



Broadening Horizons

Addressing the needs of a new generation

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Executive summary

British Council's *Broadening Horizons*

The British Council's *Broadening Horizons* series was launched in 2013 and examines the drivers for and barriers to study abroad of UK students to provide the sector with evidence to support its outward mobility strategies. In 2017, *Broadening Horizons: Addressing the needs of a new generation* surveyed 1,033 UK-domiciled students about their overseas study aspirations and found that their unique worldview, influenced largely by political and economic shifts and disruptive technologies, plays a significant role in their decision-making process. As a result, updated and tailored messaging that addresses the specific needs of this group of young people is essential for them to recognise the positive returns on an investment in study abroad.

Findings from this year's research

- In 2017, 18 per cent of students surveyed indicated they were interested in studying abroad, while 70 per cent were not and 12 per cent remained unsure
- Of the 82 per cent of students who did not state they were interested in going overseas, 88 per cent said they could be convinced to study abroad, revealing a considerable area of opportunity
- Top drivers for study abroad included a desire for travel, culture and adventure, the development of foreign language skills, to benefit from an institutional partnership and to build personal confidence
- Key obstacles to study abroad included the financial costs, distance from the UK as well as family and friends, perceived lack of foreign language skills and the UK's high quality of education at home
- Students in 2017 identified time commitment, potential lack of credit recognition and personal safety as further barriers to overseas study
- Respondents were largely happy in the UK, articulating that the UK had family, friends and the best quality of education, and required explicit reasons to consider study abroad
- The results of the EU Referendum caused confusion among UK students regarding the ease of acceptance into and the costs of overseas programmes
- Young people interested in study abroad were more likely to want to go abroad after graduation
- Respondents identified a gap in the timing and content of study abroad information presented to them
- Seventy per cent of students uninterested in outward mobility stated that help with funding would make them want to study abroad
- Over half of respondents who were not considering overseas study specified that evidence of links between outward mobility and increased employability would make them want to study abroad

Trends from five years of *Broadening Horizons*

- The popularity of study abroad among the surveyed samples fell in 2017 to 18 per cent, down from 34 per cent in 2015
- Barriers to study abroad were exacerbated in 2017 due to factors including the falling pound sterling and increased travel-related anxiety due to safety concerns
- Current students may not identify a positive return on investment in study abroad due to less awareness of the wider benefits of the experience
- The US is still the number one destination of choice for UK students in 2017, but the percentage of students that selected this option fell to 22 per cent from 40 per cent in 2015
- Top drivers for study abroad remained largely the same since 2013: to travel and pursue adventure and to improve language abilities, however in 2017 students indicated that they were motivated by university partnerships as well
- The financial cost of overseas study and difficulty communicating in a foreign language remain top obstacles year-on-year but in 2017 there was an increased focus on wanting particularly to stay in the UK, close to family and friends
- Respondents uninterested in study abroad in 2013 and 2017 stated financial help and language support would incentivise them to go overseas, but while in 2013 students called for more personal anecdotes from returned peers, in 2017 they specified wanting proof of links between the experience and widened career prospects

Looking ahead

Today's young people have unique priorities and concerns and have indicated that the guidance they receive with regard to study abroad is not properly tailored to their needs, leading to gaps in information and possibly decreased interest in the experience itself. Students must be advised on the benefits of study abroad in order for them to positively assess whether the experience is worth their time, money and travel; this is especially important in today's environment when many young people are affected by a weakened currency and travel-related fears. Students indicated that even if they were not interested in study abroad, reassurances with regard to cost and employability benefits could change their minds.

Strong, institutional-wide messaging alongside innovative solutions could provide some steer for students. The timing of messaging – early in the undergraduate career – is key as is an emphasis on research and data on the correlation between study abroad, academic performance and job prospects in and outside of the UK. There is also space for partnerships, new models of funding and technology to encourage UK students to engage in an international experience. Interest in study abroad is undeniably present in UK student populations, and more relevant communications will only help to increase participation.

Introduction

In 2012, the Joint Steering Group on UK Outward Mobility submitted recommendations to support UK outward mobility; the document set forth an argument for why the UK should prioritise study abroad of its home students and outlined steps for the sector to follow. In line with these recommendations, the sector has introduced various initiatives to support overseas study, ranging from the Universities UK International (UUKi) Go International team's management of the national outward mobility goal as part of the UK Strategy for Outward Student Mobility to the collection of national mobility data by the Higher Education Statistics Agency (HESA); a key point made in the report is that data on UK outward mobility needed to be collected more widely and uniformly, and the impacts of the experience needed to be evidenced and documented.

The original purpose of the British Council's annual *Broadening Horizons* research, established in 2013, was to document the drivers for and barriers to study abroad of UK students in order to better understand, year-on-year, how to best communicate with students the benefits of the overseas experience. Now in its fifth year, this series allows us to look back and assess how the sector's activities have impacted students' perceptions.

Today's young people face challenges not encountered by any other generation. In 2017 students are struggling to find success in a tumultuous geopolitical environment, a changing workplace and an increasingly digital world. Their worldview is different from previous generations' and so must be the manner in which they are advised. Messaging about advantages of study abroad should be aligned with current youth priorities in order to maximise uptake of the experience; should gaps in their understanding exist, it can substantially impact the cost-benefit analysis that young people undertake as part of their decision regarding overseas study. Gone is the time when a one-size-fits-all approach would be enough to incentivise students to go abroad – in 2017, for this generation, a tailored approach is a must.

Background

As the international education market becomes more crowded, traditional host destinations such as the UK and the US are increasingly investing in outward mobility schemes to encourage home students to study abroad. The UK's Strategy for Outward Student Mobility set a target of doubling the percentage, from 6.6 per cent to 13.2 per cent, of UK-domiciled full-time, first degree students studying overseas by 2020.

The discourse surrounding the importance and impacts of outward mobility has deepened in recent years and the cache of empirical evidence regarding the benefits of study abroad is growing. To support the recommendations of the Joint Steering Group on UK Outward Mobility in 2012 to collect evidence on study abroad, the British Council's *Broadening Horizons* research from 2013 to 2015 surveyed UK-domiciled students to investigate the drivers of and barriers to overseas study. The goal was, by understanding the perceived obstacles, to reveal areas of opportunity for institutions to better engage with students and encourage the overseas study experience. In past years, with some variance, primary drivers for study abroad included gaining academic credit, traveling and having a unique adventure and practicing foreign language skills; obstacles included a lack of foreign language skills and costs. A detailed analysis of trends in student sentiments regarding study abroad comparing this year's findings to those since 2013 is presented in the 'Trends in UK Outward Mobility: 2013-2017' section of this report.

The advantages of the study abroad experience are numerous and diverse, ranging from individual outcomes in cross-cultural competencies and career prospects to national impacts on labour markets and business links. The effects of study abroad on the student are far-reaching; UUK International's Go International programme helps implement the UK Strategy for Outward Mobility and produces research on various facets of the experience. In *Gone International: Mobility Works*, UUKi produced a third year of evidence demonstrating improved academic performance and employability of mobile students as compared to their non-mobile counterparts. In *Student Perspectives on Going International*, data indicated that the benefits also encompassed personal development. The British Council's *Broadening Horizons 2016: Maximising the impact of study abroad* showed students who studied abroad were more empathetic to international students in the UK, engaged in global issues and likely to travel and work abroad in the future.

While the benefits of the study abroad experience are well-documented the messaging to undergraduate students should be more targeted. According to the UK's Higher Education Statistics Agency (HESA), in 2015-2016, just 27,405 UK-domiciled students, or 1.6 per cent of all UK students, studied abroad. Most mobile students (95%) were at the undergraduate level, with the largest percentage studying Languages, literature and related subjects; Business and administrative studies was the second most popular subject area, followed by Social studies, Medicine and dentistry and Physical sciences. While the majority (59%) of those who studied abroad identified as female, of those not studying languages the majority identified as male. Most mobile students stayed within Europe, with France being the top destination, but other popular countries included the US, Canada, Australia and China.

Methods

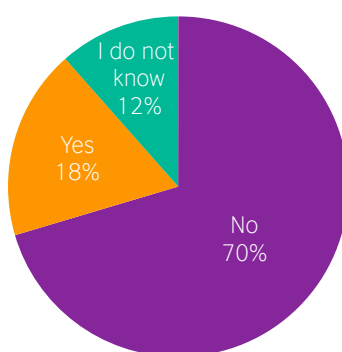
The British Council *Broadening Horizons* series has examined drivers for and barriers to outward mobility since 2013. This report will examine data from 2017 and also compare it to outcomes from the research in 2013, 2014 and 2015, when comparable groups of students were asked similar questions. In 2016, the series focused solely on the impacts of the study abroad experience on recently returned students. There are many definitions of mobility but for the purposes of this research we are studying the aspirations of undergraduates with regards to studying abroad for any amount of time.

The 2017 data used in this report was gathered in May of 2017, in cooperation with the National Union of Students (NUS). UK-domiciled students enrolled in undergraduate courses were surveyed and 1,033 responses were collected and analysed.

2017 data analysis

In May of 2017, 1,033 UK-domiciled students, 98 per cent of whom were undergraduates, were surveyed in order to understand their views on overseas study; the survey was aimed at undergraduates but two per cent of the sample were completing a foundation year. They were asked about their intent to study abroad as well as the drivers, barriers and impacts of external factors in their decision.

Are you considering overseas study?



Source: British Council

Of the total sample, 727 (70%) indicated that they were not considering overseas study, whilst 119 (12%) stated they were unsure. Eighteen per cent of respondents said they were considering a study abroad experience.

In this section we will review the sentiments of those interested in a study experience and then look at the perceived barriers of those who are not interested or are unsure about study abroad.

Students who want to study overseas

Highlights

Just 18 per cent of the sample indicated a clear interest in study abroad; of these students, the largest portion were interested in a term or year abroad during their undergraduate career. Those interested in going at the postgraduate level were more likely to do it for the whole course. The top desired destinations were all in North America or Europe with the exception of Japan and China (which was number 11) and courses of choice included languages, creative arts and design and the humanities.

Top drivers:

- Wanting to travel and have a unique adventure
- Wanting to experience a different culture
- Wanting to improve language skills
- Home institution being partnered with one abroad
- Wanting to build confidence and self-sufficiency

Top concerns:

- Cost of living and studying abroad
- Difficulty leaving family and friends in the UK
- Lack of confidence about foreign language skills

Students were divided on how accessible information was, with just over half of respondents stating it was easy to find information and about one third indicating it was difficult.

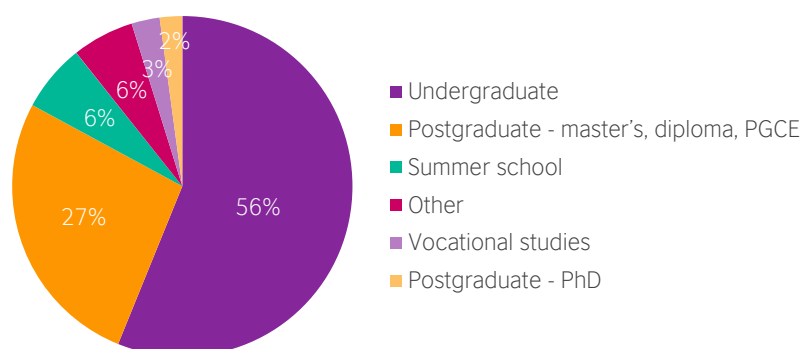
Top sources of information:

- Internet research
- School/university teachers
- Study abroad office at school/university

Students were largely focused on a future in the UK, with nearly half of students planning to stay in the UK after graduation compared to 14 per cent that would look for opportunities abroad.

The 187 students who stated they were interested in studying abroad were primarily undergraduates; five students (3%) were in a foundational year and 55 per cent were in their first year of study. Of this group of students, 77 per cent were female.

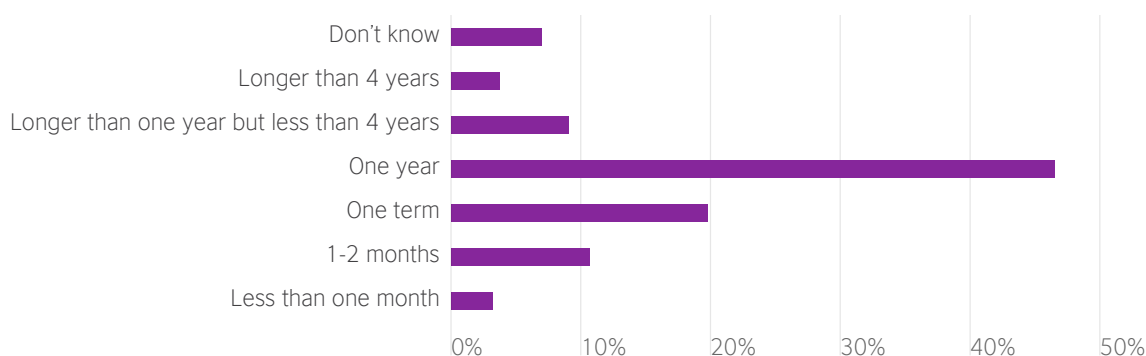
Planned level of overseas study



Source: British Council

Over half (55%) of the students who wanted to study overseas wanted to do so as part of their undergraduate course and just over one quarter (27%) stated they would do so at the postgraduate (master's) level. Smaller groups of students stated they were interested in going abroad during the summer (6%), for vocational studies (3%) and at the postgraduate research level (2%). The six per cent of students who indicated they wanted to study abroad at 'other' levels were mostly interested in engaging in a placement year (work experience as part of their degree) or specified the Erasmus programme, also at the undergraduate level.

Desired study abroad length of time



Source: British Council

Two thirds of these students wanted to do so for either one term or one year. The remaining one third of students were split in their desire to go overseas for one to two months (11%), one to four years (9%), longer than four years (4%) and less than a month (3%). Seven per cent of the sample remained unclear on the duration of time they would want to spend studying abroad.

Of the students who wanted to go abroad during their undergraduate degree, 85 per cent wanted to go for one term or one year; given that they have already started their degree it makes sense they would want to go abroad for these shorter periods of time. In contrast, the data indicates that roughly one quarter of students interested in going abroad at the postgraduate level would be interested in a full degree abroad.

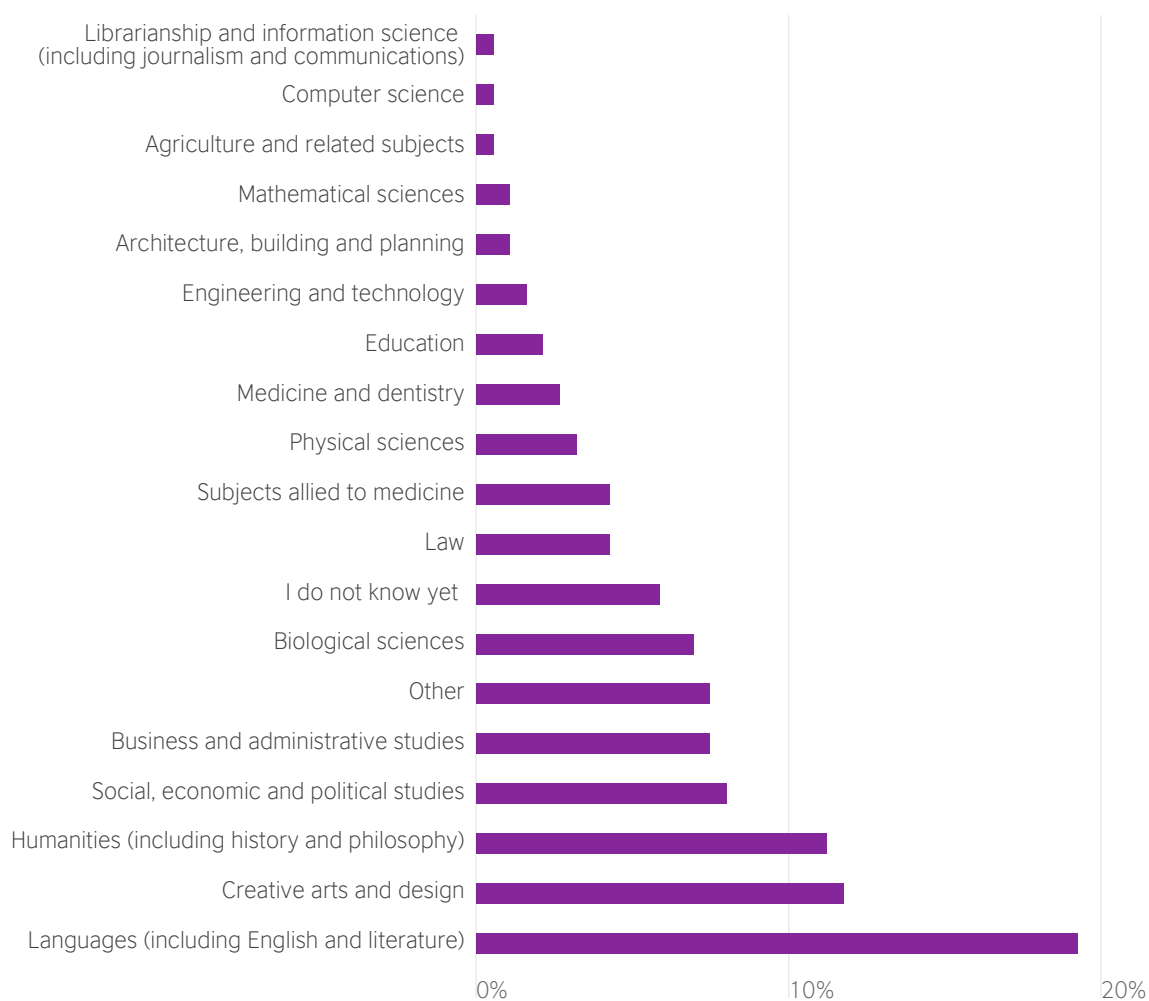
Desired study abroad location

United States of America (US)	22%
Canada	10%
Germany	9%
France	7%
Australia	6%
Sweden	5%
Japan	4%
Spain	4%
Italy	3%
Netherlands	3%
China	3%

Source: British Council

Nearly a quarter (22%) of students interested in overseas study wanted to go to the United States for the experience and an additional ten per cent were interested in Canada. Six of the remaining eight top ten destinations of choice were in Europe, with Japan (chosen by 4%) the top Asian destination; China was the eleventh highest selection, chosen by three per cent of this group of students.

Desired courses for study abroad

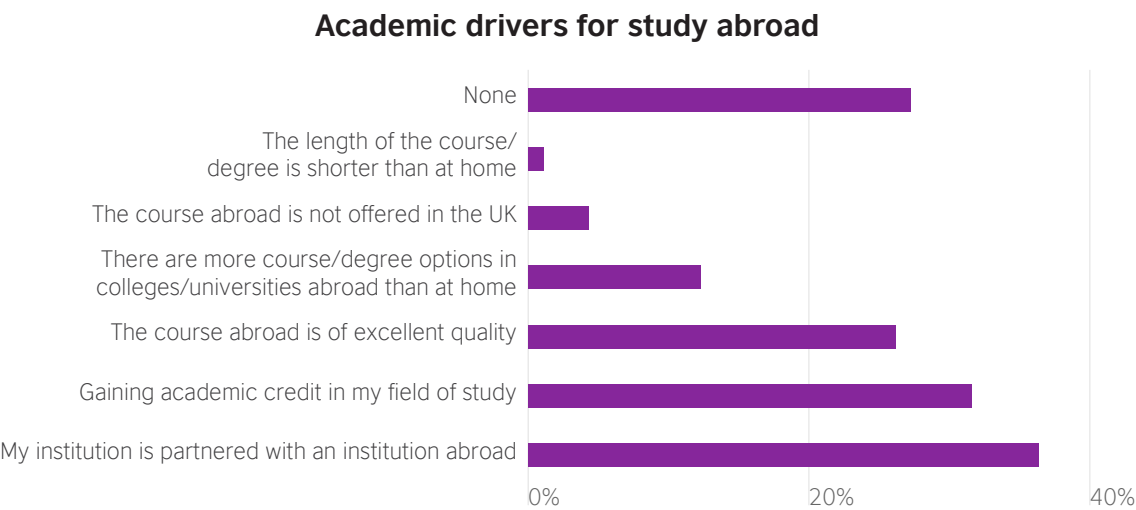


Source: British Council

Surveyed students were interested in studying abroad on a number of different courses, most notably Languages (including English and literature) (19%), Creative arts and design (12%) and Humanities (including history and philosophy) (11%). Business and administration as well as traditional STEM subjects, interestingly, were chosen by a smaller number of students. Seven per cent of respondents indicated they would want to study abroad on 'other' courses; these included journalism, tourism, performing arts and wildlife conservation.

Drivers for study abroad

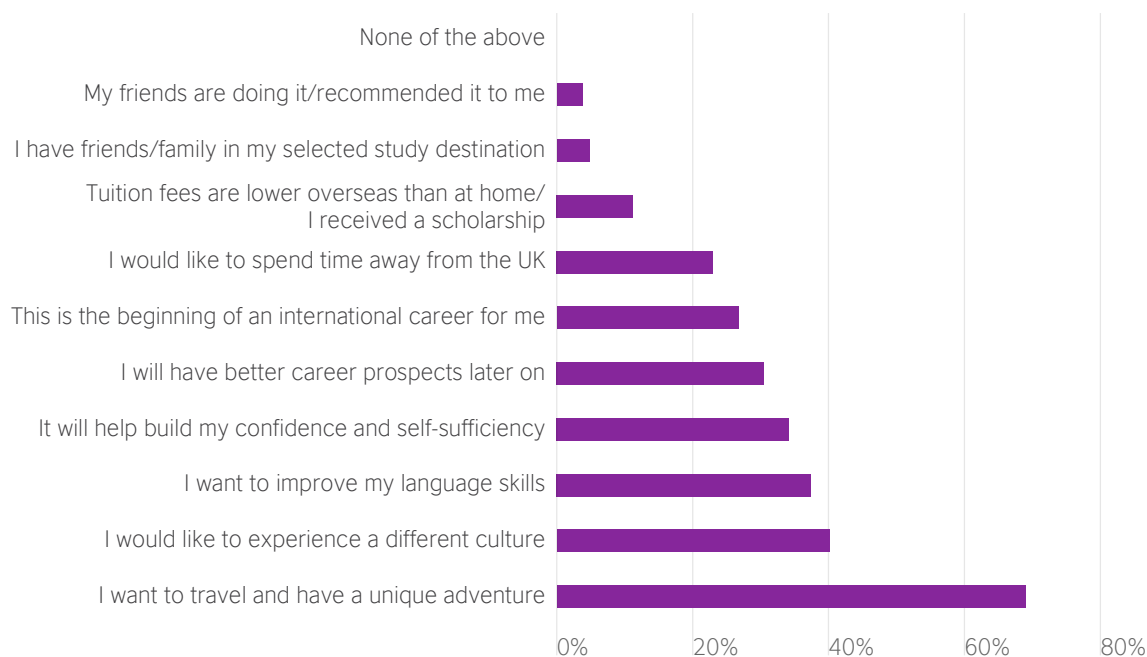
The motivations for studying abroad are numerous and complex, but for the purposes of the *Broadening Horizons* series, are separated into academic and non-academic in nature.



Source: British Council

Over a third of respondents indicated that one of the academic reasons they went abroad was their institution was partnered with an overseas institution, thus allowing the exchange. Other top academic drivers were to gain credit (32%) and to undertake a high-quality course abroad (26%). Very few students said that their decision to study abroad was a reflection of anything lacking in the UK. Over a quarter of students selected ‘none of the above’, indicating the absence of an academic reason to go abroad.

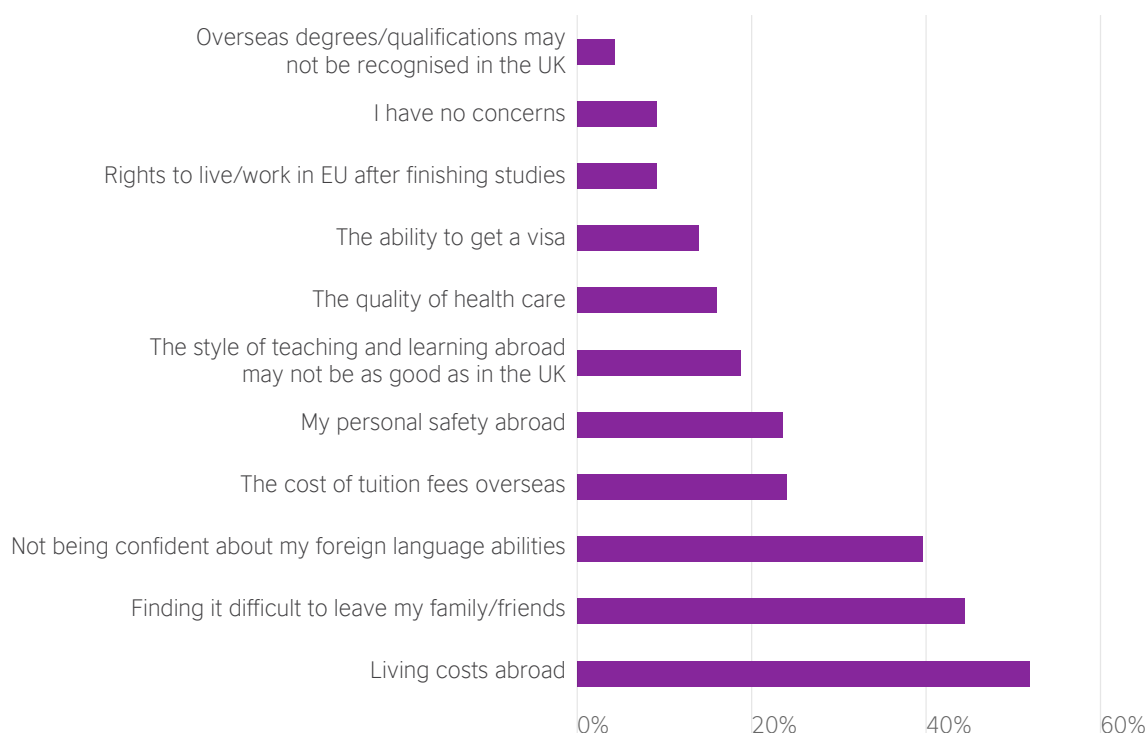
Non-academic drivers for study abroad



Source: British Council

Decidedly the most popular driver for students' interest in study abroad was to travel and have a unique adventure; sixty-nine per cent of students selected this choice, followed by to experience a different culture (40%), improve language skills (37%), build confidence (34%) and have better career prospects (30%). Recommendations from family and friends as well as having connections in the destination of choice were the least selected drivers. No students selected 'none of the above', indicating that every student had a non-academic reason to want to engage in study abroad.

Concerns regarding study abroad

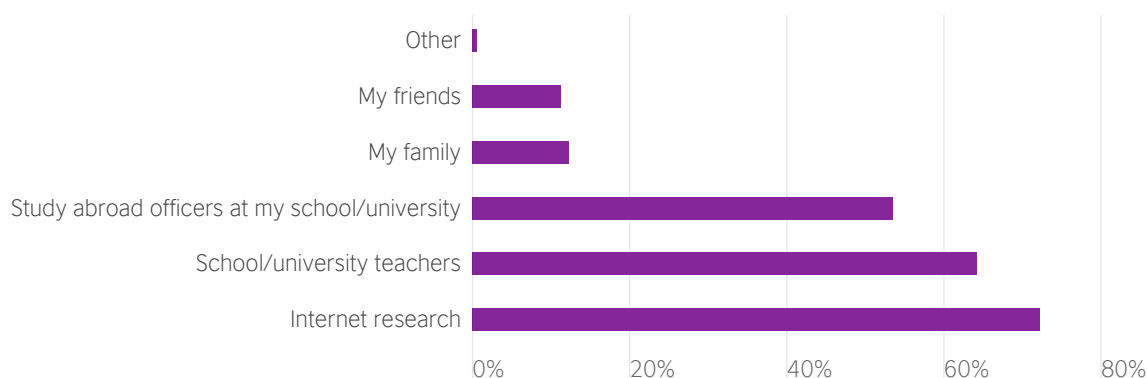


Source: British Council

Respondents were asked about their apprehensions with regard to studying abroad, and the top concern was the living costs of studying abroad (52%), followed by difficulty leaving family and friends (44%) and a lack of confidence in foreign languages (40%). Roughly one quarter of students chose the cost of tuition fees and personal safety abroad. Just nine per cent stated they had no concerns, and issues regarding the recognition of overseas degrees was selected by just four per cent.

Students who were interested in studying abroad were asked if they had any further concerns, and a few salient themes emerged. Firstly, students emphasised their apprehension regarding fitting in and finding friends in an alien environment, and were concerned about how isolation may affect them; linked to this was worry regarding homesickness. Secondly, students relayed anxiety about study abroad post-EU Referendum. Respondents were specifically nervous about increased costs and potential difficulties with gaining acceptance into European programmes. Other concerns included personal safety, access to quality healthcare and obtaining affordable accommodations.

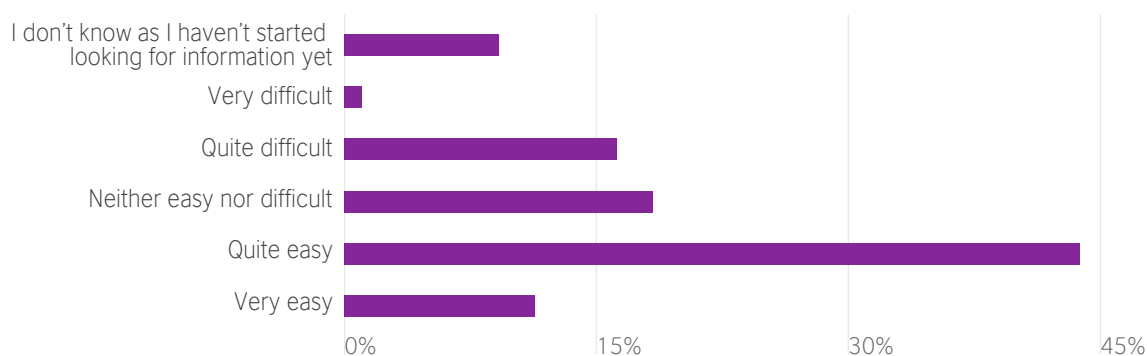
Sources of information regarding study abroad



Source: British Council

There have been calls in past years to widen the access to information about study abroad. Students stated that their primary source of information about the experience was the Internet (72%), followed by their teachers (64%) and their study abroad officers (53%). One person, who selected 'other' said their admissions officer provided them with information.

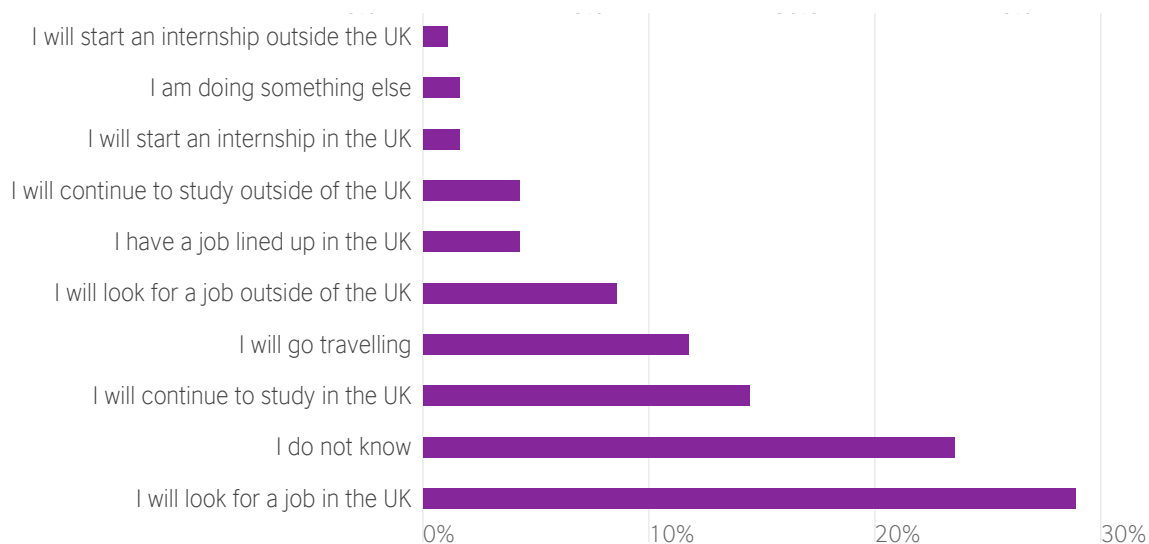
Ease of finding information



Source: British Council

Over half the students surveyed (55%) stated that it was easy to find information on study abroad and 17 per cent indicated it was quite or very difficult, though just one per cent selected the latter. No student who were already abroad at the time of the survey said that finding information was difficult, signifying that the search for information in hindsight was possibly easier than anticipated.

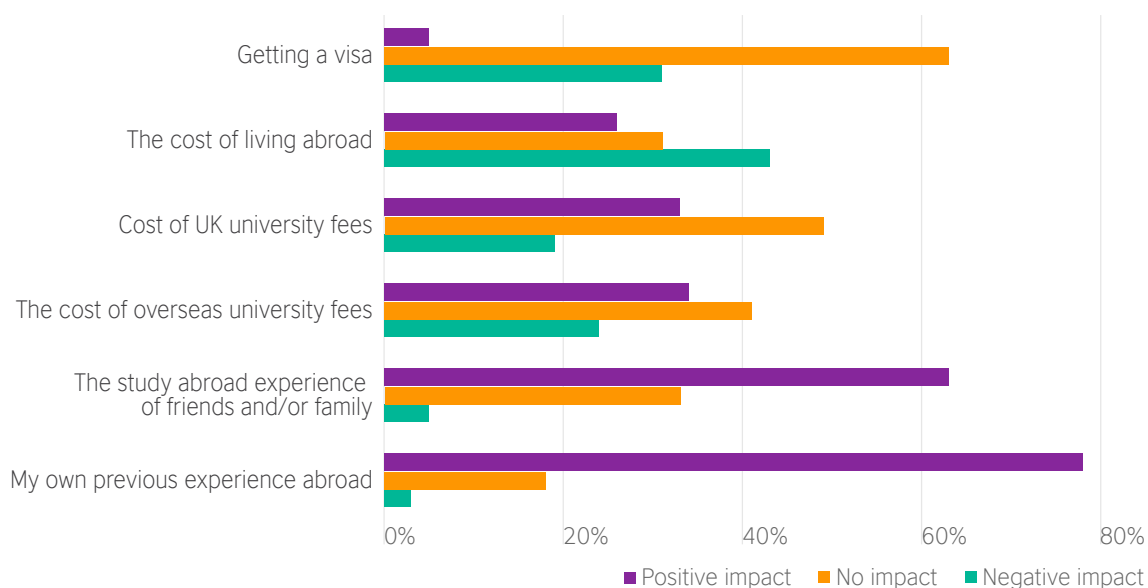
Intentions upon graduation



Source: British Council

Nearly one quarter (24%) of respondents indicated that they did not know what their plans were upon graduation, which is not surprising given the fact that the students were all undergraduates. Students mostly were interested in looking for a job in the UK (29%) and continuing study in the UK (14%), though there was a cohort interested in traveling (12%) and pursuing a job abroad (9%). Fewer than five per cent were looking to continue studying outside the UK or had a job already lined up in the UK.

Impact of factors on decision to study abroad



Source: British Council

Respondents were asked about what kind of impact certain factors had on their decision regarding overseas study. Those interested in going overseas were most positively impacted by their own previous travel experiences and those of their family and friends. The cost of living abroad had the strongest negative impact on their decision, despite the fact that the students were mostly neutral about the cost of university fees, both UK and overseas. This could potentially be because students had previously been mentally prepared to pay tuition for their education, while living costs can sometimes be seen as an additional cost.

Students who do not want to study overseas

Highlights

Students who were not interested in study abroad at the time of the survey made up the majority of the sample.

Top barriers:

- Costs
- Missing family and friends in the UK
- Being happy with life in the UK
- The belief that the UK offers the best quality for my course
- Lack of confidence in foreign language

Potential motivators for study abroad:

- Help with funding
- Evidence that study abroad improves job prospects
- Language training and support

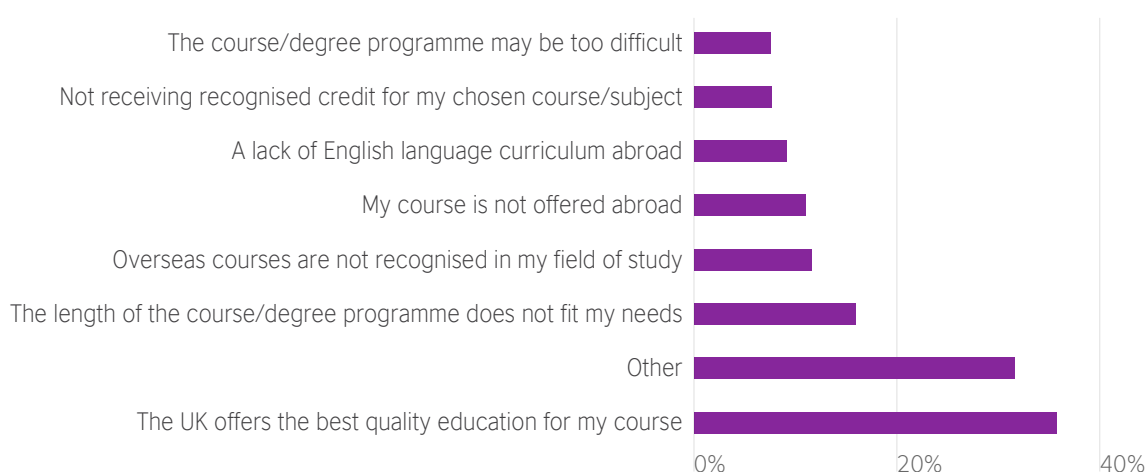
Students were focused on a future in the UK, with over three quarters wanting to stay in the UK compared to less than five per cent stating they would look for overseas opportunities after graduation.

There were 727 students (70% of the sample) who said they were not interested in study abroad whilst 119 students (12%) said they did not yet know if they were interested. For the purposes of this report, we look at these students together as students who are not currently intent on pursuing overseas study.

Barriers to study abroad

Students not interested in study abroad were asked about their academic and non-academic reasons for wanting to solely stay in the UK for study as well as what may incentivise them to consider otherwise.

Academic barriers to study abroad

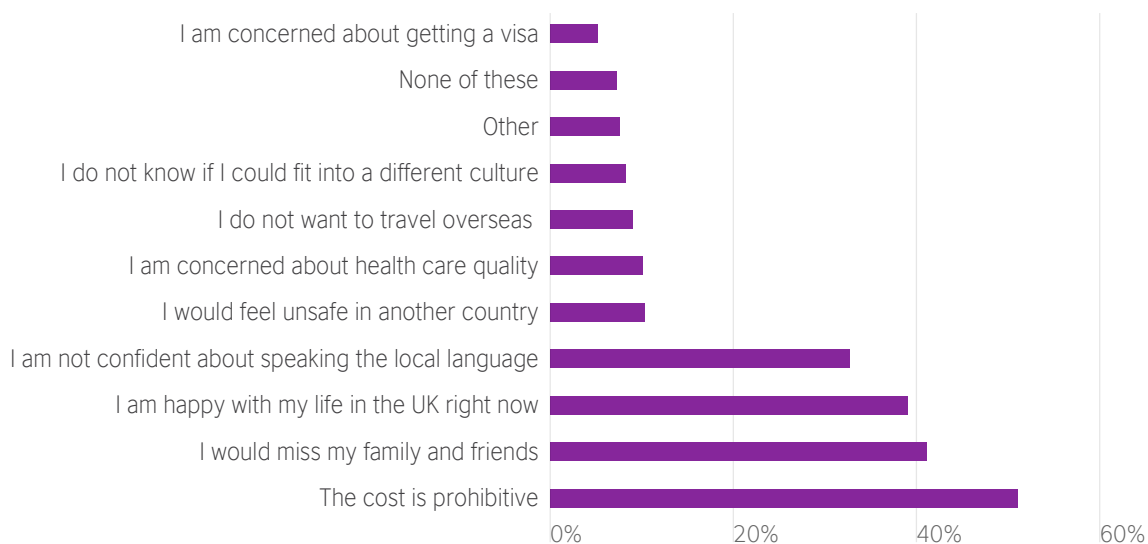


Source: British Council

The most popular academic reason to not study abroad was that the UK offers the highest quality education (36%). Other motivations selected include recognition of overseas courses in specific fields (19%), the length of the programme (16%) and specific courses not being offered abroad (11%). Less popular answers included that the course abroad may be too difficult (8%).

Thirty-two per cent of respondents selected that they had other academic reasons for not wanting to engage in study abroad. Popular reasons included a perceived lack of foreign language ability and academic and professional support abroad. Some students indicated they had previous overseas experiences. Still others stated that they could not go abroad due to the fact that they were working whilst studying. The majority of this group, however, stated that they had no academic reasons for not wanting to study abroad – their motivations were non-academic and centred on finances and family.

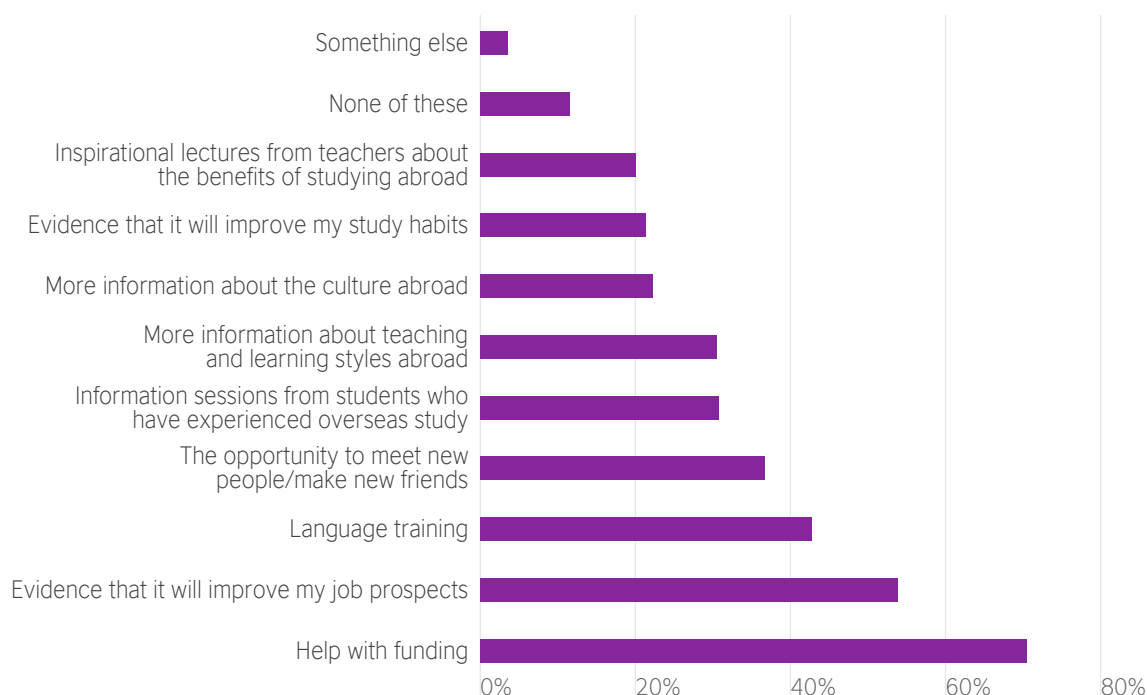
Non-academic barriers to study abroad



Source: British Council

Associated costs (living as well as tuition) were the top non-academic barrier to study abroad, chosen by just over half of respondents. Other deterrents included missing family and friends (41%) and being happy in the UK (39%) – these sentiments were echoed in various responses throughout the survey. One third of this group stated they were not confident in other local languages; students largely did not perceive visa considerations to be a barrier to study abroad.

What would motivate you to want to study abroad?

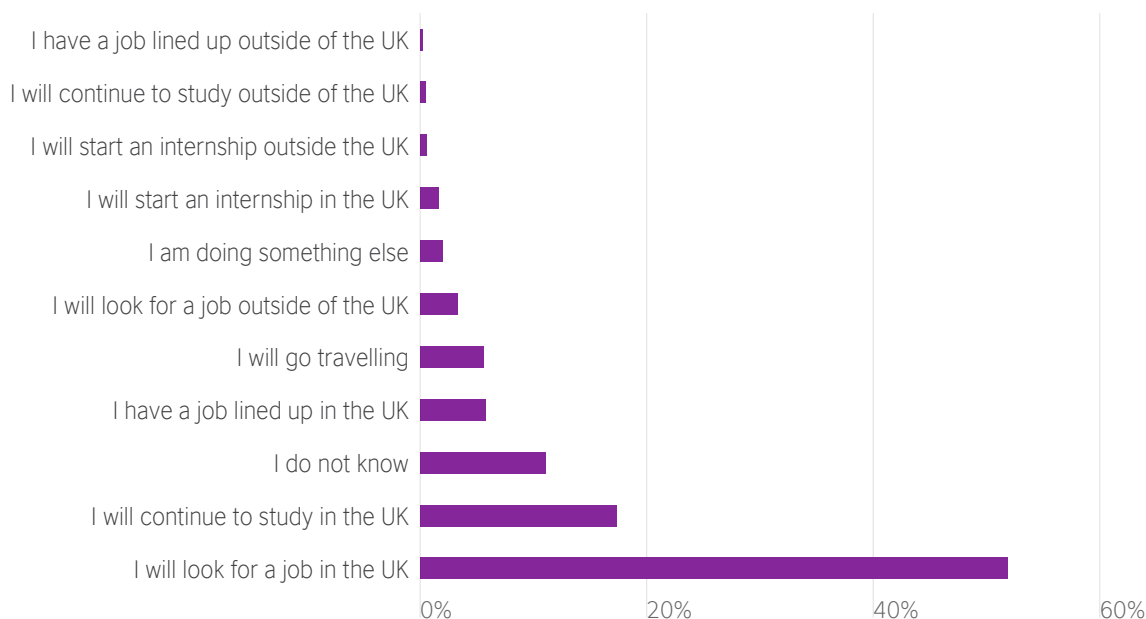


Source: British Council

We asked this group of students what, if anything, may incentivise them to study abroad. In line with the top barrier, 70 per cent of respondents stated help with funding would encourage study abroad aspirations. Other popular motivations included evidence the experience would improve career prospects (54%), foreign language training (43%) and definite opportunities to make friends (37%). More information, from returning students, about teaching and learning and about culture, was also a stated possible incentive – one student expounded on this and said had he or she received information earlier, in the first year, it would have made a difference. Other possible drivers to study abroad included facilities that would allow family and partners to accompany the student as well as information about housing. Just ten per cent of this group stated that none of these factors would motivate them to study abroad.

The rank of the above incentives was very similar when isolating for the students who did not know if they were considering study abroad at the time of the survey: help with funding, evidence that the experience boost employability and language training were the top three potential motivators.

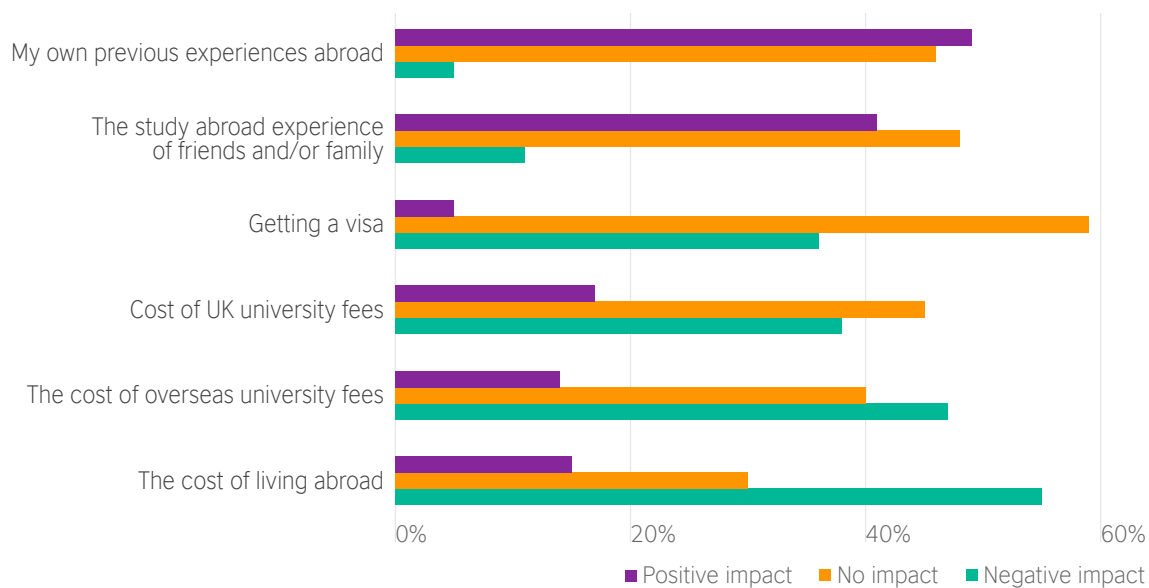
Plans after graduation



Source: British Council

Over half (52%) of this group of students indicated they would look for a job in the UK after graduation, and an additional 17 per cent stated they would continue study in the UK. Six per cent of students said they would travel but just five per cent of respondents said they would want to work or study outside of the UK. Of those who stated they would do something else, popular answers included starting a business, presumably within the UK.

Impact of factors on decision to not study abroad

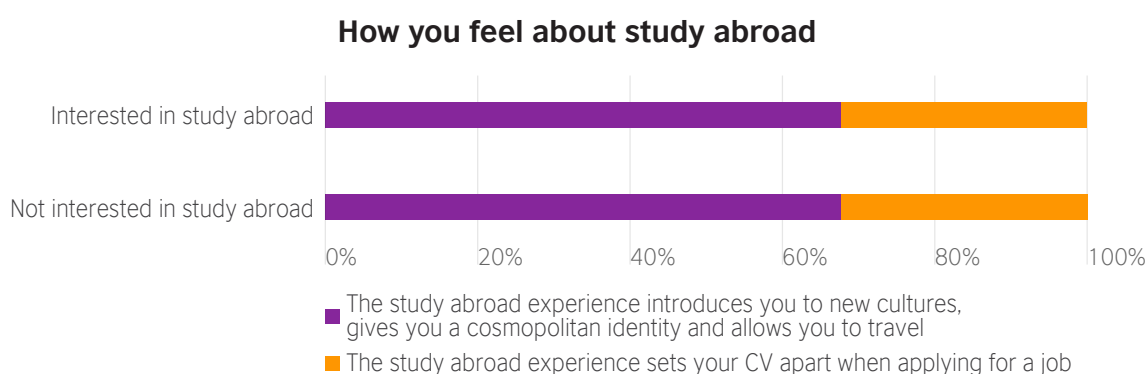


Source: British Council

Students were most impacted by the cost of living abroad when making the decision to not pursue overseas study, followed by the costs associated with overseas and UK university fees. Interestingly this group of respondents reported being positively influenced by friends and family as well as their own travel experiences.

General outlook

Much has been written about the benefits of the study abroad experience in terms of career prospects, personal growth and academic progression. However despite evidence demonstrating wide-ranging and largely positive outcomes, perceptions of the experience among students are uniformly basic and the impacts on the decision to study abroad remain varied.



Source: British Council

Two thirds of both respondents interested in study abroad and those not interested saw the experience more as one that exposes students to new cultures and allows them to personally develop. The remaining students saw it more as an experience that would potentially open up job opportunities.

Summary of findings: 2017

Today's students face a quickly transforming world and have to contend with instability on a number of fronts: the UK's place in an unpredictable global environment remains undefined, the pound sterling remains weak and political and economic shifts have left young people feeling lost and uncertain about their future. As a result, messaging regarding the benefits of study abroad must take into account this unique set of circumstances in order to effectively incentivise students to take a risk and go overseas; evidence indicates that currently there is a gap between the information needed by the student and what is given to them, potentially leading to this decrease in interest in study abroad. However, with sector-wide, targeted messaging alongside innovative solutions to this generation's distinctive priorities, there is enormous potential for achieving greater outward mobility of UK students.

In line with this, the following themes emerged from this year's data:

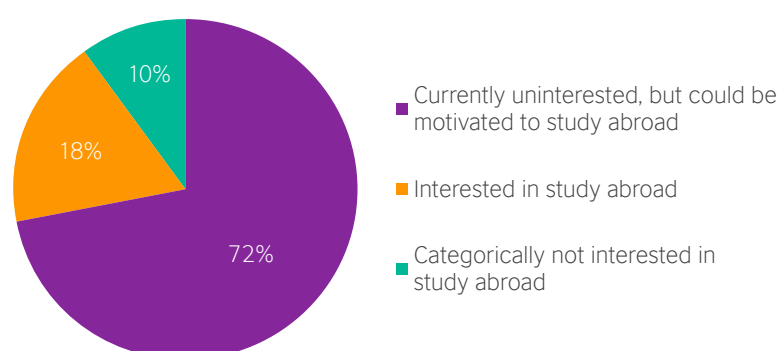
UK students are interested in study abroad if given the right incentives

Of the majority of students in 2017 who indicated they were not looking to study abroad, few outright stated an uncompromising position or a lack of general interest in going overseas. Rather, they largely specified that there were strong perceived (largely non-academic) obstacles that led them to decide to not study abroad.

'I believe that taking an extra year to complete a degree, to study abroad, requires a good reason.'

This suggests that should institutions and stakeholders take into account and address the current barriers to and misconceptions about study abroad, the actual interest in overseas study may be appreciably higher. In fact, just 12 per cent of those uninterested in study abroad said that there was nothing that could motivate them to change their minds – this means that 88 per cent of those not interested in study abroad could be convinced otherwise.

UK student views on study abroad



Source: British Council

Another way to look at this is to say that of the total sample for this research, 18 per cent were interested in study abroad, ten per cent were unequivocally uninterested, and 72 per cent were open to being persuaded.

If educators took into account what is currently important to students and linked it to relevant information about study abroad, interest in the experience may increase. Therefore, while it may seem the most significant finding of the 2017 research was that 18 per cent of surveyed students were interested in a study abroad experience, the data revealed much more opportunity among those who were not.

UK youth are UK-focused

Alongside an affinity for travel, an emergent value of current students in this year's work was an inclination to stay in the UK for a diversity of reasons. Difficulty leaving family and friends was a top concern for young people interested in study abroad as well as a top barrier to studying abroad according to our survey. Students particularly were concerned with a lack of access to family in case of emergency and the anxiety that may cause.

'If something were to go wrong, say I was in an accident of some sort, whilst I was abroad it could take a day or more for my family to get to me considering factors such as transportation and timing. However if the same accident occurred in the U.K. it would only take my parents a few hours to reach me and wouldn't cost as much.'

Students stated that they were afraid of being isolated and homesick whilst away, and they would miss university life in the UK, specifically their friends. The prospect of having to forge new relationships while abroad was daunting; In fact, the opportunity to meet new people and make friends was an attractive incentive to study abroad for those who weren't interested in overseas study.

'I fear...being lonely in a new place that I can't just escape.'

Another top barrier was being happy with life in the UK at the time of the survey. Students stated that that UK had family, friends and the best quality of education for their course; therefore without explicit incentives, they weren't interested in interrupting that at the undergraduate level to study abroad.

'What's wrong with studying in the UK?'

Interestingly, the EU Referendum in June 2016 impacted UK-domiciled students in various ways. Students who stated that the results did affect their views on study abroad indicated that they were mostly concerned about if they would be accepted into study abroad programmes in the wake of 'Brexit,' and if so, what it would then cost them. There were students who indicated they did not want to be in the UK after the results of the Referendum, but these respondents were few and far between.

'Brexit has put me off [study abroad].'

Respondents were not only UK-focused with regard to their family and education, but their career prospects; nearly half of students interested and over three quarters of those uninterested in study abroad wanted to stay in the UK immediately upon graduation, and perhaps remained uninformed of the connections between study overseas and increased employability even within the UK.

The costs of study abroad

Today's young people are astute about their higher education decisions, evaluating the return on investment of not only their university of choice but also their course and extra-curricular activities. While the desired benefits can be different depending on the individual, the ultimate goal of most university students is to succeed academically and access rewarding career prospects. Research indicates that the study abroad experience can result in such outcomes but this message ostensibly has not reached a cohort of students who remain concerned about the outcomes of the experience; this will be addressed in the next finding. Three significant costs of study abroad to the student emerged in our findings: the financial toll, the time commitment and the question of credit recognition. Students stated that the triple setback of taking on extra debt alongside potentially delaying studies and not gaining credit was too costly.

'As part of an undergrad[uate] course, it feels unnecessary and expensive, as it wouldn't count towards my final degree, but would be an extra year of study to fund.'

The cost of study abroad – literally and metaphorically – is often deemed too high by surveyed students. The financial implications of studying abroad are not only a top concern of those interested in study abroad but a top barrier to the experience for students not interested especially given the weakened British pound; this latter group of students also stated that help with funding in the form of loans or scholarships would be the greatest motivator for the students to consider the experience. Lastly, surveyed students indicated that the study abroad costs, both tuition and living expenses, had the largest negative impact on their decision-making process.

'I feel like you have to have a lot of money to be able to do it.'

A leading response to this year's survey was the obstacle of the time necessary to engage in study abroad and the fact that there was uncertainty surrounding the recognition of modules. Students were not interested in delaying their studies and missing out on time with their peers and academic cohort; not graduating with their friends also was an issue.

'A year abroad...would lengthen my degree by a year meaning I would have a year's extra debt and [would be] a year delayed in starting a career, for a year which does not contribute toward my degree.'

Further, there was not a consistent understanding of foreign qualifications in relation to UK standards, or how study abroad would fit in with the UK course – if it would at all. It is important to note, however, that clearly there was clarity for a number of students who studied abroad, as over one third of respondents stated that their main academic reason for studying abroad was to take advantage of a partnership between their university and one abroad.

'It would be great but it would mean I would have to do another semester in the UK or another year to make up the credits and the accredited modules that I would miss.'

Language remains a crucial driver and barrier

Students are most likely to study abroad on a language course and it is a top driver for overseas study, however it is also a source of great anxiety, as indicated by respondents who identified it as an important concern and obstacle. Some students do not consider the study abroad experience simply because they are not fluent in a foreign language, assuming that the experience is designed only for those who are.

'I haven't heard enough about [study abroad] - it isn't popular in my university apart from foreign language students.'

Valuing personal safety in a turbulent world

Students who were not interested in study abroad, and even some who were, stated that personal safety was a concern: this is inclusive of health and wellbeing as well as security. Students cited terrorism and the current global context as reasons to stay avoid study abroad as well as the desire to stay away from danger generally. A number of students questioned the availability and access to healthcare and support for small ailments as well as larger physical and mental health issues whilst abroad.

'Poor long term health means I...need to be able to be close to home for appointments.'

Overseas experiences are valued in different ways

The top drivers for students who are interested in studying abroad are to travel and have a unique adventure and to immerse themselves in other cultures, and respondents stated that previous experiences abroad incentivised them to engage in overseas study. Still others saw study abroad as a stepping stone to travelling and living abroad in the future. This is not to say that those who do not want to study overseas are unenthusiastic about travel, as respondents who were not intending to study abroad largely indicated that they would prefer to go overseas without the pressure of having to perform academically.

'I would prefer to travel abroad and experience things when I'm not committed to studying.'

However, overall there was a greater interest in living abroad for work or study after graduation amongst those who wanted to study overseas (14%) as compared to those who were not interested (4%).

'I plan on moving to Spain after I graduate, so any experience of studying and/or working in the country before then would be very beneficial.'

In light of these salient themes from this year's research, the following areas of opportunity emerge:

Timing and content of messaging is key

Access to information about study abroad from institutions remained a substantial barrier. Some students indicated that their universities had not explained the benefits or options in detail, or even at all. Others were happy with the information content but not the timing, indicating that they received it too late in their undergraduate career to make use of it.

'We're not given enough information at the start of my degree to be able to think about studying abroad. [I] didn't realise it could have been an option for me.'

Clear information on benefits to employability must be conveyed

Two thirds of respondents stated they viewed study abroad as a more experiential trip as opposed to one that would boost employability but over half of respondents who did not want to study abroad said they would consider it if they were presented with evidence that it would enhance their job prospects; suffice it to say, none of the aforementioned costs – financial, time or language to name a few – would be as consequential should students know that overseas study will yield a better job and higher pay.

In fact, evidence linking mobility with better jobs and salaries is available and mounting both in the UK (via research by UUKi, the British Council and the Higher Education Funding Council for England, to name a few) as well as from sources abroad. Such studies must be shared in order for students to better analyse the benefits of the experience against the aforementioned costs as well as against the choice to gain one year of work experience within the UK.

'I do not think they are worth the money as it does not stand out that much and prevents you from doing a year in industry, which makes you much more employable as you get experience in your field as opposed to another year in education.'

New approaches to student concerns

The barriers to study abroad are clear: financial cost, time commitment, ambiguity regarding degree transfer and employability, language, a desire to stay in the UK and personal safety. Universities must work together with business and government to produce innovative solutions in line with students' unique values to attract students to study abroad. Undeniably, students are open to knowing more and being motivated to go overseas but it is the responsibility of the institution to provide the steer and encourage them. Are there new models of funding for study abroad subsidised by the private sector that students can tap? Will more publicised partnerships lead to less confusion about credits and lead to increased uptake? Is academic recognition integral to the programme, and is it being communicated effectively? How can technology play a bigger role in promotion and the study abroad experience? Would transnational education within the UK provide a way to introduce a more international experience for students at home? Are there new resources universities can tap when tailoring their approaches? Much has changed with students and in the sector since the 2012 Joint Steering Group on UK Outward Mobility and as such approaches to outward mobility must also evolve.

Trends in UK outward mobility: 2013-2017

The British Council has been surveying UK-domiciled students on their perceptions regarding study abroad since 2013. Five years later, we are able to look at data from 2013 through 2015 inclusive and compare it to 2017 data to uncover how the outward mobility landscape and student perceptions have changed. In 2016, *Broadening Horizons* looked in detail at the impact of study abroad on recently returned students and as such the data from that year is not comparable.

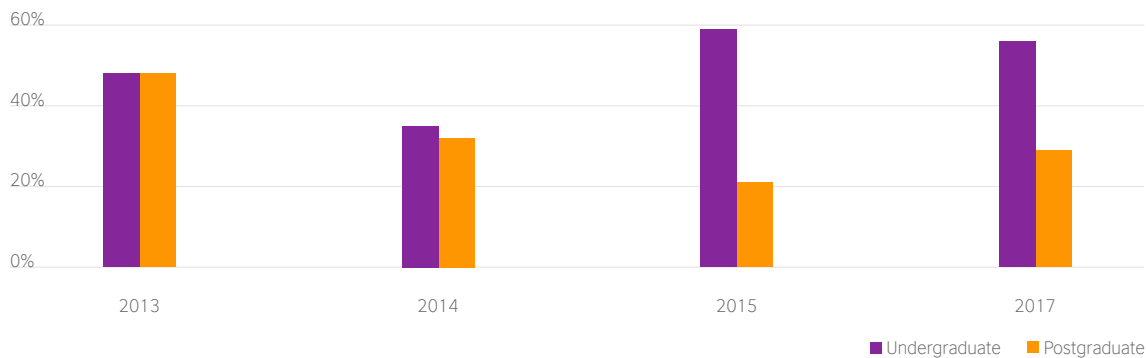
It is important to note that while the surveys disseminated year on year were not precisely the same, they were very similar, therefore allowing us to find links and identify substantial changes.

Percentage of students interested in studying abroad

2013	2014	2015	2017
20%	37%	34%	18%

Perhaps the biggest change was the percentage of the sample that was interested in study abroad. It appeared that the popularity of study abroad was generally expanding from 2013 to 2015, but in 2017 interest fell below 2013 levels. The reasons for this vary according to the student and include the fact that given the information they are working with, in 2017 many students do not see a positive return on investment of study abroad; the perceived deterrents (including financial burden, time away from family and university, potential lack of credit recognition, anxiety about personal safety) do not outweigh the benefits, which are often seen as inadequately conveyed, leaving many students who would otherwise be interested in study abroad to simply schedule personal travel for after graduation. While these factors have existed year on year since 2013, many of them are exacerbated in 2017: the falling pound sterling and uncertain global geopolitical situation have intensified travel-related anxiety and a changing and challenging workplace has made a focus on career prospects even more acute. It falls then to education stakeholders, including institutions, to communicate the considerable advantages of overseas study in light of these very serious costs.

Level at which students were interested in studying abroad



Source: British Council

According to HESA, 95 per cent of study abroad out of the UK occurs at the undergraduate level. In the 2013 and 2014 *Broadening Horizons* studies, the inclination to study abroad at the undergraduate and postgraduate levels were fairly equal, but in the last two surveyed years there has been a definite shift towards interest at the first degree level; this is a potential indication that institutional marketing regarding the experience has alerted students to the option of pursuing study abroad at the undergraduate level, especially given that in 2013 and 2014, 76 and 79 per cent of students uninterested in study abroad respectively stated that they did not have enough information, as compared to 58 per cent in 2015.

Year-on-year, our survey's students interested in study abroad were generally enrolled in the same top five courses, inclusive of language study, business and social studies, which are all top subjects of overseas study for UK students on a national level. It is interesting to note, however, that since 2014, Creative arts and design has been a popular selection for respondents, who are interested in studying the course abroad. Such subjects are becoming more attractive globally partially due to a diversification of the skills needed in the workplace as many more traditional functions become digitised.

UK student preferred study abroad destinations

2013	2014	2015	2017
US (29%)	US (33%)	US (40%)	US (22%)
Australia	Australia	Australia	Canada
Canada	France	France	Germany
France	Germany	Germany	France
Germany	Canada	Canada	Australia
Netherlands	Spain	Spain	Sweden
Italy	Netherlands	Netherlands	Japan
Spain	Japan	Japan	Spain
China	New Zealand	Italy	Italy
Japan	Italy	New Zealand	Netherlands

Source: British Council

China is a top ten destination among UK outwardly mobile students, but it fell out of the top ten preferred destinations in the *Broadening Horizons* survey in 2014, replaced by New Zealand. Australia, the second-most popular destination from 2013 to 2015 inclusive, fell to fifth place in 2017. Potentially the decreased interest in these markets is related to the long distance and length of travel time between the UK and the Asia Pacific region. Of the Asian destinations, Japan, known for language programmes as well as STEM subjects and Creative arts and design, has remained a consistently attractive choice. Besides these countries, the choices year on year have been European or Anglophone destinations, with the US as the number one selected. It is important to note, however, that the percentage of students who selected the US as a study destination dropped in 2017 to below 2013 levels. This is most likely a symptom of UK students' reaction to the changing political context in the US.

Top drivers (combined academic and non-academic) for study abroad

2013	2014	2015	2017
Gain credit	Gain credit	Gain credit	Travel and adventure
Have a unique adventure	Improve language skills	Travel	Experience a different culture
Improve language skills	Limited degree option in UK	Have a unique adventure	Improve language skills
Increase employability	Travel	Improve language skills	Benefit from a university partnership
Begin an international career	Have a unique adventure	Build confidence	Build confidence

Source: British Council

While the certain drivers for study abroad (travel, a unique adventure and immersing oneself in another culture, improving language) have remained fairly consistent since 2013 an interesting development in 2017 is the fact that the top academic driver for students is to benefit from a university partnership. As universities connect with other institutions abroad in line with national recommendations, it is encouraging that students are aware of and benefitting from such relationships. It potentially also indicates that students are passive and are happy to take advantage of well-marketed opportunities.

Also of note is the fact that since 2013, career-related drivers were less popular motivators and were not included in the top five reasons to study abroad. In 2017, as previously mentioned, more than half of respondents stated they would be incentivised to study abroad if they were presented with evidence that the experience would make them more employable: this indicates a gap in the communication of important information in 2017.

Top barriers (combined academic and non-academic) to study abroad

2013	2014	2015	2017
Costs	Programme may be too difficult	Costs	Costs
Not confident in local language	I don't know if I would fit into a different culture	Not confident in local language	Would miss family & friends
Concerned about healthcare costs	Not confident in local language	Access to quality healthcare	I am happy in the UK now
Concerned about visas	Costs	Safety	The UK offers the best quality education
Programme may be too difficult	Don't want to travel overseas	I don't know if I would fit into a different culture	Not confident in local language

Source: British Council

The financial costs of study abroad as well as the daunting task of communicating mostly in a foreign language continue to be top obstacles to UK students pursuing study abroad. Other factors, such as concern about access to healthcare and safety as well as anxiety regarding fitting in, remain barriers as well to varying degrees. In 2017, however, there was a slightly increased focus on staying in the UK, as it offered both comfort and familiarity alongside the benefit of a high quality education. Again, this apparent mind-set is one that should be addressed with proactive and open communication regarding how time abroad could further enhance life and future in the UK.

What would motivate you to consider study abroad?

2013	2017
Help with funding	Help with funding
Information sessions with returned students	Evidence it will help my job prospects
Language training	Language training

Source: British Council

Students in 2013 stated that help with the financial costs as well as language training would incentivise them to think again about study abroad, and their 2017 counterparts concurred. However, in 2017 students wanted evidence regarding study abroad and employability while in 2013 the data indicates students had a better idea of the links between the two. Perhaps as the global workplace has become more complex, with employees demanding greater flexibility and employers valuing more niche skills, students are not convinced that the study abroad experience will continue to make them stand out.

Every year – with the exception of the Internet – study abroad officers and teachers/professors were seen as top influencers and sources of information. However, the percentage of students interested in studying abroad who stated they did have enough information to make an informed decision remained fairly constant at 54 to 56 per cent. More importantly this means that the percentage of students who are interested in overseas study but feel that they do not have enough knowledge about the experience has not decreased according to our surveys; in order to ensure this cohort of students does follow through on their ambitions to study abroad it's important to continue to convey coherent messaging that is consistent with the difficulties of the day.

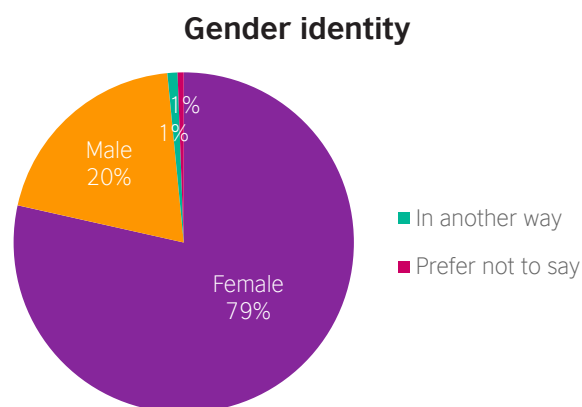
Conclusion

In 2017, acute changes with regard to the drivers for and obstacles to study abroad emerged: more students were not considering the study abroad experience and links between study abroad and employability, recognised by previous samples of students, were now less distinct. World events clearly impacted student views, with interest in the US falling and a desire to stay close to home intensifying as the EU Referendum was completed and the pound sterling fell. In some ways, however, the drivers for and obstacles to study abroad have not changed; students still want to travel and have a life-changing adventure but remain concerned about implications on their finances and ability to communicate on their programmes.

Today's young people are different from those before them and while many of their fears – the cost of living and going to school, personal safety - are difficult to appease, others can be addressed and mitigated. Guidance on all matters including study abroad must be properly tailored to their needs in order to close the gaps in information and misinformation. The sector cannot afford to reiterate the same messaging as student views change, it must look at what is of and what will be of concern and address it promptly. Only then will young people be able to make an informed and prudent decision on overseas study and the impact it will have on the rest of their lives.

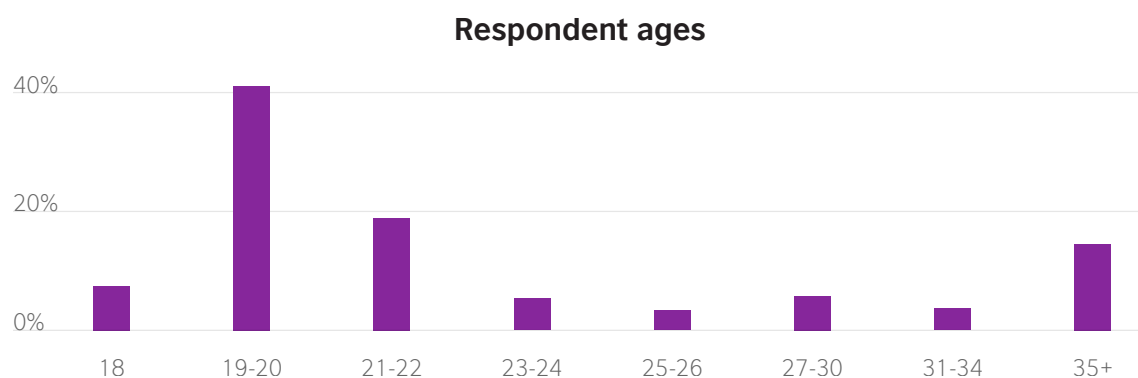
Appendix: Respondent profiles

In 2017, 1,033 UK-domiciled undergraduate students responded to our *Broadening Horizons* survey.



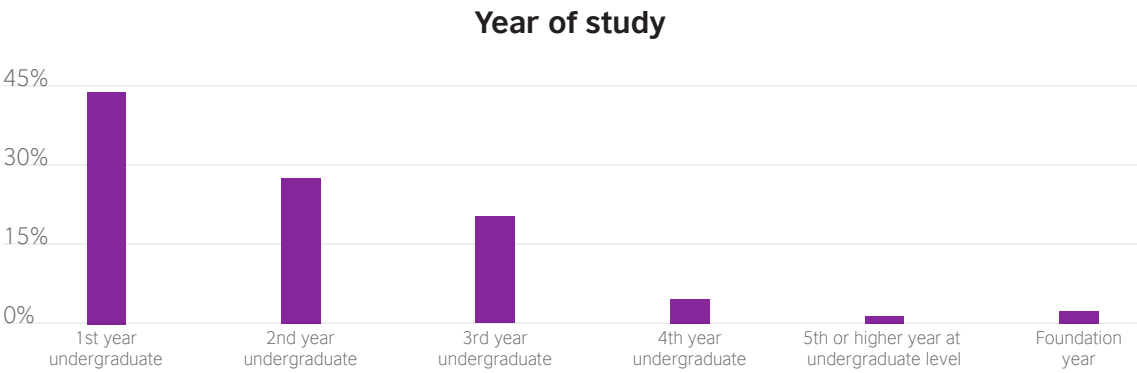
Source: British Council

A large proportion (79%) of the sample was female, with 20% identifying as male.



Source: British Council

The majority of the sample (75%) was between the ages of 18 and 26 inclusive and 15 per cent were 35 years of age or older.



Source: British Council

While two per cent of respondents were in a foundation year, the vast majority of the sample was in the process of completing their undergraduate degree.

Education Intelligence is the British Council's global higher education service. We provide reliable and accurate research, analysis and data to higher education institutions. Market intelligence is essential to locate effective partnerships, create solid collaborations and make strategic decisions regarding marketing and student recruitment.