

France and Germany

Germany and France rank among the top potential markets for educational services. Although the two markets at first glance are very different, their characteristics as sources of international students for the United States are strikingly similar and illustrate the challenges of increasing student enrollments from highly developed European economies. Unlike a number of the leading emerging markets, the decisive factors in attracting students from these markets are largely separate from straightforward considerations such as economic performance or interest in studying in the U.S. or other leading western economies.



The factors in our methodology characterize these markets and others with similar characteristics as attractive but limited in terms of opportunities for increasing student enrollments. There are already a large number of students from France and Germany at universities in the United States, and both countries have a tradition of sending students abroad in significant numbers.

Against that record, however, the rate of increase in enrollments in the United States is substantially slower than in a number of key markets in, for example, Asia or the Middle East. Finally, in light of the many educational opportunities within Europe and the large number of students who go abroad under various programs in Europe as well as the United States, the gap in potential students in these markets is perhaps smaller than in other leading educational markets.

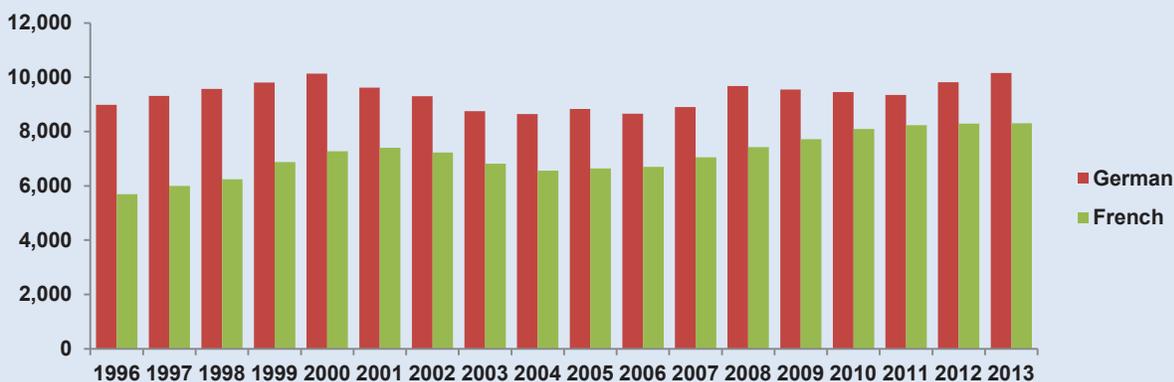
Germany, with over 10,000 students studying in the

United States, and France, with over 8,000,²⁴ are both significant markets for U.S. colleges and universities looking to diversify their campuses or increase the number of foreign students studying at their institutions. They rank in the top 15, according to the Institute of International Education statistics. However, growth during the past 15 years (33 percent for France and 6 percent for Germany) continues to be less robust than growth from other markets. The U.S. Department of Commerce estimates the two markets combined added \$623 million²⁵ to the U.S. economy in 2013 as a result of tuition, fees, and living expenses.

The majority of French students studying abroad study in Belgium (22 percent) followed by the United Kingdom (20 percent), Canada (12 percent), Switzerland and the United States (both 9 percent), and Germany (8 percent).

German students study primarily in Austria (22

Figure 1: French and German Students in the United States (1998-2014)



Source: IIE/Open Doors

Figure 2: Level of Study (French and German Students in the United States)

	France	Germany
Undergraduate	35 %	30 %
Graduate	28 %	28 %
Other	26 %	37 %
Optical Practical Training	11 %	6 %

percent), the Netherlands (18 percent), the United Kingdom (15 percent), Switzerland (11 percent) and the United States (6 percent).

A central challenge in recruiting from these two markets is that many students, when they go abroad seek schools where there are native language affiliations (for example, French speakers in Belgium or French-speaking Canada, German students in Switzerland or Austria). English-language instruction is attractive, but in these markets English is already well established in virtually all areas of international life, and opportunities abound within the EU to study in English. Perhaps even more important, tuition rates at even the top European universities, including those in the United Kingdom, are generally substantially lower than in the United States.

Level and Fields of Study for French and German Students

When looking at the level of French or German students studying in the United States, we see more similarities, with over 30 percent studying as undergraduates and slightly under 30 percent being graduate students.

Operators of intensive English Language programs should take note of the fact that in 2013, over 1,600

German students studying in the United States were studying English. During the same period, almost 1,000 French students were enrolled in Intensive English Language classes.

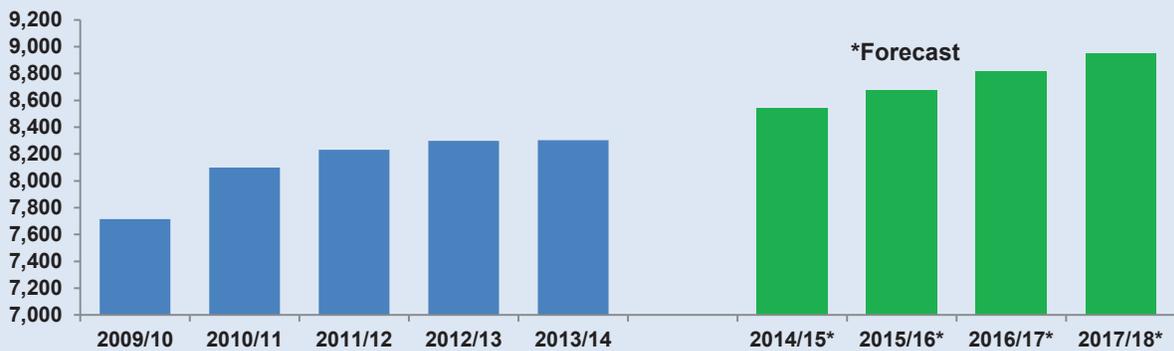
France and Germany also show many similarities with 26 percent and 20 percent of students in the United States studying STEM subjects, 26 percent and 29 percent studying Business/Management, and 20 percent and 16 percent studying “Other.”

The best prospects for increasing enrollments by students from these two countries would appear to stem from focusing on recruiting for the STEM subjects and business management, in combination with the offer of the total immersion language environment and exposure, especially in graduate business schools, to entrepreneurial training and opportunities.

Future Growth/Opportunities

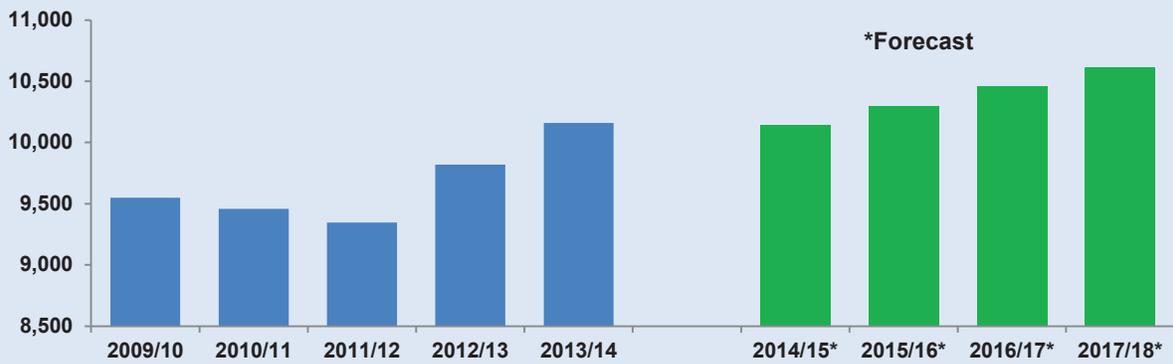
Both France and Germany are solid markets for schools interested in diversifying their international student body. Most universities in both countries have shifted to a three-tier bachelor/master/doctorate system of education – making the comparison of educational credentials easier. In addition, both countries benefit from high per-capita income, substantial business ties with the United States, and strong secondary school

Figure 3: French Students in the United States (2009-2018)



Source: IIE/Open Doors

Figure 4: German Students in the United States (2009-2018)



Source: IIE/Open Doors

education ties to the United States.

In France, the high unemployment rate has led some students to pursue the perceived employment advantage offered by a college degree. Although most universities in France offer free or nearly free tuition, these are often overcrowded, while top-tier French Grandes Ecoles confer great career advantages but are extremely competitive.

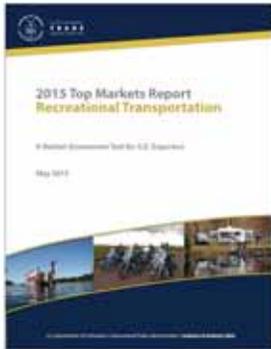
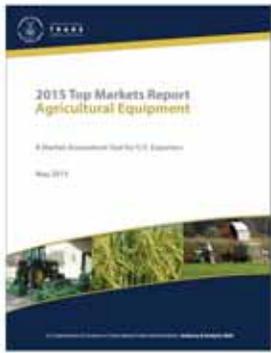
Germany boasts the largest economy in Europe, and roughly 90 percent of students study English during their schooling at some point.

It might be an attractive recruiting tool to focus on the high quality of U.S. university training and its advantages, especially in business and technology, over less-structured or, in some cases, limited European programs. The widespread use of English makes recruitment easier, but in the end the largest challenges in recruiting from Germany may be cost, the availability of alternatives in the United Kingdom or other English-speaking countries, and perhaps

differences in how German society and American society approach the complex relationship between careers and university training. Another factor is the smaller numbers of German students who follow a pure university path.

Marketing U.S. Colleges and Universities to French and German Students

In addition to traditional student fairs, U.S. colleges and universities should consider reaching French and German students through on-line advertising, blogging, Facebook, and Twitter. Many schools are successful in Germany through partnership agreements with German schools which cover student exchange and the recognition of course credits between partner institutions. In France, most U.S. colleges and universities focus their recruitment efforts in Paris. Recruitment efforts that include other cities in France in addition to Paris, particularly those with strong universities or a sister city connection generally yield effective results.



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