

Study abroad:

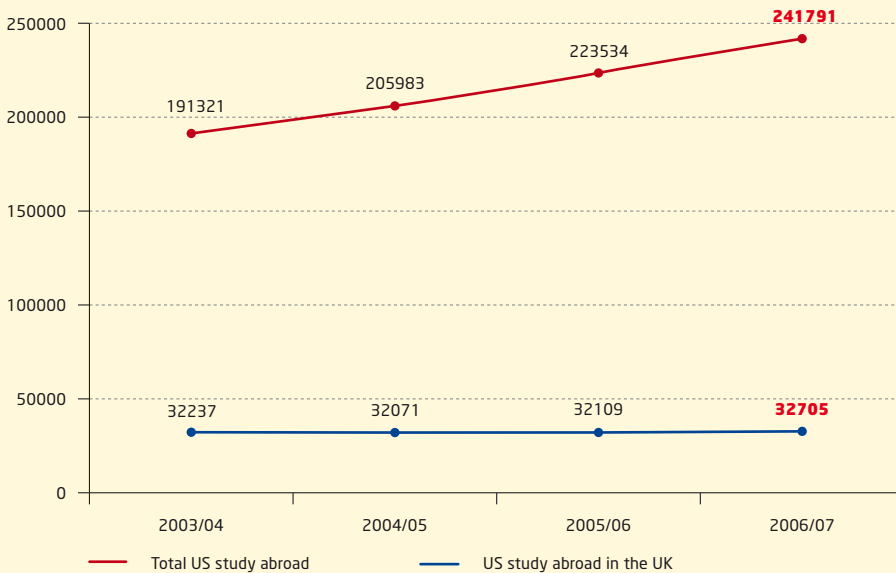
US student demand

INTO Knowledge researches issues that will affect the future of higher education world-wide. This information is extracted from our Study Abroad survey, to be published in June 2009.

DEMAND FOR STUDY ABROAD IS HIGH IN THE US: WHY AREN'T UK INSTITUTIONS BENEFITING?

The number of American students participating in study abroad programmes has increased exponentially in the past decade. The numbers studying in the UK does not follow this upward trend.

FIGURE 1 NUMBER OF US STUDENTS STUDYING ABROAD



Source: Institute of International Education (IIE)

241,791

American students studied abroad for academic credits in the academic year 2006/07, an increase of 8% over the previous academic year.

However, only

32,705

American students participated in study abroad programs in the UK in 2006/07, making up only 13.5% of the total US study abroad population. UK universities are not building their share while competition is growing worldwide.

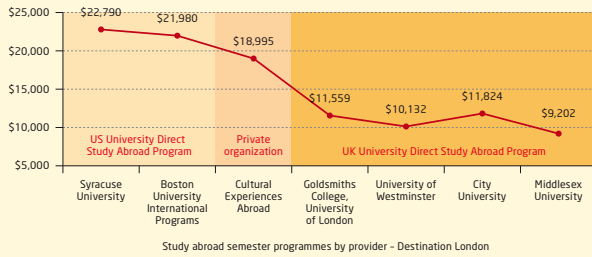
THE INFORMATION ON THIS FLYER IS DRAWN FROM TWO SURVEYS:

- 1] THE INTO-KNOWLEDGE SURVEY TO UNDERSTAND THE DEMANDS AND ATTITUDES OF US STUDENTS RELATING TO STUDY ABROAD WAS CONDUCTED ONLINE IN PARTNERSHIP WITH SYNOVATE IN 2008, DRAWN FROM A SAMPLE OF 508 RESPONDENTS.
- 2] THE INTO-KNOWLEDGE SURVEY TO DEMONSTRATE STUDENTS' EXPERIENCE AND SATISFACTION WAS CONDUCTED ONLINE IN PARTNERSHIP WITH I-GRADUATE IN 2008, DRAWN FROM A SAMPLE OF 2,676 RESPONDENTS.

BRAND PRICING PREMIUMS

Among the three options available for American students to study abroad, the price charged by UK universities located in London is consistently lower. This price point has not been perceived as a definitive influence by American students.

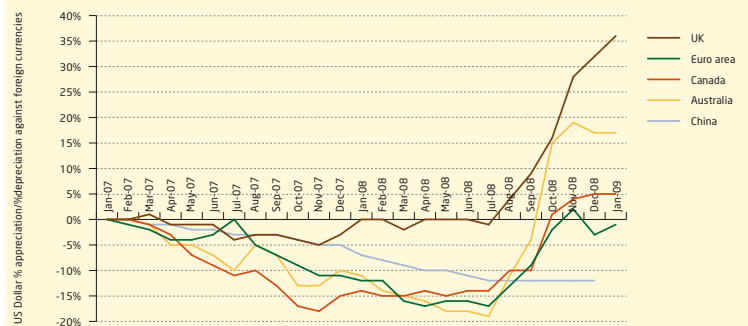
FIGURE 2 BRAND PRICING PREMIUMS



STUDY ABROAD: AN OPPORTUNITY FOR THE UK

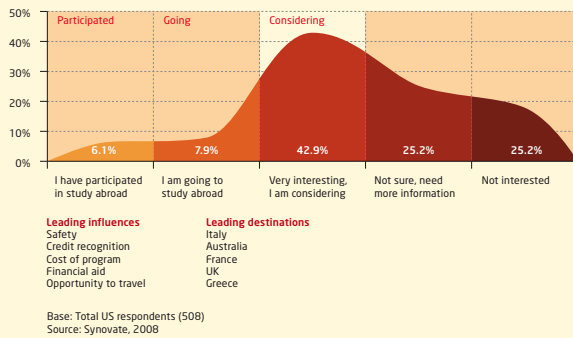
Currency fluctuation presents a potential opportunity for the UK. A weaker pound makes the UK a more affordable destination for American students.

FIGURE 3 STUDY ABROAD: OPTIMISTIC OPPORTUNITY FOR THE UK



Source: Organization for Economic Cooperation and Development (OECD)

FIGURE 4 HOW WELL DO YOU UNDERSTAND STUDY ABROAD DEMAND?



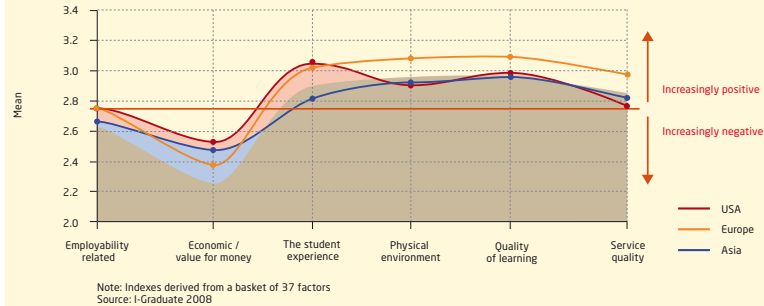
HOW WELL DO YOU UNDERSTAND STUDY ABROAD DEMAND?

We have segmented US students into different groups according to their view on study abroad. Each group is driven by a different set of perceptions, motivations and influences. How well do you understand these groups, particularly those who are considering making a commitment to study abroad?

There is a growing market for study abroad programs and an increasing choice of study destinations and greater opportunities for students. However, attention must be given by universities to the importance of meeting and exceeding student consumer expectations if they are to maintain market share.

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FIGURE 5 STUDY ABROAD STUDENTS IN THE UK: STUDENT SATISFACTION ACROSS A BASKET OF FACTORS



Note: Indexes derived from a basket of 37 factors
Source: I-Graduate 2008

STUDY ABROAD AND THE STUDENT EXPERIENCE

The student experience matters to American study abroad students – their expectations are high and differ from those of other international students. While services are important to them, a one-size-fits-all approach will not meet their expectations.