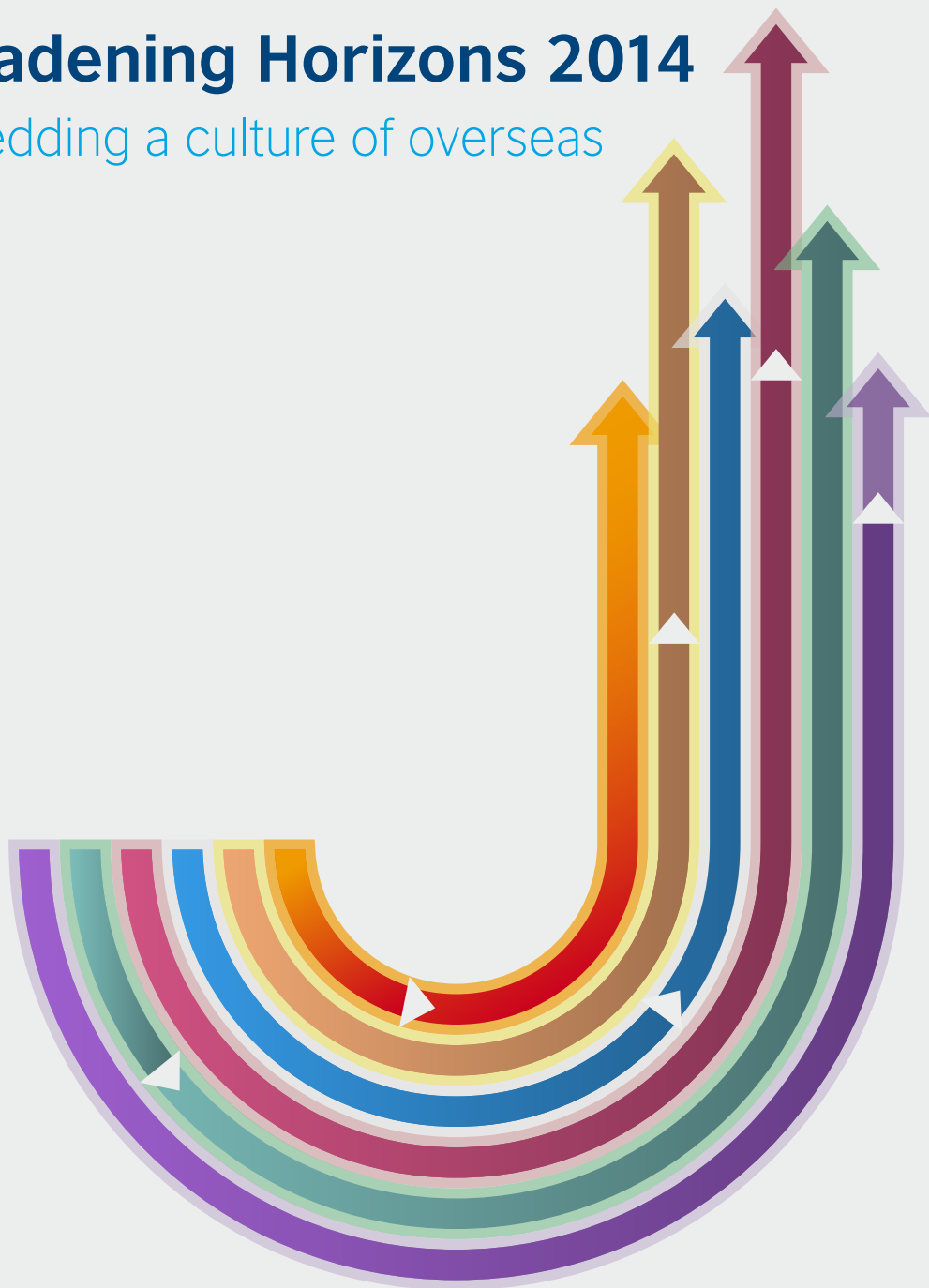

APRIL 2014

Broadening Horizons 2014

Embedding a culture of overseas
study



'When students leave their own cultural environment — for study abroad or academic programmes based on intercultural communication techniques with contents that highlight the international and global dimension of human and social interaction — they have the possibility, for instance, to develop a capacity for adaptation, flexibility, autonomy, to broaden their cultural and intellectual horizons, to increase their levels of intercultural tolerance and interpersonal communication through experiencing different idiosyncrasies.'

J Mestenhauser, 'Internationalisation of higher education: a cognitive response to the challenges of the twenty first century,' 1998

Broadening cultural and intellectual horizons

Elizabeth Shepherd
Director of Research
Education Intelligence
British Council

The first edition of this study, *Broadening Horizons: Breaking through the barriers to overseas study*, produced in March 2013 aimed to capture demand for overseas study by surveying over 10,000 UK and US students. Our aim was to understand the barriers, perceived and real, that students face when pursuing an international experience. In 2014, the aim of our research remains the same. Through this study we hope to capture and track over time the views of students on international study opportunities, access to information, scholarships and the perceived barriers that prevent them from taking up the growing number of programmes on offer.

Contents

5-6 CAPTURING THE VIEW FROM STUDENTS IN 2014

7 KEY FINDINGS

8-14 UK DATA ANALYSIS

Perceived barriers, drivers and deterrents

15-21 US DATA ANALYSIS

Perceived barriers, drivers and deterrents

22-24 CONCLUSION

The view from UK students – in summary

The view from US students – in summary

The global education challenge

A new culture of studying overseas

Embedding a culture of international experience

Capturing the view from students in 2014

The UK and the US, which house two of the world's leading education systems, are at strikingly different stages in development of their study abroad strategies for domestic students. Study abroad has been flourishing in the United States for decades with renowned programmes such as the Fulbright Program, which was established in 1946 and has sent over 310,000 participants overseas since its conception; it is the largest education exchange programme in history. International opportunities for study abroad are undertaken in real terms by a large number of US students, with more than 280,000 students now studying each year in more than 200 countries¹. However it is not only sustaining this scale, but also instrumenting substantial growth, providing access and widening participation that is the focus of US policy makers and institutions today.

The UK has taken part in the European Union's Erasmus Mobility programme since it began in 1987. In 2011/12 over 15,300 UK students undertook a mobility placement overseas, and of this total over 13,000 took part in the Erasmus programme.² On 1 January 2014 Erasmus+ was launched, replacing current funding programmes run by the European Commission in the area of education, training, youth and sport, including the Lifelong Learning Programme. The new programme aims to boost skills and employability as well as modernise education, training, and youth work across Europe.

Our 2013 student study aimed to understand the barriers, perceived or real, that UK and US students felt prevented them from studying overseas. Cost was felt by both UK (53%) and US (72%) respondents to be the greatest barrier to studying abroad, followed by other factors, such as language ability, obtaining a visa and leaving friends and family. The most significant finding showed that 24 per cent of UK students and 22 per cent of US students felt they did not have enough information about studying overseas to make an informed decision.

Strategic developments placing mobility on the agenda

There are core issues affecting comprehensive internationalisation of higher education at an individual, institutional and national sector level. The national level can have an important influence on the international dimension of higher education through policy, funding and programme development. In both the UK and the US, the past 12 months have seen important strategic developments that have placed domestic student mobility firmly on both national agendas.

In December 2013, the UK Higher Education International Unit launched the UK strategy for Outward Mobility³. Supported by governments across the UK, the outward mobility strategy formed a key part of the Government's International Education Strategy published earlier in 2013. The overarching strategy 'International Education: Global Growth and Prosperity' outlined essential elements to ensuring the continued strength of the UK as a competitive

¹ IIE <http://www.iie.org/Research-and-Publications/Open-Doors/Data/US-Study-Aboard/All-Destinations/2010-12>

² <http://www.britishcouncil.org/erasmus-facts-and-figures.htm>

³ <http://www.international.ac.uk/media/2468186/uk-he-international-unit-uk-strategy-for-outward-mobility.pdf>

provider and partner of choice in international education; these included a warm welcome to international students, support of transnational education, efficient exploitation of education technology and building new international relationships and the UK's international education brand.

The subsequent outward mobility strategy resulted from a review that highlighted several challenges to increasing UK student participation in international opportunities. These included institutional barriers, lack of comparative data and the need for more flexible definitions of outward mobility as well as language and intercultural barriers for students. The strategy sets out seven objectives, including promoting the benefits of study and work abroad through new mobility programmes like 'Generation UK China',⁴ and building capacity in UK Higher Education to facilitate outward mobility with a focus on internationalisation at home.

In the US in March earlier this year an initiative, bearing a similar name to the latest UK overseas study programmes, titled 'Generation Study Abroad'⁵ was launched by the Institute of International Education. The five-year initiative brings together leaders in education, business and government to double the number of US students studying overseas. Described by the Institute of International Education as 'Meeting America's Global Education Challenge', the Generation Study Abroad initiative aims to grow participation in study abroad and at the same time more than double the total number of participants to 600,000 by the end of the decade.

In both the US and the UK, each institution has its own set of unique challenges to get more students to study abroad. Institutions of varying size and specialism are developing innovative efforts to make study abroad more accessible to students. Alongside large scale national initiatives like Generation Study Abroad in the US and strategic developments the UK's Outward Mobility Strategy, today's generation of UK and US students are increasingly being encouraged to broaden their horizons through international experience.

As part of our 2014 study we have captured the views of over 7,300 UK and US students on studying overseas, the barriers they believe they face and what factors may drive them to undertake an overseas experience in the future. This quantitative data collection was supplemented by student focus groups, in-depth interviews and industry expert views.

⁴ <http://www.britishcouncil.org/study-work-create/study-abroad/generation-uk>

⁵ <http://www.iie.org/Who-We-Are/News-and-Events/Press-Center/Press-Releases/2014/2014-03-03-Generation-Study-Abroad>

Key findings

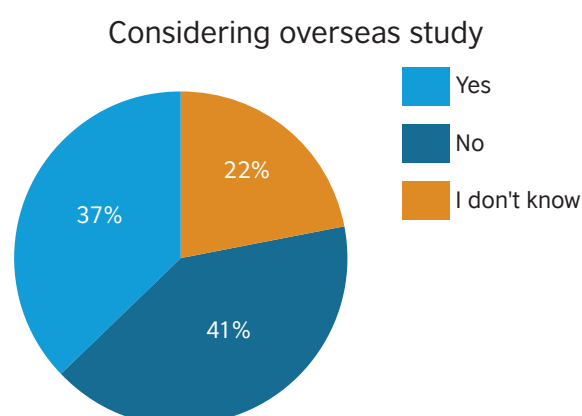
- 01** Thirty-seven per cent of UK respondents are considering overseas study, a 17 per cent increase from 20 per cent in 2013
- 02** Our data shows a fall in the number of US students wanting to study abroad to 44 per cent in 2014, from 56 per cent in 2013
- 03** The US remains the 1st choice study destination for UK students (33%), and the UK remains the top choice for US students (19%)
- 04** Experiencing other cultures (for 19 per cent of UK student and 23 per cent of US students) and travelling overseas (for 16 per cent of UK students and 21 per cent of US students) remain the greatest drivers for inspiring students to study overseas
- 05** Cost (32%) remains the greatest non-academic barrier to US respondents undertaking overseas study
- 06** Fear of not fitting into other cultures (34%) was shown to be the greatest non-academic barrier to UK students studying overseas
- 07** Twenty-six per cent of UK respondents were aware of government scholarship programmes to assist students to study abroad, an increase from 17 per cent in 2013
- 08** Twenty-three per cent of US respondents were aware of US government-sponsored programmes to promote overseas study, also an increase from six per cent in 2013
- 09** Forty-four per cent of UK students said a having the option to select a course containing a period of mandatory overseas study could lead them to actively pursuing an international study opportunity
- 10** Fifty-nine per cent of US respondents indicated access to financial aid had directly affected their decision about study abroad

UK data analysis

Perceived barriers, drivers and deterrents

The total number of UK survey respondents in 2014 was 2,630. Sixty-seven per cent of respondents were aged between 18 and 24 years old and there were a slightly higher proportion of females (59%) as compared to males (41%) in the sample.

Of the total sample, when asked if they were considering studying overseas, 37 per cent responded positively and said yes, 41 per cent said no and 22 per cent indicated they did not know. This represents a considerable increase from the March 2013 sample, in which only 20 per cent of participants responded positively, 65 per cent said no and 15 per cent stated they did not know.



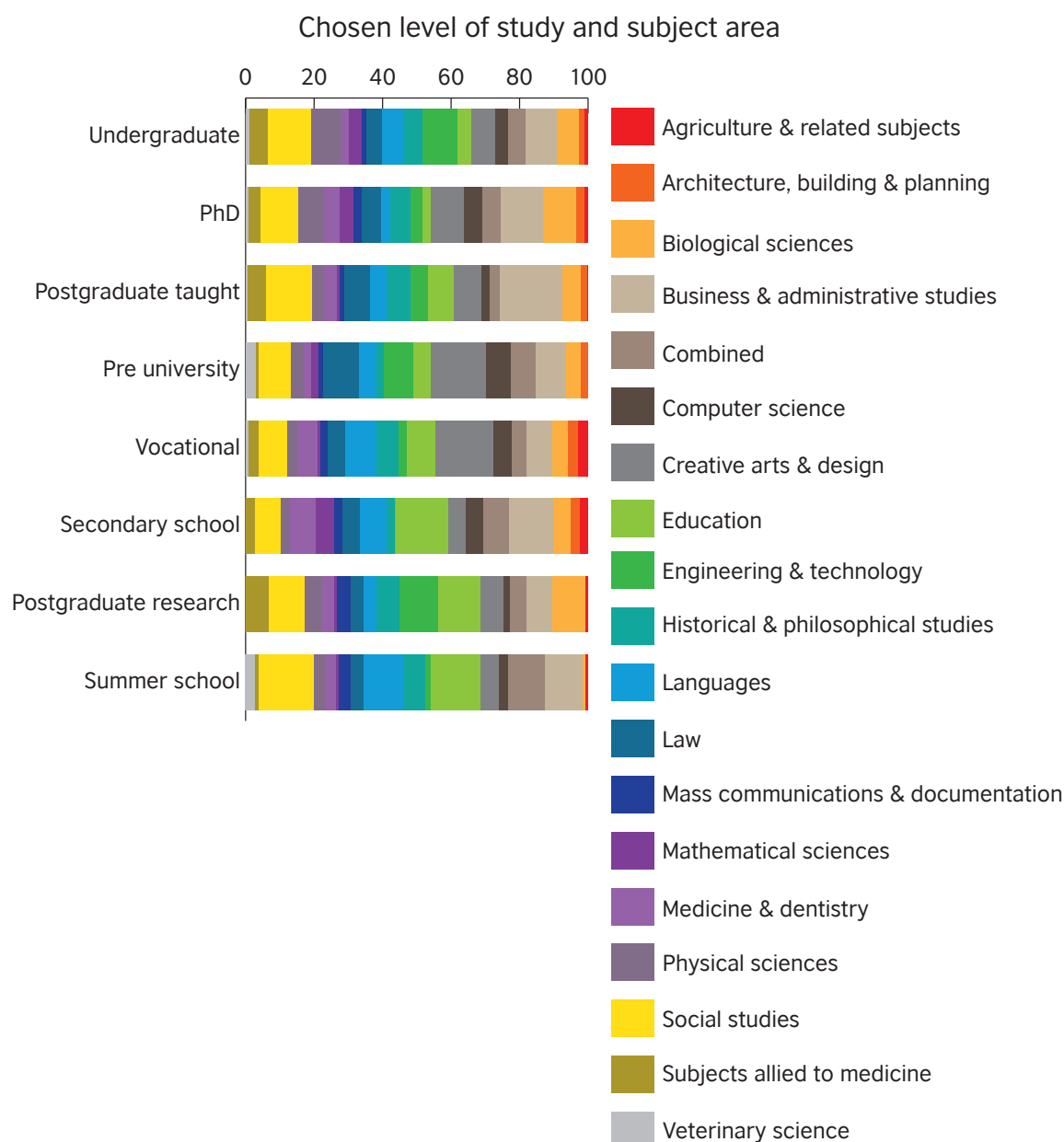
This significant 17 per cent increase of positive responses from UK survey participants shows far wider consideration of overseas study opportunities. Of these respondents considering overseas study, 95 per cent said they held a valid passport, 63 per cent stated they spoke more than one language and 24 per cent indicated one of their parents had previously studied overseas.

Preferred level of overseas study, % of total

| Chosen level of overseas study | % of total |
|--------------------------------|------------|
| Undergraduate | 35 |
| PhD | 17 |
| Postgraduate Taught | 15 |
| Pre University | 9 |
| Vocational | 8 |
| Summer school | 7 |
| Postgraduate Research | 7 |
| Secondary school | 2 |

Undergraduate was the preferred level of study chosen by 35 per cent of UK respondents, followed by PhD (17%), Postgraduate Taught (15%), Pre-University (9%), Vocational (8%), Summer school (7%), Postgraduate Research (7%) and Secondary school (2%).

The most popular subject areas for overseas study were Business and Administrative Studies (7%) and Social Studies (7%), followed by Creative Arts and Design (6%), Biological Sciences (4%), Education (4%), Engineering and Technology (4%), Languages (4%) and Physical Sciences (4%).

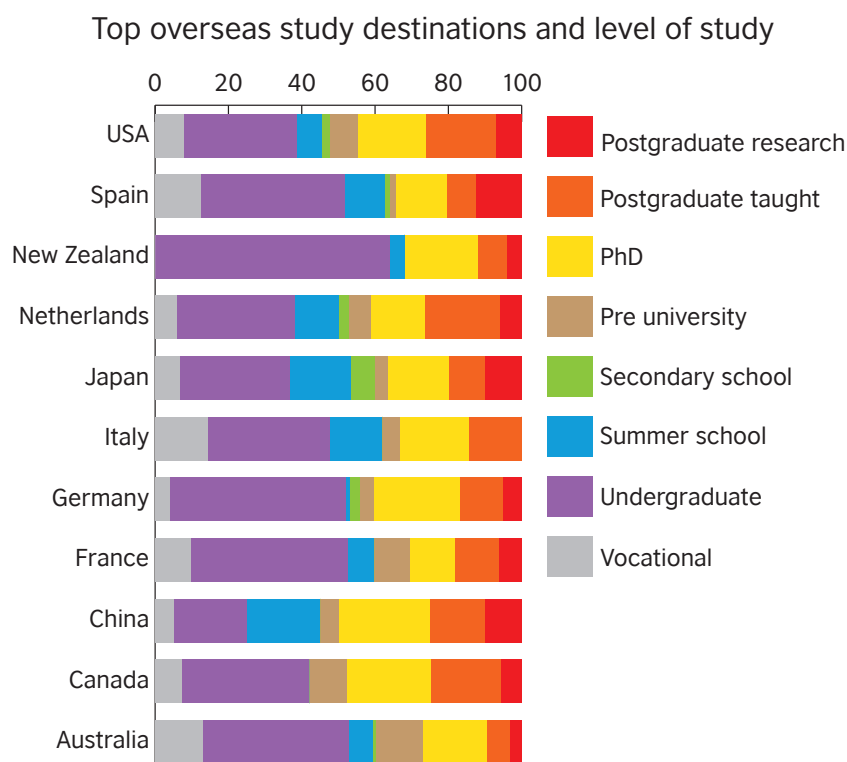


At the Undergraduate level, the largest proportion of UK respondents wanted to study Social Studies (12%), Engineering and Technology (10%), Business and Administrative Studies (9%) and Physical Sciences (9%).

At the PhD level, respondents wanted to study Business and Administrative Studies (12%), Social Studies (11%), Biological Sciences (10%) and Creative Arts and Design (10%).

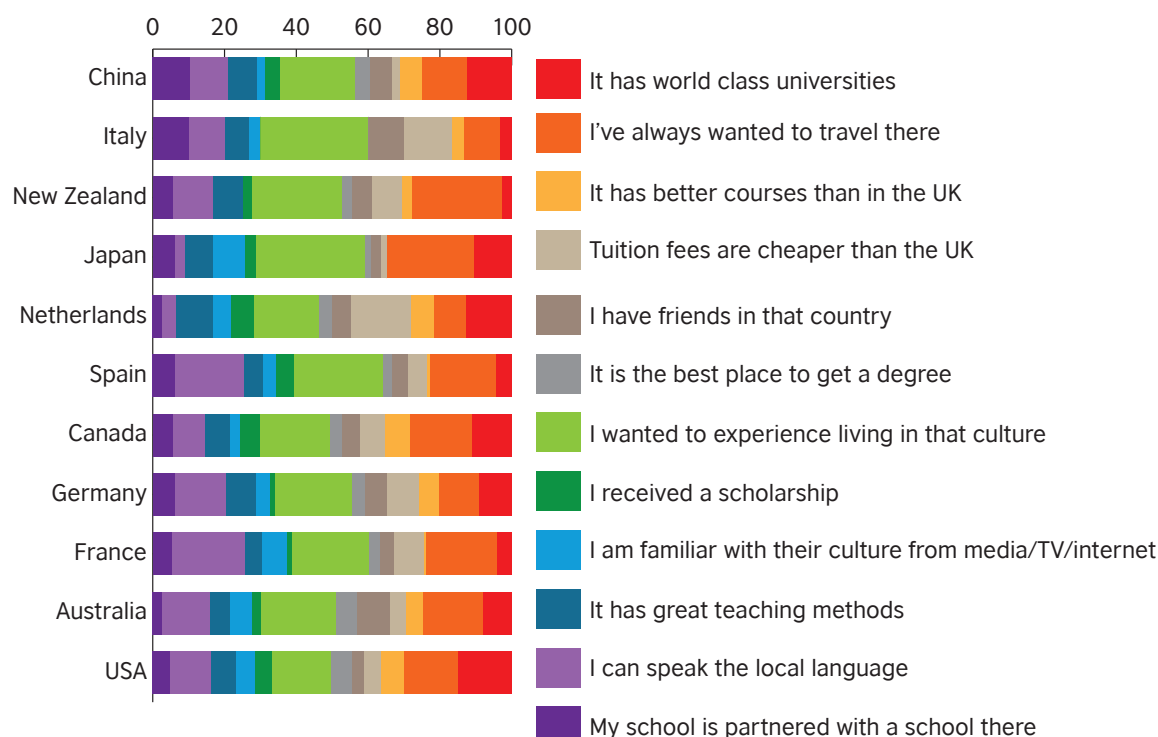
UK survey respondents that are considering overseas study ranked their top overseas study destinations as follows: USA (33%), Australia (9%), France (5%), Germany (5%), Canada (4%), Spain (4%), Netherlands (2%), Japan (2%), New Zealand (2%), Italy (1%), and China (1%).

The United States remains the number one destination of choice for UK participants interested in studying overseas, increasing in popularity from 29 per cent in 2013. The remaining top ten study destinations are largely unchanged, however Canada fell from third place with ten per cent of the overall total in 2013 to just four per cent in 2014. China has also fallen from the ninth destination of choice in 2013 with two per cent of the total to the 11th destination of choice in 2014, replaced in the top ten by New Zealand.



Overseas study destinations remain popular to UK participants largely for cultural reasons. Overall, 19 per cent of positive respondents selected their first choice study destination because they wanted to experience living in that culture. Sixteen per cent said their selection was based on wanting to travel to that country, 12 per cent said they could speak the local language and 11 per cent indicated their choice of study destination was based on the world-class calibre of that country's universities.

Top overseas study destinations and most important factor for selection

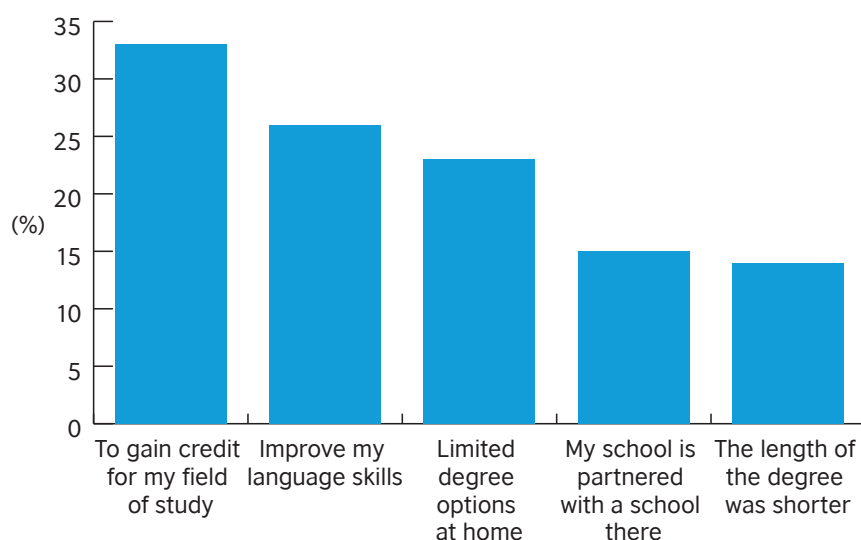


The largest proportion of respondents recognised the United States as having world class universities (15%), followed by the Netherlands (13%) and China (13%). The Netherlands and Italy were also seen as a cost-effective study destinations, with 17 per cent and 13 per cent of UK respondents respectively highlighting they believed those countries had cheaper tuition fees than the UK. Respondents indicated France (20%) and Spain (19%) as the most popular non-English speaking destinations that were attractive due to familiarity with the local language.

The least important factor when selecting an overseas study destination was having received a scholarship, selected by only four per cent of the total sample.

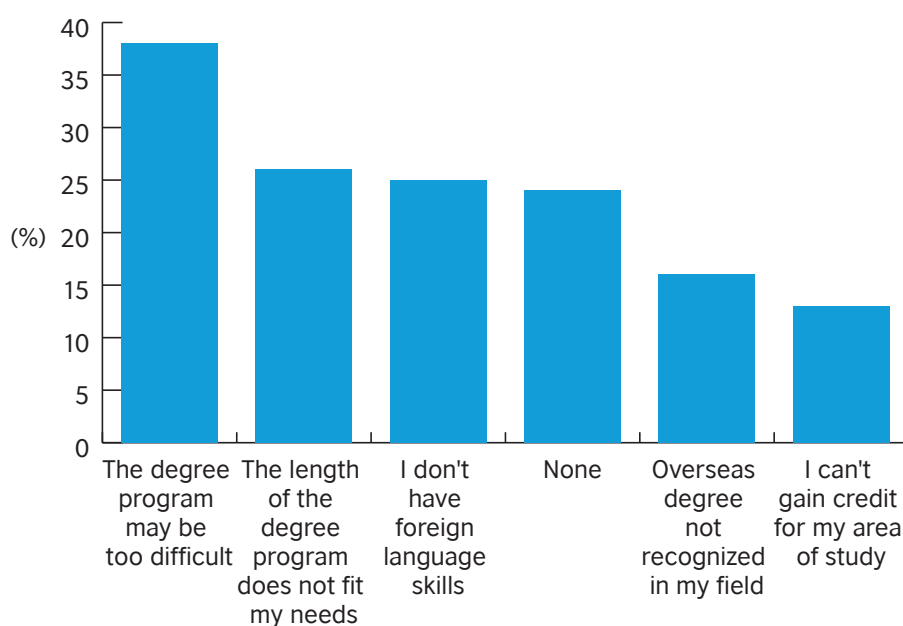
All survey respondents were asked to select what they perceived as the main academic drivers and academic deterrents to overseas study. Academic drivers selected by respondents remained largely the same as in 2013 and included gaining credit for their field of study (33%), improving their language skills (26%), acting on limited degree options at home (23%), an overseas school partnership (15%) and a shorter length degree (14%).

Main academic drivers to study abroad



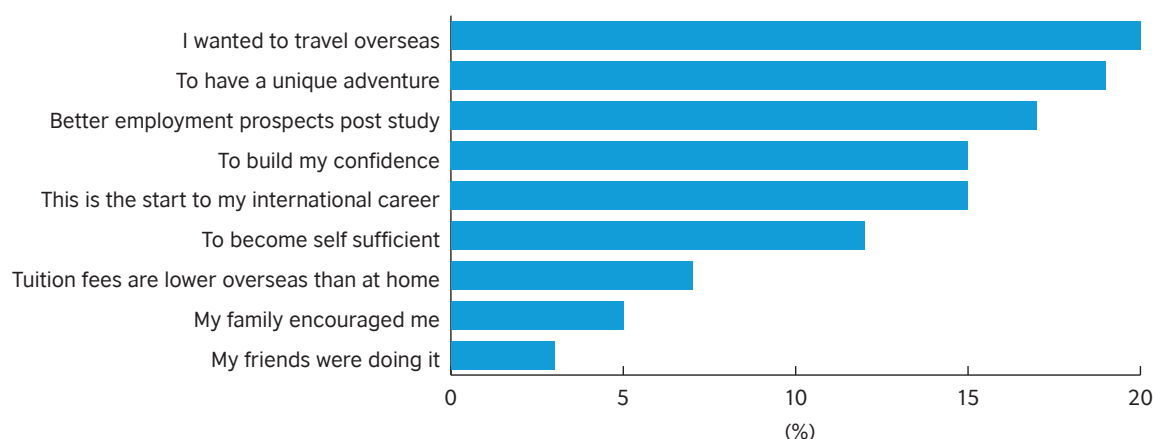
Academic deterrents have shifted slightly from the previous year's data collection. Thirty-eight per cent of the sample, a sharp increase from 13 per cent in 2013, felt an overseas degree programme may be too difficult. Twenty-six per cent said they felt the degree programme would not fit their needs and 25 per cent, down from 39 per cent in 2013, indicated they felt they did not have the foreign language skills.

Main academic deterrents to study abroad



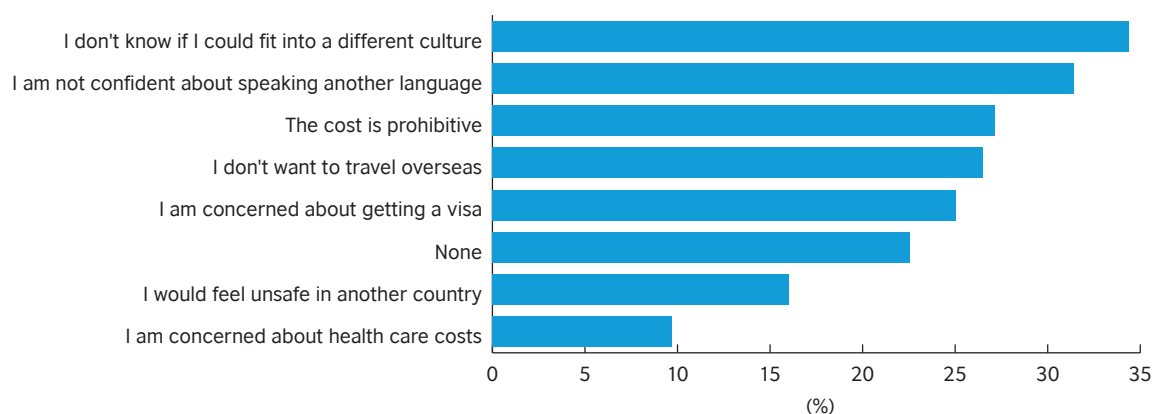
As seen in the earlier analysis, non-academic drivers to choosing an overseas study destination remain largely related to experiencing other cultures by traveling overseas (20%) and to having a unique adventure (19%). Gaining better employment prospects is recognised by a smaller proportion of respondents (17%) followed by building self-confidence (15%) and the experience allowing students to establish the beginning of their international careers (15%).

Main non-academic drivers to study abroad



When asked to identify non-academic deterrents to studying abroad, cost was not identified by the largest proportion of UK respondents as was the case in 2013. UK respondents indicated that not knowing if they would fit into a different culture was the greatest perceived deterrent (34%). This was followed by lack of confidence in foreign language skills (31%), the perception that the cost was prohibitive (27%) and not wanting to travel overseas (27%).

Main non-academic deterrents to study abroad



UK government-sponsored programmes

Of survey respondents that indicated that they were considering overseas study, 26 per cent said they were aware of a UK government scholarship programme to assist students to study abroad, an increase from 17 per cent of positive respondents in the previous year. Forty-one per cent said they were not aware of such programmes and 33 per cent said they did not know.

Of those respondents that indicated they were not considering or undecided on studying overseas, 77 per cent said they were not aware of government scholarship programmes, while 20 per cent stated that they were and 2 per cent said they did not know.

Information resources

Positive respondents indicated that Internet searches (54%) were the main source of information they used most when researching overseas study opportunities, followed by consulting study abroad officers (19%), college lecturers (18%), family (4%), friends (3%) and school teachers (2%).

When asked if they felt they had enough information to make an informed decision about studying overseas, the largest majority of positive respondents indicated they did not have enough information and access to more would have made the process easier (32%), followed by those that said they had adequate information (24%), those that said they had enough information (17%), those that said they had enough but had to work hard to find it (15%) and those that indicated they did not know (12%).

In contrast, 79 per cent of negative and undecided respondents said they felt they did not have enough information to make an informed decision about studying overseas. This figure represents a small increase from the 2013 per cent of respondents (76%) that also felt they did not have access to enough information. Completing the 2014 analysis, 17 per cent said that they did have enough information and 4 per cent said they did not know.

Access to further resources

Negative respondents were asked to indicate which resources could potentially lead them to pursue a period of overseas study. Forty-four per cent said a period of mandatory overseas study on their course, 43 per cent said inspirational lectures from teachers about the benefits, 43 per cent stated information sessions from other study abroad students, 36 per cent said help with funding and 25 per cent indicated language training.

Tuition fee increase

Positive respondents were asked if the increase in UK university tuition fees inspired them to study overseas. Fifty-seven per cent said yes, that it had. This represents a 30 per cent increase from 2013 when only 27 per cent said the UK home student tuition increase had inspired their overseas study decision. Thirty-one per cent said it had not and 12 per cent said they did not know. Of the negative respondents, 60 per cent said the UK home student tuition fee increase had not inspired them to study overseas, 35 per cent said it had affected their decision and 6 per cent said they did not know.

Post-graduation benefits of studying overseas

Respondents were asked when they graduated if they believed they would need more than their degree to secure the job they wanted and stand out from the crowd. The majority of positive respondents said they believed they would (79%), 12 per cent said they believed they would not and 10 per cent said they did not know. When asked if an overseas study experience could give them the edge they need to stand out when applying for jobs in the future, 88 per cent said they believed it would, eight per cent indicated they did not know and four per cent responded no.

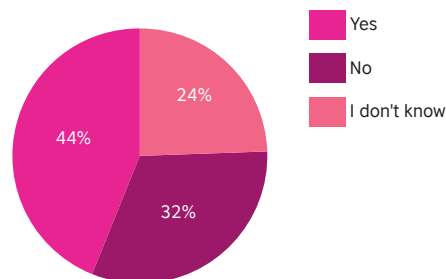
US data analysis

Perceived barriers, drivers and deterrents

The total number of respondents to the US survey in 2014 was 4,680. The sample consisted of 67 per cent females and 33 per cent males. The majority of respondents, 54 per cent, were aged between 16-and-under and 19 years of age. A further 40 per cent aged between 20 and 26, the final six per cent 27 to 34 years old.

Of the total sample, when asked if they were considering studying overseas, 44 per cent responded positively and answered yes they were considering overseas study. Respondents that said no, 32 per cent, or they did not know, 24 per cent, were asked an alternative set of survey questions based on their negative response. Between 2013 and 2014, US survey respondents responding positively that they were considering studying overseas decreased by 12 per cent from 56 per cent in 2013.

Considering overseas study



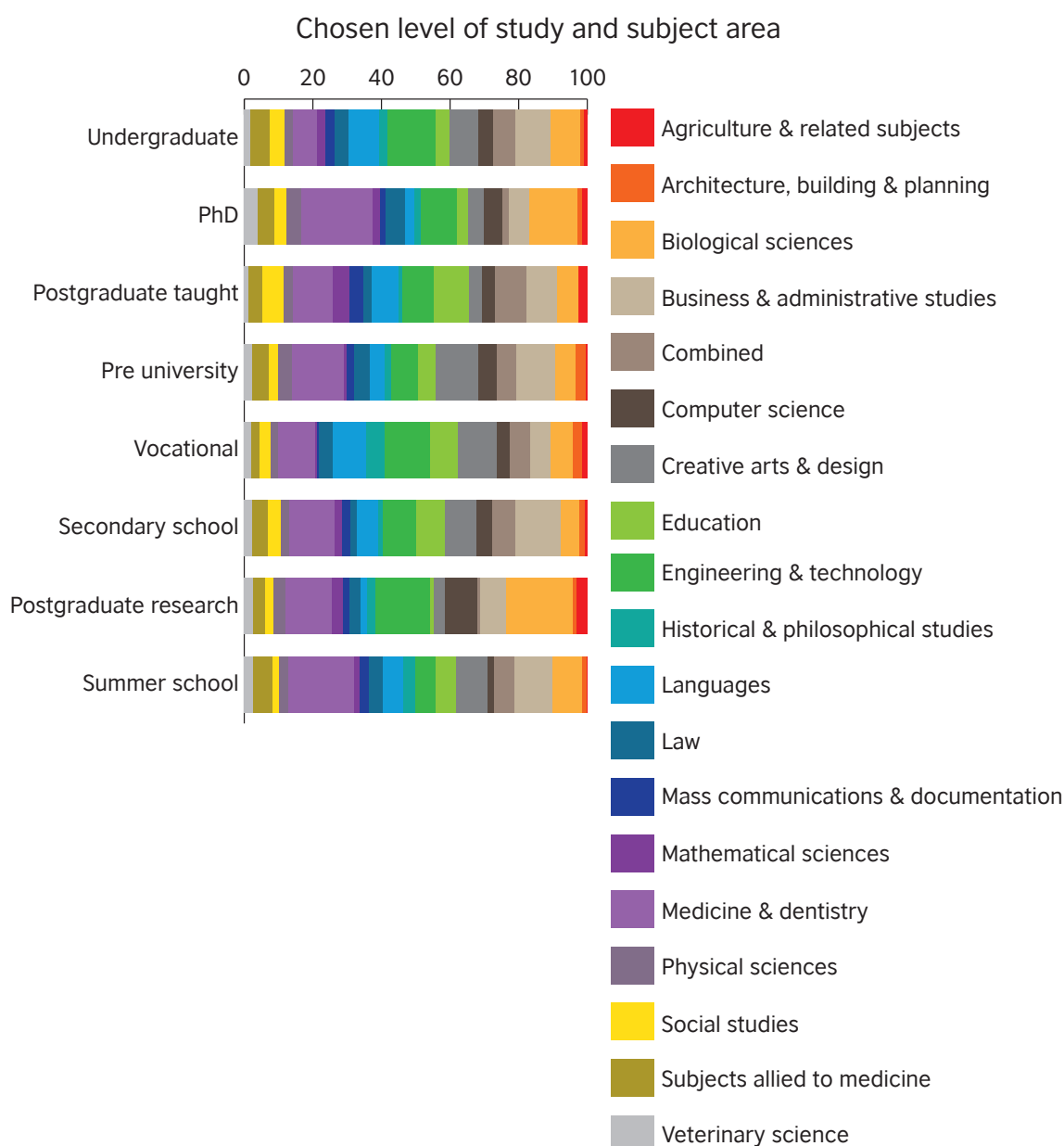
Seventy-one per cent of positive respondents indicated they held a valid passport, 18 per cent that either of their parents had studied overseas and 62 per cent that they spoke more than one language. The United States Census Bureau's 2011 report shows 21 per cent of US population speaks a language other than English at home⁶, whilst other sources show a lower proportion than this; as such the sentiment from 62 per cent of US respondents that they feel they can speak more than one language is higher than national statistics suggest, but consistent with our 2013 data.

Preferred level of overseas study, % of total

| Chosen level of overseas study | % of total |
|--------------------------------|------------|
| Secondary school | 27 |
| Undergraduate | 17 |
| Pre university | 16 |
| Summer school | 13 |
| PhD | 12 |
| Vocational | 8 |
| Postgraduate research | 4 |
| Postgraduate Taught | 2 |

The preferred level of study chosen by US respondents was Secondary school (27%), followed by Undergraduate (17%), Pre University (16%) and Summer schools (13%). The trend showing active consideration of study abroad at a younger age, likely to be illustrative of the young demographic of the 2014 US data sample, shows interest from a younger pool of students in the US that want to undertake study abroad experiences.

The most popular subject area chosen by US respondents was Medicine and Dentistry (14%), followed by Business and Administrative studies (10%), Engineering and Technology (10%) and Creative Arts and Design (9%).



Respondents at Secondary school level indicated areas of future study they would like to undertake were those allied to Medicine and Dentistry (13%), Business and Administrative Studies (13%) and Engineering and Technology (10%). At Undergraduate level, the most popular subject areas were Engineering and Technology (14%), Business and Administrative Studies (10%) and Biological sciences (9%).

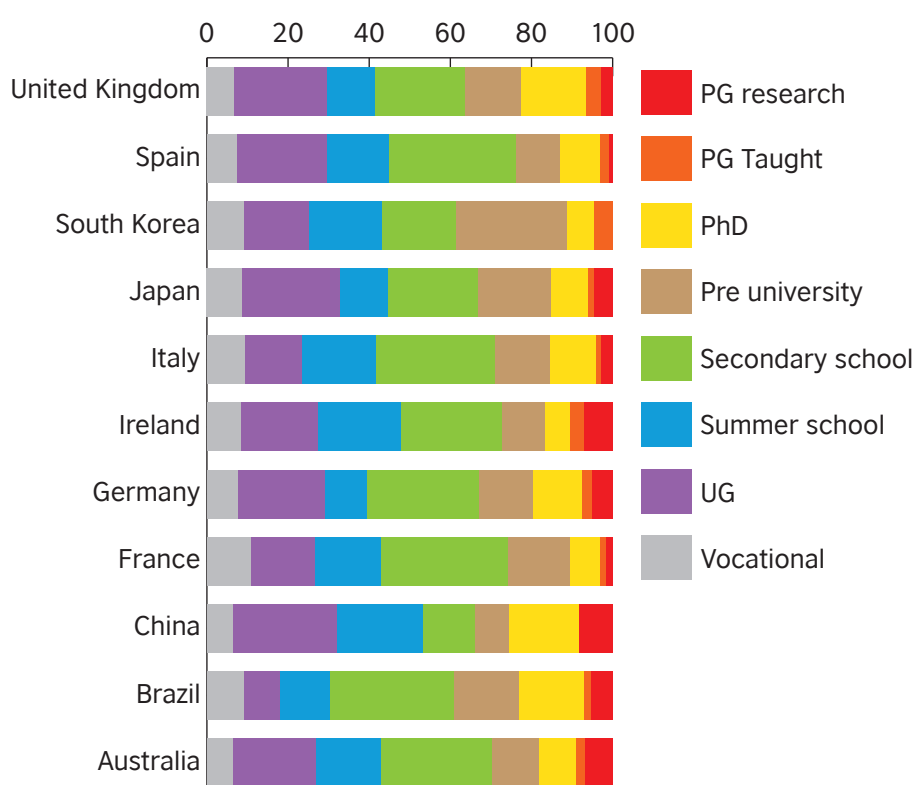
⁶ <https://www.census.gov/prod/2013pubs/acs-22.pdf>

The most popular subject choices with the highest number of responses were subjects allied to Medicine and Dentistry at PhD level (21%) and Summer school (19%). Studying Biological sciences at Postgraduate research level was also a popular choice (19%).

US survey participants that responded positively ranked their choice of overseas study destinations as follows: UK (19%), France (10%), Italy (8%), Spain (6%), Australia (6%), Germany (5%), Japan (5%), Ireland (3%), Brazil (2%), China (1%), and South Korea (1%).

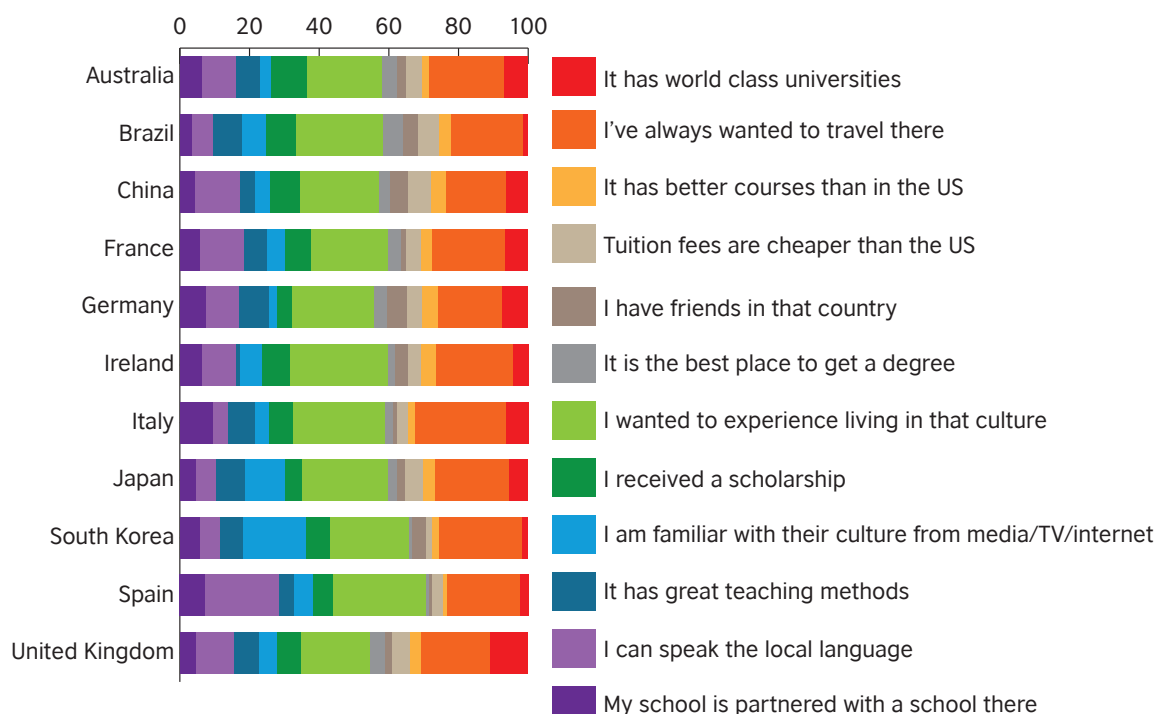
The top destination choices of US respondents remain largely the same as in 2013, with slight shifts observed; the UK has dropped fractionally from 22 per cent of the overall total in 2013, but remains the top destination choice. China has fallen in popularity from ninth in 2013 to tenth in 2014, with only one per cent of respondents selecting it as their destination of choice. Brazil has also entered the top ten most popular study destinations.

Top overseas study destinations and level of study



Overseas study destinations chosen by US students are by and large linked directly to wanting to experience the culture in that country (23%) and wanted to travel there (21%) whilst also having a level of familiarity with the local language (11%).

Top overseas study destinations and most important factor for selection

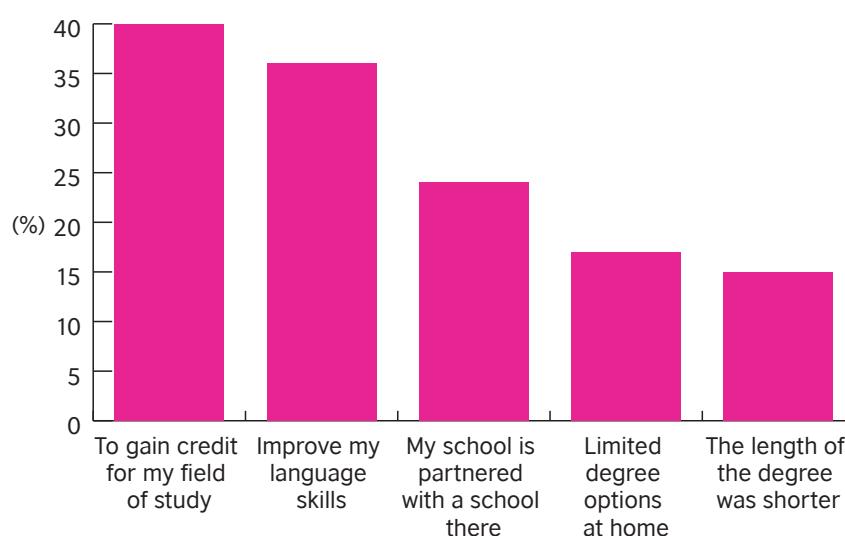


The UK (11%) and Germany (8%) were acknowledged by the largest number of respondents to have world class universities, and this was the most important factor when selecting them as overseas study destinations. Tuition fees were perceived to be cheaper in Brazil (6%) and China (6%) and the highest percentage of US survey respondents said they had friends and relatives in Germany (6%). Scholarships were identified as important factors by students wanting to study in Australia (10%), Brazil (9%) and China (9%). South Korea (18%) and Japan (12%) were identified as the overseas study destinations whose cultures were most familiar via media, TV and the internet. Italy was chosen by respondents as having the most active school partnerships (9%).

The least influential factor on US respondents' study destination choice was the presence of friend or relatives in that country (2%).

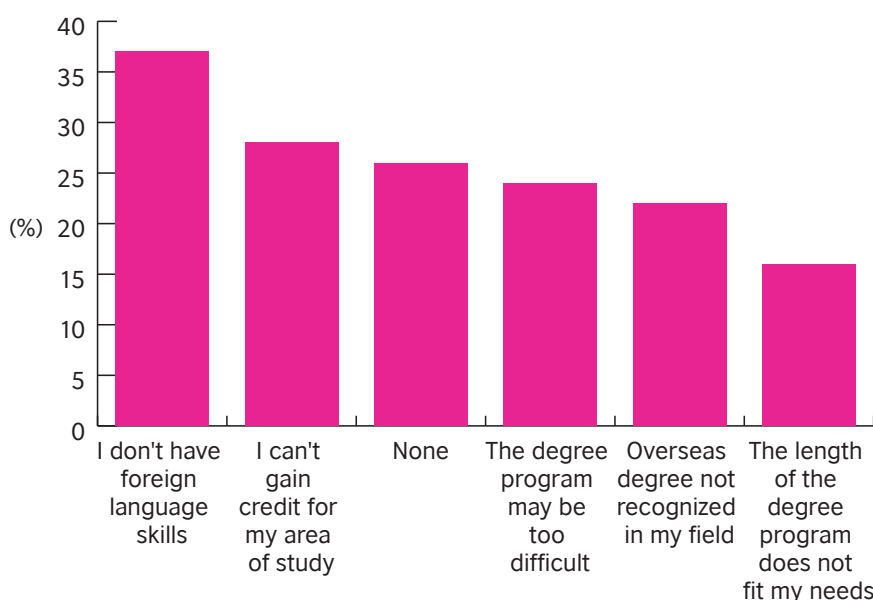
The main academic drivers for students to study overseas remain the same as the previous year's; these are gaining credit for their field of study (40%), improving language skills (36%), participating in a school based partnership (24%), acting upon limited degree options at home (17%) and the shorter length of the course (15%).

Main academic drivers to study abroad



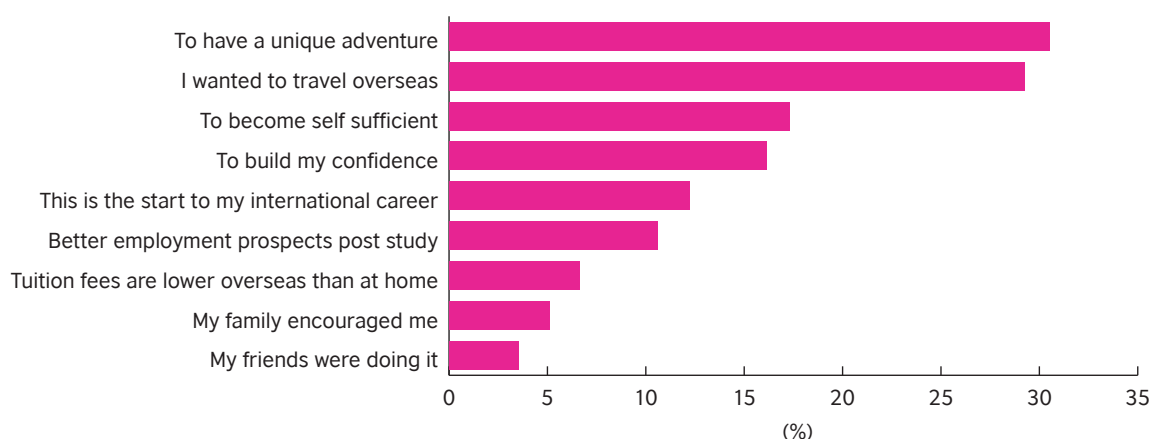
The main academic deterrents to studying overseas for US survey respondents were lack of foreign language skills (37%), being unable to gain credit for their course (28%), not included in the reasons stated (26%), the possible difficulty of the degree programme (24%), the overseas degrees not being recognised in their field (22%) and the unsuitability of the length of degree programme (16%).

Main academic deterrents to study abroad



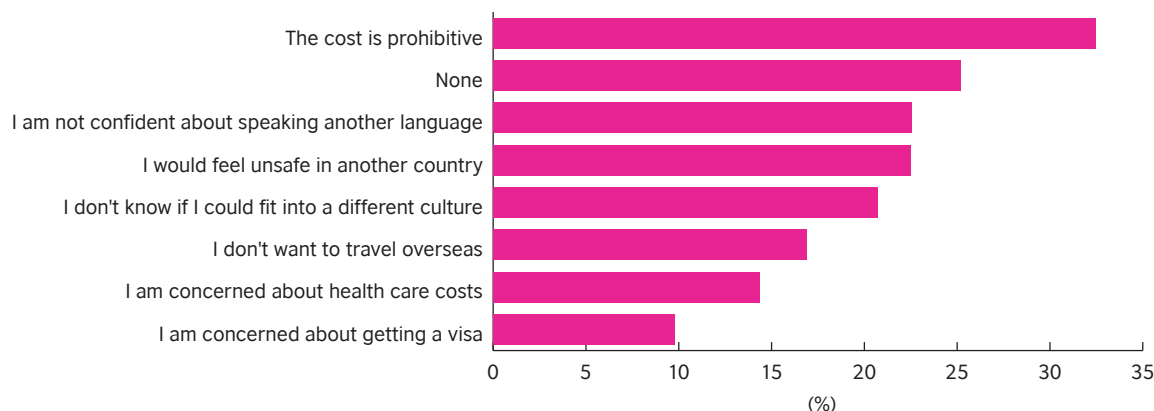
As already established in our earlier analysis, non-academic drivers largely have to do with experiencing other cultures and having a unique adventure (31%) and travelling overseas (29%), followed by wanting to become self-sufficient (17%) and building self-confidence (16%). Gaining better employment prospects was ranked as the sixth most important non-academic driver (11%).

Main non-academic drivers to study abroad



The main non-academic deterrents remain largely similar to the previous year's responses, cost (32%) remaining the greatest, a lack of confidence with foreign language skills (23%) and personal safety (22%) followed by fitting into a different culture (22%) were highlighted by US respondents as perceived deterrents to overseas study.

Main non-academic deterrents to study abroad



Respondents that selected the answer 'None', were given the opportunity to specify what to them were the main non-academic deterrents to study abroad. The verbatim comments collected revealed that family commitments, child care and traveling a substantial distance from home were the deterrents highlighted by 25 per cent of US respondents.

US government-sponsored programmes

Twenty-three per cent of positive respondents indicated their study abroad experience was part of, or they were aware of, a US government-sponsored programme. This is a considerable increase from 2013, when only six per cent of positive respondents indicated this was the case. In 2014, a further 35 per cent said they were not aware of such programmes and 42 per cent indicated they did not know.

A higher proportion of negative respondents (37%) indicated they were aware of US government programmes to promote overseas study than the previous year (25%). In 2014, 58 per cent said they were not aware of such schemes and only five per cent stated they did not know.

Information resources

Sources of information on study abroad were ranked in the following order by positive survey respondents; Internet research (43%), study abroad officers (31%), college lecturers (13%), school teachers (7%), family (4%) and friends (2%).

When asked if they had enough information about studying overseas, the largest majority (33%) of respondents said they felt they did not have enough and more information would have made the process easier. This represents an increase of seven per cent of positive US respondents between 2013 and 2014 that felt they did not have enough information about study abroad. Twenty-two per cent said they had adequate information, 17 per cent said they did not know, 16 per cent said they felt they did have enough information and 12 per cent said they had enough but had to work hard to find the information they needed.

In contrast to this, 62 per cent of negative respondents indicated they felt they did not have enough information to make an informed decision about studying overseas. This represents a decrease from the previous year, from 73 per cent in 2013. A larger proportion said they did have enough information (32%) and only six per cent said they did not know.

Access to further resources

Forty-eight per cent of respondents said that access to help with funding could potentially lead them to pursue a period of overseas study. This was followed by help with language training (38%), information sessions from other study abroad students (31%), a period of mandatory overseas study on their course (25%) and inspirational lectures from teachers about the benefits of study abroad (20%).

Access to financial aid

Fifty-nine per cent of positive respondents indicated access to financial aid had directly affected their decision about study abroad, whilst this only directly affected 46 per cent of negative respondents. This is a significant increase in students that perceived access to financial aid as a barrier to studying abroad since 2013, when 37 per cent said they felt it had impacted their study abroad decision.

Post-graduation benefits of studying overseas

Respondents were asked if when they graduated they believed they would need more than their degree to secure the job they wanted and stand out from the crowd and the majority of positive respondents (71%) said they believed they would. Ninety per cent of positive respondents said they believed an overseas study experience could give them the edge they need to stand out when applying for jobs in the future.

Conclusion

The view from UK students – in summary

Our data shows a 17 per cent increase in the number of UK respondents considering overseas study. The US remains the most attractive overseas study destination (33%) showing an increase in interest from 2013 (29%). Prospective overseas study destinations are chosen based on a desire to experience that culture (19%) or travel to that country (16%). Cost was not identified as the greatest barrier, as it was in 2013. UK respondents indicated that not knowing if they would fit into a different culture was the greatest perceived deterrent (34%).

Awareness of UK government-funded programmes had increased by nine per cent, from 17 per cent in 2013 to 26 per cent in 2014. Information on study abroad was still lacking, with a higher number of participants indicating that more information would have made the process easier for them (32%). The 2014 data also showed an increasing impact of the higher UK tuition fees. Fifty-seven per cent of respondents, a 30 per cent rise from 2013, indicated high tuition fees had inspired their overseas study consideration.

In January 2014 the UK University and Colleges Admissions Service (UCAS) reported a small rise in the number of undergraduate applications, by 1.4% in England, after the considerable dip in 2012. Commentators suggested this could be used as evidence to show the 2012 domestic fee increase had not put UK students off applying for places at university. Our 2014 data showed a significant increase in UK respondents that suggested the UK fee increase had inspired their overseas study consideration. With considerably more awareness of UK government efforts to promote international opportunities also apparent in our survey findings, there is evidence that UK perception and appetite may be shifting in favour of study abroad.

The view from US students – in summary

Compared to our 2013 data set, the 2014 data has shown the number of US respondents interested in study abroad decrease from 56 per cent in 2013 to 44 per cent in 2014. To supplement this quantitative analysis we engaged with a number of US industry experts to understand why this trend may have emerged and what it might mean. It has been suggested that the current economic situation may be impacting students' choices. American mainstream media has reported on the increasing cost of college education and students in the US are highly sensitive to the debt they could incur; the perception may be that studying abroad could contribute further to this.

Cost was highlighted in our data as a considerable barrier. It was identified by survey participants as the greatest non-academic deterrent (32%) to studying overseas and 48 per cent of respondents said help with funding could potentially lead them to pursue a period of overseas study. Of the positive respondents, 59 per cent, a 22 per cent increase from 37 per cent in 2013, indicated access to financial aid had directly affected their decision about study abroad.

It was felt that amongst US students misconceptions may exist around the value and impact

of studying abroad. Information about the use of federal or state aid can be lacking, and students may feel that if they undertake study abroad it could delay their graduation or incur much greater student debt, potentially impacting the ability to study at graduate level. These misconceptions may have impacted on our 2014 student's responses.

There was shown to be a significant increase of 17 per cent in the number respondents that are aware of US government programmes, despite an increase in US respondents indicating they did not have enough information to make an informed decision to study overseas (33%). Lack of information and evidence about study abroad is best illustrated by only 11 per cent of US respondents linking study abroad with gaining better employment prospects directly from their experience. Industry experts that we consulted felt that alongside possible misconceptions about the financial impact of study abroad, the benefits and value needed to be more clearly communicated and connected more explicitly to improving employability.

The global education challenge

The UK and United States find themselves at different phases of the same challenging journey. The UK's current focus is on national strategy development, sector consultation and developing a diverse range of programmes that fit their challenging strategic objectives. The UK aims to establish a new mind-set of international ambition in today's generation of students. The US has a history of continued success and finds itself having to sustain and grow an established sector. The next generation of study abroad students have entered higher education from a more complex financial background and challenging job market. For the next generation of study abroad students, misconceptions of financial impact need to be corrected, empirical evidence of the benefits must be provided and direct links to employment should be shown.

When asked to directly define the post-graduation value of study abroad, 90 per cent of US respondents and 88 per cent of UK survey participants showed they connected this experience with attaining the edge they need to stand out when applying for jobs in the future. However, this response directly contrasts with the response both groups gave when asked to select main non-academic drivers that would interest them in study abroad – better employment prospects was ranked only third by UK respondents (17 %) and sixth by US respondents (11 %), much lower than the priority they put on travelling and experiencing other cultures. This disconnect may be illustrative of the perspective students have of the core value placed on the study abroad experience. Redefining study abroad by communicating its value directly to increasing employability could align this disconnect highlighted here.

A new culture of studying overseas

The essential criteria for selection of an overseas study destination by both UK and US students were based upon wanting to travel to and experience the culture of that country (as evidenced by 35 per cent of UK respondents and 44 per cent of US respondents). Experiencing others' cultures was the greatest driver identified by students to study overseas. However, it is also identified as a significant barrier, as respondents indicated they may not choose to study overseas due to being unsure of fitting into another culture (selected by 34 per cent of UK respondents and 22 per cent of US respondents).

As outlined in the UK Outward Mobility Strategy, building capacity to facilitate international opportunities could begin at home. The large numbers of international students that travel to the UK and the US from across the world to study each year could provide an unprecedented opportunity to break down cultural barriers. The biggest driver for domestic students choosing to study overseas, which is experiencing culture, provides an opportunity to overcome a significant barrier. This may already be working in practice. The non-European non-English speaking overseas study destinations chosen by US respondents, namely Japan, Brazil, China and South Korea, are represented in large numbers by inbound international students on

US campuses. In interviews, UK and US students acknowledged that meeting international students at home did begin to break down perceived cultural barriers on campus.

Embedding a culture of international experience

An embedded culture of study abroad is rare amongst UK and US students, who may not believe it is necessary to travel overseas to access world-class education institutions and better courses than are available at home. Only five per cent of UK respondents and three per cent of US respondents identified this as a driver to choose an overseas study destination. Highlighted in our interviews, students often believe there is little benefit to their academic growth and development to study at an institution that is perceived to be not as academically strong as their home institutions.

A possible solution to this perceived barrier could be transnational education. As UK and US institutions grow their international footprints by extending their programmes and campuses into many global regions, their own international operations could provide a cost effective, academically certified and pre-packaged opportunity for home students. Forty-four per cent of UK respondents indicated having the option to select a course containing a period of mandatory overseas study could lead them to actively pursuing an international study opportunity.

The possible linkage of institutions' transnational education aspirations and increasing outward mobility agendas could provide a meaningful solution to this global education challenge. Students that we spoke with were by and large completely unaware that many UK and US universities had overseas partners, programmes and in some cases campuses that they could have study at. All showed great interest in this as a potential opportunity to study overseas. Embedding a culture of study abroad for home students by harnessing growing opportunities provided by transnational education could provide a convenient solution and become, to many institutions, a strategic objective.

Despite the creation of progressive strategy and high-profile initiatives to promote international study opportunities, there remain a large number of significant barriers that continue to influence the perception UK and US students have of study abroad. In both countries, steps are being taken to embed a culture of overseas study at national and institutional levels. In order for a culture of study abroad to penetrate at the individual level, become embedded as a core activity sought after by students, be recognised by employers and be part of every student's higher education experience, barriers must be broken down by clearer communication of the opportunities and benefits.