

# Japan: Debunking the “inward-looking” myth

November 2014





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# Executive summary

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The decline in interest among Japanese students in overseas study has to a degree been attributed to a so-called “inward-looking” attitude in which young people are unwilling to venture past the comfort of their home country. However, with a rapidly ageing population and an uncertain economic outlook, Japan has made it a priority to create a globally-competitive young workforce and aims to double the number of domestic students studying overseas by 2020.

Against that backdrop, the British Council surveyed Japanese students in September 2014 to understand their sentiment towards overseas study and to uncover their perceived obstacles and advantages. We received 2,004 responses to our self-completion online survey from students and recent graduates across major regions of Japan. Three distinct types of students emerged – those who have studied overseas, those who aspire to do so, and those who want to pursue their studies exclusively in Japan.

## Findings

- Japanese student sentiment towards overseas study is similar to, if not more favourable than, the sentiment of their US and UK counterparts. The number of Japanese students demonstrating interest in overseas study just about equalled those wanting to study only in Japan
- Students who have studied overseas previously were the most optimistic about their own future while those who were most pessimistic were students not interested in studying abroad
- Students most optimistic about Japan’s future were those who have already studied overseas while those most pessimistic were students who aspire to study overseas
- Students who have studied overseas or aspire to do so viewed the biggest advantages gained through that experience to be: acquiring foreign language skills, obtaining a global perspective, and having the opportunity to experience another culture
- Most students who have studied abroad or aspire to do so want international careers. Conversely, the majority of students not interested in study abroad want careers exclusively in Japan
- Sixty-nine per cent of Japanese students do not think or do not know if employers value university graduates with overseas study experience
- The majority of students were not aware of Japanese government policies aimed at encouraging study abroad
- Inadequate language skills, cost and concern over safety were the top three obstacles cited to pursuing overseas study
- Financial support, foreign language courses and evidence of increased employability were cited as incentives to encourage the pursuit of study abroad
- The main motivating factor to pursue overseas study was to improve language skills
- For students who have already studied in the UK, the main reason was also because they wanted to experience living in that culture, but the second reason was because it was safe

# Introduction

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The sharp decline in Japanese students studying overseas has to a degree been attributed by observers to the so-called “inward-looking” attitude of today’s youth, with young Japanese depicted as unwilling to venture far from the comforts of their home country. Indeed, a precipitous slide from the 83,000 Japanese students who studied abroad in 2004 – the country’s high – to 57,501 in 2011, according to Japan’s Ministry of Education, Culture, Sports, Science & Technology (MEXT) via the OECD, is a downward trend that has evolved into a national concern. An ageing demographic and economic uncertainty in Japan have made it a priority to create a globally-competitive workforce, armed with language and analytical skills attained through a renewed interest in study overseas.

The Japanese government has launched initiatives aimed specifically at encouraging study abroad, such as Leap for Tomorrow! (TOBITATE) Study Abroad Campaign and the Global 30/Development of Global Human Resources. One of the country’s near-term goals is to double the number of Japanese students pursuing study abroad by 2020. However, challenges abound. In 2010, Japan lost its place to China as the world’s second largest economy, having suffered a prolonged period of economic recession known as its “lost decade.” By 2060, the government projects that the country’s population will fall to 86 million from the current 128 million with 40 per cent over the age of 65. There are official estimates that one out of five university graduates are without secure employment.

In this environment, many students and their families understandably focus on the tangible benefits of investing in overseas study. Financial resources, foreign language ability and perceptions of a concrete outcome are all necessary in order for a student to pursue overseas study, no matter the country of origin. Do Japanese students currently feel supported enough in all those areas to make such a big decision? Is an inward-looking attitude truly the prevailing factor at play?

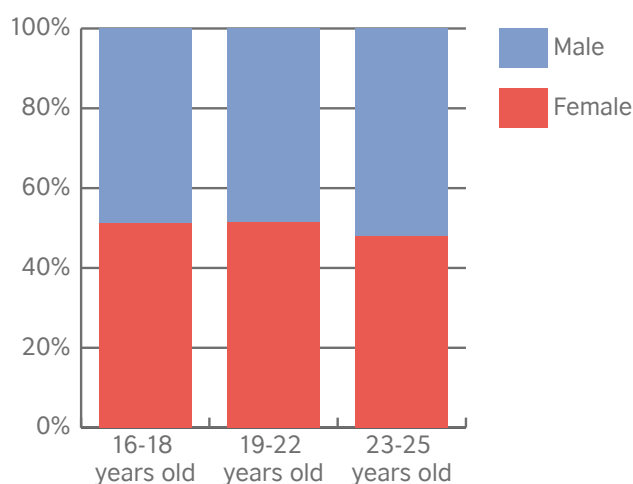
The first step in answering these questions is to understand student motivations. In September 2014, the British Council surveyed Japanese students and recent graduates to ask their opinions about overseas study, with 2,004 respondents finishing the self-completion online survey in Japanese, representing eleven major geographical regions in Japan.

Through the survey, we’ve seen three distinct types of students emerge – those who have studied overseas, those who aspire to do so and those who want to pursue their studies exclusively in Japan. Instead of viewing Japanese students in a monolithic manner, we examine each distinct group through the prism of their sentiment towards overseas study to more clearly understand influencing factors and motivations.

# The students

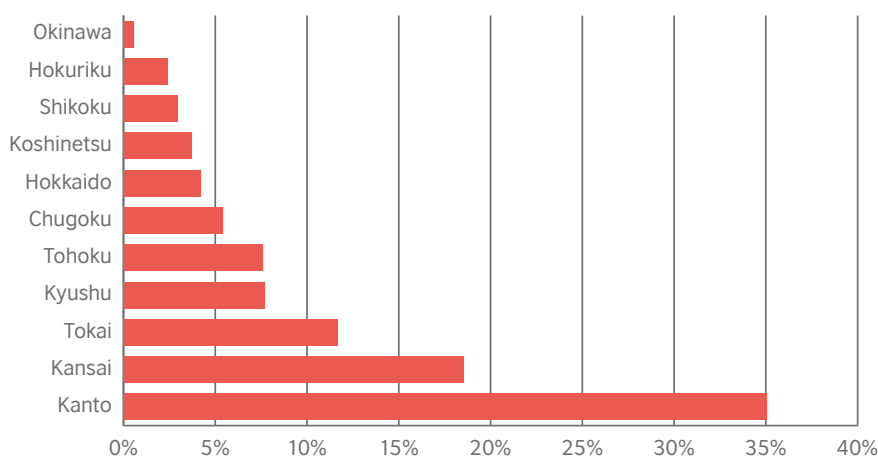
## Overall profile of survey respondents

### Gender and age



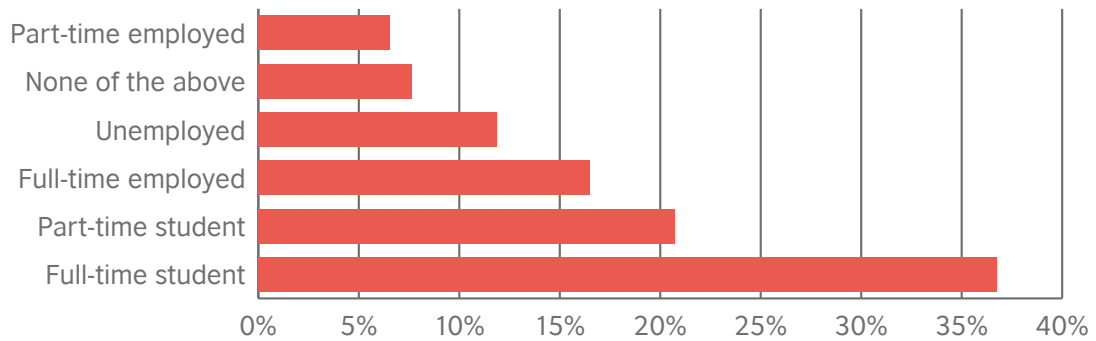
The group of 2,004 respondents was almost equally divided between males and females across all the age groups surveyed: 16 to 18-year-olds, 19 to 22-year-olds and 23-25 year olds.

### Geographic representation



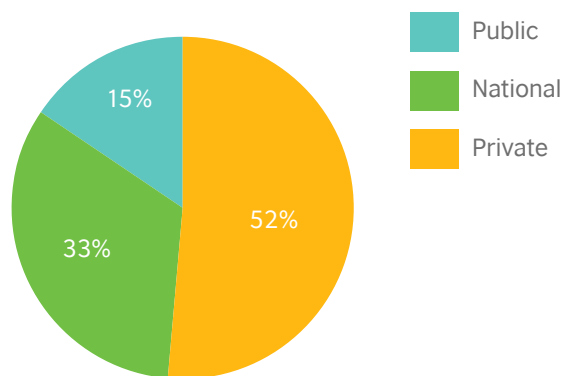
The majority of respondents hailed from the Kanto region, with the second largest group coming from Kansai and Tokai third. Tokyo, Yokohama, Kawasaki and Saitama are in Kanto, Osaka and Kyoto are in Kansai and Nagoya is in Tokai.

### Current status



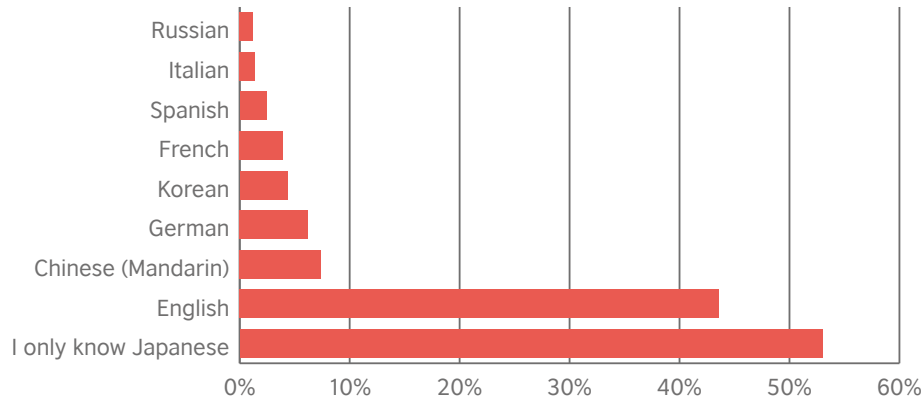
Thirty-seven per cent of respondents were full-time students, with 21 per cent studying part-time and 17 per cent working full-time. The survey includes recent university graduates.

### Current education



Of those who said they were studying, 52 per cent of the respondents were enrolled at a private university, 33 per cent at a national university and the remainder at public universities. The vast majority of universities in Japan are private.

### Second language ability

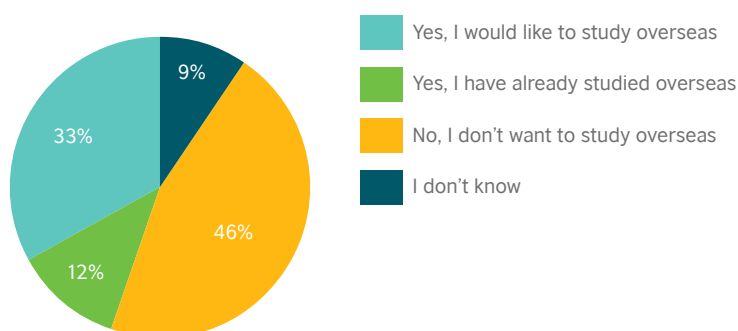


In answer to the question, "Which languages do you speak or are you learning?" 53 per cent said they only knew Japanese while 44 per cent said English. Of the total that replied they were learning a foreign language, 93 per cent of respondents were studying English and 16 per cent said Mandarin Chinese (survey participants were allowed to select all languages that applied).

# Debunking the myth

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## Student sentiment towards overseas study



The survey respondents were asked, “Would you like to study abroad, or have you already studied abroad?” Of the 2,004 respondents, 657 of them, or 33 per cent, said they were interested in study abroad and 235 respondents, or 12 per cent, said they had already studied overseas previously. Meanwhile, 922 respondents, or 46 per cent, said they were not interested in studying overseas. One hundred and ninety respondents, or nine per cent, said they did not know.

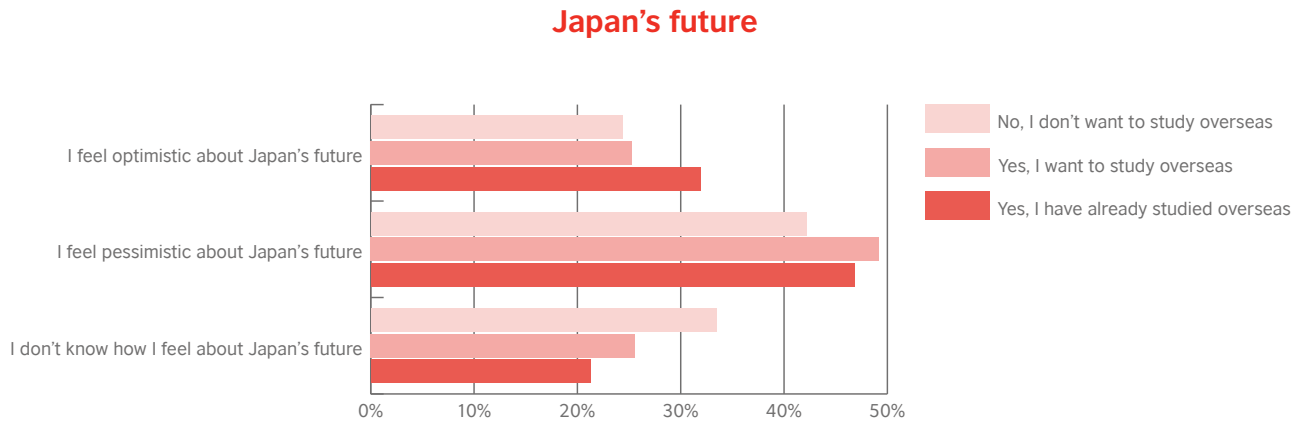
Note that the 45 per cent of Japanese students who wanted to study abroad or already have studied abroad is roughly equal to the 46 per cent of students who do not want to study abroad. When considered alongside comparable surveys of students in other developed economies, Japanese student attitude towards overseas study is similar to, if not more favourable than, that of their UK and US counterparts.

For example, in the British Council report *Broadening Horizons 2014: Embedding a culture of overseas study*, 2,630 UK survey respondents were asked if they were considering studying overseas. Thirty-seven percent responded positively while 41 percent said no. In a corresponding US survey with a sample size of 4,680, when asked the same question, 44 per cent answered yes while 32 per cent said no.

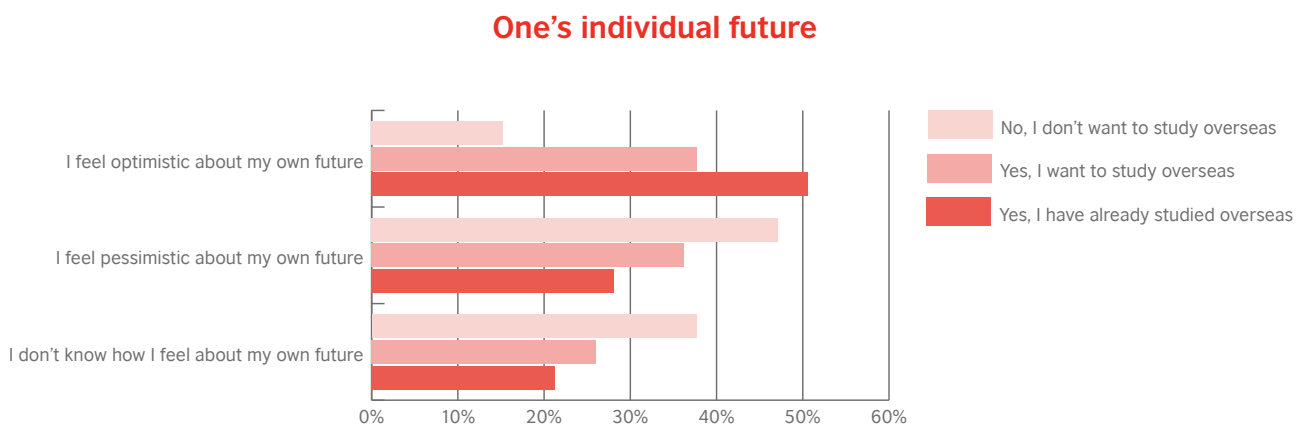


## Personal sentiment towards Japan and one's individual future

In our survey, we asked respondents how they felt about Japan's future as well as their own personal prospects.



The group who felt most pessimistic about Japan's future was comprised of students who aspired to study overseas. The respondents who were most optimistic about their home country's prospects were those who had already studied abroad, perhaps either because of what they had experienced in other countries or due to their ability to contribute to Japan's prosperity. Students who were not interested in overseas study made up the biggest group of respondents with unclear opinions about Japan's future.

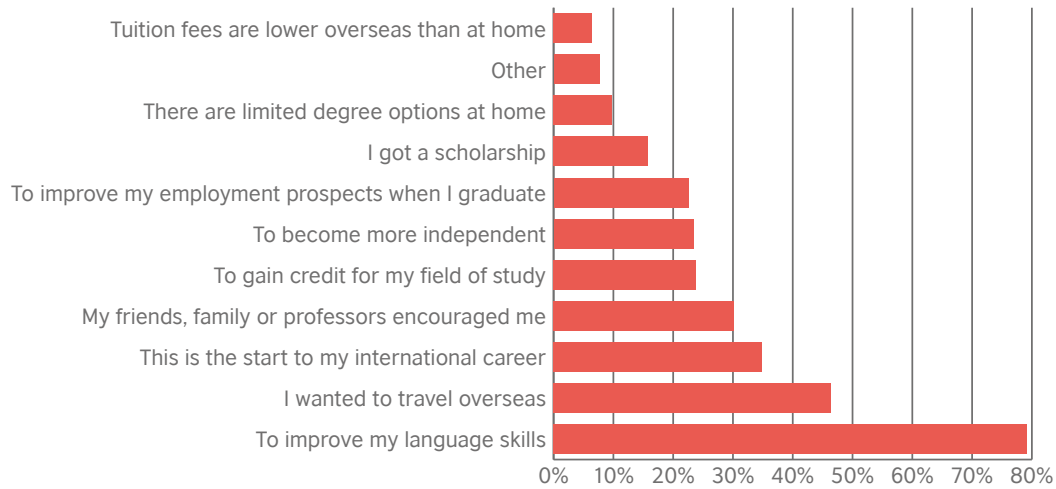


When asked about how they felt about their own futures, we found that students who had studied overseas previously were the most optimistic about their own prospects, followed by the students who aspired to study overseas. The group who made up the biggest proportion of those who were pessimistic about their futures was students who were not interested in study abroad.

To better grasp the motivating factors that play into propelling students overseas, we examine more closely the group of respondents who indicated they had studied overseas previously followed by the group who aspired to study abroad.

## Students who had already studied overseas

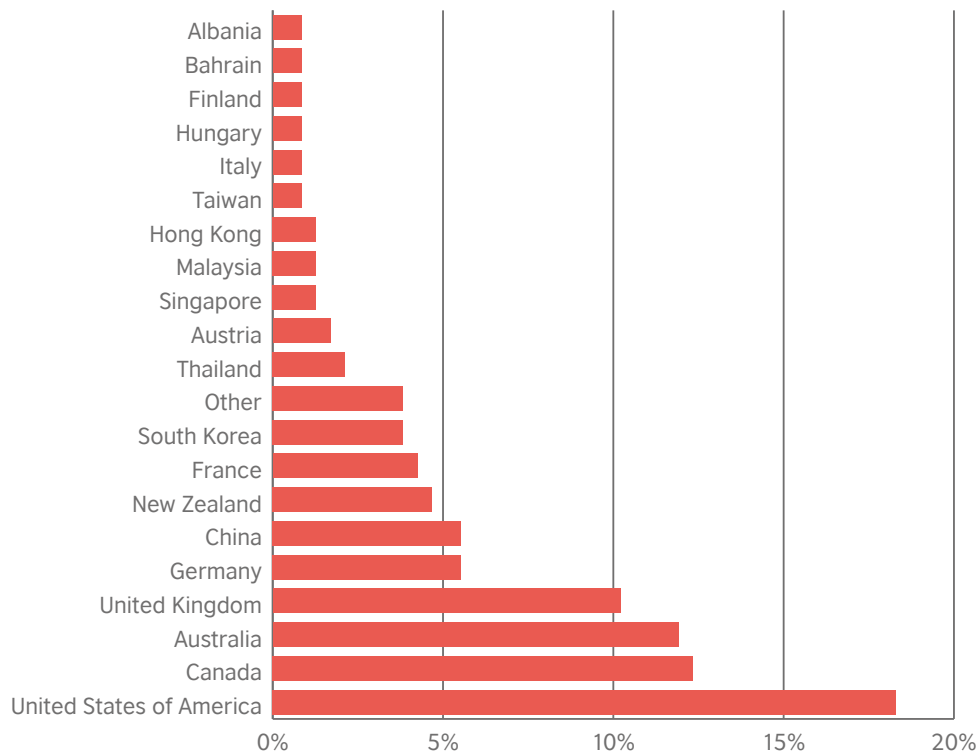
### Factors influencing decision to study overseas



The most prominent reason why the students chose to study overseas was to improve language skills, at 79 per cent (students picked their top three reasons). English language education reform in Japan, now under discussion by the government, is clearly a significant issue that needs to be addressed to help promote more Japanese student mobility. In addition, student reasons for having pursued overseas study were fulfilling a desire to travel overseas at 46 per cent, to launch an international career at 35 per cent and because friends, family or professors had encouraged them to do so, at 30 per cent. Cost was not a factor cited by many respondents.

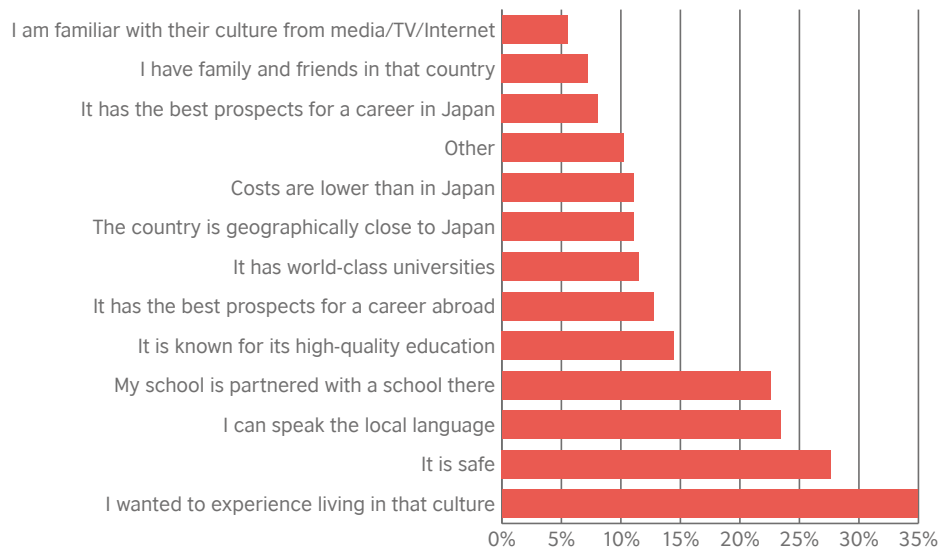
Nearly twice as many females said they had studied overseas previously than males.

### Where Japanese students go to study



Eighteen per cent of the students had gone to the US for study, 12 per cent each to Canada and Australia (per cents are rounded), and ten per cent to the UK. China and Germany each attracted six per cent of the respondents, while New Zealand hosted five per cent.

### Reasons for study abroad destination choice



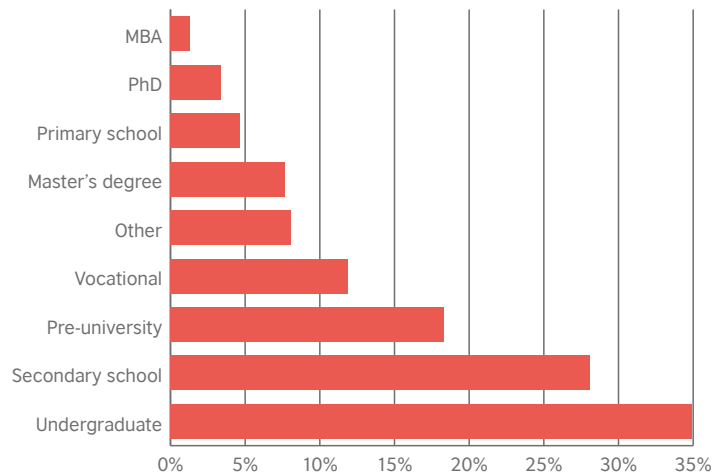
With regards to the reasons students gave for selecting their host country, 35 per cent wanted to experience living in that culture, 28 per cent said personal safety, 23 per cent said it was because they can speak the local language, and 23 per cent said because their school was partnered with a school there (per cents are rounded and up to three reasons were picked).

Among the least popular reasons for selecting their study destination were, familiarity with the country’s culture from the media and Internet, having family and friends in that country and prospects for a career in Japan. It is interesting to note that familiarity with a country through the media and Internet is not a prominent motivating factor whereas a student’s desire to actually experience that culture in person is.

Students who had studied in the US or UK were asked for specific reasons as to why and were allowed to select up to three. For those who had already studied overseas in the US, 38 per cent said they picked the US because they had wanted to experience living in that culture, 29 per cent picked the US because they could speak English, 26 per cent said it was because their school was partnered with a school there, 21 per cent said the US had the best prospects for a career abroad, 21 per cent said it is known for its high-quality education and 19 per cent said it has world-class universities.

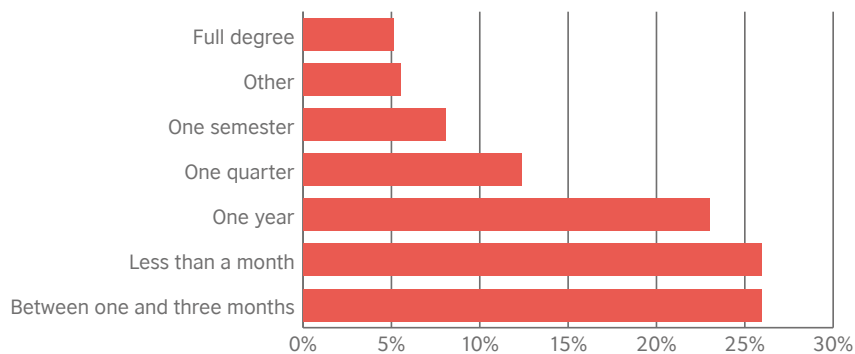
Of the survey respondents who had already studied overseas in the UK, 46 per cent said it was to experience living in that culture, 38 per cent said it was because it was safe, 25 per cent said it was because they could speak English, 21 per cent said it was because their school had a partnership with a school there, and 13 per cent said it was because it has world-class universities and 13 percent said it was because of its high-quality education.

### Level of overseas study



Thirty-five per cent of the respondents said they had studied at the undergraduate level, 28 per cent in secondary school and 18 per cent at pre-university level.

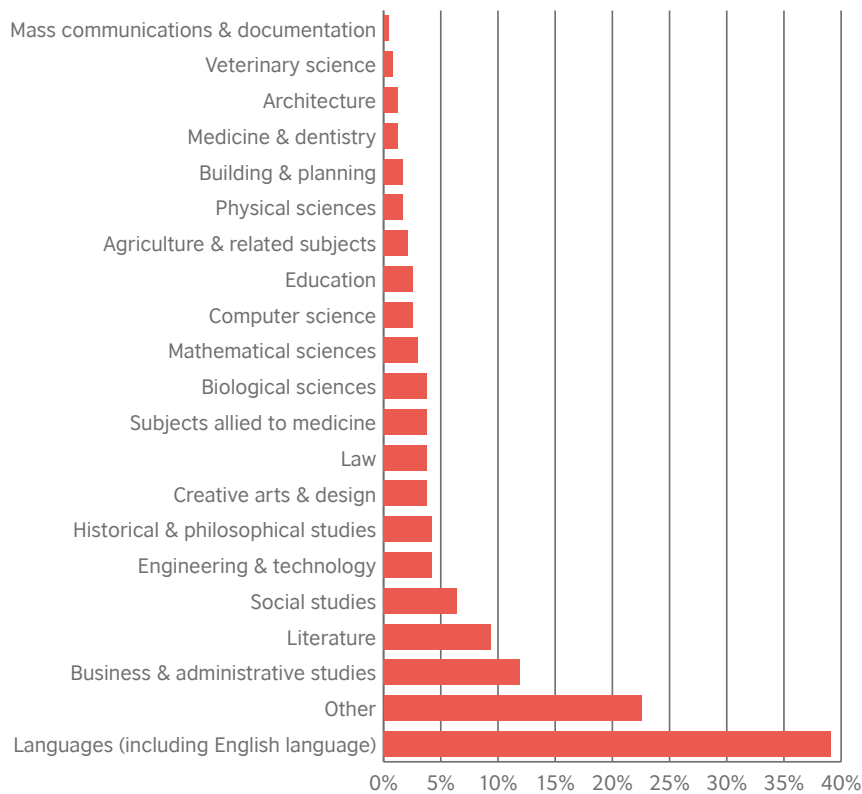
### Length of overseas study



With regards to length of studies, 26 per cent each said they had studied for less than a month or between one and three months, 23 per cent said for a year while twelve per cent had studied abroad for a quarter and eight per cent had studied for a semester. Five per cent had studied overseas for an entire degree. There is anecdotal evidence that there has been an overall pick-up in short-term exchanges or language study, a flow that is not officially captured by education organisations.



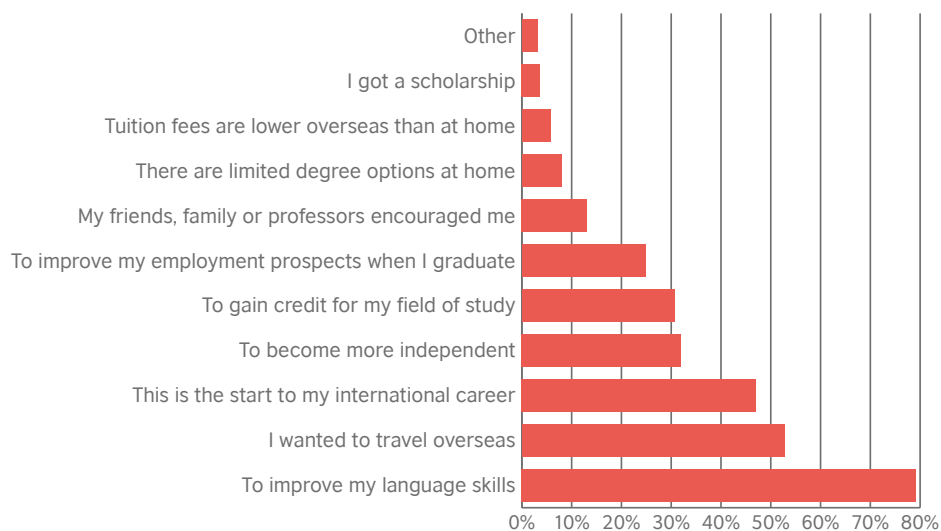
### Overseas study course choice



Thirty-nine per cent of respondents had studied language overseas, 23 per cent said other, while twelve per cent studied business, nine per cent had studied literature and six per cent studied social studies.

### Students who want to study overseas

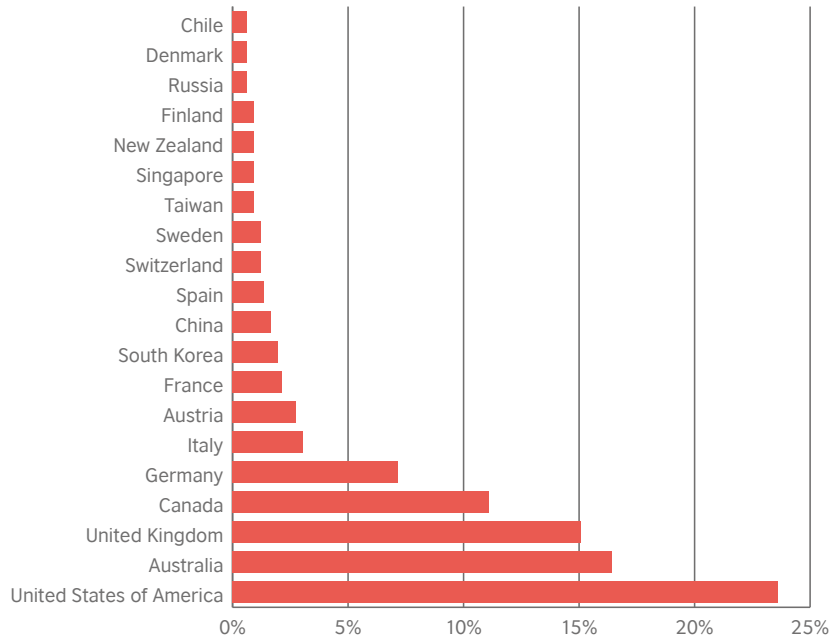
#### Factors influencing desire to study overseas



When asked their reasons for wanting to pursue overseas study, 79 per cent of the students said it was to improve language skills, 53 per cent said it was to travel overseas, 47 per cent said it was the start of an international career, 32 per cent said it was to become more independent and 31 per cent said it was to gain credit for their field of study.

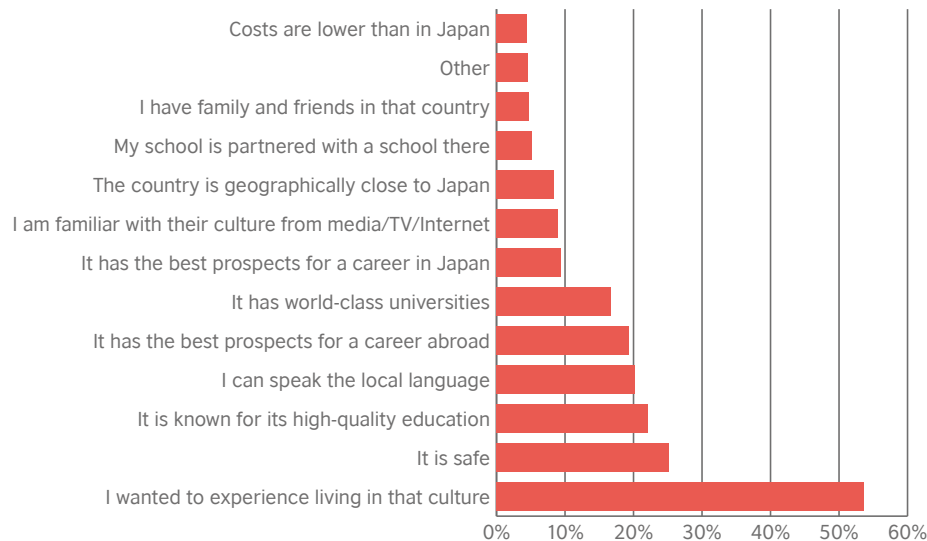
The survey respondents who said they wanted to pursue overseas study were just about equally divided between males and females.

### Where Japanese students want to study



Twenty-four per cent of the students who said they wanted to study overseas aspired to study in the US, 16 per cent to Australia, 15 per cent to the UK, 11 per cent to Canada and seven per cent to Germany.

## Reasons for study abroad destination choice

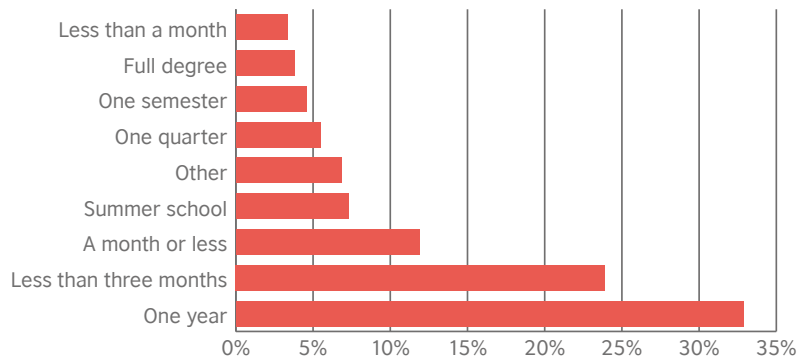


With regards to the reasons for picking their aspirational study abroad destination, 54 per cent of respondents said it was because they wanted to experience living in that culture, 25 per cent said it was because the country was safe, 22 per cent because it was known for high-quality education, 20 per cent because the respondent could speak the local language and 19 per cent because the country provided the best prospects for a career. The ability to attain a less expensive education was cited by only a small proportion of respondents as a motivating factor for choosing a host country.

Students who wanted to study in the US or UK were asked for their specific reasons and were allowed to select up to three. Of the survey respondents who aspired to study overseas in the US, 47 per cent said it was because they wanted to live in that culture, 35 per cent said it had the best prospects for a career abroad, 34 per cent said it was known for its high-quality education, 30 per cent said it had world class universities and 30 per cent said they could speak the local language.

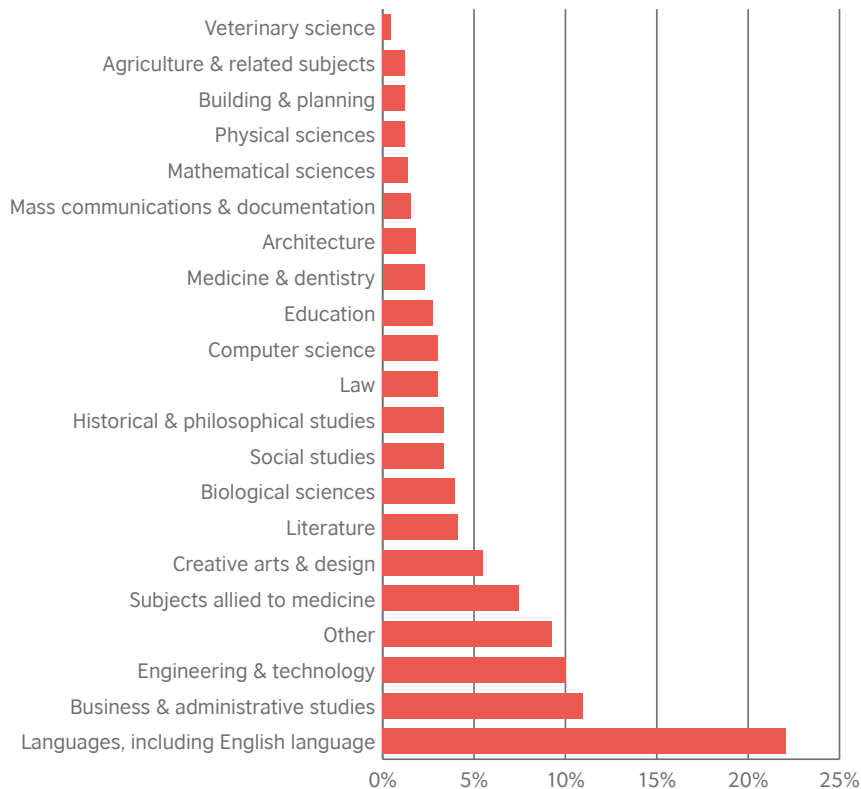
Of the students who wanted to study in the UK, 69 per cent said it was because they wanted to experience living in that culture, 29 per cent said it was because it had world-class universities, 29 per cent said it was known for its high-quality education, 24 per cent said it has the best prospects for a career abroad, 23 per cent said it was because the UK was safe and 22 per cent said it was because they could speak English.

### Length of overseas study



Thirty-three per cent of respondents wanted to study abroad for a year, 24 per cent for less than three months, 12 per cent a month or less and seven per cent for summer school.

### Overseas study course choice



With regards to the preferred subject of study for the students who wanted to study overseas, 22 per cent of the students said they wanted to study languages, including English, 11 per cent business and administrative studies and ten per cent engineering and technology.



In summary, acquiring foreign language skills was the main driver behind the decision to study overseas, both for survey respondents who had already studied abroad and those who aspired to do so. The cultural experience of living in a particular country was the overriding reason why students selected their host destinations and cost was not a significant consideration.

### Perceived advantages to be gained by overseas study



The students who had studied overseas previously and those who wanted to study abroad – totaling 892 respondents – were asked to select up to three advantages to be gained by overseas study. Fifty-nine per cent said the biggest advantage to be gained was acquiring foreign language skills, 53 per cent said obtaining a global perspective, 44 per cent said having the opportunity to experience another culture, 27 per cent said the ability to become more independent and 22 per cent said the development of “soft skills.”

## Students who are unsure about or do not want to study overseas

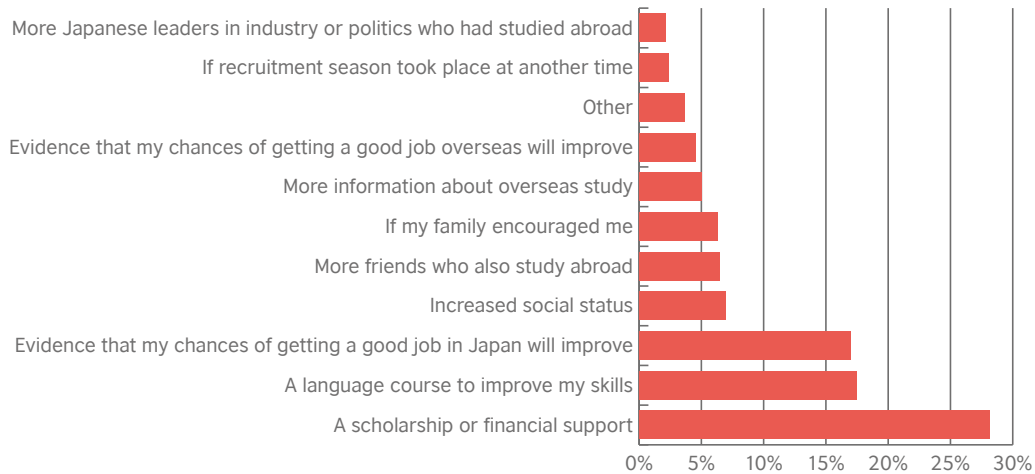
### Obstacles to overseas study



Of the reasons given why respondents were not interested in study abroad, 51 per cent said it was because they did not have good foreign language skills, 41 per cent said it was too expensive, 32 per cent said it was unsafe – not surprising considering Japan is one of the safest countries in the world -- 12 per cent said courses abroad were too difficult and 12 per cent said they were worried about being homesick. Interestingly, the well-publicised conflict with corporate recruitment season was viewed by only three per cent of these respondents as being an obstacle to pursuing overseas study. Additionally, ten per cent more men than women said they were not interested in pursuing study abroad.

A significant portion of students who did not want to study overseas did not have a passport compared to those respondents who did want to pursue study abroad. It may be reasonable to conclude those respondents who were not interested in overseas study and did not have passports have not had previous experience traveling overseas. In addition, when the overall survey group was asked whether they had a family member who had studied abroad previously, of the group who replied they did not, the responses from students who did not want to study overseas were most prominent.

### Incentives to pursue overseas study

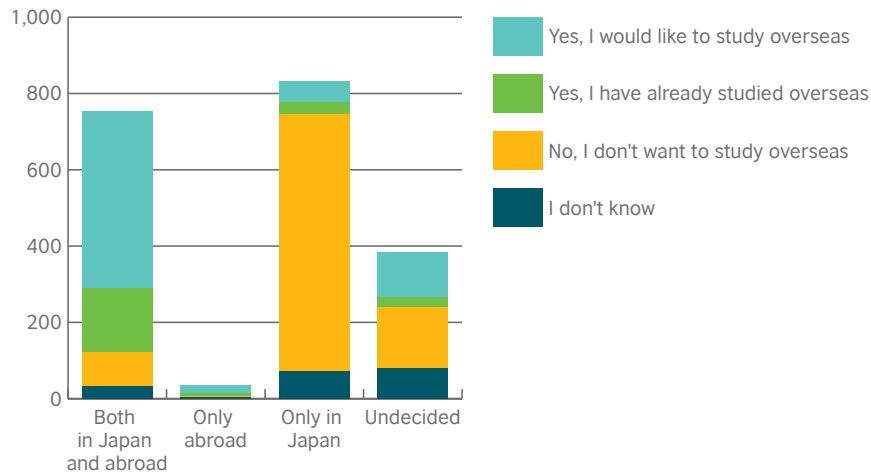


We had asked the students who were not interested in overseas study what incentive may change their minds. Twenty-eight per cent said a scholarship or financial support might encourage them, 17 per cent said a language course to improve skills, 17 per cent said evidence that chances of getting a good job in Japan would improve as a result and seven per cent said increased social status. It is important to note that a change in recruitment season was seen by only two per cent as an incentive to study overseas.

After the global recession of 2008, increasing employability has become a prominent priority for students when considering overseas study. Like many of their counterparts around the world, the Japanese students we surveyed who are interested in overseas study or who have already had that experience appear to be keenly aware of what is to be gained with regards to potential workplace skills.

## Careers

### Career location aspirations



One can make the connection between those who want to study abroad or who have studied abroad and the aspiration to develop an international career. As you can see from the graph above, the majority of respondents who want careers both in Japan and abroad are those who already have or aspire to study abroad while the largest proportion of those who want careers only in Japan are not interested in studying abroad.

There appears to be a gap, however, between students connecting overseas study with gaining attractive professional skills and their belief that employers see such connection. Eleven per cent of respondents interested in overseas study said an advantage gained through overseas study was becoming more attractive to employers, the fourth least popular reply. Correspondingly, just 23 per cent of respondents who had studied abroad previously said a motivating factor in their decision-making process was to improve employment prospects.

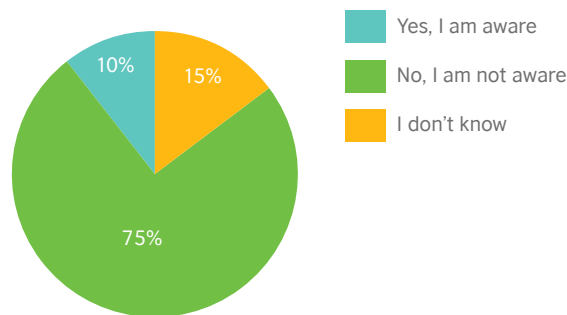
In answer to the question of whether Japanese companies in Japan value university graduates with study abroad experience, 55 percent of students overall said they did not know. Thirty one per cent said Japanese companies did value that experience, while 14 per cent said they did not. The same general proportions held when Japanese students were asked the same question regarding international companies in Japan and companies overseas. This suggests that the burden of educating students about the advantages of international study rests, in part, with the business sector, as well as with the government.

We next examined the survey results focusing on the group of students uninterested in or undecided about overseas study, to better understand the influencing factors behind their attitudes.



## Government initiatives

### Awareness of government initiatives



Seventy five per cent of overall respondents said they were not aware of Japanese government policies aimed at encouraging study abroad, such as Leap for Tomorrow! (TOBITATE) Study Abroad Campaign, or the Global 30/ Development of Global Human Resources. Ten per cent of respondents said they were aware of the programmes and 15 per cent said they didn't know. Ninety per cent of the overall survey sample either was not aware of government internationalization initiatives or did not have an opinion on the matter. It is important to note that many government policies are enacted through senior high schools and universities, so there is a possibility that the students are not aware that support they are receiving to pursue overseas study comes from the government.

# In conclusion

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By examining the survey responses of 2,004 Japanese students, it is clear that their concerns about overseas study are not due to a cultural mind-set that is exclusive to Japan – instead, when making decisions, they consider their foreign language skills, cost and employability. Like many of their counterparts around the world affected by the global recession of 2008, the Japanese students we surveyed who are interested in overseas study or who have already had that experience appear to be keenly aware of the skills to be gained, such as the ability to speak a foreign language and developing a global perspective.

However, what is most surprising is that Japanese student sentiment towards overseas study is similar to, or even more favourable than, that of their US and UK counterparts, with the number of surveyed students demonstrating interest in overseas study just about equalling students who want to study exclusively in Japan. In addition, Japanese students who have experienced study abroad are more optimistic about their prospects than those who have not. For this to be the status quo without substantive clarity from the perspective of Japanese students as to whether employers, in Japan or overseas, value university graduates who have study abroad experience, nor outright awareness of Japanese government initiatives promoting study abroad opportunities, is telling. In fact, the main reason why Japanese students pick a particular host destination is to experience the culture in that country, not for increased employability.

Certainly, there are unique in-country influences that shape the mindset of youth populations. But the fact that students in Japan weigh the opportunity to gain skills against the cost of overseas study is not unique to the country nor is it due to an “inward-looking” state of mind. Instead, what might be worth highlighting is how the experience of studying overseas seems to lift Japanese student attitudes about their own future and could be the key to encouraging more young people to take that same road.