Lawley (1998), Srikatanyoo and Gnoth (2002), show that the country image seems to play an important role in the selection of students for international education. Thus, prospective students tend to choose first the country and then the institution.

However others argue that there is no relationship among country, corporate, and brand image in their model, since brand image is stronger than the others (Peng et al. 2000). Due to the prestige image of certain countries in higher education, students tend to believe that higher education offered in these countries is high quality (Bourke, 2000).

According to Mazzarol the "local environment" also influences the attractiveness of a host country. The climate, the lifestyle and whether the country is viewed as being quiet or 'studious' were seen as aspects of this 'environment.' A study in Australia in 1992 proved that many students from South East Asia viewed Australia as a preferred destination to the United Kingdom, New Zealand or Canada because the weather was warmer. By contrast, discussions with students from Japan and the United States, undertaken by AGB in the 1990s, found Australia was viewed as a place of 'beaches and fun' but not somewhere to undertake 'serious' education (AGB 1992).

b. The city image: the city represents the place where service will be produced and consumed. Since the education service is a complex service jointly produced with a wide group of services, the physical environment will be made up of the institution facilities and the city as a whole. In this way, the students' perception about the destination city will influence the decision process as well as the country image. The work of Mori (2001) identifies location and social facilities in a town/city as the most important factor related to environmental conditions which influence the students' choice.

For instance, the city of Salamanca, in Spain, has developed a cultural image closely linked with the learning of the Spanish language and culture. In particular, the image shows Salamanca as the city where people speak the perfect Spanish. For this reason, a lot of international students go to Salamanca every summer with the purpose of learning Spanish. On the other hand, the city, with its beauty, history, arts and lifestyle contribute to an excellent

environment for interacting with other students, and consequently learning Spanish. There are many other examples of cities developing a strong cultural image thanks to the education institutions: Bologna, Cambridge, Heidelberg, Canberra, etc.

c. Campus location also was a major influence on students' choice of their host institutions (Bowers and Pugh, 1973). Gorman (1974) claims that location was the most important choice criteria, while Maguire and Lay (1981) ranked location as factor number five amongst students' choice criteria. Vaugh, Pitlik, and Hansotia (1978) reported that students identified location as the 11th most important influence amongst 16 choice criteria. Comm and LaBay (1996) ranked location as number 17 amongst 32 choice criteria. King, Kobayashi, and Bigler (1996) reported that students gave 2.5 ratings on a three-point scale to geographic location as an influence on students' choice of higher education institutions.

d. Rankings

For many prospective students, one of the most critical issues in evaluating an education institution is reputation or quality. Attempting to measure the quality of an institution is a very difficult task. A tool for measuring the quality is SERVQUAL, a scale that uses 5 dimensions:

1. reliability or the ability to perform the promised service dependably
 2. responsiveness or the willingness to assist customers and provide prompt service
 3. assurance or the knowledge, expertise and courtesy of employees
 4. empathy or the provision of personal attention and care to the customer
 5. tangibles or the physical facilities and the appearance of the staff
- (Mazzarol 2001)

However in the world of universities, the most powerful tool in measuring quality and perceiving it is the ranking.

Rankings and league tables of higher education institutions (HEIs) and programs are a global phenomenon. They serve many purposes: they respond to demands from consumers for easily interpretable information on the standing of higher education institutions; they stimulate competition among them; they provide some of the rationale for allocation of funds; and they help differentiate among

different types of institutions and different programs and disciplines. In addition, when correctly understood and interpreted, they contribute to the definition of "quality" of higher education institutions within a particular country, complementing the rigorous work conducted in the context of quality assessment and review performed by public and independent accrediting agencies. Quality is a measure of the features of the program, including academic success and the quality of the faculty.

Impact of the rankings; The case of MBA's

The rankings have become so popular and the competition to do well so tough, that many MBA schools live in fear of where they will be ranked. Schools have found that when rankings rise, admission applications go up. If their ranking drops, many tell stories of decreased enrolments, angry alumni and students, lost funding, etc. (Jambotkar, 1998; Walpole, 1998; Gioia & Corley, 2000; Patterson, 2000). For example, Dartmouth University saw its applications jump from 7,500 in 2000 to 12,000 in 2001 after a number one ranking in the *Wall Street Journal*. One large mid-western school claimed that falling out of the top ten MBA rankings caused their school to receive not a single applicant from Japan (Jambotkar, 1998). When foreign applicants can make up 40% of the MBA class, this is a problem (Gioia & Corley, 2000). In other instances, alumni have responded to higher rankings with increased donations. Southern Methodist saw an increase from 10% to 25% in alumni donations from 1996-2001, during which time they rose in their rankings to 35th in *US News* and 9th in the *Wall Street Journal*. (source: "The Perceptual Impact of U.S. News & World Report Rankings on Eight Public MBA Programs" Nissa Dahlin-Brown, *Journal of marketing for higher education* Vol. 15(2) 2005). The rankings though as a measure of success are not that useful for small, unranked institutions which must make their own strategy and positioning. That's why I argue in this paper the necessity of using the location of a program as a competitive advantage in case the universities cannot compete on the high quality market, especially for those located in highly attractive destinations or in locations with high quality of life.

e. Institution image. The brand

Every institution is aware that in order to be successful they have to come up with a clear and strong marketing strategy.

In an interview about a study he conducted in 2004 Richard Hesel, a marketing consultant for Duke University, University of Pennsylvania, University of Maryland, and Washington University Law Schools, Virginia Tech, Rutgers, etc. proposed 5 strategies for marketing a college:

1. Focus on the product

"What marketers call a brand or market position is nothing more than a compelling identity that expresses the special qualities of that product in ways that motivate the interest and inspire the dreams of important constituencies." As an example, Woodrow Wilson developed the idea of organized alumni across the nation to help with student recruitment at Princeton more than a century ago transforming the university in what Dean of the Faculty Aaron Lemonick was describing as "the only world-class research university with teaching at its heart". Also, what Hesel considers very important is the differentiated market positioning, offering the universities the competitive advantage among the competitors: Colorado College (one course at a time), the College of Wooster (independent learning), Harvard (always innovating), Columbia (the core), and Brown (the free-choice curriculum), as well as the University of Chicago, the University of North Carolina at Chapel Hill, and many of the University of California campuses.

2. Focus on strategic goals that are well defined and long-term in scope.

The types of goals on which successful marketing plans are based go far beyond operational objectives like admit rates, yield, and net tuition revenue. Instead of asking, "How can we be better known?" well-defined goals address the more critical question: "What do we want to be known for?"

3. Make critical decisions on a sound empirical basis

There is a strong necessity of market research in higher education and is a fact that very few institutions use such tools, either because they are unaware of these advanced research methods or because they are reluctant to invest the time and resources necessary to determine whether their strategic investments are worth making.

4. Integrate everything you do.

Every activity must be part of an integrated scheme, each serving the same overarching strategic goals and communicating related themes and messages because the HE compared to the business world has very little financial means at its disposal, so it must spend every marketing penny as if it were the last. On the very fashionable topic of branding Hesel says that "Branding is the current theology of higher-education marketing that was invested with the quality of revelation: a salvation for all marketing ills and the path to a glorious institutional future".

5. Commit for the long haul

Marketing higher education often suffers from the problem that Hesel calls the "brand du jour" which means that the effort in creating marketing materials are wasted due to the constant creation of new brands, themes, and images. Until recently, for example, divisions of the University of Western Ontario were using 79 different versions of the institution's logo. A good example on the other hand is New York University- NYU that started in the '70s as a regional commuter school, largely serving students from the New York metropolitan area becoming today an Ivy League school today thanks to the intelligent long haul investments. The campus was beautified, new facilities created, academic programs and teaching strengthened, faculty appointments held to high standards, a solid marketing-and-communications strategy, etc.

Branding "A strong brand is a really good relationship."¹

One of the most critical aspects of the augmented product is the development of strong brand equity. The intangible nature of the educational services increases the importance of developing a successful branding strategy.

P.Doyle ("Brand Equity and the Marketing Professional," 1998) identifies four strategies linked to successful service branding:

- ◆ Developing a focus on quality
- ◆ Offering superior service
- ◆ Being an early market entrant
- ◆ Differentiating the service from its competitors

¹ P. Doyle, "Brand Equity and the Marketing Professional," Market Leader, Issue 1, Spring 1998

Service branding is a well established concept but not so much in educational marketing. Today there are though a few exceptions, colleges and universities that adopted practices usually associated with selling Big Macs and BMW's. The importance of branding is high because colleges are not only competing among themselves and against non-educational institutions for state and federal appropriations, research money, and foundation grants and private gifts but also on getting the smartest students, the best scholars, and the highest rankings in surveys of institutional quality. Campuses now have marketing departments and are hiring professional directors to manage their images. They are turning to outside design shops and advertising agencies to retool their corporate logos and develop multimedia campaigns. Among the institutions that have recently undertaken multimedia branding campaigns to differentiate themselves from the pack and raise their statures are Ohio State University ("Do Something Great"); Florida State University ("Ideas that Move"); and Rensselaer Polytechnic Institute ("Why Not Change the World?"). In addition to the chatter, they are putting their money where their mouths are. The University of Houston ("Learning. Leading.") has undertaken a five-year, \$5-million effort to position itself as a top urban research university.

However, building an image is a process that requires constant efforts and that unfortunately is very vulnerable to external events. I would like to propose below a case of successful branding of the University of Maryland.

The case of the University of Maryland at College Park

In 1986 at the University of Maryland at College Park, an All-American basketball star died in his campus dormitory room of a cocaine overdose. Local and national news media reported that the student and several of his team mates had flunked out during the spring semester. The scandal seemed to confirm Maryland's reputation as a party school with low academic standards. Seventeen years later, the university is still working on its image with one of the boldest promotional campaigns ever seen in higher education the "Zoom Campaign". The objectives of the campaign were to transform Maryland's image from that of a middling "safety school" to one of a top-tier research university.

The strategy for the marketing campaign was to:

- Identify a strong leader
- Take risks, be creative and original
- Let students have a voice in how marketing efforts represent the institution. If you don't include them, they will be vocal in their criticism.
- Have a thick skin. What you do is visible to everyone with an institutional affiliation.

The results were spectacular. From 2000 to 2004 doubled the number of applications for freshmen admission, 35 percent growth in membership in the alumni association, double the number of donors who contribute to the university. More important, perhaps, Maryland's marketing efforts have generated buzz. State politicians have cited factoids gleaned from the university's ads. Maryland attire has become fashionable in Baltimore. Following the Zoom campaign, the University proposed last year a new campaign "Fear the Turtle". The campaigns were criticized for being too commercial and there was a lot of resistance from faculty who didn't want to become too business-focused at the expense of things that make a university unique. However, the campaign continued and in the two years after the Zoom campaign began, applications to the freshman class increased 24.7 percent. Successful branding, the experts say, fosters awareness, support, and loyalty for the brand. The true test of brand loyalty, however, is whether customers will choose a brand even though they have to pay a premium for it.

f. Getting advice or the Word Of Mouth (WOM)

Word of mouth referral is a very important source of information and communication and a strong influencing factor in the decision making process. Due to the relevancy of this communication factor the literature dedicated quite a space to research in this area. In education, satisfaction becomes a key to customer retention and positive Word of Mouth (Harvis et al., 2000). Prospective students may see communication channel like advertising media agents as manipulative (Mazzarol 2001) and they would rather refer to trusted channels. When a customer is satisfied with a service encounter, the tendency is to form a

positive attitude towards the service and similarly if a customer is dissatisfied, a negative response is expected. Guolla (1999) indicates that the degree of satisfaction determines the nature and the effects of WOM whether it is positive or negative. Dissatisfied customers would engage in negative WOM, which will have harmful effects on the reputation of the organization and its products, resulting in loss of custom. As an effect it is expected that the highly satisfied students would engage in positive word of mouth (WOM) communication such as recommending the university or course to a friend or relative or, from a broader perspective, would continue to be patrons of the university by returning for further studies, recruiting prospective students or becoming a proactive alumni (Guolla, 1999). Similarly, dissatisfaction could lead students of a university to engage in negative WOM, which would have major implications on the reputation of the university and its enrolments. Given the mobility and choices available to the retention of current students could be a challenge to universities. A study of an Australian university by Athiyaman (2000), confirmed the strong relationship that exists between student satisfaction and WOM and its impact on students' choice process and the significant link that exists between WOM and customer retention. It is therefore imperative for universities to improve satisfaction levels of students ensuring positive WOM among students in order to enhance their attractiveness to current and potential students and to maintain a competitive edge in the international market place (Harvis et al., 2000; Yau, 1994; Halstead et al., 1994).

2.3. 2 A 'Push-Pull' Model of International Education Flows

As previously seen there are many factors to influence the demand for international education and the first thing the student has to decide is if he wants to study abroad.

Economic and social forces within the home country serve to 'push' students abroad. However, the decision as to which host country they will select is dependent on a variety of 'pull' factors.

'Push' factors operate within the source country and initiate a student's decision to undertake international study. 'Pull' factors operate within a host country to make that country relatively attractive to international students. Some of these factors are inherent in the source country, some in the host country and others in the students themselves.

McMahon (1992), and Mazzarol and Soutar (2002), suggested the flow of students internationally results from a combination of 'push and pull' factors.

On one hand, *push factors* operate within the source country and initiate the students' decision to undertake international study; on the other hand, *pull factors* operate within a host country to make that country relatively attractive to international students (Mazzarol and Soutar 2002).

Mazzarol (1998) identifies three distinct levels in the decision process through which the international student moves when selecting a final study destination.

- ♦ In stage one, the student must decide to study internationally, rather than locally.

As noted, this can be influenced by a series of 'push' factors within the home country. Once the decision to study abroad has been made the next decision is the selection of a host country.

- ♦ In second stage, 'pull' factors become important, making one host country relatively more attractive than another.
- ♦ In stage three, the student selects an institution.

However, I would see more appropriate to use the concept of levels instead of "stage" because the choices in the decision process are simultaneous not consecutive and the students will not choose necessarily first the country and then the institution.

There were also identified additional 'pull' factors that make a particular institution more attractive than its competitors:

- ♦ the institution's reputation for quality,
- ♦ market profile,
- ♦ range of courses,
- ♦ alliances or coalitions,
- ♦ offshore teaching programs,
- ♦ staff expertise,
- ♦ degree of innovation,
- ♦ use of information technology,
- ♦ resources,
- ♦ size of the alumni base
- ♦ promotion and marketing efforts (e.g. the use of agents and advertising)

Promotion

The 3 key promotional elements for international education are advertising in mass media, personal selling and publicity and professional promotion. Also, international education exporters have promoted international education through private agents, fairs, use of government managed information centres located overseas, etc.

Advertising

In 1990 in Australia there was conducted a survey among international students and it was found that only 3-8% of the respondents felt that mass media advertising was their main source of information when selecting the institution (Harris, D.R. and T.M. Rhall. 1993. Survey of International Students. Canberra: Commonwealth of Australia). Another study conducted through students from Asia, Europe and North America found that heavy investment in advertising could have a negative impact in the market and especially in Asia where education is seen as a service that should not be treated as a commercial product.

Personal selling

For industries like insurance or retailing the personal selling is the most critical element in the promotion mix. In international education this concept refers to the recruitment agents who are the advisers of students in their choice of an

educational destination. However is not an easy task. Many times this approach is considered manipulative and subjective. It is difficult to find the right people to represent the institution since we are not talking only about sales persons, but people with expertise in the field. "Professional sales representatives must have a strong ego drive and empathy in order to be successful in sales" (David Mayer and Herbert M. Greenberg, "What makes a good salesman" Harvard Business Review 1964).

Professional promotion

As mentioned before there are many doubt about the usefulness of using the advertising in the mass media so the necessity of having professional promoter occurred. Other media are widely used as brochures, information booklets, presentations made by staff to prospective students, etc. The professional promotion of international education occurs at two levels:

1. generic promotion strategies to increase market awareness of the supplier country (government agencies or collaborative groups of education institutions)
2. promotion undertaken by individual institutions to enhance their own image or desirability (Mazzarol, Soutar 2001).

McMahon (1992) examined the flow of international students from eighteen developing countries to developed countries during the 1960s and 1970s, testing an outbound or 'push' model and an inbound or 'pull' model.

The push model suggested the student flow was dependent on

- ♦ the level of economic wealth,
- ♦ the degree of involvement of the developing country in the world economy,
- ♦ the priority placed on education by the government of the developing country
- ♦ the availability of educational opportunities in the home country.

His pull model suggested student attraction to a host country was influenced by

- ♦ the relative size of the student's home country economy compared to the host country,
- ♦ economic links between the home and host country,

- ♦ host nation political interests in the home country through foreign assistance or cultural links
- ♦ host nation support of international students via scholarships or other assistance.

McMahon found a negative correlation between economic prosperity in sending countries and the volume of international student flows, and a positive correlation between the size of the host nation and the sending nation's economies.

2.3. 3 Studies and surveys

Lee and Tan (1984) identified among the factors that contribute to the decision to study abroad

- ♦ the lack of access to higher education among many countries in;
- ♦ historical or colonial links between host and home;
- ♦ a commonality of language,
- ♦ the availability of science or technology-based programs
- ♦ the geographic proximity of the home and host countries.
- ♦ the perceptions of the quality of the tertiary education system available in the home country;
- ♦ the relative wealth of the home country population and the GNP growth rate in the home country.

Agarwal and Winkler (1985) studied the demand for an international education in the United States among students from fifteen developing countries throughout the post-war era. They found that in the late 70's early 80's the proportion of international students seeking to undertake higher education in America had declined for most countries. While noting that international student flows had risen strongly since the 1950s, the later slow down was linked to the rising cost of a United States university education and improvements in higher education opportunities in source countries.

Their study suggested the principal flow drivers were

- ♦ per capita income in the home country,
- ♦ the price or cost of education,
- ♦ the education opportunities available in the home country
- ♦ the expected benefits of studying abroad.

Another study conducted by **Zarich & Koester in 1987** in USA found that among the 5000 applicants for the International Educational Exchange these are the main reasons to study abroad:

- ♦ 35% stated that their parents speak a second language and 30% said their parents were raised in another country at least for a year
- ♦ 61% of students had prior travel experience out of USA

- ♦ The major concerns about the trip of those choosing to study abroad were sufficient money -25%, language-22%, meeting people-11%, getting around; housing and food-8%; adjustment 7%.
- ♦ The major personal goals for the students considering to study abroad were to gain knowledge of the country 31%; improve academic and education performance-25%; have fun 16%; improve a foreign language-14%; improve self confidence-10% and meet people 4%.
- ♦ The major personal goals for the students actually choosing to study abroad were to improve education-38%; improve foreign language-22%; gain knowledge of the country 21%; improve self confidence 9%; have fun 7% and meet new people 3%
- ♦ The most common impacts of the students international experience were better understanding of the foreign country 54%; would like to live in another country-47%; be more interesting in news of international events-30%; improve self confidence-28%; establish long term relations 22% and improve academic performance 12%.

In **1989** a study conducted by **Clarion University of Pennsylvania** found four criteria as influencing the students' decision to go to USA to study:

- ♦ cost of living
- ♦ the availability of a scholarship
- ♦ opportunities for employment
- ♦ the academic entry requirements in the host country
- ♦ success of friends or alumni in careers post graduation

A research conducted by **Lawley in 1993** found 7 factors contributing positively in choosing Australia as a destination for education:

- ♦ Standard of course
- ♦ Standard of educational facilities
- ♦ Life style
- ♦ Potential to emigrate
- ♦ Opinions of friends and family
- ♦ Low levels of racial discrimination

The main concerns identified were recognition of qualifications and personal safety.

A study conducted in **1996** for the **Australian International Education Foundation** which examined the decision making process of international students from South Asia to Australia found that students with adequate financial support were motivated to study abroad in order to “learn more about western culture” and obtain better quality education.

Other factors

- ♦ Prior knowledge and awareness of the country they eventually selected as a study destination
- ♦ The geographic proximity
- ♦ The host’s country’s environment (climate, crime...)
- ♦ if they know students who studied there before
- ♦ recommendations from family and friends
- ♦ the perception that study abroad is better than locally
- ♦ the student ability to gain entry to local programs (too difficult they would choose internationally especially in countries with internal problems; Asia)
- ♦ the lack of access to higher education opportunities in source countries
- ♦ the desire of the students to understand the “West”

Mazzarol, Kemp and Savery found in **1997** six main factors to influence a student to study abroad:

- ♦ The level of **knowledge and awareness** of the host country in the students’ home country, including the availability and the ease of information about the potential destination country. The destination’s reputation for quality and the recognition of its qualifications in the student’s home country also formed a part of this factor.
- ♦ **Personal recommendations** that the study destination receives from parents, relatives, friends and other ‘gatekeepers’ prior to making the final decision.

- ♦ The **cost issues**, including the cost of fees, living expenses, travel costs and social costs, such as crime, safety and racial discrimination. The presence of students from the student's country (social cost) and the availability of part time work (financial costs) also formed part of this factor.
- ♦ The **environment**, which related to perceptions about the study "climate" in the destination country, as well as its physical climate and lifestyle.
- ♦ The **geographic proximity**, which related to the geographic (and time) proximity of the potential destination country to the student's country.
- ♦ The **social links**, which related to whether a student has family or friends living in the destination country and whether family and friends have studied there previously.

The study conducted by **Mazzarol and Soutar** in **2000** tried to identify reasons why students selected a particular study destination.

- ♦ The perception that an overseas course of study is better than a local one.
- ♦ The student's ability to gain entry to local programs.
- ♦ The desire to gain a better understanding of the 'West' and an intention to migrate after graduation.
- ♦ The reputation or profile of the country in which the student is seeking to study
- ♦ The institution's reputation for quality
- ♦ Parental influence
- ♦ The institution's links or alliances with other institutions familiar to the student
- ♦ The "local environment"
- ♦ The costs
- ♦ The institution's reputation for having high quality staff
- ♦ The institution's alumni base and word of mouth referral process
- ♦ The number of students enrolled at the institution
- ♦ Whether an institution is willing to recognize students' qualifications.

Still in Australia in **2000** was conducted a survey of international students who started a course of study in this country. The survey was completed by nearly 2,000 students from 82 countries enrolled with 66 Australian education providers. The survey questionnaire included questions about sources of information on study in Australia that students used in making decisions on overseas study and factors which they thought important in their choice of Australia as a study destination and their choice of provider.

The survey also asked about students' experiences of and satisfaction with the process of obtaining a visa, their plans regarding work and expenditure in Australia and their plans for future study.

The most important factors in students' decisions to come to Australia to study were:

- ♦ the attraction of studying in an English-speaking country
- ♦ the quality of Australian education,
- ♦ the positive impact of Australian qualifications on their job prospects,
- ♦ Australia's reputation for the kind of course they were interested in
- ♦ Australia's safe and friendly environment.

Students' families at home and acquaintances who had studied in Australia were the most important influences on their decision and education agents were the most important non-social influence on students' decisions.

The most important factors in students' choices in relation to providers were the quality of courses available and a provider's reputation for the type of course a student was interested in.

The most important influences on this decision were students' acquaintances, who had studied with the provider, education agents and students' families at home.

Family influence has been extensively reported as a key push factor profoundly affecting the choices of international education (AIEF 1997; Duan 1997; Jolley 1997; Lawley 1993; Mazzarol and Soutar 2002; Smart and Ang 1993a). Most studies on consumer behaviour identify family as reference groups or "an actual or imaginary individual or group, which has significant influence upon an individual's evaluations, aspirations or behaviour" (Deutsch and Gerard 1955).

It is believed that family members have the ability to shape behaviour and lifestyle, influence self-concept, and contribute to the formation of values and attitudes (Bearden and Etzel 1982; Childers and Rao 1992; Kotler and Fox 1995).

A research conducted on families on Thai students' indicated that on the qualitative phase influence from family can be slotted into one of five categories:

- ♦ finance,
- ♦ information,
- ♦ expectation,
- ♦ persuasion,
- ♦ competition.

Subsequent quantitative analysis demonstrated that students from family with direct experience of study abroad are, themselves, subject to higher family expectation to study abroad than students from family without direct experience.

Figure 7. Summary of the literature review

Topic Researchers	Decision making process	Brand	Image, reputation, positioning
Ball et al., 2002),	key factors in the choice of higher education surveys		
Bowers and Pugh, 1973).	Campus location		
Baldwin & James, 2000).	rational choices of higher education choice factors of the student-consumer		
Binsardi & Ekwulugo, 2003;	choice factors of the student-consumer		image and reputation of HE in UK
Bakewell & Gibson-Sweet, 1998;	lack of information for student decision-makers		image and reputation <i>Market positioning</i>
Czarniawska & Genell, 2002).	competitive advantage segmentation and market positioning		
Cant 2004	Cultural skills		
Comm and LaBay (1996)	Campus location		

Fill, 2003)		brand awareness, brand recognition and brand recall	
Foskett & Hemsley-Brown, 2001)	the key factors involved in student choice		
Gomes & Murphy's (2003)	increasing competition for overseas students, students choice in international markets surveys		
George, 2000),	advertising and access to information		institutional and sector image
Gorman (1974)	Campus location		
Gray et al., (2003)		Brand	Market positioning
José María Cubillo, Joaquín Sánchez, Julio Cerviño 2001	Factors in the choice process		
Kemp & Madden, 1998;	key factors in the choice of higher education surveys		
King, Kobayashi, and Bigler (1996)	Campus location		
Lee and Tan (1984)	Factors to study abroad		

Javalgi et al., 2001	country image		
Harrison-Walker (1995)	country image		
Lawley (1998)	country image push&pull decision factors		
Ivy, 2001);			image and reputation <i>Market positioning</i>
Mori (2001)	City image		
McMahon (1992)	'push and pull' factors 'push and pull' model		
Mazzarol, 1998;	Students abroad influence of "local environment"	The augmented product	
Mazzarol, Kemp and Savery 1997	Decision factors		
Mazzarol & Soutar, 1999;	Decision factors		
Maringe, 2004)	needs of home-based and international customers		
Nicholls et al., 1995;	Students abroad		
Nguyen & Le Blanc (2001)			relationship between institutional image and institutional reputation
Oplatka & Hemsley-Brown, 2004).			the involvement of

			students in the marketing and image-building
Oplatka, 2002)			institutional and sector image organisational image and "product" status
Pugsley & Coffey, 2002;	choice factors of the student-consumer		
P.Koetler 1998			positioning
Peng et al., 2000	country of origin		brand
Phau and Prendergast, 1999	country image		
Srikatanyoo and Gnoth (2002)	country image		
Soutar & Turner, 2002)	key factors in the choice of higher education surveys		
Vaugh, Pitlik, and Hansotia (1978)	Campus location		
Wall et al., 1991	country image influences		

2.3. 4 Conclusions

1. Country image has a direct and positive relationship with the purchase intention
2. The country image positively affects program evaluation and institution image
3. Country image positively affects city image
4. City of destination plays an important role in the configuration of the purchase intention
5. The campus location is very important
6. The quality of life in the educational destination influence students decision
7. The quality of the program (rank) has a very important impact on decision making process

Also

8. The language is a relevant factor, either for its commonality (if English) either for the desire to learn/ improve a new language
9. The desire to know and learn more about another country is important
10. Geographic proximity is essential for both students and parents

The above literature review concludes that beside the personal reasons and the institution image a high impact on the decision process has the image of the country, the city and the campus.

The 3C's model

The empirical evidence demonstrates that most of the programs highlight in their marketing efforts the academic value of the program and insist on the augmented product (image, reputation). This factor could be enlarged by a new dimension that of the location since the research proves that has a major impact on the decision process. I would like to propose the attributes of the educational destinations as part of the augmented product, arguing that location, in particular in the case of programs in tourism, is an added value to the actual product.

This could offer a competitive advantage to those programs located in attractive destinations. While not putting in question the important relevance of the academic value of the programs, the courses, the brand and the reputation, I would like to propose for future research a new model, the location with three components: Country, City, Campus (3C's).

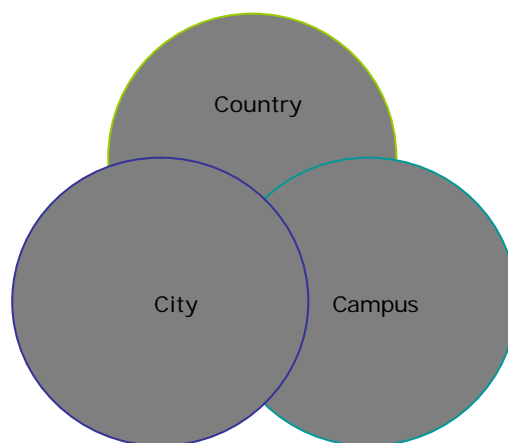


Figure 8 . The 3C's model. Own source 2007

The empirical research presented in the following chapter will insist on the value of country and city attractiveness in terms of touristic value and quality of life leaving room for future research for the campus dimension².

² As an observation for the "Campus" dimension, the programs located in USA are the ones that exploit it the most.

The hypothesis advanced in this study is that a touristic destination can be a strong competitive advantage for a university located in a touristic destination. Very popular places like Paris, Venice, Florence, Las Vegas, etc. are not only great campus locations but they offer the students the possibility to analyze the tourists behaviour, to notice the economical impact of this sector on the destination, to see how the transport in the city can or is influenced by the flows of tourists for and to a specific location, to observe the communication, management, marketing activities of the tourism offices and the professionals in the field, how the media reacts to different events, trends, etc. Also, in a city or a country with strong tourism import/export there is a strong research interest for the impact of tourism for the location. The strong players in the tourism industry are in the same time the place of origin of tourists but also destinations. The interaction between arrivals and departures is also an interesting phenomenon to analyze.

Such places are permanent case studies for programs in tourism and the students, beside the advantages of the actual product (courses) will be constantly exposed to the impact of tourism for and in a destination therefore the universities located in such destinations should take advantage of their positioning.

The examples of famous locations like Silicon Valley, with universities like Stanford and programs in Software Engineering, technology, etc., Harvard Medical School and the Mass General Hospital, Swiss Federal Institute of Technology in Zurich and the strong presence of research centres like IBM, Google, etc. could become models for the tourism programs located in strong tourists destinations.

If this model could be adapted to the tourism industry, we could expect that programs in cities like Barcelona, Paris, Vienna, Rio de Janeiro, etc. (that for now are very low in ranking) will gain a strong competitive advantage for the programs in tourism and hospitality since the cities will be perceived as a recepy of success and the presence of the program will again have more credibility.

As seen, the literature in the field and the studies consider the 3C's important aspects. The next step in this research will be to analyze if the Universities in their marketing efforts integrate or not the image of the country and the image of the city as part of the promotion of the university or they insist more on the

traditional aspects like the actual product or the augmented product (with a special emphasis on the ranking).

The following chapter will present the empirical research made on a sample of 113 master programs in tourism in the world. I chose the programs in tourism particularly because I consider that a model of marketing based on the image of the country or the destination should start from those in the field who teach about destinations and tourists decision making processes. Also, I think that the students interested in taking a next step in HE process in tourism are more sensitive to their future education destination due to the psychological proximity factor.

Chapter 3 Empirical analysis

3. 1 The purpose of this study

The hypothesis advanced in this research is that since the literature considers the impact of location/country high on the decision making process of students, the universities, as players in this field, should be aware of the importance of these factors and integrate them in their marketing efforts. As mentioned previously, the students are not choosing only a degree but also a second home for a couple of years and in this stage of their life the attractiveness of a place over another, could be of high importance.

The data base contains more than 7000 universities but due to the constraints of size, language, accessibility and time I analyzed about 10% (around 700 universities) that resulted in 113 master programs in tourism³.

The data base contains the following data:

1. Name of the University
2. Degree offered and type of degree
3. Website of the program
4. Ranking of the programs (*using Cybermatrix measurement method*)
5. Location (city and country)
6. Touristic ranking of the country (TRC)
7. Touristic value of the destination (TVD)
8. Quality of life indicator in the country (Qlife)
9. International tourists arrivals (ITA)
10. Population
11. The ratio between ITA and population
12. Language (English or not)
13. Marketing tools (intensive use of the location)

³ The specialty of tourism was chosen over the specialty in hospitality.

3. 2 The tools

The language

The master programs in tourism analyzed are mostly taught in English, with a very few exceptions (4) even if the host countries of the programs are not necessarily English speaking:

Country	English programs	Non English programs
Australia	8	
Austria	1	
Belgium	1	
Canada	2	1
China	2	
Croatia	0	1
France	4	
Germany	2	
Hong Kong	1	
India	1	
Ireland	2	
Italy	2	1
Korea	2	
New Zealand	3	
Netherlands	3	
Spain	2	
Sweden	1	1
Switzerland	3	
Thailand	2	
United Kingdom	36	
United States	32	
TOTAL	109	4

Figure 9. Distribution of programs in English/Non English

Distribution of programs by language

The fact that the language of study is English especially in the non-English speaking countries confirms the international attribute of tourism as a discipline. There seems to be an opportunity for future research in order to answer this question: why are most of the programs in English? Is it because the “lingua franca” of tourists is becoming English or is it simply because of globalization?

Distribution of programs by country

As we can see from the table 9, the highest number of programs in tourism are in the leading education destinations: USA, UK, Australia but important tourism origin and/or destination countries like Switzerland, New Zealand, Netherlands, Italy, France, Germany, Spain, Canada, Thailand, Ireland, are also well represented in the program suppliers group.

The distribution of these programs in highly touristic countries demonstrates the awareness of the importance of tourism.

The touristic value of the country

The touristic value of the country (TRC) is considered an important factor responsible for choosing a program over another. The values for the countries were obtained by using the country ranking of World Tourism Organization, Tourism Market Trends, 2005 Edition. As a comment for this variable, since the programs analysed here are already in the top 30 of most touristic countries in the world, the following tables will place in low touristic positions countries like New Zealand, Australia, Sweden, India, Switzerland that per se are countries with important touristic incoming and/or outgoing phenomenon.

As a consequence we have a cluster of programs located in general in highly touristic countries that needed however to be differentiated.

The value of the destination

Since there is no relevant touristic ranking of all the destinations in the world, I rated the destinations on values from 1 to 3 to each destination in which 3 represents the highest touristic value and 1 the lowest.

The results are the following:

- ♦ 31 destinations⁴ - 3 high (touristic value)
 - Paris, Bangkok, Boston, Barcelona, London, Dublin, Miami, Melbourne, Singapore, New York, Chicago, Hong Kong, Beijing, Orlando, Honolulu, New Orleans, Sydney, Canberra, etc.
- ♦ 36 destinations - 2 medium (touristic value)
 - Lugano, Innsbruck, Trieste, Edinburgh, Adelaide, Freiburg, Birmingham, Chang Mai, Lancaster, Atlanta, Philadelphia, Glasgow, Oxford, Mumbai, Liverpool, etc.
- ♦ 46 destinations - 1 low (touristic value)
 - Spearfish, Dorset, Breda, Buckinghamshire, Canterbury, Leeuwarden, Clemson, Ithaca, Dalarna, Tallahassee, Vietri sul Mare, Gent, Cergy-Pontoise Cedex, Leeds, Canterbury, Middlesex, Tianjin, Biltmore Hall, Raleigh, West Lafayette, Rochester, Dunedin, Sheffield, Manchester NH USA, Swansea, Opatija, Umeå, Chur, Brighton, Preston, Derby, Gainesville, Guelph, Ontario, Champaign, Lancaster, Leuven, Luton, Amherst, Guilford, Menomonie, Blacksburg, etc.

The ranking of the programs

The rank positioning was considered for this research the quality factor determining choices in the decision process.

The great share of the rankings on the market analyzes the most relevant 500 universities that are present on the market. Since many of the programs identified in this research belong to smaller universities or new entries in the educational market I used as a reference the **“World Universities' ranking on the Web”**, an initiative of the Cybermetrics Research Group. The company currently analyzed about 10.500 university domains and 4.000 research related organizations. The Ranking proposed by this group is based by the presence of the program on the web, and combines a series of indicators that measures different aspects of the web presence of the institutions⁵.

This approach permitted to rank all types of higher education institutions, both public and private. However, there were still 38 programs not ranked.

⁴ These programs have a strong potential to exploit their destination as previously mentioned in Chapter II.4 and to transform their destinations in laboratories of research for their students.

⁵ The obvious precedent is the Web Impact Factor (WIF) proposed by Almind & Ingwersen (2003) that is based on link analysis.

The data collected here concludes that we have:

- 12 programs – 1 to 50
- 7 programs - 51 -100
- 20 programs - 101-500
- 17 programs - 501-1000
- 10 programs - 1001-2000
- 1 program - 2001-3000
- 38 programs - 0 rank

Quality-of-life indices - The Economist Intelligence Unit's index for 2005 (EIU)

The indices were calculated by EIU using the survey results on satisfaction as a starting point, and a means for deriving weights for the various determinants of quality of life across countries.

According to this index we have the following results:

- ♦ 2 programs – 1st place – Ireland
- ♦ 18 programs - between 2 and 10
- ♦ 40 programs – between 11 and 20
- ♦ 45 programs – between 21 and 30
- ♦ 1 program - between 31 and 40
- ♦ 2 programs – between 41 and 50
- ♦ 3 programs – between 60 and 70.

Marketing tools

Special attention was dedicated to the marketing efforts of the universities and especially to the question whether they took advantage of the value of the location or the country.

Values from 0 to 3 were given based on the intensity of the presence of the location in their promotion⁶, both printed and electronic.

The rating criteria were based on the personal evaluation of the programs marketing of each website, analyzing the following criteria:

- ♦ "0" value – no presence of the location (50 programs)
- ♦ "1" value - the location was just mentioned (24 programs) as seen in the examples below:

⁶ Printed (flyers, brochures) and the websites.

The example of EUHT SPOL in Barcelona

The location is mentioned just where the programs is in terms of geographic position and how to get there.



The example of Waterloo University Canada

The location is not even mentioned, but the campus and how to get there.

UW's main campus is located in the City of Waterloo, a one-hour drive west of Toronto. The area is home to 2 universities and community college, so there are plenty of student-oriented businesses and activities to keep you busy!

The best way to see what life is like at UW is to come for a visit. Or, if you live too far away to visit, check out our virtual campus tour.

- ♦ "2" value- the location was underlined as a pull factor (30 programs)

The example of CHN University Netherlands

The description of the location presents the country, in terms of geographic location, culture, language, quality of education as well as the city and its high value for being the best student city of Netherlands. Clearly the programs target international markets.

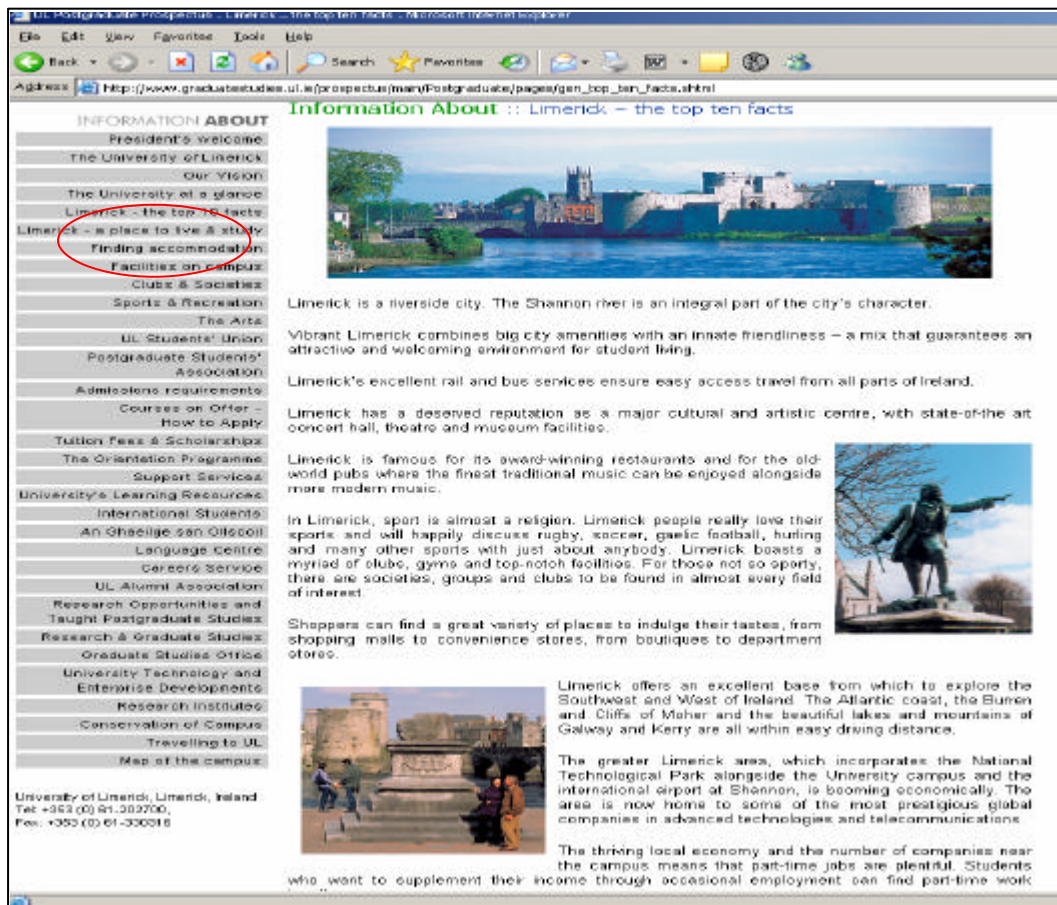
Why start your journey in the Netherlands?

Situated no more than an hour's flight from London, Paris or Berlin, the Netherlands has been called the Gateway to Europe. The country's open, tolerant culture, its long history of economic stability and its experience of educating overseas students have made it a popular destination for visiting students from all over the world. The country has become a multi-ethnic and multicultural society, and through its excellent system of education can boast a population able to communicate in at least two foreign languages of which English is the most predominant.

Leeuwarden with its three Universities of Professional Education is home to over 23,000 international and Dutch students. On a population of 90,000 the students represent an important segment of the Leeuwarden community and as such have a significant impact on social, cultural and economic life of the city. Consequently, twice in the last few years, Leeuwarden has been chosen as the 'Best Student City of the Netherlands'.

- ♦ "3" value- the location was highlighted and used as a pull factor. (9 programs)

Ex: The case of Limerick University.



The website of the master program in tourism of The University of Limerick dedicates two pages to the City of Limerick and to its lifestyle even if the city of Limerick is not an important tourist destination.

These tools presented above will help us identify where the master programs are positioned, if/how they exploit their resources, where the potential markets are and what opportunities are left for marketing high education in tourism using the attributes of the location.

Chapter 4 Analysis of the results

Every institution is aware of being located in a physical environment, a region, a state, a city, a place with typical patterns that confronts the institution with certain opportunities and threats. A college near coast can offer programs in marine biology, a university in Hawaii or Las Vegas should have almost by default a program in tourism or hospitality, a school in a hurricane area will need to spend more on safe buildings, etc. "Institutions tend to be less aware of the forces of the macro environment that shape opportunities and pose threats to the institution (Kotler)." The macro environment consists of large scale forces categorized as *demographic, technological, political/legal, regulatory and socio-cultural forces*. What is important is the fact that they are constantly changing and that they are largely outside the control and influence of educational institutions. So, since they have very little control on the macro environment, what they have to do is identify and adapt to the macro environmental trends by identifying the opportunities and threats in this environment, formulating objectives, strategies, structures and systems.

In order to analyze our hypothesis there are three questions to be answered. The data gathered from the 113 master programs should provide these answers. At the end of this analysis we should have a clear idea on how these programs are positioned on terms of quality of life of the country, on how attractive their location is and especially if in their markets effort is taken into consideration the attributes of the location.

In the following pages, I will analyze the relationship between the rank of the programs and the touristic value of the country, the destination, the quality of life as well as their marketing efforts.

Method

With the data gathered from the 113 programs I created an opportunity-threat matrix trying to identify the positioning of these programs in different matrices.

The answers for each question are presented in the following graphics.

The value matrix (Opportunity - threat)

		Rank	
		Low	High
Location	High	Opportunity position	Ideal position
	Low	Troubled position	Mature position

Figure 10 Value matrix .Source: own elaboration 2007

The matrix presents where these programs are positioned, in terms of rank and location. Each position corresponds to a higher or lower threat/opportunity relation.

Positions:

- Opportunity: a university low in rank and high in touristic attractiveness of the country/destination can exploit the location's value in front of the competitors located in non-attractive destinations but is threaten by those high in rank
- Ideal: a university high in rank and high in touristic attractiveness of the country/destination has a secure position from competitors and high opportunities to exploit the advantages of the location
- Troubled: a university low in rank and located in a location of low value can exploit little in the direction proposed here and will have to find a different positioning. i.e. local markets, niche program, etc.
- Mature: a university positioned high in rank but low in location value can exploit the advantage of their ranking only. A possible solution would be to use the advantage of the campus as a pull factor.

1. The first question to answer is where these programs are located and how they are ranked?

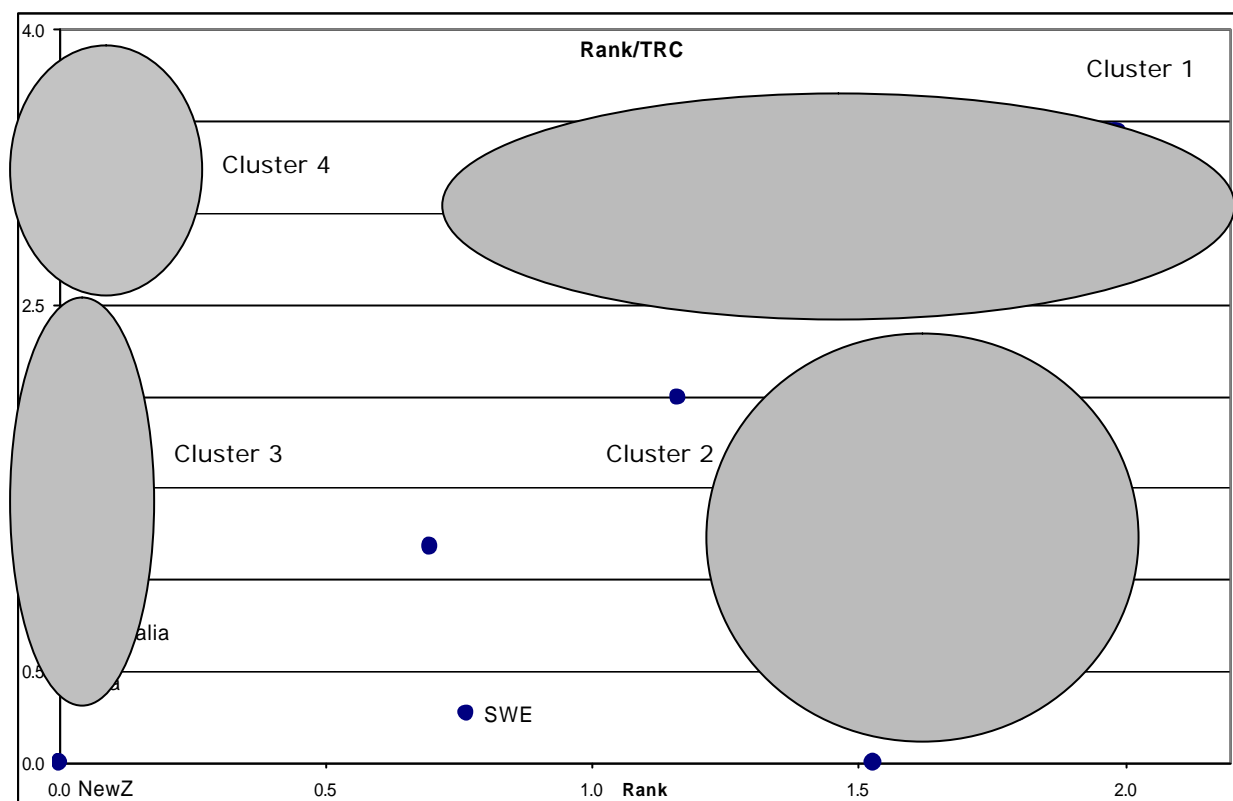


Figure 11 Rank and touristic ranking of the country⁷

There are four illustrative clusters⁸ identified in Table 11.

Implications:

		Low	Rank	High
TRC	High	Opportunity position Cluster 4 France, Spain, Mexico, Germany, Italy		Ideal position Cluster 1 USA, UK, Austria, Canada, China
	Low	Troubled position Cluster 3 New Zealand, Sweden, Australia ⁹ , India		Mature position Group 2 Ire, Bel, Australia, HK, Sweden

⁷ The touristic value of the country is given by the absolute number of international tourists arrivals. Source WTO

⁸ The clusters are hand drawn. The precise cluster analyses wherethese results follows below

⁹ Different programs in the same country may appear in the different clusters. Only the majority will be mentioned.

1. Cluster 1 Ideal position refers to those programs high in rank and high in touristic ranking of the country. We have programs in 4 specific countries that are both strong in rank as well as in TRC:

- China: Nankai University Beijing China
- UK: Sheffield Hallam University, Leisure and Food Management, University of Strathclyde , Lancaster University
- USA, University of New Orleans, Florida International University, Clemson University, University Of South Carolina
- Austria: MCI-Management Center Innsbruck Business School
- Canada: Université du Québec à Trois-Rivières, University of Guelph.

The strong positioning of these universities in terms of both rank and TRC gives them the possibility to insist on their both main attributes, rank and TRC but since their competitors in cluster 2 are lower in TRC they will have to insist on their competitive advantage, the high TRC.

2. Cluster 2, mature position, gathers programs in less touristic countries but high in rank:

- Ireland, University of Limerick
- Belgium, Ghent University
- Australia, University of Canberra, Griffith University, Sydney's UTS Graduate School of Business, University of Queensland, Monash University,
- HK, Polytechnic University
- Sweden, Umeå University

These programs have a strong position in rank but the TRC is lower compared to cluster 1, as a consequence their efforts in marketing should underline the quality, the rank, the reputation. Their competitors, the countries in cluster 1 will always have the advantage of attractiveness of the country but the programs in cluster 2 in order to stay competitive should identify more markets: local, geographic or cultural proximity, etc.

3. Cluster 3 brings together programs in a troubled position, low in rank and low in TRC

- New Zealand, Lincoln University
- Sweden, Dalarna University,
- Australia, Adelaide Hospitality and Tourism School
- India, SNDT Women's University

These programs have low rank and low TRC and as a consequence their positioning is difficult. Since they cannot compete on any of these attributes they will have to identify new opportunities for a better positioning: local markets, price competition, niche programs, etc.

4. The programs in cluster 4 have an opportunity position due to their high position in the TRC but also they face a very difficult market due to those positioned high in rank. However, since the majority of these programs are relatively new on the market they can exploit the great potential of the location and channel their marketing efforts towards this direction.

- France , AIM, Paris Graduate School of Management – PGSM,
- Spain, EUHT StPOL
- Germany ANGELL Business School Freiburg, Hochschule Bremen
- Italy, MIB School of Management, Tourism and Hospitality
- Mexico, Universidad Intercontinental

2. Are there programs in countries with a high quality of life and how are they ranked?

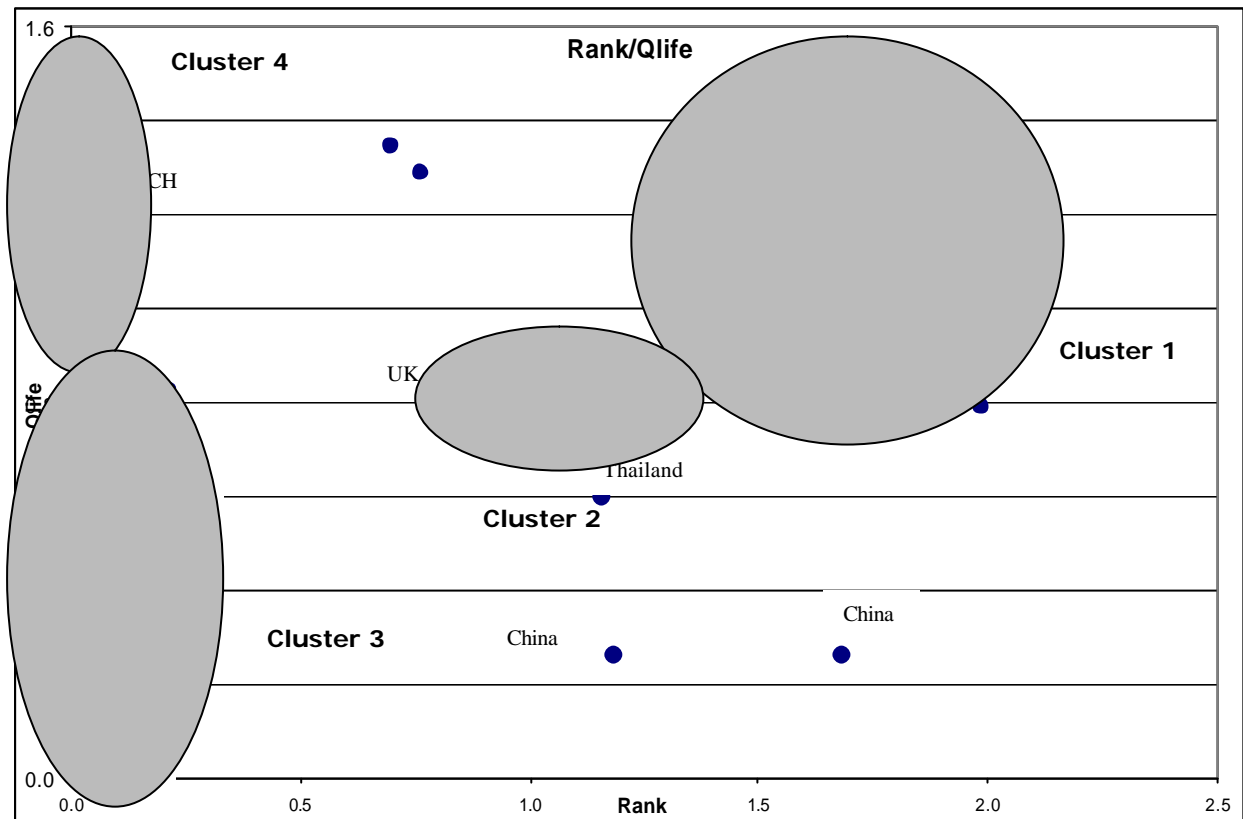


Figure 12 Rank and quality of life of the country

The quality of life is a very important factor in the decision making process primarily for the parents. Living in a country with high life standards is considered safe and the countries that enjoy this attribute should be aware of it and take advantage.

The table 12 illustrates that the majority of programs analyzed here are located in countries with a medium to high level of the quality of life and very few in very low quality of life countries that are specified in the table.

1. Cluster 1 Ideal position refers to those programs high in rank and high in quality of life:

- USA, Cornell, VT, University of New Orleans, Florida International University, Clemson University, University Of South Carolina
- Ireland, University of Limerick
- Austria: MCI-Management Center Innsbruck Business School
- Canada: Université du Québec à Trois-Rivières, University of Guelph.
- Sweden, Umeå University

- Netherlands, University of Leuven
- Belgium, Ghent University

The strong positioning of these universities in terms of both rank and quality of life gives them the possibility to insist on their both main attributes, and what is very important to notice is that using this attribute some of the universities that were lower in TRC are suddenly in competitive advantage, like Ireland, Sweden, Netherlands, Belgium. For them this attribute should be very present in their marketing efforts. The countries that were high in TRC also, will have a double advantage, of both safe and attractive destinations.

2. Cluster 2, mature position, gathers programs in average Qlife but high in rank. Most of these programs are in UK, Sheffield Hallam University, Leisure and Food Management, University of Strathclyde, Lancaster University.

The Qlife component could still be a very strong competitive advantage especially if correlated with a second attribute, rank or TRC.

3. Cluster 3 brings together programs in a troubled position, low in Qlife and low in TRC

- India, SNDT Women's University
- Mexico, Universidad Intercontinental
- Thailand, Assumption University
- Croatia, The Faculty of Tourism and Hospitality Management

These programs have low rank and low Qlife and as a consequence their positioning is difficult. Since they cannot compete on any of these attributes they will have to identify new opportunities for a better positioning: gaining local markets, price competition on international level, niche programs, etc.

However since these countries are important in tourist incoming, they should develop programs for students from their market especially, trained to become part of the local tourism sector. A solution for these programs could be micromarketing¹⁰.

¹⁰ A form of targeting in which companies tailor their marketing programs to the needs or wants of narrowly defined segments

4. The programs in cluster 4, low in rank/high in Qlife have an opportunity position due to their high position in the Qlife but also they face a very difficult market due to those positioned high in rank.

- France , AIM, Paris Graduate School of Management – PGSM,
- CH, HTW Chur, Les Roches School of Hotel Management
- Australia, Adelaide Hospitality and Tourism School
- Spain, EUHT StPOL
- UK, Queen Margaret University, Buckinghamshire Chilterns University, CECOS London College of IT and Management
- USA, Southern New Hampshire University,
- Korea, Dong-A University
- New Zealand, Lincoln University
- Germany ANGELL Business School Freiburg, Hochschule Bremen
- Italy, MIB School of Management, Tourism and Hospitality

		Rank	
		Low	High
Qlife	High	Opportunity position Cluster 4 US, UK, CH, Fr, It, Ger, Korea, NZ,	Ideal position Cluster 1 US, Ire, Aus,
	Low	Troubled position Cluster 3: India, Croatia, Mexico, Thailand	Mature position Cluster 2 UK

3. Are there programs in touristic destinations¹¹ and how are they ranked?

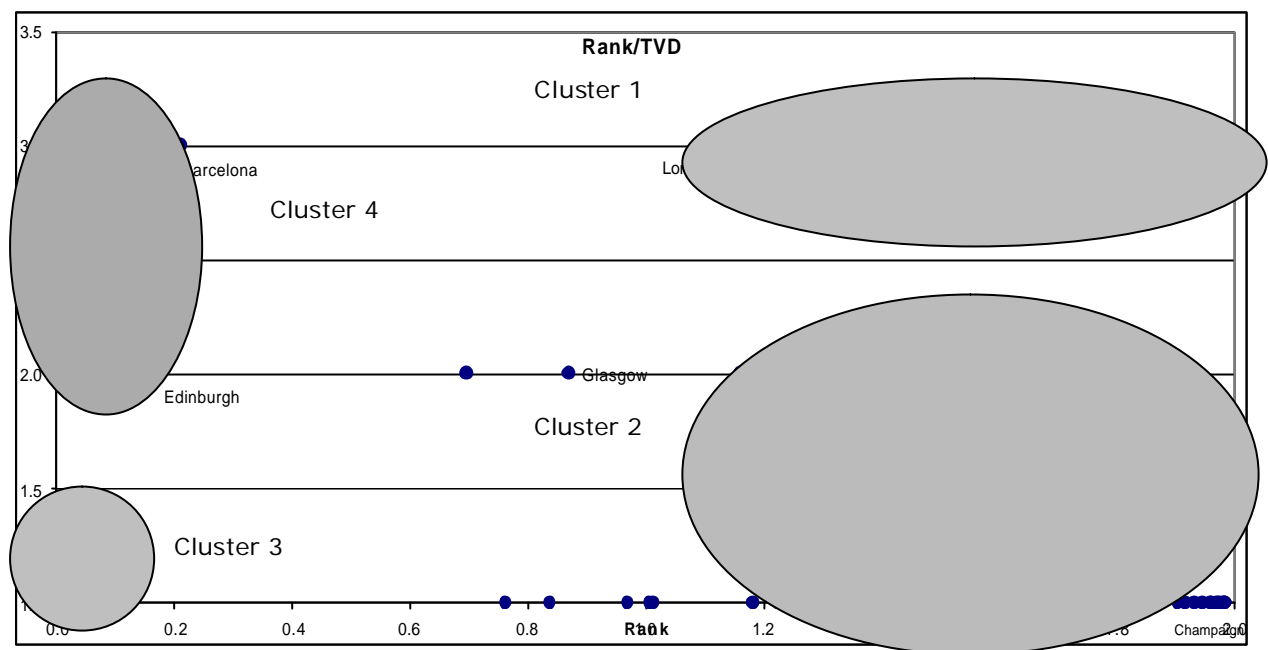


Figure 13 Rank and touristic value of the destination

The city, as the literature mentions, is a very important factor in the decision making process of students. Being located in a very attractive city should be considered a high advantage for the programs located in such destinations.

The table 13 illustrates the positioning of our programs.

The four clusters identify here present the picture of the scene in Rank and TVD matrix.

1. Cluster 1 Ideal position refers to those programs high in rank and high in TVD:

- USA: Miami, Boston, New York
- Ireland: University of Limerick
- Australia: Melbourne, Sydney, Canberra
- UK : London

Again a new door opens to those programs that are located in high touristic value destinations and less in TRC or Qlife. Their marketing efforts could be channeled in this direction now, promoting the city, the tourism impact, the life style, etc. The strong positioning of these universities in terms of both rank and TVD gives them the possibility to insist on their both main attributes.

¹¹ 16 programs in rank 0- TVD 1
 13 programs in rank 0- TVD 2
 9 programs in rank 0- TVD 3

2. Cluster 2, mature position, gathers programs in average TVD and high in rank. Most of these programs are in UK, USA, as well as in China, New Zealand, Canada. The TVD component could still be relative advantage especially if correlated with a second attribute, rank or Qlife. Their ideal markets are the high quality students looking for secondary or tertiary cities or students coming from the same origin cities, international markets, etc.

3. Cluster 3 brings together programs in a troubled position, low in TVD and low in TRC. We have here 38 programs in non touristic cities and also very low in rank. A high majority come from USA and UK. These programs should insist on Qlife and TRC more than on TVD. The table 18 will presents a more detailed picture of the programs than have 0 value in rank.

4. The programs in cluster 4, low in rank/high in TVD have an opportunity position due to their high position in the TVD but also they face a very difficult market due to those positioned high in rank.

- France , AIM, Paris Graduate School of Management – PGSM,
- Spain, EUHT StPOL

Since the rank of the programs is very low but the cities are very attractive, their marketing should be oriented towards this direction and try to improve in time the quality of their programs.

Implications:

		Rank level	
		Low	High
TVD level	High	Opportunity position Cluster 4 AIM, PSGM, EUTH StPOL	Ideal position Cluster 1 USA, Ireland, Australia, UK
	Low	Troubled position Cluster 3 USA, UK	Mature position Cluster 2 USA, UK, China, New Zealand, Canada

3. How are the programs marketed?

In the following table the programs are positioned according to their rank and their marketing efforts. In the highest position both in rank and in their marketing efforts we have universities like Cornell, University of Limerick and Otago University.

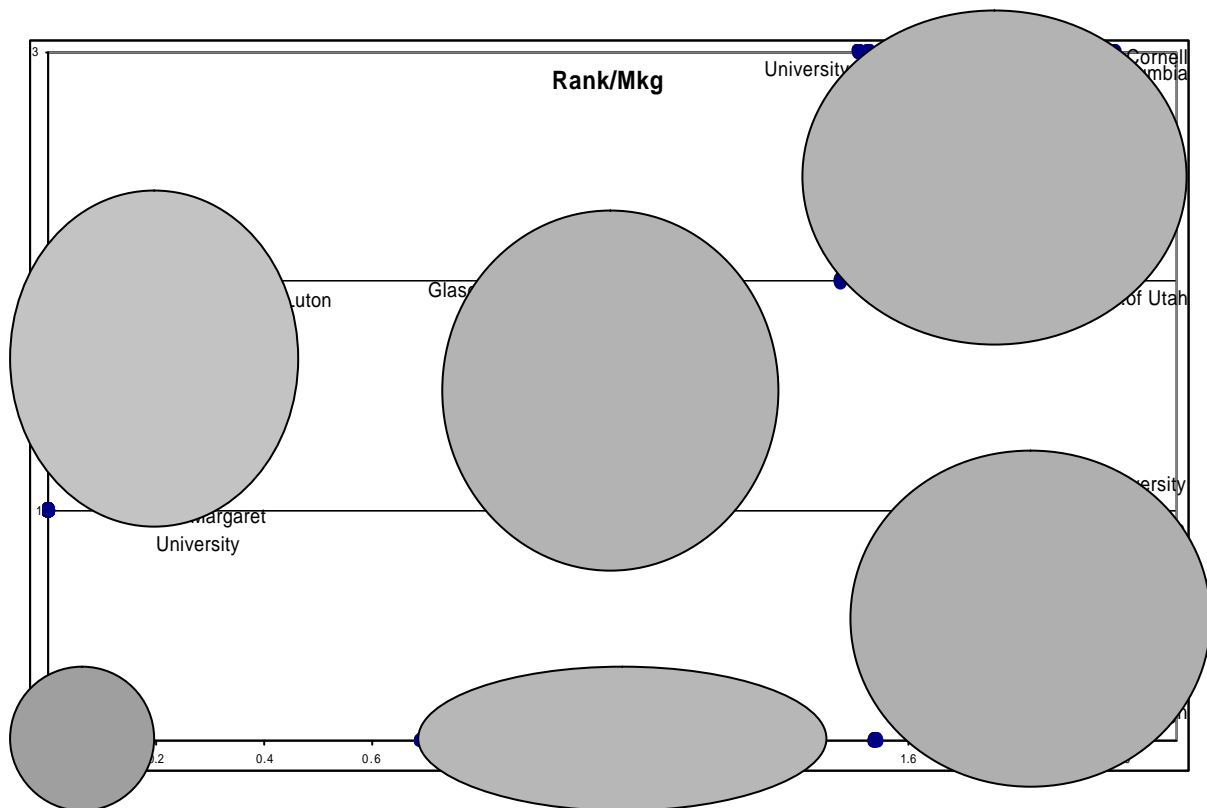


Figure 14 Rank and marketing efforts

What is very important for our research is to notice that many of the programs positioned very high in rank have also a strong marketing effort like VT, Limerick, Cornell, Utah, etc.

There is though an unused resource for those high in rank but low in Mkg like Purdue, Pennsylvania, Illinois, and they should be aware about the strong competition they are facing especially since there are so many universities high ranked that are using the marketing tools to attract more students.

What is very important to notice is there are 15 universities in point 0 that make no effort to market themselves even if many of them have a competitive advantage either in TVD (PGSM), either in Qlife (NL), either in TRC (It, UK, USA):

- "SNDT Women's University
- "Adelaide Hospitality and Tourism School

- "Keimyung University Business Administration"
- "Dong-A University"
- "Breda University of Applied Sciences Netherlands."
- "Hochschule Bremen"
- "Universidad Intercontinental"
- "Buckinghamshire Chilterns University College Leisure and Tourism"
- "CECOS LONDON COLLEGE OF IT and MANAGEMENT Higher Education"
- "FONDAZIONE ANTONIO GENOVESI SALERNO - SDOA"
- "MIB" School of Management Tourism and Hospitality Management
- "Black Hills State University"
- "Roosevelt University "
- "EUHT StPOL"
- "Paris Graduate School of Management - PGSM"

These programs should take a position and analyze what could become their competitive advantage in marketing their program and start using it.

As we have seen from the data presented there is a high potential of marketing their destinations and also there is no obvious correlation between the positioning of the destinations and the marketing.

The following tables will illustrate the relation between the rank, positioning of the country/city and the marketing effort of the programs. The results will give a general frame of what is the current situation in this area.

Who, where and how

In the previous tables we have observed which programs are in competitive destinations in terms of attractiveness of the country or the city and as well as quality of life and we have discussed potentials for marketing. We have then looked at their marketing efforts and found no correlation with the ranking of the program even if the literature recognize the importance of these attributes as pull factors in attracting students. Therefore now in the following tables I gather both attributes to identify unused potentials.

Rank, TRC and Mkg

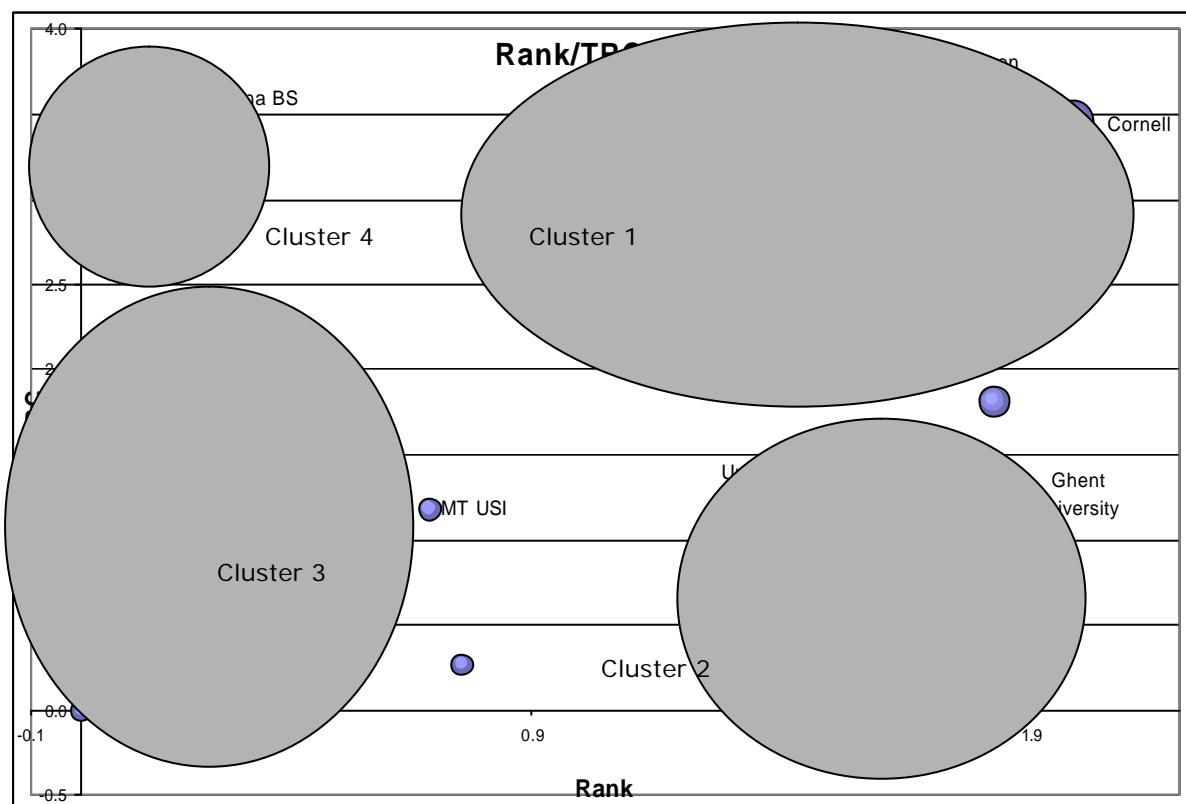


Figure 15 Rank, touristic ranking of the country and mkg efforts¹²

An analysis of the relation between the rank, TRC and marketing efforts indicates that there is still potential in the field of marketing for many of the programs positioned high in touristic value of the country but low in ranking. As a general trend the British Universities are the leading group in marketing their destination.

¹² The Mkg effort is illustrated by the size of the bubbles

1. Cluster 1. Ideal position refers to those programs high in rank and in TRC that we've seen previously in Table 12. Their marketing efforts seem to be high on average with a few exceptions. We could argue that these universities high in rank understood the importance of the location for the students. There is still unexploited potential for HK Polytechnic University, Quebec, New Orleans, etc. These programs should take advantage of the touristic value of their country and include it in their marketing efforts.

2. The programs in cluster 2, with a mature position, are average TRC and high in rank. With the exception of Limerick and Otago, the programs in this cluster exploit less the TRC. As will see on the Table 15, the TRC component could still be a very strong competitive advantage especially if correlated with a second attribute, rank or Qlife.

3. Cluster 3 brings together programs in a troubled position, low in TRC and low in rank. A very interesting phenomenon to observe is the growth in marketing towards the higher points in the vertical axis. We have programs in 0 rank, 0 TRC and 0 Mkg and then going up the axis we find programs in higher TRC and higher Mkg like HTW, CHN, Assumption, etc.

We could argue that these programs are becoming aware of the location value even if they are still not exploiting it to the maximum.

4. The programs in cluster 4, low in rank/high in TRC are a mix of unexploited resources, like MIB, Barcelona BS, Luton Univ, that use the location as a pull factor but in the same time we have programs like MIB, PSGM, EUHT.

Since the rank of the programs is very low but the countries are very attractive, their marketing should be oriented towards this direction and try to improve in time the quality of their programs.

Rank, TVD, Mkg

The analysis of the relation between the rank, TVD and marketing efforts¹³ indicates again the potential in the field of marketing for many of the programs positioned highly touristic destinations but low in ranking but also an unexploited field for high rank programs.

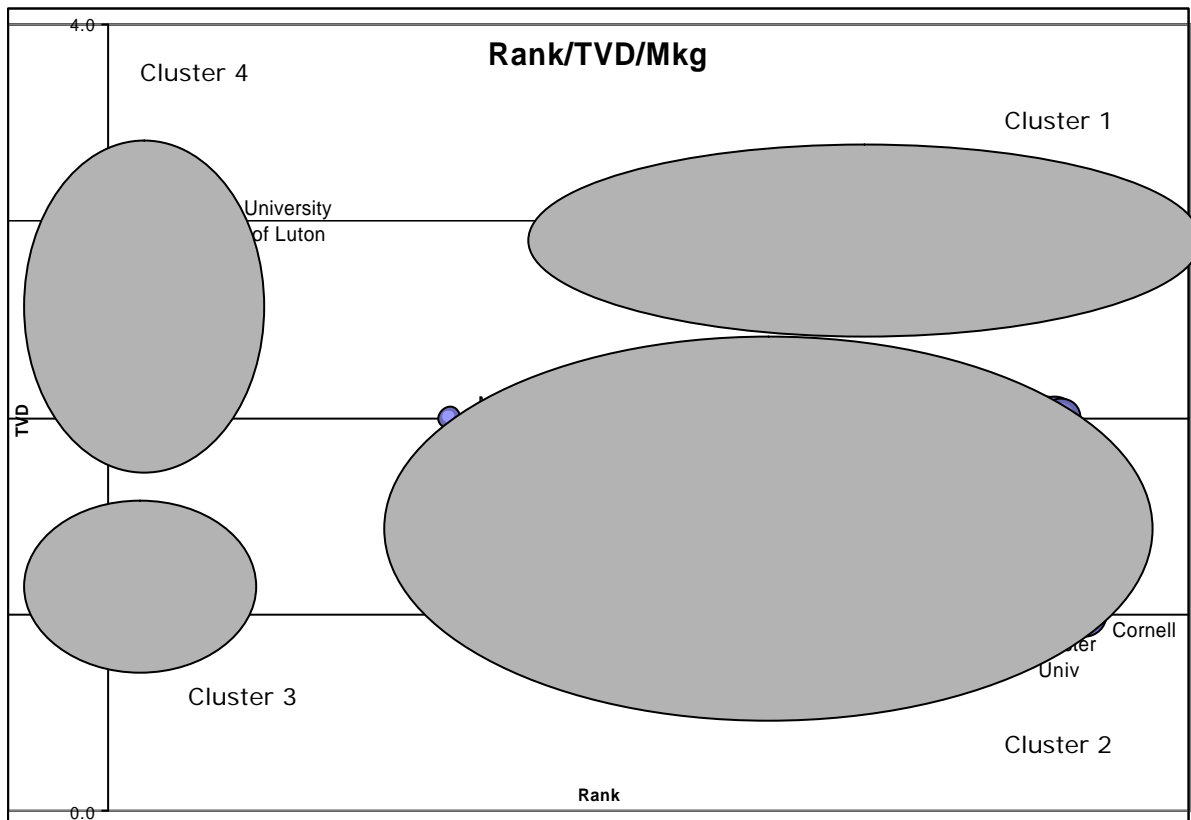


Figure 16 Rank, quality of life of the country and mkg efforts

1. Cluster 1 Ideal position refers to those programs high in rank and high in TVD:

- USA, Miami, Boston, New York
- Ireland, University of Limerick
- Australia: Melbourne, Sydney, Canberra
- UK, London,

Again a new door opens to those programs that are located in high touristic value destinations and less in TRC or Qlife. Their marketing efforts could be channeled in this direction now, promoting the city, the tourism impact, the life style, etc. The strong positioning of these universities in terms of both rank and

¹³ The values for MKG start from 1 to 4 in this case and not from 0 to 3 for better visualization.

TVD gives them the possibility to insist on both their main attributes and use this potential in the marketing (that for now they don't do).

2. Cluster 2, mature position, gathers programs in average TVD and high in rank. Most of these programs are in UK, USA, as well as in China, New Zealand, Canada. The TVD component could still be a very strong competitive advantage especially if correlated with a second attribute, rank or Qlife. Their ideal markets are the high quality students looking for secondary or tertiary cities or students coming from the same origin cities, international markets, etc.

3. Cluster 3 brings together programs in a troubled position, low in TVD and low in TRC. We have here 38 programs in non touristic cities and also very low in rank. A high majority come from USA and UK. These programs should insist on Qlife and TRC more than on TVD. The table 15 will present a better picture of the programs than have 0 value in rank.

4. The programs in cluster 4, low in rank/high in TVD have an opportunity position due to their high position in the TVD but also they face a very difficult market due to those positioned high in rank.

- France , AIM, Paris Graduate School of Management – PGSM,
- Spain, EUHT StPOL

Since the rank of the programs is very low but the cities are very attractive, their marketing should be oriented towards this direction and try to improve in time the quality of their programs.

Observations:

The cases of Florida University, Cornell, Sheffield Hallam University, and all the others high in rank, low in TVD but high in Mkg demonstrates that these programs are aware that the location is an important factor in the decision making process. Even if their destinations are not among the best they exploit in their presentations the attributes and the quality of the cities. As an observation, these universities have as competitive attributes their campuses that could be the main pull factor since according to literature is a major factor.

Qlife/Rank/Mkg

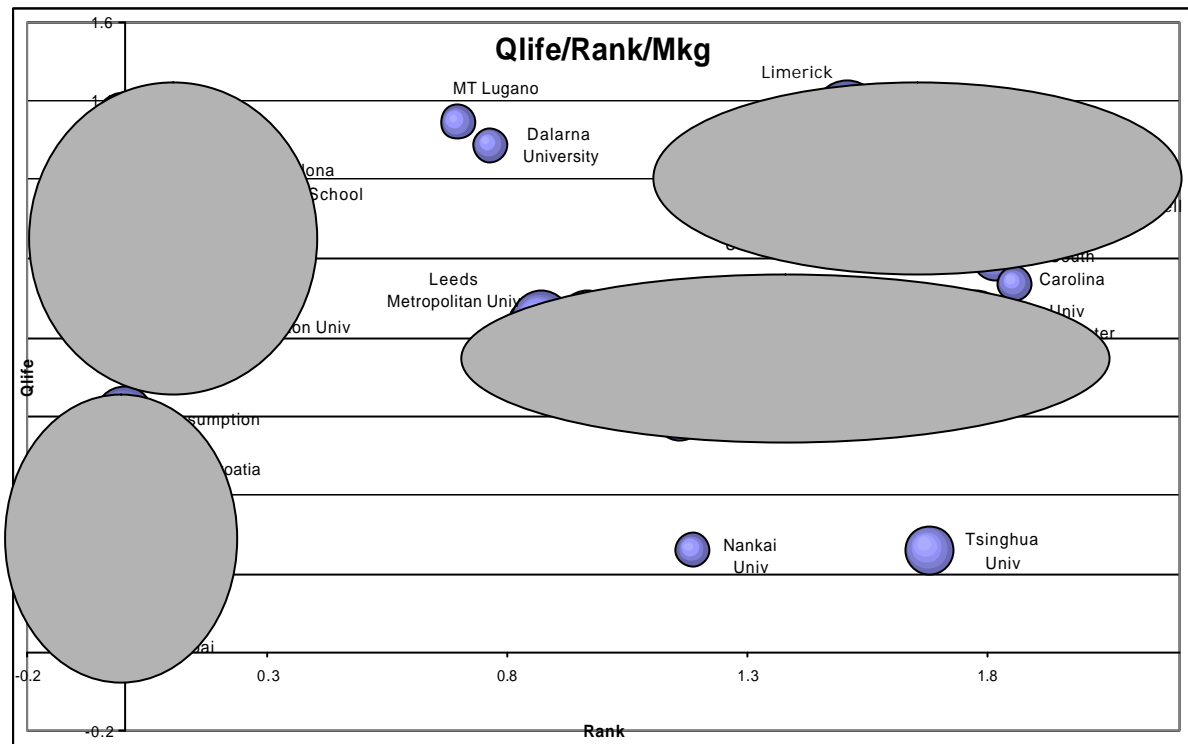


Figure 17 Rank, quality of life and marketing efforts

1. Cluster 1 refers to those programs high in rank and high in quality of life:

- USA, Cornell, VT, University of New Orleans, Florida International University, Clemson University, University Of South Carolina
- Ireland, University of Limerick, DIT
- Australia, University of Otago, University of Canberra
- Austria: MCI-Management Center Innsbruck Business School
- Canada: Université du Québec à Trois-Rivières, University of Guelph.
- Sweden, Umeå University
- Netherlands, University of Leuven
- Belgium, Ghent University

As a general trend, most of the programs are using the location attributes with a few exceptions, like DIT, Sydney UTS, University of Canberra, etc. The potential of these variable shouldn't be neglected because we notice that programs in countries like Ireland, Sweden, Netherlands, Belgium that are lower in TRC are now are better positioned due to the value of the quality of life. Using this attribute they can develop a competitive advantage. The countries that were

high in TRC also, like USA will have a double advantage, of both safe and attractive destinations.

2. Cluster 2, gathers programs in average Qlife but high in rank mostly from UK, and one from China. As previously mentioned, the programs in UK tend to use their location in their marketing and there are just two exceptions that could improve their presence: Napier University Business School in Edinburgh and Oxford Brookes University. The Qlife component could still be a very strong competitive advantage especially if correlated with a second attribute, rank or TRC.

3. Cluster 3 brings together programs low in Qlife, low in TRC, India, SNDT Women's University, Thailand, Assumption University, Croatia, The Faculty of Tourism and Hospitality Management. SNDT Mumbai is still on a very difficult position but the other two seem to make an effort in this direction. As mentioned before, these universities are not very competitive for the international market so they should use the micromarketing, or improve their local position, find niche programs, etc.

4. The programs in cluster 4, low in rank/high in Qlife have an opportunity position due to their high position in the Qlife but also they face a very difficult market due to those positioned high in rank. In general their effort in marketing is average, high with CHN, Les Roches and Luton University as positive examples but with very low value for Mkg for

- France , AIM, Paris Graduate School of Management – PGSM,
- CH, HTW Chur, Les Roches School of Hotel Management
- Australia, Adelaide Hospitality and Tourism School
- Spain, EUHT StPOL, Barcelona BS
- UK, Queen Margaret University, Buckinghamshire Chilterns University, CECOS London College of IT and Management
- Germany ANGELL Business School Freiburg, Hochschule Bremen
- Italy, MIB School of Management, Tourism and Hospitality and Fondazione Antonio Genovesi Salerno – SDOA

The programs mentioned above are in a critical position due to their low rank and also their effort in attracting students is not impressive at all. Since they

have the advantage of a high quality of life standard they should acknowledge it and promote it.

A further interesting question is to see how the programs ranked "0" are positioned in term of attractiveness (TRC & Qlife) and marketing tools. This graphic will offer a picture on what they are/can be competitive.

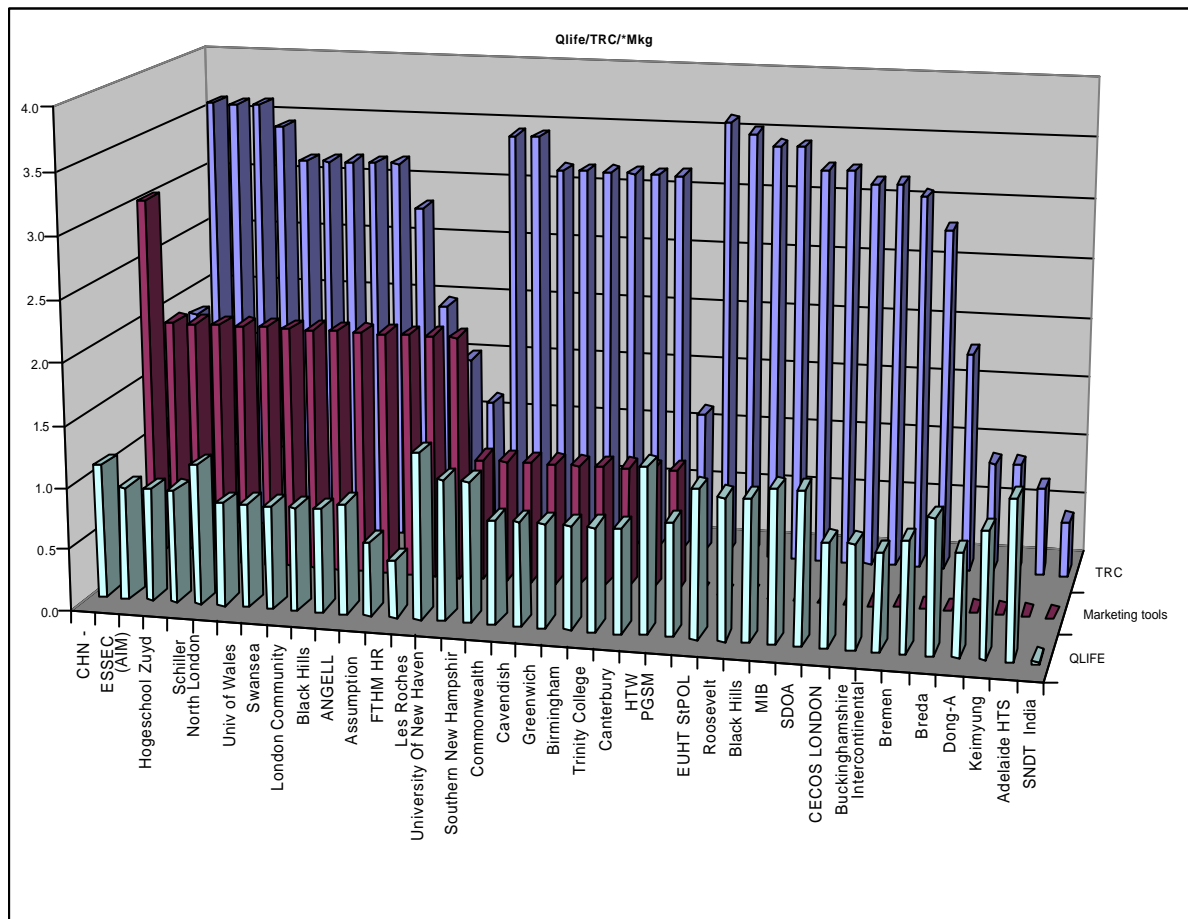


Figure 18. Qlife, Mkg and TRC for programs in rank 0

As we can see there are many unexploited resources for those programs high in TRC and Qlife but very low on Mkg. These programs could start considering the possibility of using the location as a pull factor since the quality of the program is not their competitive advantage.

As seen from the figure 18 the cases in 0 Mkg and high in TRC: EUHT StPOL, Lincoln University, Hogeschool Zuyd, Roosevelt University, University Of New Haven, MIB School of Management Tourism and Hospitality, University of North London, University of Wales Institute, Universidad Intercontinental Mexico,

ANGELL Business School Freiburg, Breda University, Black Hills University, CECOS London, Buckinghamshire, Intercontinental.

I cannot state that only the quality of life value or the touristic values of the country/city are sufficient for a good positioning on the higher education market, already extremely competitive. However, highlighting these advantages could become a good starting point in attracting students and in time and with efforts they can also try improving the quality of their programs.

The big picture

An overview of the entire variables of interest (RANK, QLIFE, TRC, TRD, MKG) was created in SPSS¹⁴ using a hierarchical cluster analysis (the Ward Method¹⁵). This method uses an analysis of variance approach to evaluate the distances between clusters.

The dendrogram¹⁶ identifies four clusters:

Cluster	RANK	QLIFE	TRC	TRD	MKG
1	1.07	1.14	2.85	2.1	0.62
2	0.04	0.94	0.63	2.06	1.14
3	1.57	0.96	0.52	1.97	0.35
4	1.69	1.02	0.42	2.6	2.05

The Cluster 1 as seen in table 19 is composed by programs high in TRC, TRD and Qlife, average in Rank but low in Mkg. There is a strong opportunity for these programs to exploit more the attributes of location in their marketing efforts. The model of the 3C's can become a competitive tool for these programs especially if they also have good campuses.

In the Cluster 2 there are programs high in Qlife and TRD but low in TRC and 0 in Rank. Due to the high touristic value of their cities they can position

¹⁴ Statistical Package for the Social Sciences: A software system for data management and analysis, used for many univariate and multivariate statistical analyses.

¹⁵ Ward's method for cluster analysis is a hierarchical method designed to optimize the minimum variance within clusters and takes as input, a subject by variable matrix of maximum size (300 x 300).

¹⁶ A graphical procedure for representing the output of a hierarchical clustering method defined as a binary tree with a distinguished root, that has all the data items at its leaves

themselves in a market for programs with a special interest for city tourism, business tourism, conventions, events etc. The low rank is a handicap but since the market for programs in tourism is still young can be overcome. In time though, they will have to improve the quality of the masters.

The cluster 3 has high values in Rank, TRD and Qlife but low in TRC and in marketing. These programs are those high in rank that use mostly the quality of the program as a pull factor. There is however, due to the high quality of life and touristic value of the destination a high potential in using the 3C model in marketing their universities.

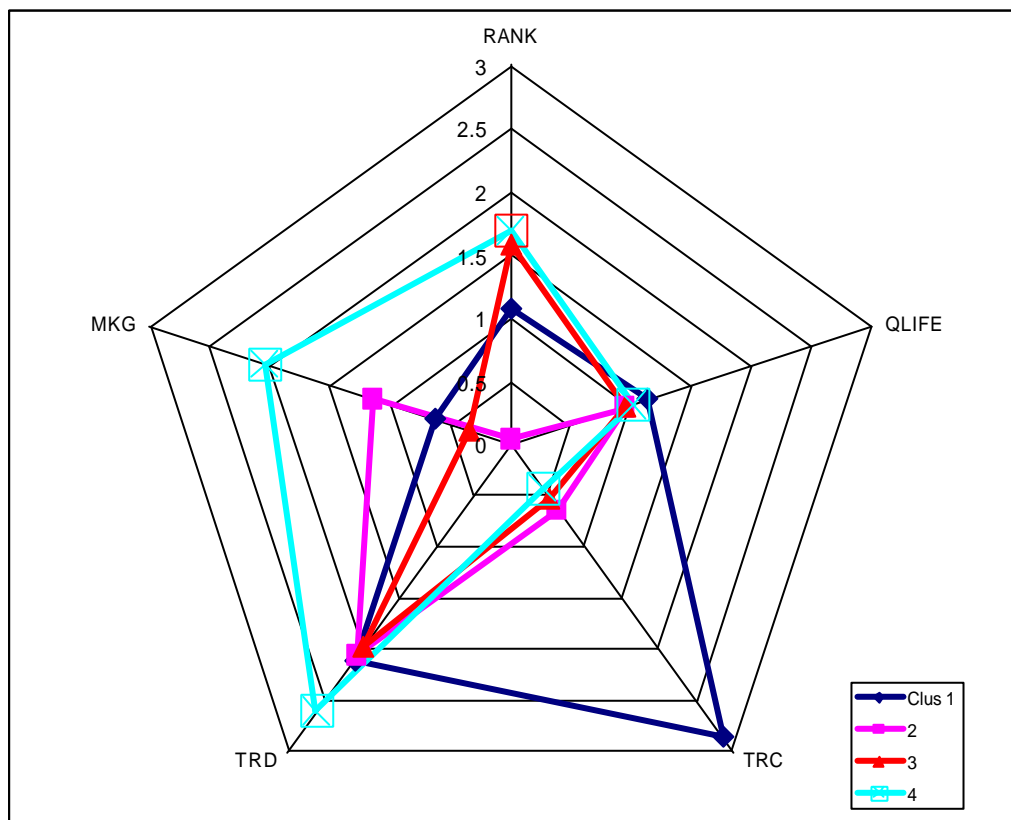


Figure 19 The cluster analysis

The programs in Cluster 4 are high in rank, Qlife, TRD and Mkg but low in TRC. They seem to be those located in popular tourist cities, with a high quality of the program and also aware of the importance of the location attribute. These programs are highly competitive. The programs in Cluster 3 that have similar attributes but very low Mkg could become their direct competitors if will apply the 3C model.

For a final look on how many programs use the location as a pull factor (regardless the attributes of the destination) we have the following results:

- ♦ 45% - 0 mkg
- ♦ 22.5% - 1 mkg
- ♦ 26% - 2 mkg
- ♦ 7% - 3 mkg

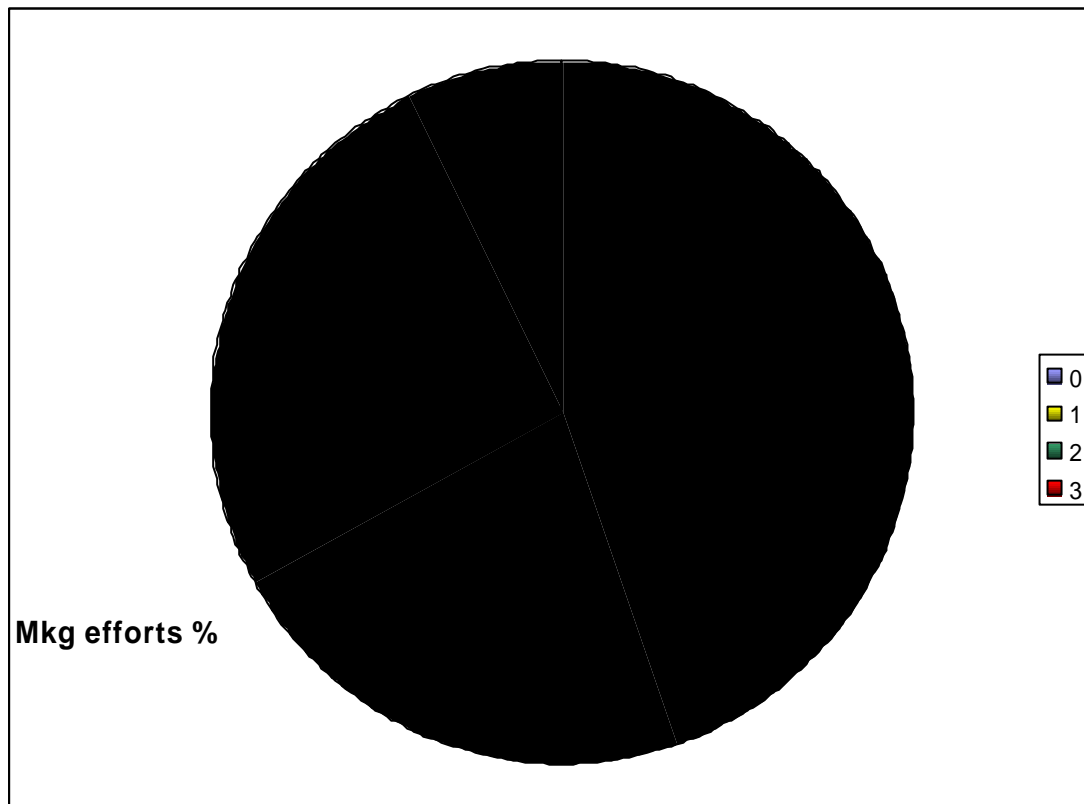


Figure 20 General view on Mkg efforts

The general view of the marketing efforts of all the programs analysed in this project confirms the hypothesis announced early. There is still a high opportunity in this direction since more than 67% of the universities presented here are not exploiting at all or very little their potential in using the location as a pull factor.

In the following chapter I will propose a few ideas to improve the marketing using the attractiveness of location and a suggestion for future research using the 3C's model.

Chapter 5 Opportunities for improved marketing and directions for future research

A lesson from hospitality

As previously mentioned, in the decision making process the students are not only interested in the academic attributes of their future educational destination but also in what comes with the “package”. Variables other than academic quality can be significant for marketing educational programs.

The higher education depends of many forces as seen in figure 23 that determine its environment and they all should be considered in their strategic planning. The higher education environment is highly competitive, and subjective to the impact of economic and demographic forces. The international higher education context is strongly influenced by political forces, for example the changes in East Europe that opened a new market for international education, by technological forces, the access to online education, to resources offered by the internet, to communication without physical barriers. The culture has also a strong impact on the higher education context motivating students to study abroad, to be exposed to different cultures, to be an active part of the globalization phenomenon.

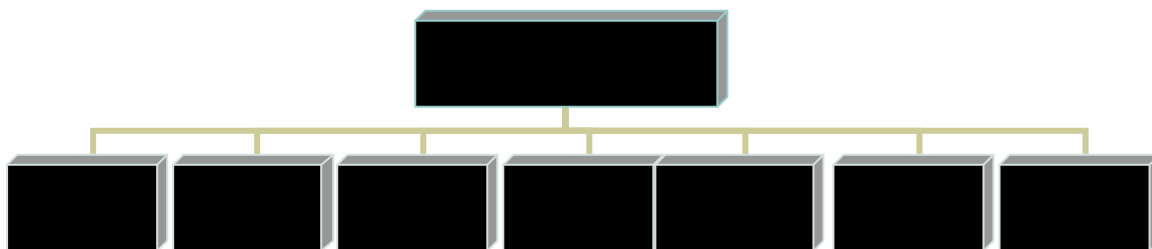


Figure 21 Major forces in the higher education environment. Adapted from P.Kotler, Marketing for hospitality and tourism, Prentice Hall 2003

The international education and the tourism/hospitality industry, have in general in common the service aspect. They are both intangible before purchase, depending in this case very much of the characteristics of the augmented product, they vary according to the time, place and provider and in the same

time they cannot be separated from the provider. Also, both have the characteristic of being perishable, meaning they cannot be stored for later use or sale.

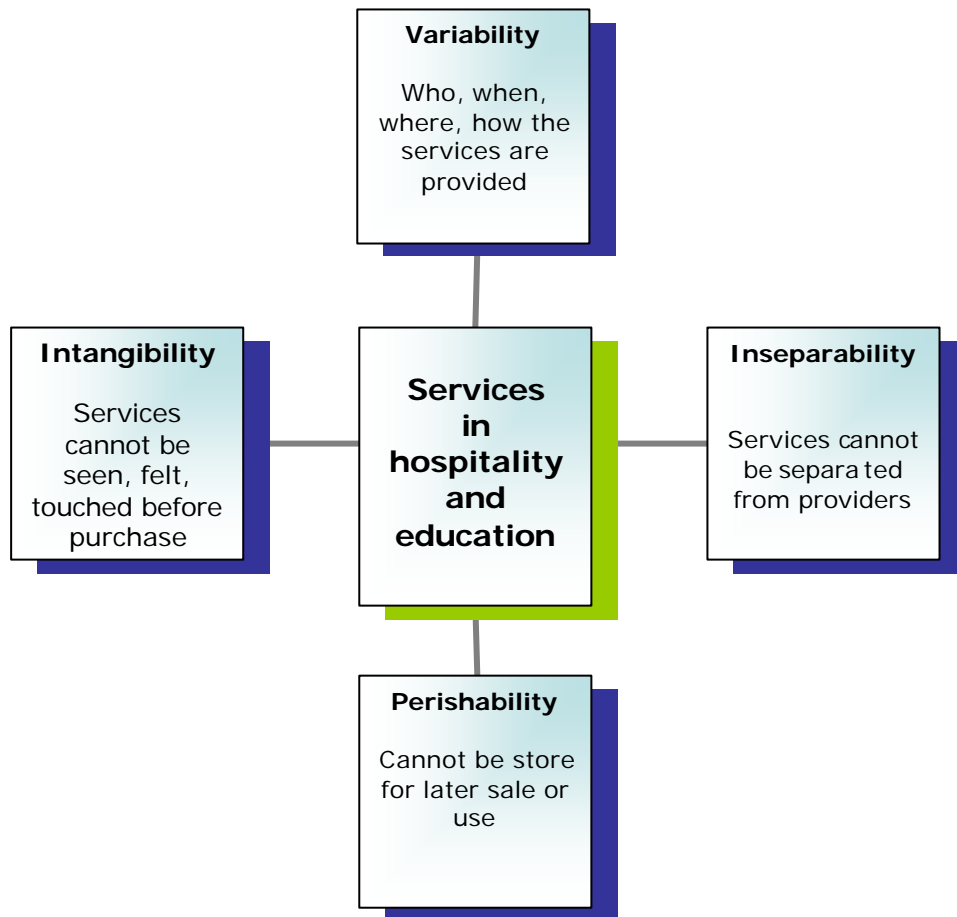


Figure 22 Four hospitality service characteristics. P.Kotler, Marketing for hospitality and tourism, Prentice Hall 2003

A very imported attribute that these have in common from the rest of the other services is the fact that once the service is acquired the clients have to stay there and consume the service (either tourism destination either education destination) starting a host/guest relationship. Getting information on the educational destination, on its location, prestige, accessibility, atmosphere, travelling to get there, discovering new cultures, people, life styles, is a behaviour very similar to those of tourists.

If these services are so similar we could go even farther by importing the hospitality approach of treating customers in education, and start attracting and treating the students with all-inclusive "educational packages" meaning underlining the core product, offering a strong actual product, and "augmenting

the augmented" product by adding to the reputation and brand image the 3C's: country, city, campus attributes. A touristic product is also complex and is given by the host country's attributes, the city's atmosphere, the accommodations and the restaurants. The more integrated the offer will be the higher will be the willingness to pay of tourists to get to the specific destination, to consume the services there and eventually return. The students, as the literature confirms, are also looking for a product that would cover most of their needs: a good career prospect, a higher status, a recognized school with a strong brand, an international and intercultural context, a great city to live in and a lively campus atmosphere. It is most difficult to provide the whole package but the closer universities covers these needs the more successful the will become.

The marketing techniques used by hospitality and tourism could inspire the universities in their promotion, recruitments, selling activities. This study's results can have implications for marketing education in terms of attracting students exploiting the enlarged frame of the augmented product

The 3C's model of marketing a university based on the location attractiveness that I propose as a direction for future research could become a creative tool and could help shaping and personalising the image of a university.

Since the decision of acquiring a product or a service can be positively influenced by the image of the country especially when the brand is unfamiliar, and some studies argue that the country's image is the first source that consumer consider in product evaluation, the universities could exploit more this attributes especially in the case of countries with strong touristic reputation. For example, countries like France, Italy, Spain, Switzerland that have a very high touristic value but programs very low rank could develop a strategic positioning based on the image of the country. For the international student market in particular, such a location is credible in terms of programs in tourism due to the reputation, the stereotype that the students attach to its services, especially because of the strong intangible attribute of the services. Also, countries with less touristic value but very high in life quality, like Sweden, Ireland, Australia, New Zealand, etc. that have a weaker positioning in terms of quality of the program could insist on this value to gain a stronger positioning on the international student market.

The value of the city, seen as the social atmosphere, the lifestyle, the opportunities, the international context, the accessibility, is a strong pull factor. As the place where the education will be produced and consumed, the city is also the place where they will spend a couple of very important years in their young adult life, where a very important network for their future career can develop. The students' perception of the city before acquiring the education product is essential. Cities with strong tourist attraction would benefit from this perception if properly exploited by the universities. As previously mentioned, a touristic city is a permanent case study for students in tourism and hospitality and not only as observers of the phenomenon but also as active players in the industry, through research, stage and internships, events, media, etc. The high value of the city as a pull factor can become a topic of future research for high education.

The last C from the 3C's model is the campus, that in this empirical research was less analysed but according to the literature, the campus is a major influence factor on student decision. As an observation from the empirical research, I noticed that the universities that have a good campus use it the most in their presentation, especially those in USA and Australia.

The force of the combined 3C's gives an experience value to the acquisition process in choosing education for future students and helps the unfamiliar brand to attract through the familiar ones (in this case the country and the city image).

However, the results presented in Chapter IV mirror the state of most institutions and the gap between the expected product and the delivered one.

The programs in tourism should be pioneers in marketing their educational destination due to the profile of their future students. And if these students, according to the literature, consider the destination as an important factor why the universities in their marketing campaigns do not? I won't argue here that only the attributes of the location are sufficient to develop a strong program and maybe who is strong already doesn't need to emphasize the attributes of the destination because they compete on high quality but if the 3C's could become a competitive advantage in a market that is already extremely competitive, they shouldn't be a neglected tool.

Chapter 6 Conclusion

Summary of the study

The main purpose of this study is to examine how and why, in international high education with an emphasis on master programs in tourism, the location of the program can be an important factor in the students' choice of education.

The theoretical base of this study comes from a literature review in the field of marketing international education, several studies and surveys, with a special interest for the results identified by Cubillo Jose Maria, Joaquin Sanchez Complutense and Julio Cervino Carlos III in their study "International students' decision-making process" published in the International Journal of Educational Management in 2001. This study identifies four main factors responsible for the students' decision in choosing a university: personal reasons (personal improvement and advice), country image effect (country image, city image) institution image and program evaluation.

The proposal for this research was to analyse in particular the impact of the image of the country and the city on the marketing efforts of the universities. Since most of the higher education institutions are entering the global market and education has become available around the world, the need for competence in attracting international students has increased as well as for tools in attracting them.

With a demand of almost three million international students that become mobile and interesting in travelling, leaving home and experiences new cultures, the institutions offering higher education at international level should be aware that they could have more advantages in positioning on the map of international higher education not only through the quality of the programs, which is a sine qua non attribute but also through other ones that make the location where the education will be consume more attractive: the country, the city and the campus. The first two aspects were analysed in this study leaving room for future research on the importance of the last one.

The concept of marketing higher education has been neglected and refused by the institutions for a long time, because the education, seen either as a service either as a product by the literature, had nothing to do with the concept of selling and promoting goods that are obviously necessary. Due to the high increased competition, the responsible authorities in higher education became more aware of the fact that they need to stand out in the crowd. The main efforts of the marketers in these institutions were channelled through the quality of the programs, and a very powerful tool developed in time, the rankings. Being part of an Ivy League school became the race of the last decades. However, getting a strong position, becoming a leader in a market that has more than 7000 universities is not easy, and new positioning methods have to be discovered.

The third part of this study presents the tools used in the empirical analysis of the data gathered from 113 master programs in tourism. The language of the programs was considered relevant because of the international character of tourism. Out of the 113 programs, only 4 are not taught in English, even if the rest of them are not located in English speaking countries.

The ranking of the universities was considered the variable for quality of the programs and the source of the ranking was the ranking proposed by the Cybermatics Research Group, "The World Universities ranking on the web". Using this tool more universities had the possibility to be ranked, since most of the traditional rankings are taken into consideration the main 500.

The touristic value of the country where the program is placed was another variable considered for this study. The reference used for identifying the positioning of these countries was the country ranking of World Tourism Organization, Tourism Market Trends, 2005 Edition. As mentioned, the programs analysed here are already located in the top 30 of most touristic countries in the world. This situation place then in low touristic positions countries like New Zealand, Australia, Sweden, India, Switzerland that per se are countries with important touristic incoming and/or outgoing phenomenon.

Another variable analysed was the value of the destination. The destinations where the programs are located were given values based on personal evaluation of the presence and the importance of tourism for the specific place. Cities like New York, London, Paris, Barcelona, etc. received 3 points, Lugano, Innsbruck, Glasgow, etc. two points, and all the others 1 point.

The quality of life of the countries was considered as a pull factor and the method used was the index created by the Economist Intelligence Unit in 2005.

The question that this thesis asks is how these programs, that with the tools mentioned above receive a specific value, are promoted, and especially if the two variables most relevant for this analysis are considered in their marketing efforts.

The results of this analysis are presented in the Chapter 4 and they confirm the hypothesis presented at the beginning of this project. In a market with intense competition, the competitive advantages of one location over another should be of main interest for the stakeholders. However, the results prove that less than 40% really consider the two variables, country and city as attractive factors for marketing their institutions and that there is still a strong potential for many of the programs with high values in location attractiveness or quality of life.

Implications

This study's results can have implications for marketing education in terms of attracting students exploiting the attributes of the location. I specifically insist that the programs in tourism and hospitality should be the pioneers of this approach since the profile of their students is the one that fits the most this approach. The marketing techniques used by hospitality and tourism industry could inspire the universities in their marketing campaigns. One of the main characteristics of the international higher education is the fact that the students once decided on what university to choose they leave home and live away for few years. The factors that influence the tourists in choosing a place over another according to their needs, wants and desires are somehow similar to those of students looking for a place to study. They will become guests for this

period and act accordingly for the time spent abroad even if the period of time is much longer than in the case of tourists.

Outlook for future studies

One idea that rises from this thesis as a direction for future research is the model of the 3C's, marketing high education based on the attributes of the 3 components: country, city and campus. If many universities today use the campus as a pull factor demonstrates that they try to offer their future students a new "home away from home". The combined approach could become a stronger tool in attracting them and convince them to choose one program over another. The 3C's combined can bring the value of what tourism calls an "experience" and help the students unfamiliar with the brand of the program to act though the familiar one(the image of the country, the city and the campus).

The emerging of programs in tourism and hospitality in the last ten years is also an important component to analyse and future research could try to identify how this trend started, where are the centres of concentrations of these programs and if there is a correlation between the level of development in tourism of a country and the number of programs in tourism. A new hypothesis emerges, that the HE in tourism, compared to professional formation in hospitality has always been located in the origin countries of tourists and that therefore future markets for HE in tourism will be located in emerging economic centres.

The field of marketing higher education in tourism is still very resourceful and with more data and effort new concepts can arise.

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