

Understanding U.S. Study Abroad in Ireland:

Economic impact and future possibilities

Main Research Report 2018

Southern Cross Consulting



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Education in Ireland is Ireland's national brand for the promotion of higher education internationally. Education in Ireland is managed by Enterprise Ireland, the government organisation responsible for the development and growth of Irish enterprises in world markets. See www.educationinireland.com and www.enterprise-ireland.com.

ASAPI – The Association for Study Abroad Providers in Ireland is a national grouping of providers in Ireland and includes U.S. Colleges with a campus in Ireland, third party providers and internship providers. ASAPI was formed in 2015 to raise the profile of the sector, promote best practices, raise cultural understanding between the two countries, and to lobby for sectoral recognition with the Irish government <https://asapireland.org/>.

Southern Cross Consulting is an Irish consultancy organisation whose associates specialise in international education with a particular focus on North America..



Gill Roe – Principal Author

Gill Roe is highly experienced professional who has worked within the fields of international education and development for almost 30 years.

Following the completion of her Master's in Development Studies at the University of Bath, Gill spent five years as UNICEF's Senior Research Fellow at the Centre for Social Research of the University of Malawi. A particular feature of this posting was the design and implementation of an innovative five-year ethnographic and qualitative research programme on the effects of structural adjustment on urban poverty in Malawi, resulting in a number of policy initiatives and several publications.

In the intervening period, Gill has undertaken and managed numerous research and programme activities across a broad spectrum of disciplines and methodologies, with a particular focus on international and higher education in North America and Africa. She has worked with government, non-government and multilateral agencies including Irish Aid, Irish Universities, HEDCO, AusTrade, British Council, EU, IIE, NASFA, Norad, NUFFIC, MOPAN, SADC, UNDP, UNESCO and the World Bank.

Prior to establishing Southern Cross Consulting, Gill worked for Enterprise Ireland/Education in Ireland for several years, managing Ireland's higher education promotional programmes in North America as well as EI's international education data and research programmes. She has represented Ireland on a number of international education research and data advisory committees.

Gill established Southern Cross Consulting in 2014 in response to a recognised need for an independent voice in higher education across the international and development sectors. Today, her company provides specialist consultancy and research services to the international higher education and development sectors with a focus on policy, strategy development, research and data analysis and international trend analysis.

Study Reference Group Members

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Karl Dowling - Resident Director for the Foundation for International Education in Dublin, a non-profit educational organisation providing customised programmes in Dublin and London for international undergraduate students. Karl is a co-founder of the Association of Study Abroad Providers in Ireland (ASAPI) and has served as co-chairman for the organisation. He is Ireland's first recognised Certified Professional in Education Abroad by the Forum on Education Abroad. Karl holds degrees from University College Dublin and the University of Amsterdam.

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Acronyms

AH	Arts and Humanities (programmes/fields of study)
ASAPI	Association of Study Abroad Providers in Ireland
AY	Academic Year
CASSIE	The Consortium for Analysis of Student Success through International Education
CSO	Central Statistics Office (Ireland)
EI	Enterprise Ireland
EU	European Union
FLP	Faculty Led Programme
GSA	Generation Study Abroad (IIE)
HE	Higher Education
HEA	Higher Education Authority
HEI	Higher Education Institution
IIE	Institute for International Education
INIS	Irish Naturalisation and Immigration Service
IoTs	Institutes of Technology
JYA	Junior Year Abroad
m	Million (€)
NAFSA	Association of International Educators
SCC	Southern Cross Consulting
STEM	Science, Technology, Engineering and Maths



Introduction and rationale for the study

As an English-speaking country with strong historical and economic links to the U.S., and a compatible academic system, Ireland is well placed to attract U.S. study abroad students and has proved a popular destination for several decades, attracting close to 12,000 such students in academic year (AY) 2016/17. Today Ireland ranks as the seventh most popular global destination for U.S. studentsⁱ, and first in the world for the number of study abroad students per capita. Numerically, the U.S. is by far the most important country of origin for international students in Ireland.

Ireland hosts a significant number of international students within both its Higher Education Institutions (33,000) and its English language schools (130,000 per year) and the economic impact of the presence of these students is well documented.ⁱⁱⁱ Despite the prominence of U.S. study abroad within the international education landscape in Ireland, previous studies have tended to concentrate on degree-seeking students resulting in a lower national profile for the U.S. study abroad sector, and its significance sometimes being overlooked within the national discourse on international education in Ireland.²

A comprehensive exploration of the operations of this sector - which are known to be complex - and its impact on Ireland's economy and society is therefore overdue. This study represents a first step in addressing this deficit - an attempt to describe this important sector and its operations with clarity. For the first time in Ireland, this study has gathered detailed primary source data from both study abroad providers and students, employing a number of methodologies to achieve a complete understanding of the U.S. study abroad sector. The approach generated solid economic data and uncovered the attitudes of both U.S. students and study abroad providers in Ireland as a study destination. Using first hand qualitative and quantitative data combined with secondary research, the study also comments on the equally important 'soft' or 'intangible' outcomes of U.S. study abroad and future opportunities and challenges for Ireland in this sphere.

It is hoped that this study will stimulate the key stakeholders in Ireland (government, the immigration service, higher education institutions, U.S. institutions, and study abroad providers) to come together to develop a focused and holistic plan around the future of the highly valuable study abroad sector.

Structure of the report

The summary of key findings which follows provides a synopsis of a large study undertaken over a 12-month period between May 2017 and May 2018, which generated an enormous quantity of primary data. The main findings are briefly presented, and their implications for the future of study abroad in Ireland discussed. Chapters 1 and 2 which follow fully detail the findings of the research and provide more complete data analysis under each heading. The Appendices to the document offer a detailed description of the research methodology, expanded discussions on the barriers to study abroad for U.S. students and the accommodation challenges in Ireland as well as some additional data.

Referencing

Numbers i, ii, iii... refer to document references/bibliography and are found at the end of the document.

Numbers 1, 2, 3... refer to footnotes which are located at the end of the page where they appear.

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² For example, a report recently published by the HEA on the Internationalisation of Irish Higher Education (2018) made no mention of U.S. study abroad in its detailed report. *Clarke, M., et al (2018): The Internationalisation of Irish Higher Education. Higher Education Authority 2018.*





Understanding U.S. Study Abroad in Ireland: Economic impact and future possibilities

Summary and discussion
of key findings





I. Understanding U.S. study abroad in Ireland

Utilising the wealth of primary data gathered for this study as well as secondary research, the first part of this study explores the characteristics of study abroad globally, and comparatively as it specifically manifests in Ireland (detailed in Chapter 1 below). The analysis interrogates relevant key elements of the sector including the changing study abroad landscape and the particular features of study abroad in Ireland. This section also profiles the study abroad student, investigates why students and programmes choose Ireland, and discusses perceptions around study abroad in Ireland.

The U.S. Study Abroad Student

Despite the availability of international study options for almost 100 years and the well-rehearsed benefits of such experience, U.S. student interest in pursuing overseas opportunities remains persistently low, with less than 2% of students choosing this option each year.^{i,v}

The U.S. Institute of International Education's (IIE) 2017 figures show a 3.8% increase in study abroad over the last year, but longitudinal analysis suggests that the overall rate of growth has slowed over the last five years, compared to the previous decade. With higher debt burdens than most, U.S. students can be inhibited from studying abroad by real and perceived concerns around cost, an absence of prior international exposure, inadequate information, weak faculty engagement, complex funding models and concerns over security and health.ⁱ

The constraints facing U.S. students have resulted in a largely homogenous study abroad population globally, characterised by their mid to high socio-economic status, being predominantly white (72%), female (67%), attending doctorate-granting or masters colleges or universities (85%) and with one third originating from just five States (California, New York, Pennsylvania, Massachusetts, and Ohio).^{i,v}

The most striking change in U.S. study abroad over recent years has been the swing towards shorter term programmes with particularly strong growth in programmes of eight weeks or less. In 1994/95 short-term programmes accounted for 39% of study abroad - today these programmes account for 63% of students. For those seeking an international experience yet facing financial constraints or inhibited by the barriers described, a short-term programme offers a viable option.³

Official study abroad programmes commenced in Ireland around 1970 and have grown steadily - by an average of 8% - over the last five years. In academic year 2016/17 - the focus of this study, it is estimated that there were 11,912 such students in Ireland for a total of 95,035 weeks.

The study abroad landscape in Ireland is a complex tableau incorporating several modes of logistical and academic delivery.

As a result of the cooperation of all sectors with this study, a clear picture of the sector in Ireland has emerged (also refer to Table I below which breaks down the number of students in each sector):⁴

1. Irish Higher Education Institutions (HEIs) host around 34% of U.S. study abroad students (n=4,044 including exchange students, but excluding summer school students), who are generally present for one semester and account for over 60% of all study abroad weeks in Ireland. Almost 90% of these students are in the university sector, with 10% in private colleges and less than 1% in Institutes of Technology (IoTs). Study abroad students in Irish HEIs are received directly through partnerships with U.S. institutions (65%), arrangements with third party providers (27%) and direct application (8%) with the majority in situ for one semester.

3 For example, 90% of community college students who studied abroad in 2015/16, chose a short programme.ⁱ See Chapter 1 and Appendix 2 for further details on the key constraints facing many U.S. students considering study abroad.

4 See Chapter 1 for a full and detailed description of study abroad operators in Ireland.

- 2. Irish HEI Summer Schools:** most universities and some other HEIs run annual summer schools which range from one to eight weeks. Students on these programmes account for 10% (n=1,142) of all study abroad weeks.
- 3. Third Party Providers** are colleges or private organisations which channel students to both Irish HEIs, and to their own institutions (if they are also a college with a campus in Ireland). Most students coming to Ireland through third party providers remain for one semester and are studying in an Irish HEI, but a considerable range of durations and programme types was observed. Careful cross-referencing of the data from all sectors has established that around 40% of all U.S. study abroad students in Ireland are delivered through third party providers of whom there are an estimated 20 operating semester length programmes, and more operating short-term programmes in Ireland - eight of whom responded to the survey.
- 4. U.S. Campuses in Ireland** are owned and operated by an established U.S. university or college. These programmes may recruit exclusively from their home campus and/or attract students from other U.S. institutions. These colleges operate both one semester programmes and a variety of shorter programmes ranging from two to ten weeks in duration. An estimated 14% of students (n=1,660) are based in 17 known U.S. campuses in Ireland (13% of all study abroad weeks). As noted, some U.S. colleges based in Ireland are also third-party providers who may also offer internships. They may have students studying on their own campus and/or within one or more Irish HEIs.
- 5. Internship Providers** are generally commercial organisations that offer 'for-credit' internships to study abroad students. These students account for 6% of the study abroad sector (n=730) and 7% of study abroad weeks in Ireland. Most other providers also offer internships.
- 6. U.S. Faculty-led Programmes (FLPs)** are short study abroad programmes led by academic staff from a U.S. HEI. These programmes can be difficult to categorise as they display multiple modes of operation: from programmes fully managed by Irish HEIs or third party providers on behalf of U.S. institutions, to programmes entirely organised by the faculty-leader directly from the U.S. FLPs, who sometimes link in with other programmes in Ireland or other countries and are of varying duration, with two weeks being most popular. These students are estimated to account for 36% of the sector (n=4,336), and 16% of study weeks.

Box I: Summary of Research Methodology

The methodological approach for this research was designed in consultation with the Study Reference Group which included Education in Ireland and ASAPI (together representing all sectoral members, except FLPs).

Phase 1 of the study involved desk research, focus group discussions and interviews with HEI study abroad managers, administrators of U.S. programmes (both colleges and third-party providers) and faculty-led programmes to understand the study abroad landscape in Ireland and to confirm assumptions around categorisation and the size of the sector.

Baseline data for the sector was calculated using IIE Open Doors data over several years.ⁱ Primary source data was gathered directly through detailed surveys of the six study abroad sectors operating in Ireland, and through a further survey administered to U.S. study abroad students in Ireland. These surveys included a broad range of questions on student profiles, programme operations, expenditures and attitudes.

For consistency across the international education sector in Ireland this study employed a very similar economic model to that developed by the Department of Education and Skills for its most recent International Education Strategy.ⁱⁱⁱ Data collected has also been analysed with close reference to both IIE and Central Statistics Office of Ireland data (CSO)ⁱⁱⁱ as relevant. Full details can be found in the Annex of this document.

The research team were extremely fortunate to receive strong cooperation and assistance from all study abroad sectors in Ireland, ensuring a high level of confidence in the data collected. Overall, through the surveys the location of **71% of an estimated 11,912 study abroad students** in Ireland in 2016/17 was captured directly.

**Table I: Study abroad sectors in Ireland: numbers and duration
(expanded from primary data)**

Duration	Irish HEIs AY	Irish HEIs summer school	U.S. College	Internship	FLP	Totals	%
1 week	10	257	173	-	542	982	8%
2 weeks	34	155	365	-	1,821	2,375	20%
3 weeks	19	341	50	-	796	1,206	10%
4 weeks	17	291	123	21	399	851	7%
5 weeks	0	97	-	128	209	434	4%
6 weeks	4	-	332	407	58	801	7%
7 weeks	-	-	-	23	23	46	<1%
8 weeks	42	-	17	26	-	85	1%
9 weeks	17	-	-	21	-	38	<0%
10 weeks	30	-	-	-	396	426	4%
1 semester	3,669	-	568	100	93	4,430	37%
1 year	144	-	-	-	-	144	1%
J-term/ AY short	58	-	-	-	-	58	<1%
OTHER	-	-	32	4	-	36	0
Totals	4,044	1,142	1,660	730	4,336	11,912	100%

Source: IIE 2017, ASAPI/EI 2018

The study found that while study abroad in Ireland is complex and multi-layered in its operations, it presents a unique offering compared to many other European countries which accounts for its success, and provides scope for considerable future development. Overall survey responses from students and providers suggest that Ireland is attractive chiefly because it is English speaking, offers excellent opportunities to travel to Europe, is safe and friendly, has an interesting (and fun) culture, a connected history, an understandable academic system and for the most part, well-aligned programmes.⁵ Figure I below highlights student respondents reasons for choosing Ireland, showing weighted responses on a Likert scale of 1-5, where 1 = not relevant and 5=highly relevant.

Each provider sub-sector emphasised the value of different elements, but all agreed that **English language** was of primary importance. Irish HEI respondents rated the 'ranking of Irish universities' as the second most important reason for choosing Ireland while students ranked this last out of 13 choices.

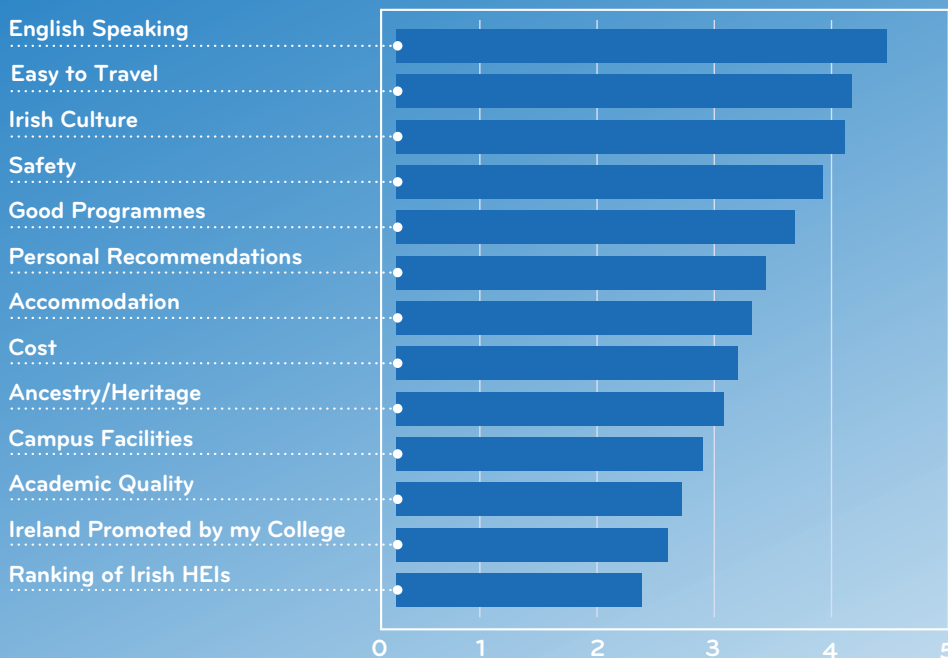
Other providers (third party providers, U.S. campuses and FLPs) ranked 'safety' as the next most important factor and 91% of students ranked this as relevant in influencing their choice (compared to only 30% in a similar study carried out in 2011)ⁱⁱ.

Ireland is expensive for international students and this emerged as a particularly strong concern for U.S. campuses and third party provider respondents.⁶ Irish HEIs exhibited less concern noting that high cost was a given in study abroad and Ireland was not out of line with other destinations. Student respondents appeared to share this sentiment as Figure I shows. In summary, costs were universally acknowledged as high, but were not considered an absolute deterrent given the current status quo of the sector, i.e. attracting traditional study abroad students from middle to high socio-economic backgrounds.

5 See Chapter 1 for a full description of why students choose Ireland.

6 Highlighting the high costs of accommodation, socialising, local transport and phone/data costs ValuePenguin for example ranks Ireland as the 5th most expensive country to study in. See Appendix 3 for further details.

Figure 1: U.S. students responses to question: "Why did you choose to study abroad in Ireland?"
Responses are weighted on a Likert Scale of 1-5 (1 not relevant - 5 highly relevant)



Source: ASAPI/EI 2018

Ancestry is a significant factor in determining a study destination and of particular importance for Ireland, with an earlier study finding that almost 70% of U.S. students had some degree of Irish ancestry.ⁱⁱ

Students choosing Ireland tend to follow general global patterns, originating from East coast states, North mid-West states, California and Texas. A special analysis undertaken for Ireland by IIE shows particularly strong growth over the last five years from the Los Angeles, Pittsburgh, Philadelphia and Atlanta metropolitan areas.

Academic choices: IIE data for all U.S. study abroad students illustrates the growth in importance of Science, Technology, Engineering and Maths (STEM) subjects (from 16.4% in 2005/06 to 25.2% in 2015/16) and the corresponding comprehensive decline in humanities (declining from 14.2% to 3.7% over the last decade) thus reflecting the push towards more career-outcome oriented study abroad.ⁱ It is in this area that the profile of study abroad in Ireland deviates most significantly from the global norm. Findings from this and other studies show that 58% of student respondents (in Irish HEIs, but with similar findings across all sectors) were taking arts and humanities subjects. In addition, a further 18% were taking business, science or engineering combined with arts and humanities.

The global trend towards **reduced duration of the study abroad experience** is reflected throughout the sector, but most especially in the rise in popularity of FLPs, probably the fastest growing sector in Ireland. FLPs offer the student a tailored and contained international academic experience which is cost-effective.⁷ U.S. colleges and third party providers in Ireland are increasingly offering short programmes to address demand. Aside from summer programmes, Irish HEIs have been slower to respond to this demand, but conversely given the unique combination of factors which make up the Irish offer, it is likely that Ireland will be one of the few countries which will see one-semester programmes continue to grow, as they plateau globally.

⁷ One FLP respondent stated that to their knowledge their University ran at least 40 FLP programmes each year globally.



II. The economic impact of U.S. study abroad in Ireland

Introduction

Part two of this study explored the economic impact of U.S. study abroad in Ireland from May 1 2016 to May 1 2017⁸, using primary source data gathered for this survey from all sections of the sector and from students. The contribution of this sector to the Irish economy has been calculated by collating student tuition income, study abroad programme expenditure across all sectors and student and visitor spend.⁹ As noted, the estimated number of U.S. study abroad students present in Ireland during AY 2016/17 was 11,912 who – across all sectors – spent a total of 95,035 weeks studying in Ireland. Tables II and III provide a summary of the direct, indirect and induced economic impact of these students.¹⁰ To further develop context and offer a reference point, where possible student expenditure data was matched with the economic impact data published within Ireland's most recent international education strategy document.ⁱⁱⁱ

In the opinion of the authors the overall figures are likely to reflect a conservative estimate of the economic impact of study abroad in Ireland. As detailed in Chapters 1 and 2, third party providers, U.S. Colleges, FLPs and internship operators are mostly private institutions whose home base is outside Ireland and who therefore had no obligation to respond to this study, at all or in full. Although detailed levels of financial data were generously furnished by most respondents, there were some areas of non-response, particularly in relation to programme expenditure, which were considered commercially sensitive by some of the larger public HEIs and the private institutions both Irish and non-Irish. Also, in some cases, further programme/tuition fees or costs may have been paid to Irish HEIs but not fully captured by this study. Finally, although at least 30% of tuition income generated through study abroad does not accrue in Ireland – as students attending U.S. colleges pay tuition to the parent institution, and students on FLPs all pay their tuition fees to the home institution – it may be the case that some U.S. institutions based in Ireland are receiving a greater proportion of 'home fees' than uncovered by this study.

Additionally, the figures relating to visitors are believed to be low. Focus group discussions revealed that too many questions here would have resulted in respondent fatigue and a low response rate, and therefore detailed questions about expenditure beyond accommodation were not asked. Further research is required to unearth a clear understanding of programme and student visitor spending in Ireland.

8 Summer school data pertains to summer 2016 and student data pertains to the 2017 Autumn semester.

9 The methodological approach for this phase of the project is summarised below and further detailed in Appendix 1.

10 'Indirect' impacts refer to the impact on suppliers to the businesses that have experienced an increase in demand due to the presence of the students. To calculate this, 'indirect' multipliers for different categories of expenditure were applied to the direct expenditure. These multipliers were previously calculated in the International Education Strategy using Central Statistical Office (CSO) data.

'Induced' impacts refer to shifts in spending on goods and services at the household level as a consequence of changes in income of the directly and indirectly affected businesses. This refers to the 'ripple effect' of suppliers having more money in their pocket, which they in turn use to fund their own expenditure and lifestyles. Here, the International Education Strategy/CSO multiplier for the 'Education' category was applied to the direct expenditure.

Table II: Total direct economic impact of total U.S. study abroad to Ireland, 2016/17 (€)

Profile	
Total students	11,912
Total study weeks in Ireland	95,035
HEIs/ALL Provider contribution:	
General expenditure (programme costs)	€9,405,290
Staff salaries	€6,620,656
Staff accommodation (FLP)	€352,624
Visitors to HEIs/providers (accommodation spend only)	€210,044
SUB-TOTAL	€16,588,614
Student Contribution	
Tuition fees (Irish HEIs only)	€26,764,371
Student accommodation spend	€22,156,750
Visitors to students (spend, including accommodation)	€11,983,826
Student general (living) expenditure	€11,905,186
Student large one-off expenses	€2,329,387
Student travel abroad - spend in Ireland	€4,139,289
Student travel within Ireland	€2,334,261
SUB-TOTAL	€81,613,070
Total	€98,201,683
Source: ASAPI/EI 2018	

Table III: Total economic impact of U.S. study abroad to Ireland, 2016/17 (€)

CSO sector	Total direct impacts	Indirect impacts (type 1 multiplier)		Induced impacts (type 2 multiplier)		Total
Accommodation, food & beverages	30,150,073	0.302	9,105,322	0.9853	29,706,867	68,962,262
Cultural & sporting activities	1,607,442	0.0999	160,583	0.4665	749,872	2,517,897
Education (inst. income & staff salaries)	33,590,152	0.228	7,658,555	1.167	39,199,708	80,448,415
Land transport services	2,096,775	0.4377	917,758	1.0984	2,303,097	5,317,630
Public administration	1,321,542	0.3886	513,551	1.0296	1,360,660	3,195,753
Recreation	2,209,286	0.0734	162,162	0.6579	1,453,490	3,824,938
Retail trade (weekly expenditure)	3,033,613	0.3035	920,701	0.8224	2,494,843	6,449,157
Retail trade (large one-off)	5,525,380	0.3035	1,676,953	0.8224	4,544,073	11,746,406
Travel and tourism services activities	18,667,420	0.0737	1,375,789	0.8681	16,205,187	36,248,396
Totals € *figures vary slightly due to rounding	98,201,683		22,491,375		98,017,796	218,710,854

Source: ASAPI/EI 2018

- The tables highlight the significant economic contribution of the entire U.S. study abroad sector to the Irish economy, at almost **€100m in direct impacts and €220m overall** during the period under review.
 This is equivalent to more than 25% of the impact of the entire international education sector in Ireland or the English language sector as calculated by DES and is particularly impressive as only two thirds of this cohort pay tuition fees in Ireland - normally the most significant single contributor to economic impact when assessing the international education sector.ⁱⁱⁱ
- On average, each U.S. study abroad student directly contributes €8,244 to the Irish economy with each study week contributing €1,033. Taking indirect and induced impacts into consideration raises each student contribution to €18,360 to the Irish economy - €2,301 per student week.** Looking across the CSO sectors (see Table III), it is clear that the education sector benefits most from study abroad (37%). Institutional income, which includes tuition and fees paid to Irish HEIs by third party providers is the single most important financial category here.
- The next most important category is 'accommodation, food and beverages' which accounts for 32% of the total output.
- The tourism and travel sectors in Ireland also benefit significantly from U.S. study abroad (accounting for 17% of total output).
- The study abroad sector **directly supports 187 jobs in Ireland** which range from director/manager level to student officers and administrative staff across all providers. The knock-on effects (indirect and induced impacts) generate 261 further jobs, leading to a **total of 448 full-time jobs overall.**
- Overall one full-time job is created through the presence of 27 study abroad students in Ireland, and **every 15 one semester students results in the creation of one full-time job.** Assuming an increase of 8% per year, it is reasonable to assume that within five years, this sector will be supporting **667 jobs.**
- Across the study abroad sector, providers are spending €6.62m on staff salaries.**

Programme expenditure

The fact that a considerable portion of study abroad tuition spend does not accrue to Ireland, means that the provider/institutional contribution (programmes costs, salaries, visitors...) is less significant to the economy - at 16% of total spend - than might be expected.

- Excluding accommodation, all providers (including Irish HEIs) are spending almost **€9.5m per annum on programme expenditure**.¹¹
- Study abroad programmes attract large numbers of visitors (academics, managers/advisors and administrators), who overall spent more than **3,000 nights in Ireland spending an average of €65.30 per day on accommodation**.

Student expenditure

The nature of the study abroad sector - where a large proportion of tuition spend does not accrue to the destination country - means that the student contribution (tuition payments to Irish HEIs, living expenses, travels, visitors...) is more significant to the economy than the institutional contribution as noted above. This is clear from Table II which shows that 84% of direct expenditure comes from students. Unsurprisingly given the general profile of U.S. study abroad students (mid-to high socio-economic status, spending a relatively short time in country and high travel rates), these students were found to be higher spenders than the average international student in Ireland.

- The only study abroad sector which generates tuition income and fees is Irish HEIs. **Total direct expenditure on tuition fees is €27m which calculates as €384 per study week for the HEIs study abroad programmes, and averages at €5,800 for a semester programme**. Summer school programmes are more expensive, averaging at €907 per study week. Fees charged to summer students are generally inclusive of accommodation, trips and a number of social events.

Living expenses (calculations below do not include tuition payments)

Not including tuition costs, but including visitor expenditure, the direct financial contribution of this sector to Ireland is €577 per week.

Excluding travel costs and visitor expenditure, U.S. study abroad students are spending €383 per week, as compared to €198 as recorded by DESⁱⁱⁱ for the general international student population two years previously, further highlighting the value of this sector to Ireland.

For most categories of U.S. study abroad student in Ireland, accommodation is provided as part of the overall programme package. Across the entire sector U.S. short-term students are paying an average of €233/week. This figure is skewed upwards by the FLP sector whose weekly accommodation costs vary significantly depending on the choice of accommodation and duration of stay. **The overall direct accommodation spend in 2016/17 was €22m.**

Across the country, student respondents reported that they are spending an average of **€125 per week on living expenses** (with a median expenditure of €119). This category **excludes** accommodation costs, large once off expenses, and travel costs.

As is the case internationally, food is the most significant weekly cost for students, accounting for almost 30% of expenditure - a further 20% of the weekly spend goes on 'eating out' which includes takeaway meals and drinks. **Overall U.S. study abroad students spent €3.4m on food and alcohol, and €2.3m on eating out/takeaways in 2017.**

¹¹ Reported programme expenditure in Irish HEIs is lower than anticipated at just under €0.6m compared to €1.25m by their summer schools - less than 20% of the average cost per student of the other sectors. This is due to a number of factors, including hesitation around divulging commercially sensitive information. Irish HEIs indicated that average programme expenditure per student is lower than for other providers, as they achieve significant economies of scale within this sphere: they often recruit very large numbers from one U.S. institution; have on-going exchange programmes which do not incur large promotional costs; are not necessarily required to include academic and other costs in their calculations (such as travel and rent/building costs) which come from central institutional budgets beyond the study abroad/international office. Where a U.S. institution sends several students to one Irish institution, there is also a level of burden sharing - these institutions frequently provide their own staff and support mechanisms to manage student (for example) welfare issues and practical aspects such as accommodation, programme trips, orientation etc. This can significantly reduce financial costs for the receiving institution.

Student's direct spending on social and cultural events averaged €23 per week, accounting for 18% of student expenditure overall. As most students live on campus, average transport costs were low at €11 per week.

Using general expenditure data from the surveys and grossing up for each sector by student numbers and weighted weekly figures provides a total living cost spend of €12m. The students based in Irish HEIs – by virtue of the longer duration of their stays are responsible for almost 50% of this expenditure.

Student respondents were also asked to detail 'significant once off' expenditures in relation to their spending in Ireland. By far the most significant once-off expenditure was the Irish Naturalisation and Immigration Service (INIS) fee of €300. This requirement applies only to one-semester (or longer-term) students and incurs a fee of €300. It is estimated that about 91% of one semester/one year students pay this fee – a total of €1.24m during the period under review and over 25% of all INIS fees generated by international students.ⁱⁱⁱ

A particularly interesting finding was that students reported almost no variance in weekly expenditure across the four cities covered under this study (Dublin, Cork, Galway and Limerick).

Travel and visitors

Given the importance of 'ease of travel' as a reason to study in Ireland, it is unsurprising that 94% of respondents (93% of whom were one-semester students and 7% were one-year students) had taken a trip away from their base in Ireland or a trip outside Ireland.

Students spent between one and 25 nights away from their study base in Ireland with an average of 4.8 nights and a median of three nights, spending an average of €79 per day away. Over the period under review, one semester/one-year students took more trips than shorter-term students and spent a total of €2.3m.

The study found that U.S. study abroad students on one-semester/one-year programmes spent more time traveling outside Ireland than within Ireland. However, they spent almost twice as much money in Ireland arranging travel to other countries than they did on their Irish trips (i.e. purchasing airfares, transport to airport, duty free etc.). The findings show that survey respondents took an average of five trips per person outside Ireland during their study abroad period. Average student expenditure in Ireland for trips outside Ireland was €638, or €128 per trip – a total spend of €4.2m.

Family and friends visiting students in Ireland is a significant revenue generator, especially for one semester/one-year students.¹² Eighty percent of student respondents reported that they have been visited by family and/or friends during their time in Ireland. Overall, study abroad students based in Ireland for one semester or more attract three visitors each to the country. Spending by visitors at €73/day was lower than the CSO average for U.S. visitors of €103/day. Feedback from student focus groups, and call backs to respondents indicated that student visitors (often friends studying abroad in another European country) tended to spend very little during their trips to Ireland as they generally did not incur accommodation costs, ate cheaply and did not travel around the country. On the other hand, family members coming to visit tend to stay in hotels, hire cars and travel around Ireland for extended periods, spending up to €4,000 per trip (as reported by student respondents). The direct annual expenditure of family and friends visiting U.S. study abroad in Ireland is €12m.

The overall value to the Irish Economy of U.S. student travel and the spend of their associated visitors was at least €36m in 2016/17.

The foregoing discussion reveals that the economic impact of U.S. study abroad to Ireland is substantial. The DES analysisⁱⁱⁱ calculated the direct output of international education at €401m for AY 2014/15 (*ibid*, p56). The report focused almost entirely on full-time degree seeking students, not capturing short-term study abroad/summer students within Irish HEIs, students on U.S. campuses in Ireland, interns or FLP students. However, the figures generated by the current study - focusing on short-term categories - clearly point to the high value of this sector (and short-term study programmes in general), and the importance of including the entirety of this dynamic arm of international education within the national data in future.

The sector offers other advantages to Ireland such as the potential for a broad regional distribution of programmes and strong 'intangible' benefits.

¹² Students on one-year programmes had an average of six visitors compared to three for one semester students.

In Ireland the most significant economic, social and cultural benefits of international education accrue to Dublin, and beyond than to the four major cities of Cork, Galway, Limerick and Waterford, with some smaller urban or rural areas benefitting from international students.¹³ However, an important finding of this research is that U.S. study abroad, beyond the traditional one-semester model within Irish HEIs is characterised by its geographical spread, offering economic and other benefits across the country, and with potential to do so much more, for example:

- A small number of Irish HEIs, U.S. organisations and other organisations offering programmes thrive in rural areas (see **Chapter 2, Box 8** for a discussion on the impact of one HEI offering study abroad within a rural community).
- U.S. campuses in Ireland do not automatically locate in Dublin, with several quite large and established programmes located in Galway, Kerry, Mayo, Waterford and Wicklow.
- Irish HEIs Summer School Programmes almost always include one or more trips to other parts of the country, often with several overnight stays, thus contributing significantly to the local economy.
- The 39 FLPs who responded to this study are concentrated in Dublin, Galway and Cork, but operate across 22 counties, with several visiting many counties (North and South) during their short programmes. Many summer school programmes also operate across the Island of Ireland, thus representing one of the few known elements of international education actively responding to the DES aspiration of “North-South cooperation promoting a ‘whole of Ireland’ approach to internationalisation”.^(iii, p40)

As well as the economic benefits described here, U.S. students bring a range of advantages that are difficult to measure and define in monetary terms. The presence of the U.S. student in the Irish classroom helps to develop intercultural competency, critical thinking ability and communication skills amongst domestic students. U.S. (and other international) students also benefit Irish HEIs by ensuring that many programmes remain viable, which in turn offers domestic students greater choice. International students also increase the social and cultural diversity of our HEIs and their programmes, enriching the teaching and learning environment.

Critically, U.S. students are also likely to increase the country’s ‘soft power’ becoming informal ambassadors for Ireland and our institutions, and ultimately strengthening cultural, trade, research and diplomatic links. This impact is bolstered by the dual facts that most have had a highly positive experience whilst in Ireland (see Figure II below) and have been directly responsible for at least three other people visiting the country. As well as remaining life-long friends of Ireland and being likely to visit again during their lifetimes, some will return to Ireland for further studies, or possibly to employment, generally in high value positions.

Figure II: Ratings of Irish study abroad experience by U.S. students (%)



Source: ASAPI/EI 2018

13 International students are located in Institutes of Technology and other colleges throughout the country including those in Athlone, Dundalk, Sligo, Carlow, Tralee and Letterkenny. However, these institutions host negligible numbers of U.S. study abroad students.



III. The future of study abroad in Ireland¹⁴

This study provides a thorough description of study abroad in Ireland, profiling it against the global norm and establishing the strong economic and social value of the sector to Ireland.

Ireland's study abroad sector offers an attractive package and is in a healthy state at present. It is particularly appealing to the fairly narrow demographic which defines the cohort today, yet possesses a number of universal advantages which will continue to favour Ireland as the sector shifts to embrace greater diversity and the changes that will bring. These advantages include - but are not limited to - language, safety and ease of travel to other destinations.

In the context of global uncertainties, these advantages can be accentuated to ensure that Ireland can experience growth both in one-semester programmes and short-term programmes, which it is well positioned to do. In the current climate, areas of uncertainty refer specifically to fears around safety due to terrorist attacks in the U. K. and other parts of Europe, and to the impact of Brexit. At present Ireland scores particularly well with regard to safety - ranking as the 10th safest country in the world, well ahead of other top European competitors in the study abroad sphere.^{iv}

Alongside with the positive findings, there are also some quite serious challenges for study abroad in Ireland. The current model is successful, but in essence has not changed since the early days of study abroad. New and more flexible and diverse modes of study abroad combined with the unknowable impact of Brexit and other geopolitical complexities raise demands and uncertainty for the sector. These facts raise a number of interlinked questions for government, Irish HEIs, U.S. campuses, third party providers and the wider community who are invested in study abroad programme delivery in Ireland:

- Ireland already has the highest U.S. study abroad population per capita. Consideration needs to be given to what, if any limits should be set around expansion of this sector.
- Assuming expansion is feasible, can Ireland both grow as a destination and continue to maintain quality and a fresh appeal - what measures should be taken to ensure the sustainability of this sector?
- Is there capacity for significant increases across all sectors?
- Does growth offer an opportunity to broaden the reach of the sector to smaller urban and rural areas and into the IoT or other sectors - how can this be facilitated?
- Brexit remains an unknown quantity: most provider respondents felt that Ireland would receive an increase in numbers because of Brexit, though several also commented that they did not know what impact it would have, and that students were not thinking about Brexit when they considered their destination. Study abroad advisors are thinking of these political issues however and noted that benefiting from Brexit would require more joined up thinking at government level and a concerted campaign emphasising the similarities and differences between Ireland and the U. K. for the study abroad student.
- Given that U.S. study abroad is the one known area of North-South cooperation within international education on the Island of Ireland, should deeper cooperation across the Island be further supported by both governments (as recommended by the DES Strategy documentⁱⁱⁱ)? Does Brexit constitute an opportunity or a barrier here?
- What role should government play in supporting all elements of this important and dynamic sector beyond current Education in Ireland brand support to Irish HEIs? Is there room for expansion within the brand? Should government for example offer support to encourage more FLPs or U.S. institutions to set up operations in Ireland, or does this work against the interests of Irish government-recognised HEIs? Can the immigration experience be enhanced to provide a more streamlined experience for this large cohort of students?

14 See Chapter 1, section 1.9 for a full and detailed description on attitudes to study abroad in Ireland.

- The deep reliance on arts and humanities programmes within study abroad in Ireland throughout all sectors is a double-edged sword: on one hand, Ireland's rich offering across a broad spectrum of arts and humanities specialisms is clearly a unique selling point, allowing for distinctive semester programmes and particularly attractive short-term and faculty-led programmes. On the other hand, with the focus from the U.S. firmly on the career advantages of study abroad, and the corresponding decline in students choosing these fields over the last decade, Ireland risks being pigeon-holed as focusing solely on arts and humanities or viewed as an 'education tourism' destination rather than a serious academic destination.
- Aligned to the discussion on academic aspects is the finding that while **overall student satisfaction is very high**, as Figure II shows, lower satisfaction was expressed with respect to academic programmes in Irish HEIs, campus facilities and the accessibility of academics. Responses to earlier questions in the survey suggested that students did not harbour high academic expectations for their study abroad experience. Further research is required here to understand if this is a global phenomenon or specifically relating to Ireland.
- Short-term programmes (eight weeks or less) are becoming the norm in study abroad and to remain a leading destination, Ireland will need to increase its short-term offerings during term time and to develop these programmes across a range of subjects including STEM. In developing these programmes thought needs to be given to creative and innovative ways of incorporating internships and service learning elements into these programmes.
- Internships for academic credit are becoming increasingly important and the evidence suggests that Ireland is benefitting strongly from this. Further thought could be given to developing creative industry relationships and developing a strong offering here for the more career focussed study abroad student.
- As the study abroad cohort diversifies, Ireland needs to find innovative ways to attract the non-traditional student.¹⁵ Scholarships would be an important element here, as financial constraints are the most significant inhibitors for many non-traditional students.
- As noted above, the development of STEM and shorter programmes across several disciplines with an internship offering is necessary. In addition however, Ireland could also focus on specific cohort led models and develop a high quality niche offering, for example, targeting athletes through intense sports-focused programmes, or heritage students through historical/genealogy programmes.

Overall, the findings of this study are highly encouraging and further growth seems likely. The positive results at economic, social and cultural levels, and the goodwill and cooperation witnessed from providers and students alike suggests that Ireland has an opportunity to build on its success to develop a new and fresh study abroad model, which embraces a regional dimension and expands into other sectors, including tourism.

This study and the points raised above suggest that further research is required around a number of factors to fully understand the impact of this sector and the capacity for growth within the education system. Important initial steps however would be the inclusion of Irish HEI short-term programmes within the annual HEA data, and the incorporation of programme and visitor numbers within the DES international education economic model. These two actions would provide useful annual data and enhance our understanding of the value of both U.S. study abroad and the entire international education sector to Ireland.

Such a model would require government support and the various sectors to work together to focus on capacity issues and the other potentially limiting factors mentioned above to ensure quality standards are maintained across the board. One semester programmes are likely to remain the remit of the universities, U.S. colleges and third party providers, but the growing short-term requirements present both opportunities and challenges for all sectors and regions.

¹⁵ See Chapter 1 and Appendix 2 for a full discussion on the barriers and constraints to study abroad for U.S. students. In summary, a 'non-traditional' student (who does not study abroad in representative numbers) includes 1) minority and disabled students, 2) financially challenged students, 3) students whose U.S. curriculum may make it difficult for a semester away (e.g. IT and engineering), 4) students with jobs, 5) students with campus commitments such as student government and 6) student athletes.



Understanding U.S. Study Abroad in Ireland: Economic impact and future possibilities

Chapter One: Understanding U.S. study abroad

Introduction

This chapter describes the U.S. study abroad sector, exploring its characteristics both globally and comparatively as it specifically manifests in Ireland. The analysis interrogates key features of the sector including: the type of student who studies abroad; programme duration; top destinations, and why students choose Ireland; places of origin; subject choices; funding models and the perception of study abroad in Ireland. The discussion is informed through a combination of secondary research in the case of the overall sector, and by the findings of this study in relation to Ireland.

1.1 Background to U.S. study abroad

The United States has been to the forefront of international education since the end of the First World War: its higher education institutions consistently attracting greater numbers of international students than those of any other country - with annual numbers rising to over one million for the first time in 2015/16.^{v,vi}

Conversely, and despite the availability of international study options for almost 100 years, U.S. student interest in pursuing overseas opportunities has remained persistently low, with a miniscule proportion of the country's 20.5m college students choosing this option each year.^{vii}

Box 1: Summary of research methodology, phase 1

The methodological approach for this research was designed in consultation with the Study Reference Group which included Education in Ireland (representing its members: government recognised HEIs in Ireland) and ASAPI (representing its members: U.S. colleges in Ireland, Third Party Providers and internship providers).

The first step for phase 1 of the study was to understand and describe the study abroad landscape in Ireland - a complex tableau incorporating several modes of logistical and academic delivery - many of which interact with each other, often at multiple levels.

Following research on the various models of study abroad provision, extensive consultation was undertaken across all the sectors in Ireland to identify the main modes of operation.

Baseline data was calculated using IIE Open Doors data over several years^{i,v} analysis of which suggests that the number of students choosing Ireland has increased by an average of 10% for the past five years. Conservatively assuming continued growth of 8%, it was estimated that 11,912 U.S. study abroad students were present in Ireland during the 2016/17 academic year. This figure is used throughout the study.

Focus groups and interviews were held with U.S. students, Irish HEI study abroad managers, administrators of U.S. programmes (both colleges and third-party providers) and faculty-led programmes to confirm all assumptions around categorisation and the size of the sector.

Following rigorous testing, surveys (online questionnaires) were administered to all study abroad sectors in a rolling fashion from July 2017 to February 2018. The data was requested for the period May 1, 2016 to May 1, 2017 (academic year (AY) 2016/17, and for summer 2016 in the case of Irish HEI summer-schools). A student survey was administered in November/December 2017. This questionnaire was specifically designed to elicit a comprehensive picture of weekly student expenditure (covering 20 categories), thus allowing our economic modelling to generate estimates for other cohorts of students who could not be included in the survey.

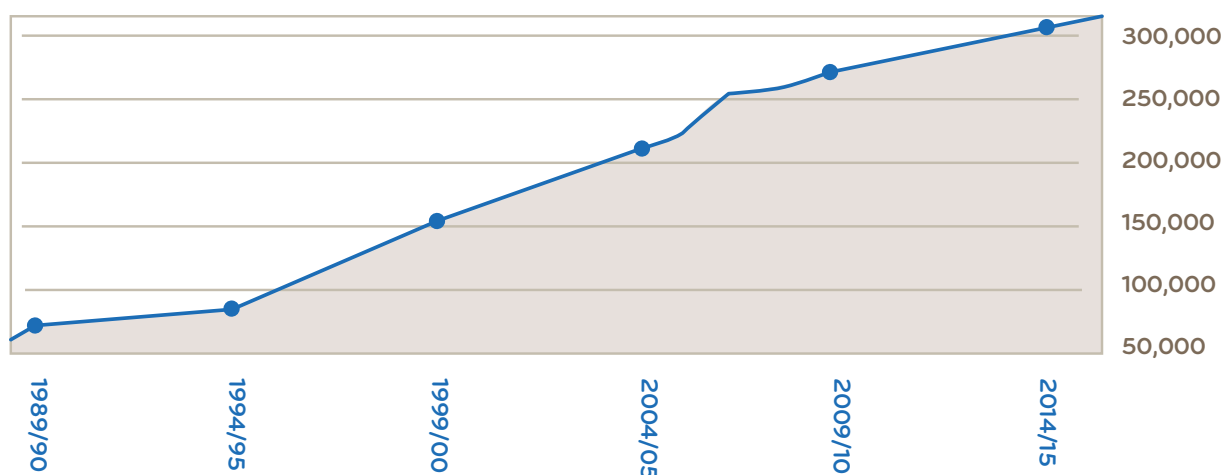
The research team were extremely fortunate to receive strong cooperation and assistance from all study abroad sectors in Ireland, ensuring a high level of confidence in the data collected. Overall, through the surveys the location of 71% of all study abroad students in Ireland in 2016/17 were captured directly - a much higher percentage than was anticipated.

See Appendix 1 for full details of the research methodology.

The 2017 Open Doors report on international education exchange from the Institute for International Education (IIE) notes an increase of 3.8% in U.S. numbers studying abroad for academic credit over last year. While the total figure of 325,339 for 2015/16 represents a three-fold increase over the last 20 years, there is evidence to suggest that the overall rate of growth has slowed in recent years: with increases over the last 10 years standing at 46%, compared with only 19% over the past five years.ⁱ

The relatively low levels of international exposure have raised concerns at both educational and government levels that U.S. graduates may be less well prepared for entry into a globalised workforce and demonstrate a weaker understanding of international issues than their European or Asian counterparts. This has resulted in the development of a number of important initiatives to promote study abroad amongst U.S. students – especially ‘non-traditional’ cohorts. These include IIE’s Generation Study Abroad (GSA) which was established in 2014 with the ambitious target of doubling the number of U.S. college students studying abroad to 600,000 by the end of the decade and diversifying the demographic,ⁱⁱ and the Senator Paul Simon Study Abroad Program Act, aimed at expanding study abroad opportunities for undergraduate students. These are powerful statements of intent, yet while some growth has been achieved, GSA and other initiatives have not attained their targets.^{viii}

Figure 1: U.S. study abroad students (globally) 1989/90-2014/15



Source: IIE Open Doors 2017ⁱ

The Forum on Education Abroad’s ‘State of the Field’ survey undertaken every two years, reflects the concerns of study abroad practitioners from both public and private institutions with respect to study abroad inhibitors.¹⁷ The report (based on survey returns from over 200-member institutions) serves today as a quasi-monitor of GSA and other targets and aspirations. The 2017 Report finds that 89% of U.S. institutions aspire to increase study abroad numbers (99% of public and 81% of private institutions). Of these 13% saw an increase in numbers over the last year but a further 13% saw a decline in numbers suggesting that overall, little significant growth was attained amongst U.S. institutions within the study and serving as a reminder that high level aspirations can take some time to filter down to the programme/ action level. Forum members note for example that limited endowment or scholarship funding and the lack of funding (federal and institutional) for summer, cultural and language programmes serve as a continuous barrier to growth and act as a particular deterrent to attracting diverse populations of students.

16 These figures refer to 2016, the latest available from the GSA website <https://www.iie.org/Programs/Generation-Study-Abroad>.

17 The Forum on Education Abroad includes over 700 U.S. institutions, programme providers and overseas institutions and organisations. The organisation focuses on developing and implementing standards of good practice in education abroad, encouraging and supporting research initiatives, and offering educational programmes and resources to its members. Its mission is to help to improve education abroad programmes^{ix, x} to benefit the students that participate in them. <https://forumea.org/about-us/who-we-are/>.

Table 1 is taken from the Forum's 'State of the Field Survey' 2017 (which is undertaken for and by U.S. institutions) neatly summarises the obstacles described above and in Appendix 2, and their varying significance to the study abroad sector, including non-U.S. organisations.

Table 1: Top five barriers to increasing the number of students participating in education abroad			
Rank	U.S. Institutions	U.S. Programme Providers	Overseas institutions & organisations
1	Competition with home campus activities, sports and U.S. internships	Geopolitical environment (including travel advisories)	Lack of portability of financial aid, tuition waivers, scholarships, work, study, jobs or other benefits from the home country
2	Rising cost for programme operation, marketing & administration	Resistance from student's families, fear, lack of encouragement	Not enough support from or access to institutional leaders
3	Lack of portability of financial aid, tuition waivers, scholarships, work, study, jobs or other benefits from the home country	Competition with home campus activities, sports and U.S. internships	Not enough interest on the part of faculty members and professors to integrate education abroad into degree requirements for credit transfer
4	Resistance from student's families, fear, lack of encouragement	Rising cost for programme operation, marketing & administration	Not enough faculty or staff interested in leading experiences or teaching courses abroad
5	Not enough interest on the part of faculty members and professors to integrate education abroad into degree requirements for credit transfer	Not enough support from or access to institutional leaders	Competition with home campus activities, sports and U.S. internships

Source: Forum on Education Abroad, 2018^{ix, x}

Overall the chief concerns at institutional level centre around insufficient staffing, inadequate numbers of academic advisors, low levels of interest and mismatched faculty engagement to manage and support the increased student numbers that the promotional efforts are attracting. A further inhibiting factor is the myriad of funding models for study abroad evident both within and between institutions with many considered as inadequate to develop programmes - often despite the espoused strategic aspirations of the institution. The report also noted that overseas institutions and organisations reported significantly fewer barriers to receiving U.S. study abroad students than did the U.S. institutions face in sending the students.

Box 2: The benefits of and barriers to studying abroad for U.S. students

An abundance of international longitudinal studies show that the skills developed while studying abroad such as intercultural competence, confidence, independence, foreign language proficiency, and adaptability are transferrable to the workplace and provide graduates with a competitive advantage when seeking employment. Students with international experience display stronger career aspirations, achieve greater levels of success and are likely to attain stronger academic results. Studies in the U.S. further suggest that this impact is magnified for under-represented groups.

These advantages are well-recognised but overseas study remains elusive for 98% of the U.S. student population. The impediments to study abroad as viewed by U.S. students and their families are summarised in Table 1 and include the actual and perceived costs of such mobility (and associated concerns around forgone income and job security in the case of the increasing numbers of U.S. students who are working to support themselves through college), an absence of prior international exposure, a fear of racism, inadequate information, weak faculty engagement, concerns over security and health.^{ix, x}

See Appendix 2 for an expanded discussion on the benefits and barriers to study abroad and on U.S. initiatives to promote study abroad.

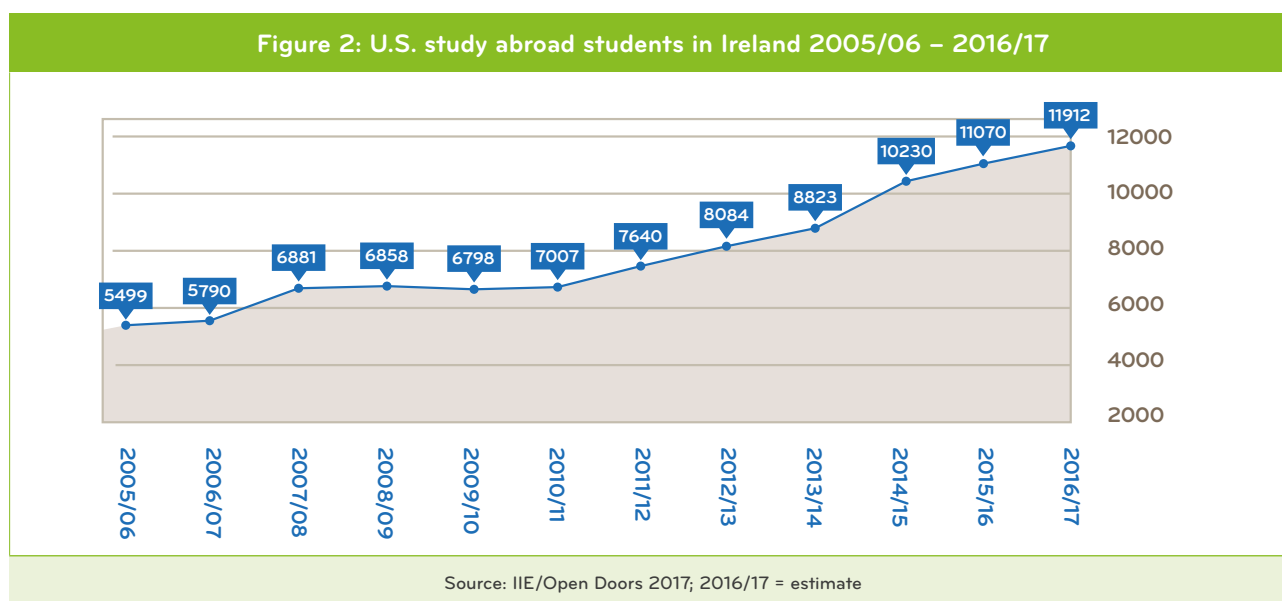
'Students with international experience display stronger career aspirations, achieve greater levels of success and are likely to attain stronger academic results.'



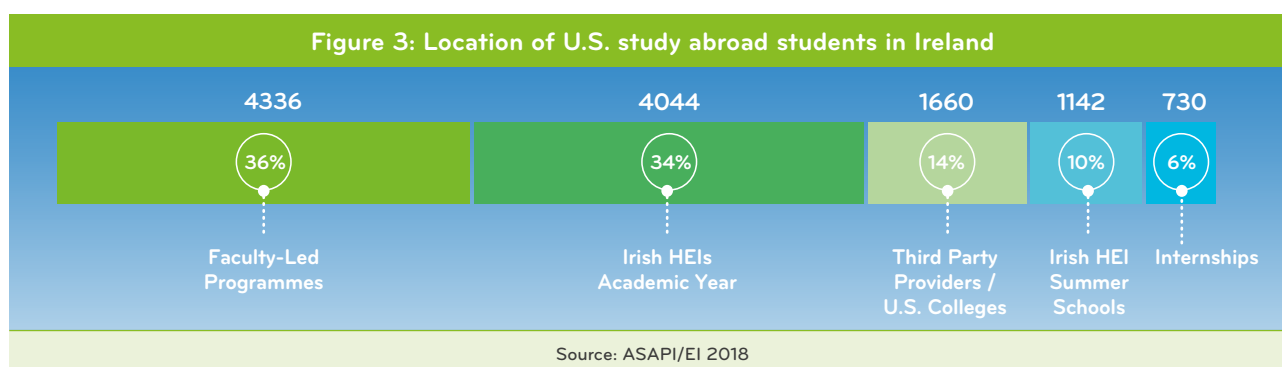
1.2 The study abroad landscape in Ireland¹⁸

Ireland has welcomed short-term U.S. students for many decades, with formal 'study abroad programmes' commencing in the universities from 1970 onwards.¹⁹ IIE figures show that in 2015/16 Ireland hosted 11,070 study abroad students (of varying duration, see Table 2 below) - 3.4% of the total U.S. study abroad cohort and an increase of 8.2% on the previous year. Historical data suggests that while growth has been uneven, the number of students choosing Ireland has increased by an average of 10% each year for the past five years.

Figure 2 uses IIE data to illustrate the growing numbers of U.S. students choosing Ireland since 2005/6. Assuming continued growth of 8%, it is estimated that there were 11,912 U.S. study abroad students present in Ireland during the 2016/17 academic year – the period during which this study took place - for a total of 95,035 study weeks - these figures are used as the basis for this study and are provided in full in Table 2.



The study abroad landscape in Ireland is complex: students can choose their engagement via a number of routes and an array of programmes across varying timescales. As a result of the cooperation of all sectors with this study, and closely matching the primary findings with IIE data, a clear picture of study abroad in Ireland has emerged and the number of students located within each sector is illustrated by Figure 3.



18 Unless otherwise stated, all U.S. study abroad student figures and statistics are taken from IIE Open Doors Data. The latest available figures refer to 2015/16 academic year (published in November 2017). Other figures/data relating to study abroad in Ireland are taken from the set of surveys carried as part of this research study and sourced as 'ASAPI/EI 2018'. Data gathered by the Higher Education Authority (HEA) on U.S. study abroad in Ireland is not generally employed in this study. HEA data on U.S. study abroad is considered unreliable at present as a result of systems issues within Irish HEIs, and because no mechanism currently exists to capture data on short-term (less than one semester) academic programmes or summer school students – the fastest growing categories. The HEA also does not capture data from private HEIs and cannot generate data on non-Irish HEIs operating in Ireland or U.S. faculty-led programmes. See references i and iv and <https://www.iie.org/Research-and-Insights/Open-Doors/Data>.

19 The findings from this ASAPI/EI study show that the first study abroad programme commenced in Trinity College Dublin in 1970, followed by University College Cork in 1980 and National University of Ireland, Galway in 1985.

a) Irish Higher Education Institutions (HEIs):

This study found that around 34% of U.S. study abroad students (including exchange students, not including summer students) are located in Irish HEIs as illustrated by Figure 3. Numerically, this translates to 4,044 students as Figure 3 shows. Students in Irish HEIs are generally present for one semester and thus account over 60% of all study abroad weeks. Almost 90% of these students are in the university sector, with 10% in private colleges and less than 1% in Institutes of Technology – IoTs. Study abroad students in Irish HEIs are received directly through partnerships with U.S. institutions (65%), arrangements with third party providers (27%) and direct application (8%) with the majority in situ for one semester. Partnerships are emerging as increasingly significant, especially for the university sector - although variation across institutions was noted. For the universities, there is the added attraction of the development of research and other partnership programmes as relationships develop.²⁰

b) Irish HEI summer schools:

Most Irish universities and a number of other HEIs run annual summer schools. Students on these credited programmes are received through partnerships with U.S. institutions, arrangements with third party providers and direct application (often as a result of promotional activities). Programme durations range from one to eight weeks, and students on these programmes account for 10% of the population (n=1,142).

c) Third party providers:

Third party providers are colleges or private organisations which channel students to both Irish HEIs, and to their own institutions (if they are *also* a college with a campus in Ireland). These providers can be considered facilitators of study abroad as they can recruit students from a variety of U.S. institutions to participate in programmes across the sector. Most students coming to Ireland through third party providers remain for one semester and are in an Irish HEI, but a considerable range of durations and programme types was observed. Third party providers manage study abroad programmes, place students in HEIs and take responsibility for most non-academic elements, including accommodation. The services offered vary from provider to provider, with several having a fully-staffed office in Ireland, while others have one part-time staff member (perhaps with a larger office in another country). Third-party providers also work outside the Irish HEI sector, running shorter term programmes directly or in partnership with other providers, running Faculty-Led Programmes (FLPs) and operating for-credit internship and serviced learning programmes, or programmes offering a combination of options.

Careful cross-referencing of the data from all sectors has established that around 40% of all U.S. study abroad students in Ireland are delivered through third party providers of whom there are an estimated 20 operating semester length programmes, and more operating short-term programmes in Ireland - eight of whom responded to the survey.²¹ These providers are an important source of students to the entire higher education sector, but as noted above their importance to the university sector is understood to be declining in significance as direct partnerships increase.²² Third party providers are particularly important to private colleges, providing over 90% of students in the case of the private colleges which took part in this study.

20 Exchange students are included in this survey. Interviews with Irish HEIs in the course of this research revealed an interesting dichotomy within the institutions. In some institutions, schools and colleges are generally anxious to develop exchange partnerships which benefit Irish students and the institutional reputation, however the study abroad managers see the constant increase in demand for exchange students resulting in a decrease in their study abroad income. Other HEIs have decided not to become involved in exchange programmes.

21 See full list of known providers in Appendix 1.

22 There is no baseline evidence on which to base this statement, but six out of seven Irish universities indicated in interviews that they favoured developing their direct relationships with U.S. HEI partners ahead of their relationships with third party providers for the reasons noted above.

d) U.S. campuses in Ireland

These are Irish based campuses which are owned and operated by an established U.S. university or college. These programmes may recruit exclusively from their home campus and/or attract students from other U.S. institutions. The institutions usually have a physical presence in Ireland and a number have been operating in Ireland for some time (with one having a continuous presence since 1980). However, some operate on a 'fly-in' basis for the semester and have no permanent physical location or staff based in Ireland. These colleges operate both one semester programmes and a variety of shorter programmes ranging from two to ten weeks in duration. As Figure 3 shows, an estimated 1,660 study abroad students are based in 17 known U.S. campuses which have been established in Ireland. These students account for 13% of all study abroad weeks. Some U.S. colleges based in Ireland are also third-party providers (and may also offer internships), have students studying on their own campus and/or within one or more Irish HEIs – making for challenging analysis! Eight of these colleges are located in Dublin with the remainder spread across Galway, Kerry, Mayo, Waterford and Wicklow.

e) Internship providers:

Internship providers are generally commercial organisations who offer 'for-credit' internships to study abroad students. As noted however Irish HEIs, third party providers and U.S. campuses, can also offer internships. Open Doors 2017 reports that internship programmes (and non-credit associated work and volunteering programmes, which are not included in this study) are rapidly increasing with more than 300 colleges reporting 23,000 such placements in 2015/16²³. The findings from this study concur with IIE, noting that internships are showing strong growth, and in fact suggesting that in Ireland this sector may be growing at a higher rate than previously understood. This study captured 730 students (6% of total) who were undertaking internships for credit in Ireland, varying from four-six weeks in duration (in the main) – an increase of 120% over 2015/16 (*ibid* p96²³). These students account for 7% of all study abroad weeks and come through a number of routes including third party providers and organisations who specialise in internship provision. In addition to those students exclusively on internship programmes, there are increasing numbers of programmes which include partial internships of one or two days per week, or a number of weeks within a semester. Three internship providers responded to this study (and four third party provider respondents also offer internship programmes), these providers were all based in Dublin.

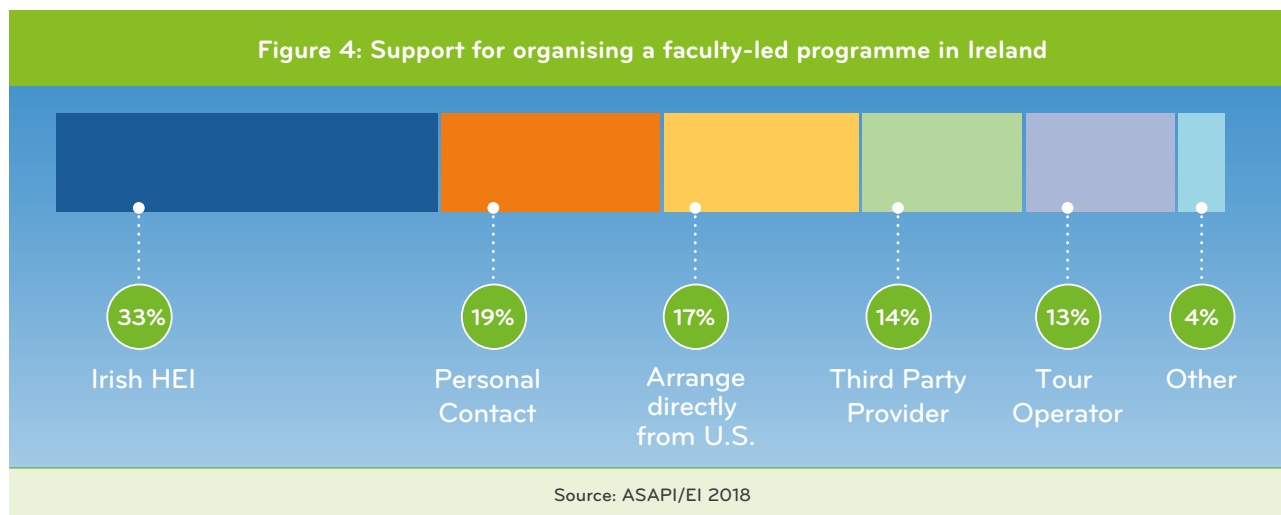
f) U.S. Faculty-led programmes (FLPs):

FLPs are short study abroad programmes led by U.S. academic staff. These programmes are difficult to categorise as they display multiple modes of operation: from programmes fully managed by Irish HEIs on behalf of U.S. institutions, to programmes entirely organised by the faculty-leader directly from the U.S., as Figure 4 illustrates. FLPs sometimes link with other programmes in Ireland or other countries and are of varying duration, but on average last between one to three weeks, with two weeks being most popular as Table 2 (p13) shows.

23 Discussions with organisations providing internships within Ireland indicated that numbers were doubling each year. What is evident from the surveys and follow-up interviews is that this sector is growing very quickly, with one provider indicating that their numbers had doubled each year for the last three years. This survey located 730 interns in AY 2016/17, while according to IIE, Ireland had 333 interns in 2015/16 (note that IIE will only track these students if they went through the university to arrange the internship). The growth in internship provision matches well with the U.S. student's greater interest in career-focused opportunities. There is a dearth of data however on what constitutes an internship, levels of remuneration, duration and availability.

As noted the duration of study abroad is reducing. This is reflected across the sector globally, but most especially in the rise in popularity of U.S. FLPs, probably the fastest growing sector in Ireland. These short-term programmes account for an estimated 36% of all study abroad students in Ireland, and 16% of all study weeks (a total of 4,336 students – see Figure 3). FLPs offer the student a tailored and contained international academic experience which is cost-effective. It is notoriously challenging to quantify these programmes – even within U.S. institutions it is not always possible to discern how many FLPs are operating over a given academic year.²⁴ In Ireland, these groups are not required to procure visas or obliged to register with immigration services as they are generally within the State for less than 90 days, so there is no available source of data on this student flow.

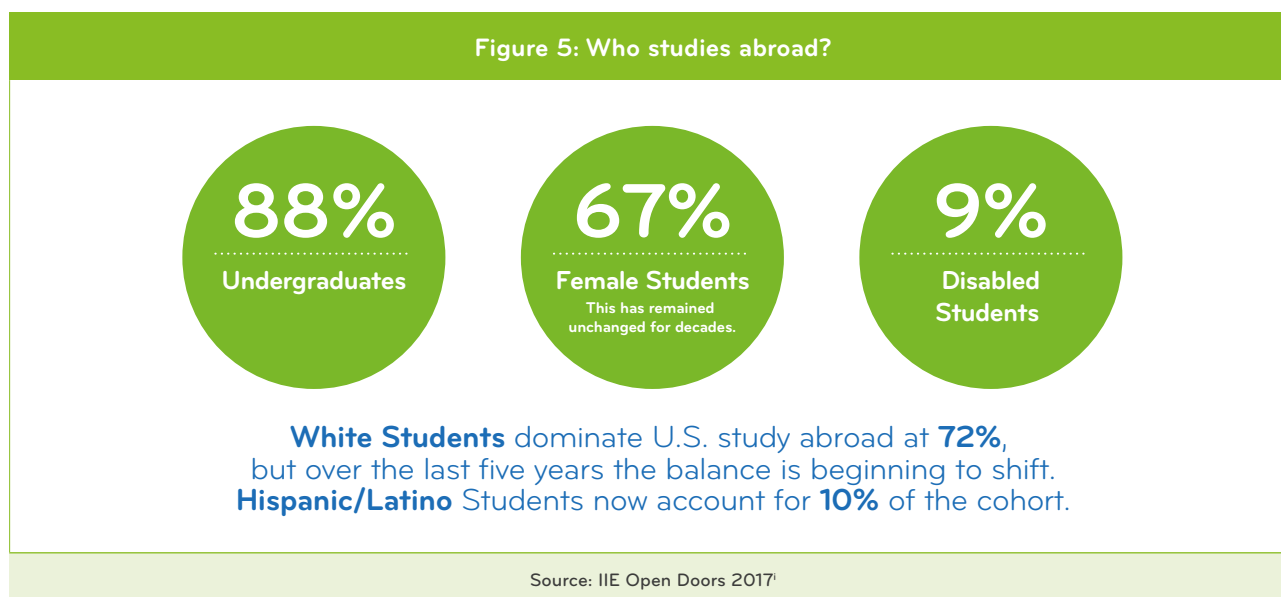
Figure 4: Support for organising a faculty-led programme in Ireland



1.3 U.S. study abroad student profile²⁵

Although latest figures suggest increasing diversity, the constraints facing U.S. students described above have resulted in a largely homogenous study abroad population. Globally, candidates, as demonstrated by Figure 5 are generally characterised by their high socio-economic status, are predominantly white (72%), female (67%), attend doctorate-granting or masters colleges or universities (85%) and one third originate from just five States (California, New York, Pennsylvania, Massachusetts, and Ohio).

Figure 5: Who studies abroad?



²⁴ One FLP respondent stated that to their knowledge their University ran at least 40 FLP programmes each year.

²⁵ Unfortunately, IIE are unable to provide breakdowns of most variables by country, and therefore a comprehensive comparison of the profile of students who choose Ireland against the full study abroad population cannot be undertaken at this time.

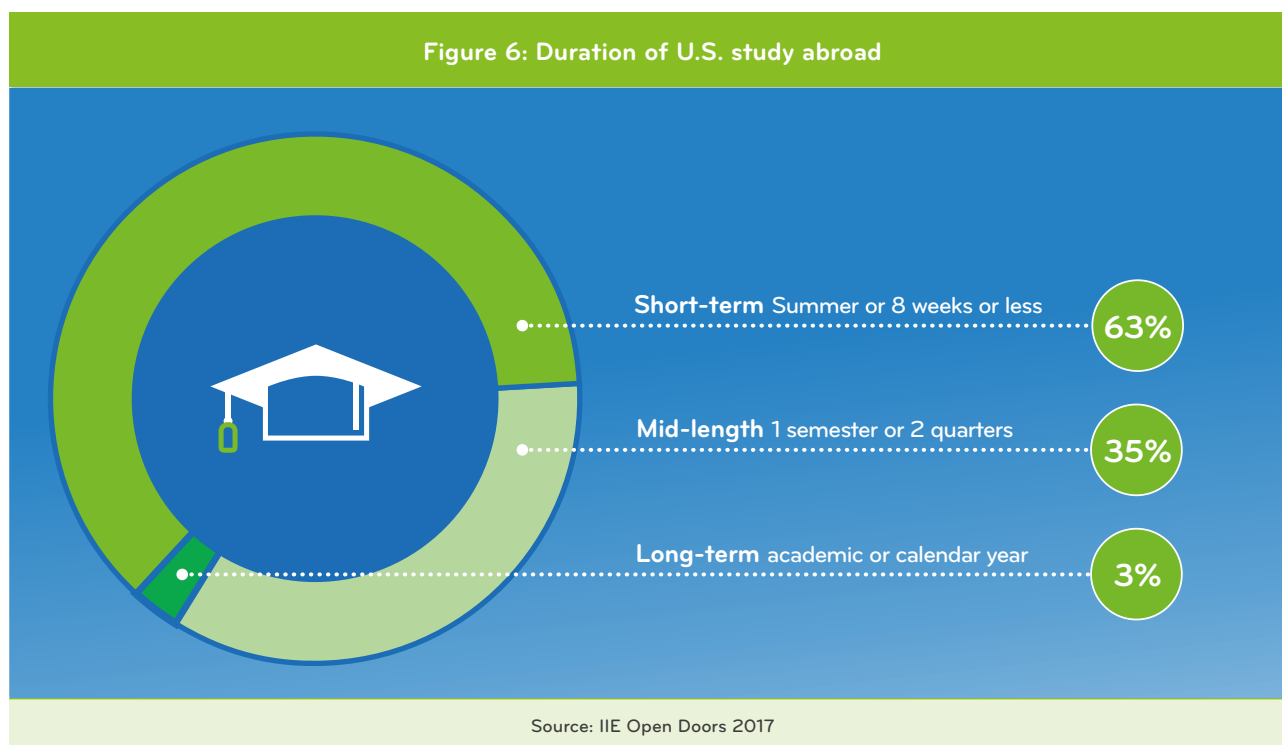
The proportion of underrepresented races and ethnicities attending U.S. higher education institutions has increased over the last decade from 17% to 28% but this diversity is not yet represented in the study abroad population where this group make up slightly under 10% of the cohort, and Black or African American students just 6%. The pattern is different for Asian American students who account for 7% of undergraduates and 8% of the study abroad population (*ibid p11 and p85*). These and other underrepresented clusters often also face the most challenging obstacles to study abroad.^{26, xii}

1.4 U.S. study abroad duration

1.4.1 Overall study abroad duration

The swing towards shorter term programmes is the most striking change in U.S. study abroad over the last decade with particularly strong growth in evidence for programmes of less than eight weeks. For those seeking an international experience yet facing financial constraints or inhibited by the other barriers described, a short-term programme offers a valuable option.²⁷

Looking back to 1994/95 illuminates the changes sharply – at that time short programmes (categorised as eight weeks or less) accounted for 39% of study abroad for U.S. students - today these programmes account for 63% of students globally, as highlighted by Figure 6.



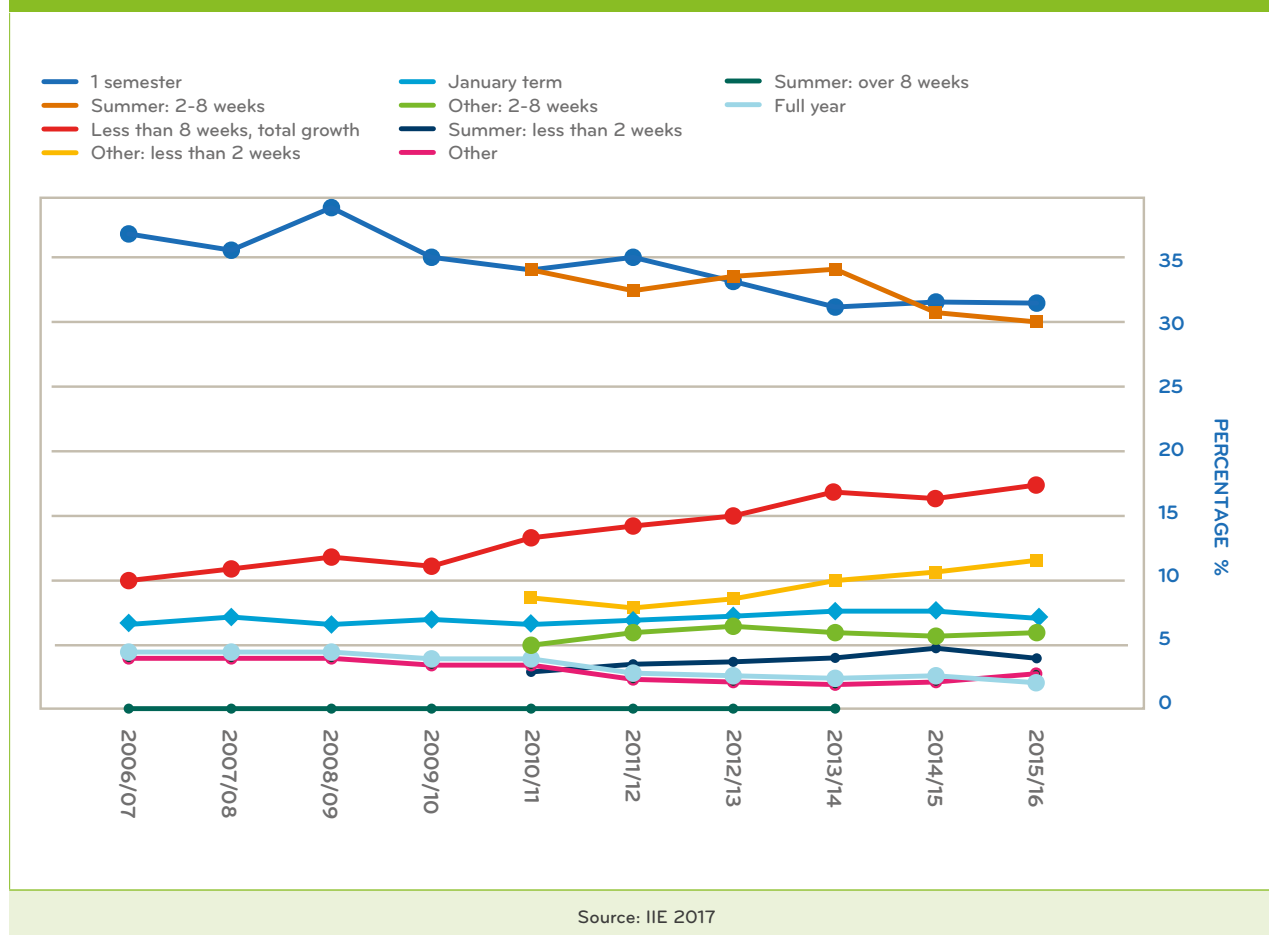
26 See Appendix 2 for an expanded discussion on barriers to study abroad.

27 For example, 90% of community college students who studied abroad in 2015/16, chose a short programme - *ibid p11*.

IIE data collated from 2005/06 to 2015/16 and referring to all U.S. study abroad students is presented in Figure 7 and illustrates more recent shifts.²⁸

These shorter-term experiences are often FLPs or short-term programmes within the academic year ('other' in Figure 7) which take the form of January term (J-term) or Maymester programmes. These usually have a duration of three weeks and have remained steady over the last decade, growing by less than 1% during that period.

Figure 7: U.S. study abroad duration changes (global) 2006/7-2015/16



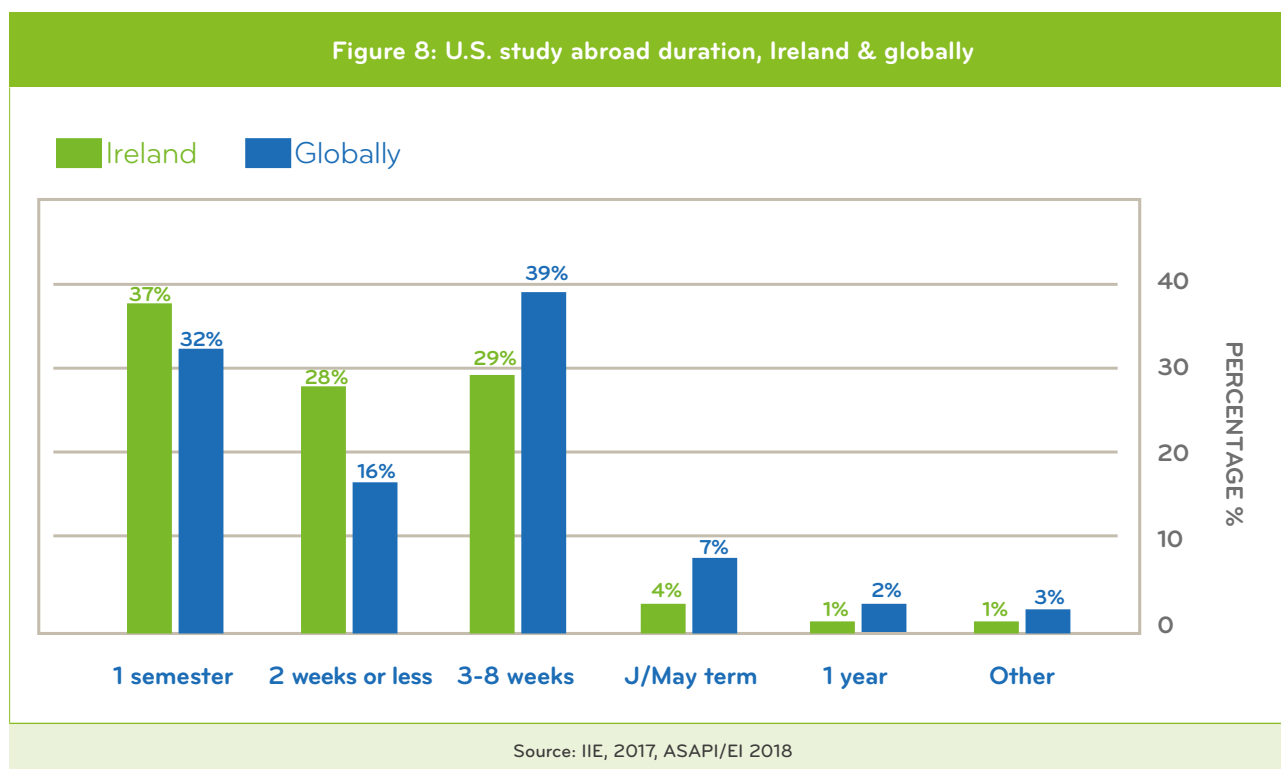
'Summer programmes' have been included as a specific category by IIE since 2010/11. In total these programmes account for 38% of all students, but as Figure 7 shows, by far the most significant category are those of 2-8 weeks duration, most likely averaging out at 4-6 weeks. These programmes can be led by third party providers, U.S. faculty or offered by HEIs in destination countries. It should be noted that in Ireland 'summer programmes' refer specifically to those operated by Irish HEIs, while IIE include FLPs which operate during the summer months data. For clarity around this issue, Table 2 (p13) breaks down programme duration by each sector, clearly demonstrating the differences between each programme and provider in Ireland.

One semester programmes remain the most popular but have declined in importance over the last two decades, dropping from 45% in 1994/95 to 36.3% in 2006/7, and falling a further 4.4% to 31.9% in 2015/16. In actual numbers these students are plateauing at just over 100,000 per year.

²⁸ Note that the red line in Figure 7 denotes total growth in programmes of less than eight weeks from 2006/7 to 2015/16, and that the that the green and yellow lines further delineate the same figures from 2010/11 onwards, to illustrate that programmes of less than two weeks are showing stronger growth. See Appendix 4, Table A3.1 for the full breakdown of these figures.

1.4.2 U.S. study abroad duration in Ireland

The information gathered by this study shows that study abroad in Ireland conforms largely to the global norm, though as an English-speaking country it is naturally more attractive for both one semester programmes and very short programmes (two weeks or less) than other destinations. Globally 3-8 week programmes are the most popular, as illustrated by Figure 8 which compares IIE data with that obtained by this study for each major duration category.



The findings for Ireland are further broken down in Table 2 which indicates the location of all known study abroad students in Ireland in 2016/17 and the duration of their study.

- For Irish HEIs specifically, 91% of study abroad takes the form of one semester programmes with a further 4% studying for 1 year. With the exception of the J-term programmes (of which there are very few), the remaining short-term programmes are students coming in from third party providers for specific modules.
- Irish HEI summer schools operate from 1-6 weeks, with most falling within 3-4 weeks.²⁹
- Just over one third of U.S. college (& combined third party providers) students in Ireland are present for a duration of one semester, but shorter programmes (notably two and six-week programmes) are also important for this sector.
- Internships largely operate from 4-6 weeks but can extend beyond this and increasingly run to six or even twelve months.
- FLP student numbers peak between two weeks (42%) and three weeks (18%).³⁰
- Although one-year programmes are not popular for U.S. students in general at 2.4% of total, Ireland attracts a smaller number than average at less than 1.5%.

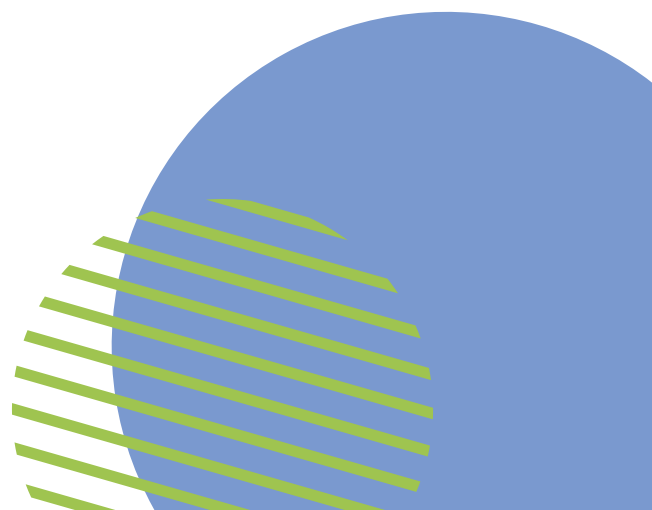
²⁹ In the questionnaire administered, summer school managers/directors were given a 5-6 week duration option, this is included under 5 weeks in Table 2.

³⁰ The ten week programme skews the figures slightly here and is a programme annually operated by one institution.

Table 2: Study abroad sectors in Ireland: numbers and duration (expanded from primary data)

Duration	Irish HEIs Academic Year	Irish HEIs Summer Schools	U.S. Colleges	Internships	Faculty-led Programmes	Totals	%
1 week	10	257	173	-	542	982	8%
2 weeks	34	155	365	-	1,821	2,375	20%
3 weeks	19	341	50	-	796	1,206	10%
4 weeks	17	291	123	21	399	851	7%
5 weeks	0	97	-	128	209	434	4%
6 weeks	4	-	332	407	58	801	7%
7 weeks	-	-	-	23	23	46	<1%
8 weeks	42	-	17	26	-	85	1%
9 weeks	17	-	-	21	-	38	<0%
10 weeks	30	-	-	-	396	426	4%
1 semester	3,669	-	568	100	93	4,430	37%
1 year	144	-	-	-	-	144	1%
J-term/ AY short	58	-	-	-	-	58	<1%
OTHER	-	-	32	4	-	36	0
Totals	4,044	1,142	1,660	730	4,336	11,912	100%

Source: IIE 2017, ASAPI/EI 2018

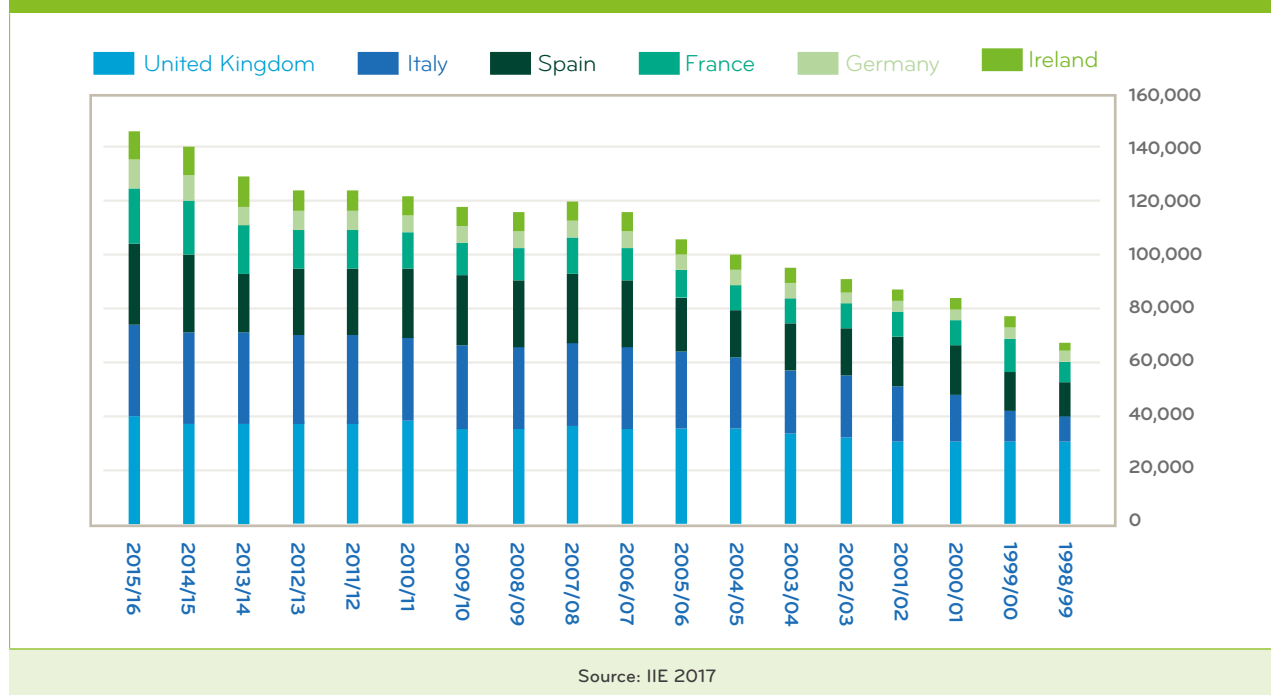


1.5 Destination choices for U.S. study abroad students

While U.S. students study abroad in 220 countries or territories, the figures demonstrate strong patterns of clustering, with 56% studying in the top 10 destination countries,³¹ and 54% studying in Europe. The popularity of certain countries and regions shift each year and there is some evidence of increasing diversification with higher numbers choosing Asia, the Caribbean and Latin America than ever before. Europe has always attracted the largest numbers of students - amounting to a total of 176,890 in 2015/16 - but although the actual numbers are up by 6,000, statistically growth declined from 5% in 2014/15 to 3.5% in 2015/16.^v

Figure 9 reveals how six European countries have been the dominant destinations for U.S. students for several years. These six countries represent 144,000 students, 82% of U.S. students studying abroad annually in Europe, and 44% of those studying abroad globally. Over the last year all of these countries have experienced continued growth (ranging from 2.5% to 5.8%), but Ireland's progression has outpaced these destinations with average increases of 10% per year for the last five years, as noted above. The IIE/Open Doors 2016 report acknowledged Ireland as one of only four countries in the top 25 destination countries experiencing growth of 15% (15.9%) or more;^v in 2017 this growth rate had dropped to 8.2%. Ireland's growth as a destination however continues to be one of the highest of any European country within the top twenty-five with the exception of Denmark and the Czech Republic (15% and 13% respectively) - both of which are starting from a significantly lower base of around 4,000 students.

Figure 9: U.S. study abroad – Top European destinations (2005/6–2015/16)



1.5.1 Why do U.S. students choose Ireland as their study abroad destination?

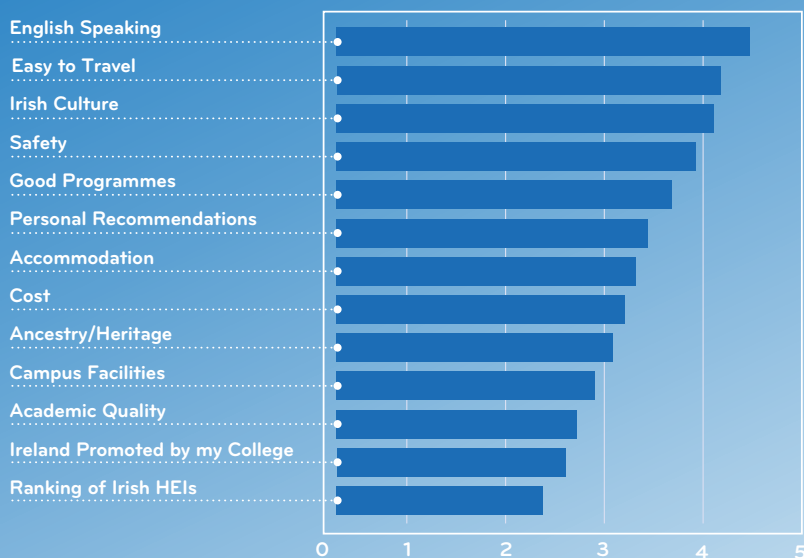
Findings from the student surveys and focus groups undertaken as part of this study, as well as results from a study of 1,000 North American students in Ireland undertaken in 2011 by Enterprise Ireland help to understand why study abroad students choose Ireland.ⁱⁱ

Students responding to this study - all of whom were on one semester programmes - were asked why they chose Ireland as their study abroad destination. They were given a choice of 13 suggested reasons (of which they could choose more than one), plus an 'other' category and an opportunity to comment. The results, illustrated by Figure 10 provide an interesting insight into the motivation of this cohort of students. Responses are weighted on a Likert Scale of 1-5 (1 not relevant - 5 highly relevant).

³¹ The top ten destinations are: U.K.; Italy; Spain; France; Germany; China; Ireland; Australia; Costa Rica and Japan. The U.K. has remained in the number one position since Open Doors first began reporting on Study Abroad in 1986 (i, p10). In 2014/15 for the first time, a slight decrease of 0.2% was noted in the Open Doors figures for the U.K., 2015/16 figures indicated a return to growth of 2.5% (ibid).

It is evident that study abroad students are primarily attracted to Ireland because it is English-speaking, offers a broad range of travel opportunities as a result of its proximity to mainland Europe,³² has an attractive culture and is safe. Academic programmes and the ranking of Irish HEIs feature well down the priority list. When asked a similar question, Irish HEI *staff* respondents to this study demonstrated a somewhat different emphasis. Using the same rating system (1-5) these respondents, in common with the students weighted 'English-speaking' as the most attractive quality (3.75). In joint second place was culture/fun and the ranking of Irish HEIs (3.42) – the latter, which was ranked last by student respondents demonstrates an interesting difference in perspectives.

Figure 10: U.S. student responses to question: "Why did you choose to study in Ireland?"
 Responses are weighted on a Likert Scale of 1-5 (1 not relevant - 5 highly relevant)



Source: ASAPI/EI 2018

In recent years concerns around **safety and security** have become increasingly central to discussions about study abroad destination. An analysis of the data suggests that security, political instability and natural disasters do not serve as a barrier *per se* for U.S. students, but have an impact on decision making with regard to destination. For example, following the Ebola outbreak in West Africa in 2013, student numbers to that region fell by 68% and following terrorist attacks in Paris in 2015, there was a 5% decline in students choosing France (see Figure 13b).¹ Numbers are now recovering for both areas.

Nonetheless, when considering study destination, safety emerges as a key factor in the decision making process for students, their parents and study abroad directors. This shift is illustrated by the 2011 Enterprise Ireland studyⁱⁱ highlighted by Table 3, which found that safety was a factor in choosing a destination for just 30% of respondents. Six years later the current study found that safety was a "relevant, very relevant, or highly relevant" factor in choosing Ireland for 91% of respondents' - a significant shift over a short period of time.

Table 3: Importance of safety in choosing Ireland (%)

Highly relevant	37
Very relevant	30
Relevant	24
Somewhat relevant	6
Not relevant	3
Source: ASAPI/EI 2018	

³² Given the high importance placed on the category 'ease of travel' by student respondents it is unsurprising that only 6% had not taken a trip away from their base in Ireland or a trip outside Ireland. Student travel is detailed under student expenditure in Chapter 2 below.

Ireland clearly benefits from being ranked as the 10th safest country in the world - ahead of all other top European destination countries and particularly significant in the context of terrorist attacks in the U.K. and Europe over the last five years. When asked about the attractive qualities of Ireland for study abroad, 'safety' received the second highest ranking from all providers, and when asked to rank their experience of safety in Ireland 83% of student responses said it was either excellent (45%) or very good (38%).

"Of increasing importance, I think will be the question of safety abroad for U.S. students and we will be expected to provide the same reassurances of student safety as is expected of U.S. universities currently..."

[provider respondent ASAPI/EI 2018]

"I felt very safe" ... "Friendliest place I've ever been, also feels very safe" [provider respondent ASAPI/EI 2018]

"Ireland's reputation as a safe, friendly environment is an asset in the current climate. Feedback from our U.S. study abroad students is overwhelmingly positive, and students are disseminating this via social media to prospective U.S. students."

[provider respondent ASAPI/EI 2018]

Cost and accommodation

Ireland is expensive for international students,³³ especially in terms of accommodation, and this emerged as a particularly strong concern for U.S. campuses and third party provider respondents, 73% of whom either strongly agreed, or agreed with the statement "the cost of living in Ireland will have a negative impact on our programme's future viability".

"In state universities in relatively poor states like mine (Kentucky), student debt loads increasingly hinder many students from going abroad." [provider respondent ASAPI/EI 2018]

"Ireland is extremely popular with U.S. students for its landscape and culture as well as ancestry reasons. Cost is the main inhibiting factor." [provider respondent ASAPI/EI 2018]

Others noted that high cost was a given in study abroad and Ireland was not out of line with other destinations, and that the positive aspects outweighed the expense.

"While the cost to study in Ireland can be higher than other locations, most of our students who want to go there will go there anyway - either due to curriculum alignment, heritage, or just general interest." [provider respondent ASAPI/EI 2018]

Irish HEIs exhibited less concern, scoring an overall weighted average of 3 (out of 5), when asked "will the cost of living have a negative impact on the future of study abroad in Ireland":

"The issue of price I feel is less important, London, Paris, Florence, Barcelona etc. continue to be the most popular destinations and none of these cities are cheap, for partners or providers." [provider respondent ASAPI/EI 2018]

Cost did not feature as a particularly high concern for the student respondents, falling towards the lower middle end of the scale of deciding factors as Figure 10 shows. Students acknowledged that Ireland was an expensive country but appeared to agree that taking the decision to study abroad would incur high costs and they had prepared for this.

"My only critique would be letting students be more aware of the costs to study abroad. I spent thousands more dollars on accommodation and travel and food than was anticipated and that is fine, but if I had known I would have taken out a larger student loan... Overall, this semester has been incredible! I cannot wait to come back to Ireland!" [student respondent ASAPI/EI 2018]

33 Highlighting the high costs of accommodation socialising, local transport and phone/data costs ValuePenguin for example ranks Ireland as the 5th most expensive country to study in. See Box 3 and Appendix 3 for more details.

The findings of this study around the impact of costs are mixed and in balance could be described as universally acknowledged as high, but not considered an absolute deterrent given the current status quo of the sector, i.e. attracting traditional study abroad students from middle to high socio-economic backgrounds. The negative impact of cost is counteracted to a large extent by the positive impacts of language, safety, ease of access to other European countries and curriculum alignment. This may work as an increasingly negative factor as the sector further diversifies over time.

Box 3: Accommodation shortages in Ireland

At the top of the cost pyramid lies accommodation. The severe housing shortage across most of Ireland's cities has led to spiralling rental charges with increases noted for the last 24 consecutive quarters. Dublin in particular is an expensive choice for students as the graphic below illustrates, currently the most expensive European city to study in after London.

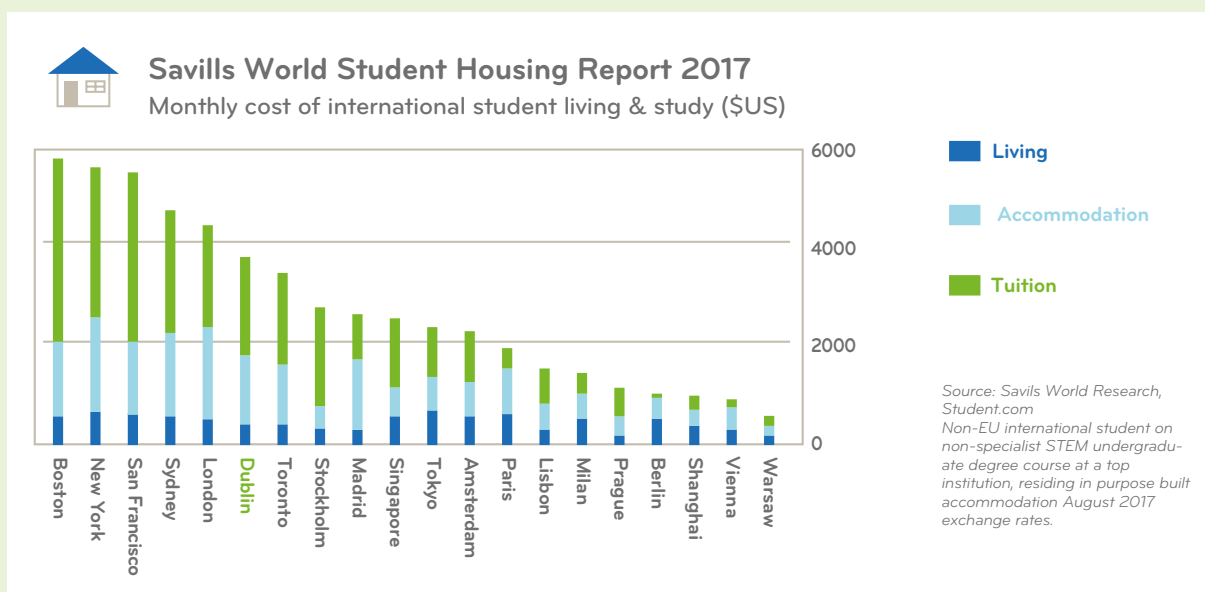
Students, whose accommodation is normally provided did not raise accommodation as an area of concern. Study abroad directors and managers across all sectors of this study however shared their unease about accommodation shortages and high costs across all Irish cities and its potential to negatively impact reputation and growth. The majority of Irish HEIs and third-party providers/U.S. Colleges strongly agreed with the statement "The accommodation situation in Ireland will negatively impact the numbers of students we can attract to Ireland" with many considering this as the most significant threat to the sector.

FLPs who accommodate around 70% of their students in hotels, B&Bs, hostels or rented properties (often outside major cities) are not experiencing such problems.

"While growth in numbers from the U.S. studying abroad in Ireland has continued we have concerns relating to the impact that the lack of availability of good quality accommodation will have on this cohort"

"Our enrolment numbers are capped at the moment due to lack of available student accommodation. We would like to grow our programmes but cannot presently solely due to a lack of available student accommodation".
[provider respondent ASAPI/EI, 2018]

The last 12 months has seen the release of a national strategy on student accommodation and evidence of some movement within this area (please refer to Appendix 3). Interviews with providers in Dublin indicate that for the first time in four to five years, they have noted increased property availability since early 2018, with some suggestions that there may soon even be an over-supply of student housing by 2019 in the capital. While general housing availability remains at critically low levels it appears now that student housing is an attractive prospect for developers as a number of requirements associated with general housing developments such as reserved social housing and the inclusion of adequate parking does not apply to these developments.



For an expanded discussion on the accommodation situation and the government response, please see Appendix 3. Expenditure on accommodation is discussed in Chapter 2.

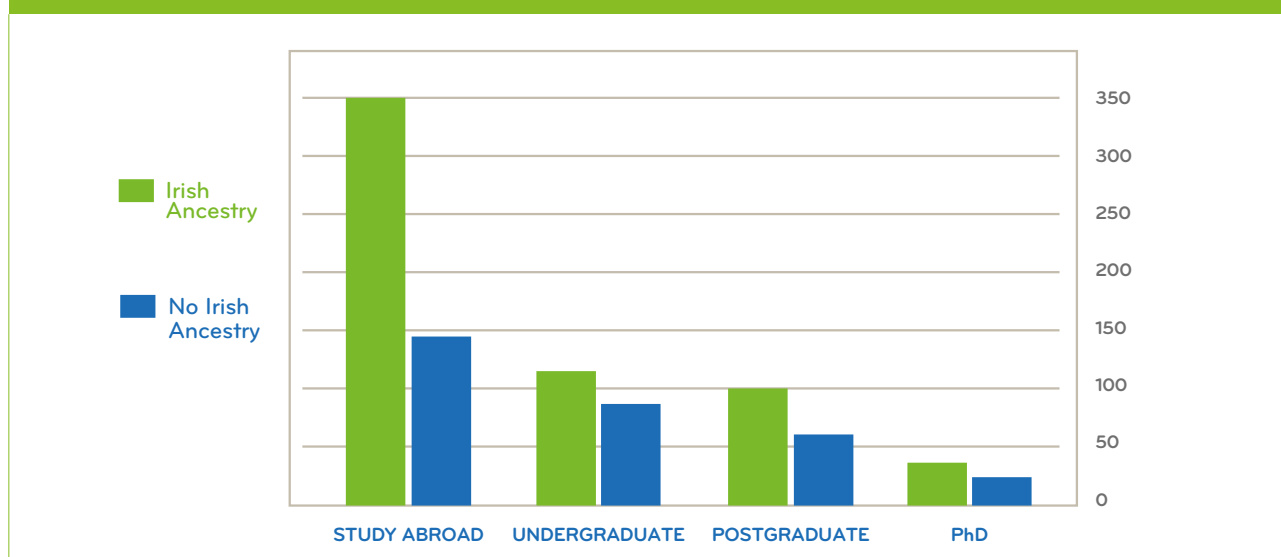
The least important factor for students in choosing Ireland was the ranking of Irish HEIs, similarly academic quality is ranked 11th out of 13 options. Students are however quite interested in the relevance of specific academic programmes on offer, the flexible offers and the possibility of internships as the comments below illustrate:

"Major related class and was able to get a placement/internship while abroad."
[student respondent ASAPI/EI 2018]

"It was one of the few that allowed me to take a wide range of the courses I needed in different areas."
[student respondent ASAPI/EI 2018]

"... the internship aspect of my program was a huge plus."
[student respondent ASAPI/EI 2018]

Figure 11: Ancestry of U.S. students in Ireland



Source: Roe, 2011³⁴

Ancestry

Ancestry is generally understood to be a significant factor in determining a study destination and this appears to be particularly relevant for Ireland. The 2011 study found that over two thirds of respondents had some degree of Irish ancestry, but that recent ancestry (first generation) was not an important factor in choosing Ireland – with just over 5% reporting that they had Irish parents. In that study 38% of respondents with Irish ancestry reported that this was a very or *quite* important factor for them in their decision to study in Ireland. Interestingly however, 69% of the same group considered studying in another country before choosing Ireland, indicating that while the heritage/ancestry factor is important, it would not appear to be the defining factor for students.³⁴ The 2011 study also found that Irish ancestry was significantly more important to study abroad and exchange students than to full time undergraduate or postgraduate/PhD students as Figure 11 highlights. Findings from the current study suggests that as the popularity of study abroad increases, Ireland is likely to attract an increasing cohort of students without Irish ancestry/heritage as the country's advantages in terms of language, ease of access to Europe and safety come to prominence.

Ireland is often promoted to study abroad students as a destination which offers significant and exciting opportunities for personal and academic development, being uniquely 'different... yet not that different'. As well as the English-speaking advantage, the semesterised academic system offers familiarity to the U.S. student, while the proximity to Europe presents the opportunity for travel and adventure with ease. Ireland's strong tradition within the arts, culture and history is the third element which completes the appeal for the study abroad student.

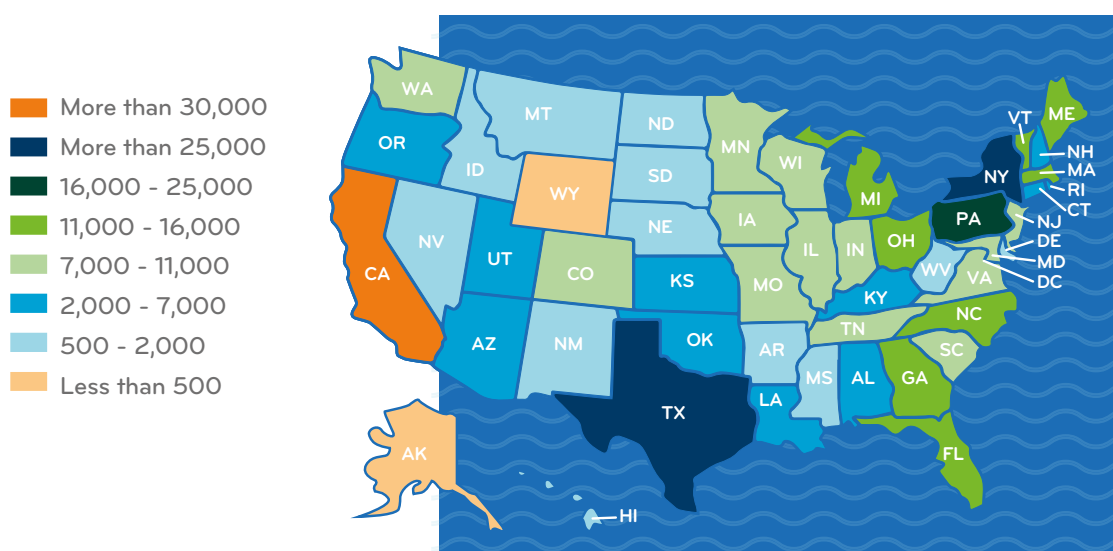
34 The most commonly cited "other countries" which were considered for study were England, Scotland, Canada and Australia (*ibid*).

1.6 Origin of U.S. study abroad students

Students from all U.S. states study abroad, but as Figure 12 shows overall students are more likely to originate from the Eastern half of the country, with the significant exceptions of California and Texas. Data on the percentage of the *student population* studying abroad by state would be a much more telling indicator, however this information is not available at present for every state. We do know however that although Washington DC, Vermont, Rhode Island, Massachusetts, Connecticut and Delaware do not score highly in terms of absolute numbers all have study abroad rates of 17% or more and DC has a study abroad rate of 40%.^v IIE figures also reveal the impact which one institution can have on the figures for each state (a breakdown of this data can be found in Table A3-4, Appendix 4).

Data from a number of sources indicates that Ireland corresponds largely to the norm, attracting students from the North-East, North Mid-West states and California, with Texas becoming more important in recent years. Students surveyed as part of this study conformed to the anticipated pattern: originating from a total of 37 States, with Massachusetts (18%), New York (14%) and Illinois (10%) being the most significant. The findings of the current study also closely mirror those of the 2011 Enterprise Ireland study.ⁱⁱ

Figure 12: Numbers of U.S. students studying abroad by state



Rank	State	No. 2014/15	No. 2015/16	% Change
1	California	30,142	32,125	6.6
2	New York	26,725	26,950	0.8
3	Pennsylvania	18,927	19,524	3.2
4	Texas	16,605	17,929	8.0
5	Massachusetts	15,063	14,642	-2.8
6	Ohio	12,868	14,136	9.9
7	Florida	11,195	11,543	3.1
8	North Carolina	11,506	12,650	9.9
9	Michigan	10,760	11,146	3.6
10	Georgia	10,488	11,429	9.0

Source: IIE/Open Doors 2016, 2017

Figures 13a and 13b below offer a more detailed analysis of the top metropolitan areas of origin for Ireland. This special analysis was performed by IIE for this study and the full data set as well as further charts are provided in Appendix 4.

Figure 13a shows the top ten metropolitan sending areas for Ireland in 2012 and 2017. It is interesting to note that over the last five years the top ten areas of origin for Ireland have remained the same, with one exception: in 2012 the Seattle-Tacoma-Bellevue (Washington State) Metro Area was in 9th position with 118 students and in 2017 this area had dropped to 13th position with 79 students.

Otherwise, Chicago-Naperville-Elgin (Illinois) is the only area to have exhibited a decline in numbers over the five-year period. There is little evidence of growth in the Providence-Warwick (Rhode Island) and Minneapolis/St. Paul (Minnesota/Wisconsin) areas.

Ireland has attracted strong growth from the Los Angeles metropolitan areas and solid increases from the Pittsburgh, Washington DC, Philadelphia and Atlanta metropolitan areas. The top sending areas of Boston and New York/New Jersey are continuing to increase, but at lower levels.

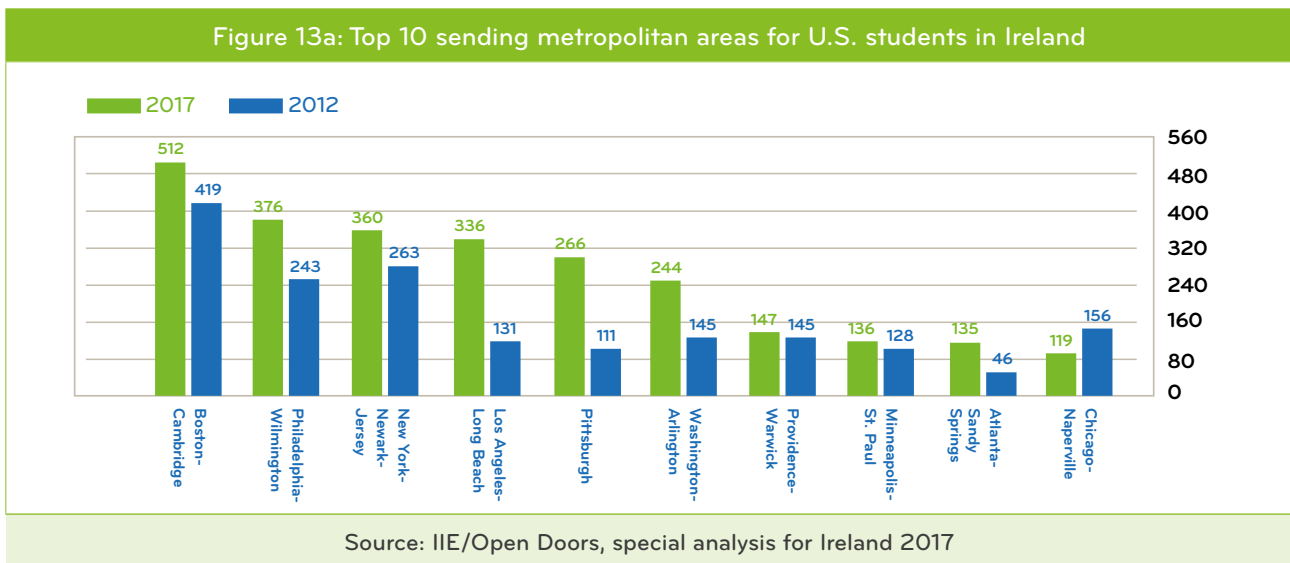
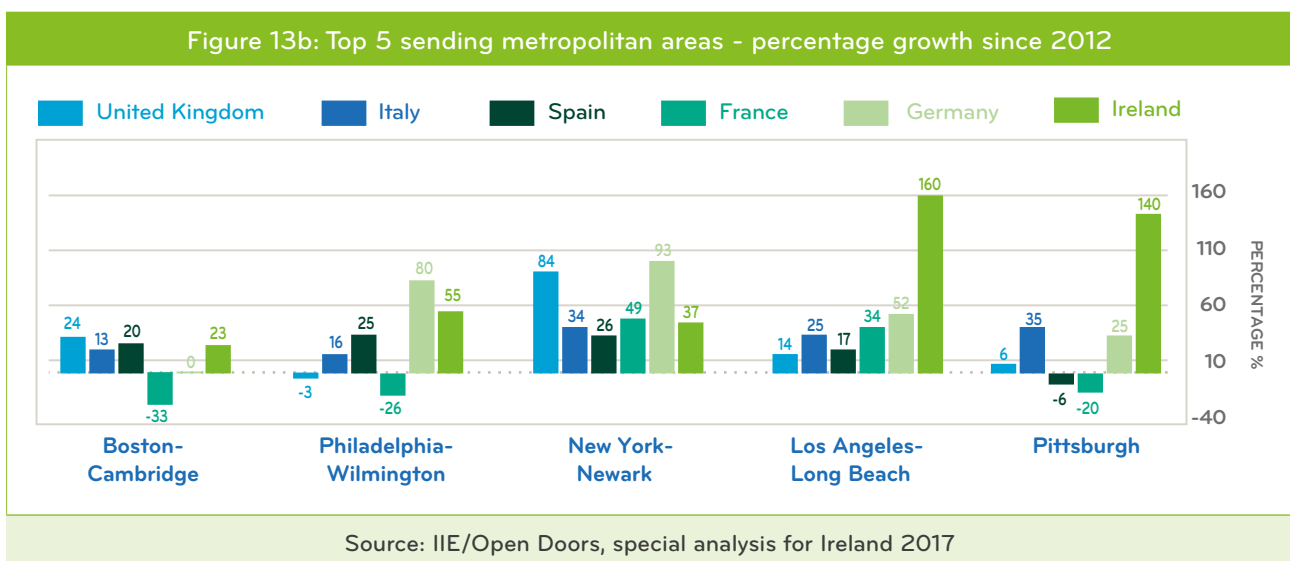


Figure 13b compares Ireland's percentage growth from its top five sending areas with the other top European destinations from 2012-2017. Again, Los Angeles and Pittsburgh stand out as exceptionally high growth areas – however while Ireland's percentage growth is high, allowing optimism for the future, the actual numbers are considerably lower than all other countries under discussion with the exception of Germany (see full figures in Appendix 3). Figure 13b also shows how the number of students choosing France declined in several metropolitan areas, attributed by IIE to the terrorist attacks of November 2015 as noted above. The Boston metropolitan area is a very important source area for both Ireland³⁵ and Spain, while the New York metropolitan area is important for the U.K., Italy, France and Germany. (*ibid*, p10).



35 At least two major Boston-based universities have campuses in Ireland.

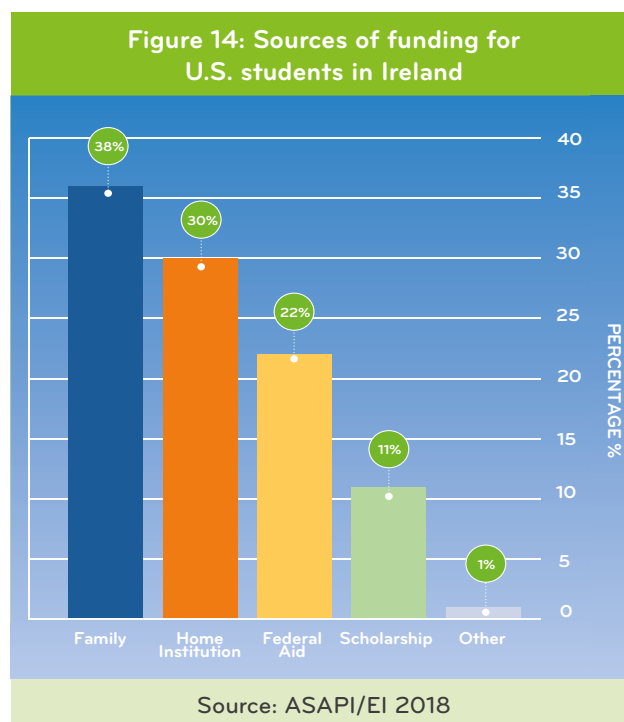
1.7 U.S. student funding for study abroad

As noted above (see Table 1) study abroad funding is a complex area from the institutional perspective and can be daunting for the student. Many institutions offer a variation on a model which involves **“Charging [the student] ‘home school fees,’ adding a study abroad fee [and] negotiating a discount with a program provider...”**^{xi,36} In terms of tuition, the vast majority of students continue to pay ‘home tuition’ fees and in addition, pay a programme fee, and/or their own room and board (plus living expenses). An analysis of the 2015 Forum on Education Abroad Study showed that in only 18% of cases do the institutions pay the programmes expenses and room and board.^{xi} This raises an interesting issue: in the case of Ireland, the tuition fee for a one semester study abroad programme falls between €4,000–€7,000 for humanities (with variations across institutions), while average one semester fees in the U.S. can be double, or in some cases treble that amount, implying that in most cases it is financially advantageous for the U.S. institution to have students study abroad. Most institutions have study abroad offices and staff, around half of whom are funded through study abroad fees with the balance being directed to general funds (*ibid* and Forum 2018).^x These funds may in turn be used to provide needs-based and merit-based financial aid to students, but the formulae vary enormously and appear generally not to be well understood.³⁷

IIE report that institutions award high levels of financial aid for students to study abroad on their programmes, and on other approved programmes as Table 4 shows (no further detail is available). Students taking part in this study were asked about the sources of funding which enabled them to study in Ireland and were offered six answer options from which they could choose as many as were relevant to them. The results are provided in Figure 14 and demonstrate the importance of both family and home college support. Most respondents choose at least two options, with some choosing three or more. Under ‘other’, 20% of respondents commented that they had either worked and saved in the U.S. prior to coming or had taken out a loan, or both.³⁸ A number of Irish universities and colleges offer partial scholarships and financial support through Generation Study Abroad (GSA) and other programmes. Less than 1% of students indicated that they had received GSA support.³⁹

	Institution's own programmes	Approved outside programmes	Other programmes
Federal aid	94.4	95.7	51.0
State aid	90.6	88.8	40.7
Needs-based institutional aid	90.4	78.3	25.9
Merit-based institutional aid	89.1	76.3	24.6
Other aid	92.1	88.6	39.2

Source: IIE 2017



36 Further details on U.S. funding and management models can be found at www.forumea.org and <https://ejournals.bc.edu/ojs/index.php/ihe/article/download/8005/7156>.

37 A search through programme websites of 12 U.S. colleges in Ireland and third party providers demonstrates a deep variation across the sector. U.S. students coming to programmes in or through these institutions are paying between \$13,000 and \$25,000 per semester. These costs generally include academic costs and accommodation.

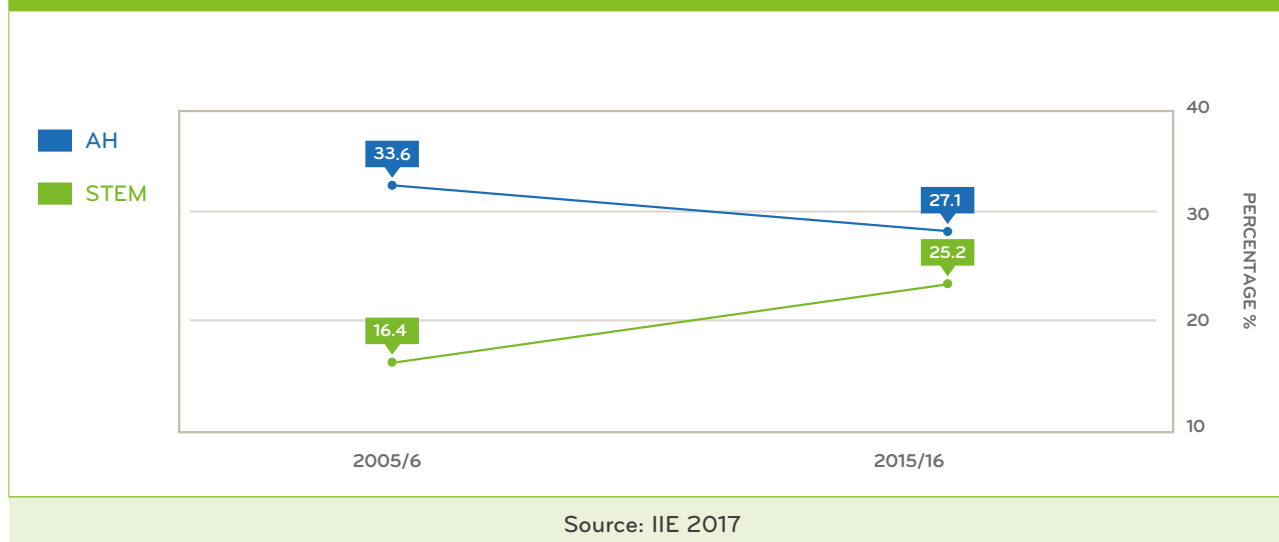
38 Full-time international students are entitled to work in Ireland for a maximum of 20 hours per week during term-time and 40 hours per week outside of term time. As the majority of U.S. study abroad students are in Ireland for 90 days or less, and semester students for about 120 days, it is rare for them to work whilst in-situ. Less than 1% of survey respondents were working during their study abroad experience in Ireland.

39 The promotion of GSA support to students and study abroad advisors could be given further consideration. Knowledge of the bursaries (generally offered in the form of travel grants of \$2, 000) appears to be low within both groups. For more information see <https://www.iie.org/programs/Generation-Study-Abroad>.

1.8 U.S. students' academic choices

Figure 15 employs IIE 'fields of study' data for all U.S. students studying abroad over the last decade and extracts STEM and Arts and Humanities (AH) findings to emphasise the growth in importance of STEM subjects for study abroad students, and the corresponding decline in AH. This reflects the push internationally towards more career-outcome oriented study abroad and the general focus away from AH and towards STEM within higher education. In extracting IIE data for this Figure, all efforts were made to allow for the closest possible comparison between IIE data and Irish data which use different systems to categorise subject choice. Under 'Arts and Humanities' IIE categories of humanities, fine/applied arts, education, communications & journalism and languages/international studies are included.

Figure 15: Changes in preferences between Arts & Humanities (AH) and STEM subjects (globally) 2005/6-2015/16 (%)



IIE data shows that STEM⁴⁰ fields predominate globally for study abroad students and have become increasingly important over the last decade, growing from 16.4% in 2005/6 to 25.2% in 2015/16. Business and management has also seen growth in the same period from 17.7% to 21%, while the popularity of social sciences subjects have declined from 22% to 17.ⁱ

The global decline in the popularity of AH subjects is comprehensively revealed by an examination of IIE's single category of 'humanities' (as opposed to the combination of categories described above) which alone shows a decline from 14.2% to 3.7% over the last decade.

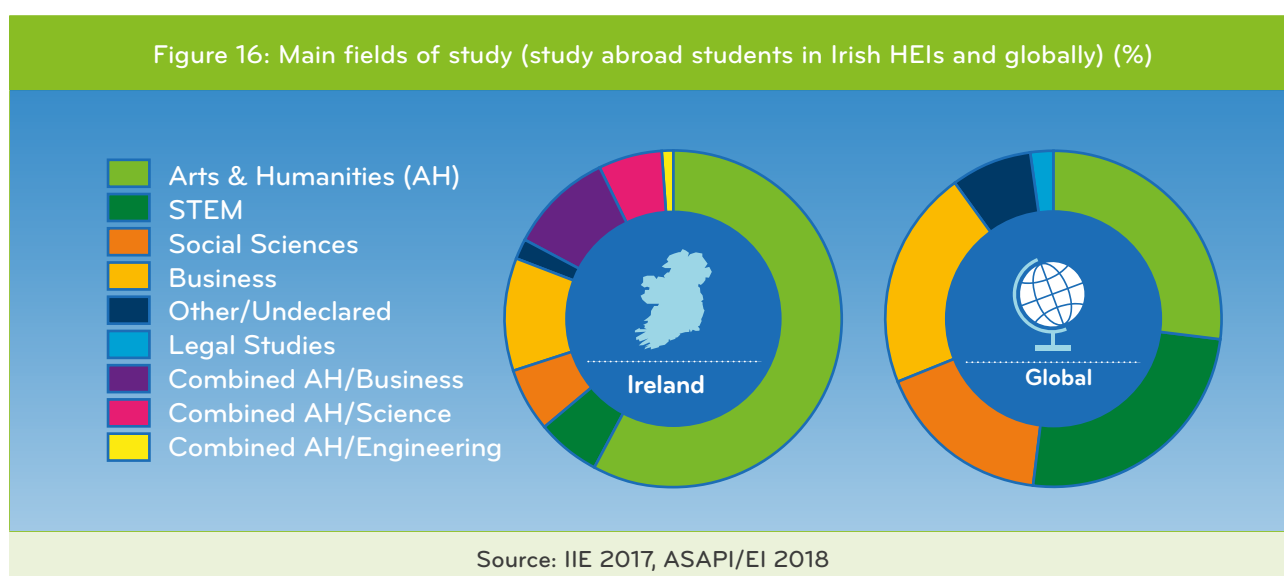
It is in this area that the profile of study abroad in Ireland deviates most significantly from the global norm. Figures collected by Ireland's Higher Education Authority (HEA) - which capture only one and two semester U.S. students in public HEIs²¹ - indicate that humanities, applied and fine arts account for 68% of subject choice for junior year abroad students in Ireland.⁴¹ Findings from this study reveal similar trends: using the data generated from Irish HEIs only, Figure 16 shows that 58% of student respondents (mostly one semester students – see Table 2) were taking arts and humanities subjects. In addition, a further 18% were taking business, science or engineering *combined* with arts and humanities choices.

40 Defined by IIE/Open Doors as: physical or life sciences; health professionals; engineering; maths or computer science and agriculture (ibid, page 87).

41 HEA 2017: see www.heai.ie

This study found similar results from the other study abroad sectors in Ireland:

- In the U.S. colleges sector 42% of students are taking arts and humanities subjects with 13% taking business and a further 18% taking combined business and humanities programmes. Eleven percent are taking social science programmes and 7% are taking STEM;
- For internships, the most important fields are business (40%), arts and humanities (20%), social science (14%) and science (9%);
- FLPs are operating largely within the arts and humanities fields with 82% of FLP respondents to this study describing their programmes in this way. The most popular subject areas noted by FLP (29%), history (23%), art (20%) and photography (14%) programmes. However subject areas can be broad: for example, one two-week programme indicated that the following subjects can be included during that period:



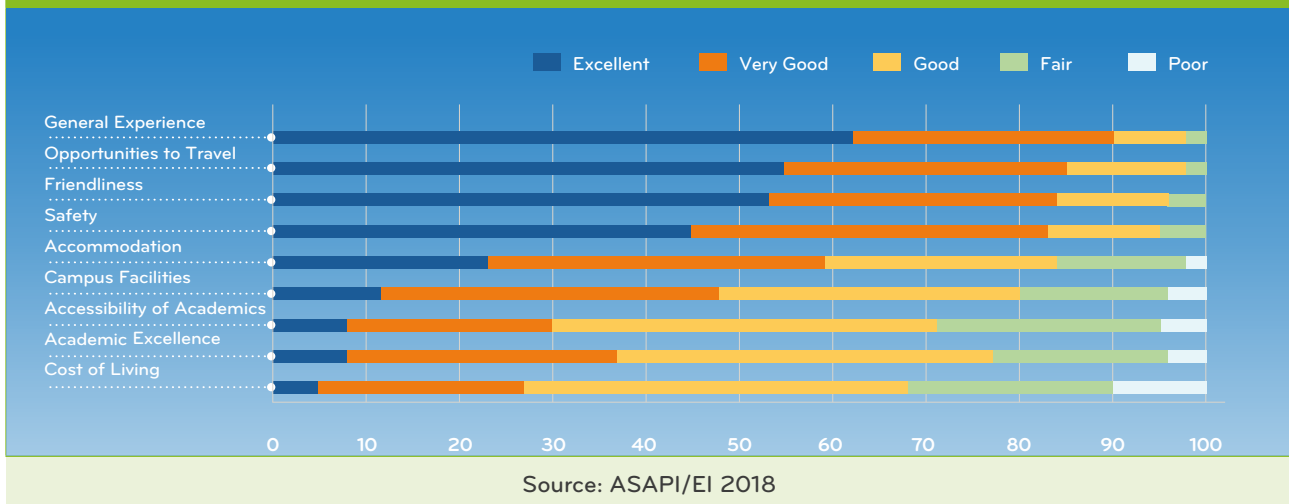
The findings clearly point to a deep reliance on arts and humanities programmes within study abroad in Ireland – across all sectors. This dependency is a double-edged sword: on one hand, Ireland's rich offering across a broad spectrum of arts and humanities specialisms is clearly a unique selling point, allowing for distinctive semester programmes and particularly attractive short-term and faculty-led programmes. On the other hand, with the focus from the U.S. firmly on the career advantages of study abroad, and the corresponding decline in students choosing these fields over the last decade, Ireland risks being pigeon-holed as focusing solely on arts and humanities or viewed as an 'education tourism' destination rather than a serious academic destination. This latter concern is borne out to some extent when exploring the reasons students choose Ireland and is encapsulated in the comment below from an Irish HEI respondent to this study:

"I think there may be a perception that study abroad in Ireland is a 'jolly' and that students are more concerned with travel than with study! For Ireland to increase student numbers we should be encouraging and targeting majors and professions (STEM, Business, Healthcare etc.) and not just the 'heritage' student or focusing on Ireland as suitable because of its beauty, safety, English speaking aspects (though these are important too!)" [HEI respondent ASAPI/EI 2018]

Aligned to the comment above is the finding that while overall student satisfaction is very high, as Figure 17 shows, lower satisfaction was expressed with respect to academic programmes in Irish HEIs, campus facilities and the accessibility of academics. Responses to earlier questions in the survey suggested that students did not harbour high academic expectations for their study abroad experience.

What is difficult to elicit from the responses is whether students were considering academic quality at all when choosing Ireland as their study abroad destination. Further research is required to understand if this is simply a feature of study abroad per se, or a particular comment on study abroad in Ireland.

Figure 17: Ratings of Irish study abroad experience by U.S. students



"The hardest part would be adjusting to a different approach in academics. I was raised doing homework every night since I was old enough to attend school, so only have class once maybe twice a week and only one or two big assignments that made the grade has been intimidating."

"I hated that there were only 2-3 graded assignments all due at the end of the semester. The beginning of the semester was hardly rigorous or challenging (but I was okay with that, as I am abroad)!"

"I have loved studying abroad and being in Ireland. However, my experience at xxx wasn't ideal [Irish HEI]. I found the teachers very unhelpful and, in some cases, rude when I asked for help."

"My academic experience was very poor due to professors. With this being said, I still loved the school and the content of most classes. It did not ruin the experience for me."

"I very much enjoyed my study abroad in Ireland. Even though the coursework was not as rigorous as my home university, I still learned a good amount."

"The education is a lot more laid back than at home which is really nice and allows me to travel a ton!"

[student respondents ASAPI/EI 2018]

Box 4: Gender of study abroad students in Ireland

Figures from HEA, from this study and from previous studies indicate that Ireland may attract a slightly higher percentage of female students than the global norm of 67%.

The HEA figures (which capture only one and two semester U.S. students in public HEIs²¹) indicate that 75% of U.S. study abroad students are female, while the Enterprise Ireland 2011 studyⁱⁱ reports the same figure. Respondents to the student survey administered as part of this study were 79% female, which is higher than might be expected, however females are known to be more likely to respond to surveys and this sample was not large enough to ameliorate this potential bias.

See for example: Smith, William G. (2008): *Does Gender Influence Online Survey Participation? A Record-Linkage Analysis of University Faculty Online Survey Response Behaviour.* San José State University and ERIC June, 2008

http://scholarworks.sjsu.edu/cgi/viewcontent.cgi?article=1003&context=elementary_ed_pub

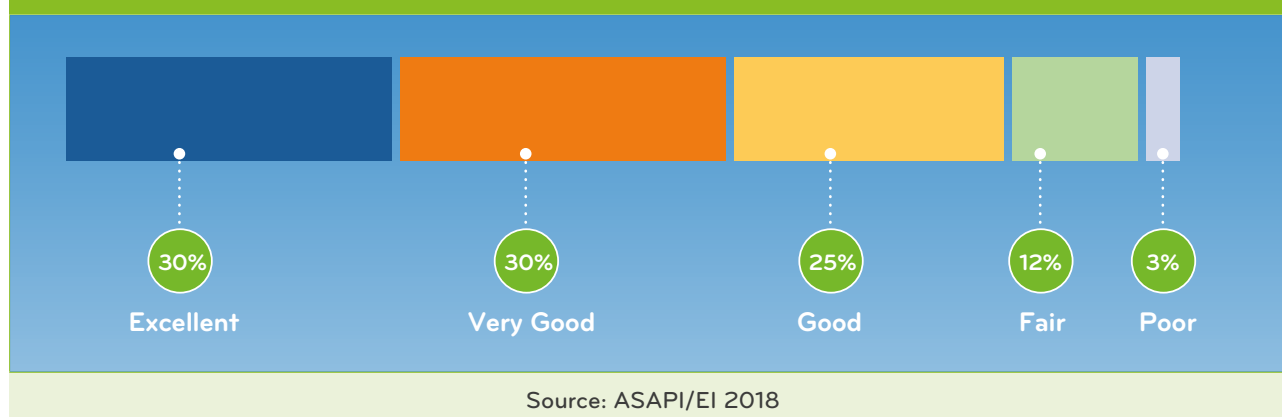
The concern raised by students around the unavailability of academics in Irish HEIs is often explained as one of perception and system difference: in Ireland, academics are generally not as available to undergraduate students as they might be in the U.S. However, the U.S. student is generally paying 'home' tuition fees and does harbour an expectation of being able to talk to academic staff when required, especially when trying to come to grips with differing grading and other systems.

1.9 Attitudes to study abroad in Ireland

Students

Overall, U.S. study abroad respondents rated their experience in Ireland very highly as Figures 17 and 18 demonstrates. Figure 18 represents the total responses over eight categories with 60% consistently choosing excellent or very good. When asked to rank their 'general study abroad experience in Ireland', 62% rated it as **excellent** and 28% as **very good** (a total of 90%), this reveals a positive increase from 2011 when just 73% of students rated the overall experience as **excellent** or **very good**.⁴²

Figure 18: Students responses to the question: "How would you rate your experience in Ireland?"



While the overall picture is very positive (see Box 5 for a selection of student comments), it is not universally so. An area which a small percentage of students commented negatively upon was around making friends. There has been much commentary internationally on the "ghettoisation" of international students and it appears that, despite the high rankings for 'friendliness' (often from the same students) and the general reputation Ireland has for being one of the friendliest nations, for a significant number of this group, interacting with Irish students has proved difficult:

"My least favorite part was making friends with people in my program. Everyone was very cliquy and exclusive. I wish I had a little more opportunity to meet international students outside the U.S."

"Ireland is pretty boring, and when you have never been anywhere in the world but have no money, you see boring Ireland. It was very hard making Irish friends. They have other permanent friends and usually live at home. Dublin is so expensive ... It's a very isolating and lonely place sometimes especially on the weekends. I would not recommend, and cost has a lot to do with it, but I know others who loved it."

"I regret coming here, both to xxx [Irish HEI] and Ireland. Ireland because the people seem to be mostly snobs, and xxx [Irish HEI] because it is too expensive and offers little in return."

[student respondents ASAPI/EI 2018]

⁴² One of the most voiced concerns of the students surveyed in 2011 was the poor quality of Wi-Fi within their institutions or accommodation. Wi-Fi was not mentioned by any respondents to the current study.

Study abroad providers

U.S. colleges and third party providers emphasised the positive impact of increased U.S. outbound mobility, with 100% either strongly agreeing or agreeing with the statement "Increasing outbound mobility from the U.S. will favour Ireland". Irish HEIs also felt that the increasing flow of students would favour Ireland, giving an overall weighted average of 3.3 out of 5 to the same question.

The FLP sector were almost entirely positive towards the future of study abroad in Ireland as the selection of comments below indicates:

"I have always had good support from the overwhelming majority of the Irish people and organizations I've worked with over the years. That certainly makes the amount of work involved in setting up a program easier, both in terms of the total work-load and my willingness to do it. I see our program continuing biennially for another few years... but then I retire, and the chances are that my department's international focus will shift to wherever my successor has a research interest."

"We were very pleased with the availability and affordability of university housing in Ireland during the summer (this was one of our main reasons for choosing Ireland over the U.K.), with the helpfulness of the staff at both xxx and xxx, [Irish HEIs] and with the general ease of booking everything from the U.S. We will definitely recommend Ireland as a destination to other faculty!"

"Presently at the University of xxx [U.S. university] there are about 22 Faculty-led study abroad programmes. Several have been affected by low enrolments. However, my Ireland program is very popular. My class already is full for 2019. I don't even have to advertise. It is all by word of mouth from students. We love the Irish!!!!!!"

"I believe there will continue to be a strong future for study abroad programmes for American students in Ireland. There are many Americans of Irish descent and with the strong ties between the two countries and the natural curiosity that brings, students are interested in exploring the country. It is also a warm, welcoming place with a fascinating history and culture."

[FLP respondents
ASAPI/EI 2018]

Box 5: U.S. student comments on studying abroad in Ireland

"Coming to Ireland has been a once in a lifetime experience and I cannot wait to come back someday with family and friends."

"Studying abroad was one of the best experiences of my life and I would recommend it to every college student. This semester has allowed me to be exposed to new cultures and I am so thankful to have had the opportunity to come to Ireland."

"I love living in Ireland and I found it not too hard to transition from the U.S. There are a few things to get used to, for example driving on the opposite side and taking public transportation, but overall it was very easy to adapt."

"All around, Ireland was a fantastic location to spend my semester abroad. I have had multiple opportunities to travel throughout my semester and haven't seen an impact on my overall education."

"...you can't top the people here. There is a reason why people all over the world are proud to exclaim their Irish ancestry!"

"Coming from a small(ish) town in Minnesota, in the Midwest where people are generally very friendly, Galway captures a lot of that. There's a great sense of welcoming and safety walking around at any point of the day, just like in my hometown."

"I love Ireland and do not want to go home!"

Source: ASAPI/EI 2018

Irish HEIs are cognisant of the need to respond to the changing study abroad landscape, but as large institutions, are less nimble and cannot develop programmes as quickly as smaller institutions or keep pace with the expansion of FLPs. The development of further summer school and January- or May-term programmes offers an interesting opportunity here.

"Individual University marketing and promotion efforts, combined with 'Education in Ireland' branding has raised awareness of Ireland in the U.S., particularly in non-traditional areas of the U.S. e.g. mid-West, West Coast, South. One concern is the growth in short-term faculty led programmes which could harm the semester/year-long offering. We need to adapt to this shift and look at bespoke offerings for our existing and new partners."
[HEI respondent ASAPI/EI 2018]

Most respondents agreed that uncertainty around Brexit and its impact on U.K. higher education and student immigration regulations could serve to bolster study abroad numbers in Ireland. However, most were unsure how significant the potential gain might be. Any gain is likely be short-term, as U.K. universities will be aggressively searching 'soft markets' to replenish the international students which may be lost from Europe and other countries as a result of the uncertainties caused by Brexit.⁴³

"I don't think students consider Brexit when considering Ireland or the U.K. While the cost to study in Ireland can be higher than other locations, most of our students who want to go there will go there anyway - either due to curriculum alignment, heritage, or just general interest."
[provider respondent ASAPI/EI 2018]

"Our joint Ireland-U.K. study abroad remains our strongest program. Impacts of Brexit remain unknown, but the uncertainty in the Euro and GBP should balance the current uncertainty of the USD's value, so we should still see a strong demand for this program."
[FLP respondent ASAPI/EI 2018]

43 The impact of Brexit on international education remains unclear. International student applications to the U.K. increased for the 2017/18 academic year and U.K. Higher Education Planning Institute (HEPI) suggest that there are three possible reasons for this: 1) the U.K. has guaranteed access to the student finance system for EU students commencing programmes in AY 2020/21 for the duration of their studies, 2) Sterling has fallen significantly, making studying in the U.K. cheaper than previously 3) the U.K. may also be benefiting from the "'Trump card' ... with applications from Mexican students up by 53 per cent." This is a positive but unstable situation: EU numbers could decline after 2021, the value of Sterling is likely to fluctuate, and the reliance on one market is not a strategy for growth.

Additionally, as HEPI point out: "Since the EU referendum was won, largely, due to the appeal of the U.K. 'taking back control' of its own borders, the Government has taken a broader look at U.K. immigration policy. The 2017 Conservative party manifesto stated "It is our objective to reduce immigration to sustainable levels... Overseas students will remain in the immigration statistics... and within scope of the government's policy to reduce annual net migration". The position of the U.K. Government towards international students could act, therefore, as a barrier to the ambitions of many U.K. higher education institutions, wishing to increase their international student intake in the future."

<http://www.hepi.ac.uk/2018/02/21/higher-education-brexit-britain-changing-future-international-students-uk/>

For many respondents, particularly U.S. colleges and third party providers important issues to be addressed to support the growth of study abroad in Ireland included more joined up thinking at government level and better services across Irish HEIs for students:

"Ireland ... has a great reputation in the U.S. But, the Irish government could do more to treat study abroad as a viable and important sector (and this ASAPI/Education in Ireland link is a great start). ... I would love to see some joined up thinking between the various sectors of the Irish government and the study abroad sector to leverage all that Ireland has to offer."
[provider respondent ASAPI/EI 2018]

"I believe Ireland is a Centre of Excellence in third level education. I believe this is particularly true in relation to academics/teaching/level of education gained. However, I feel we may be lacking somewhat on the student services side. I think we need to focus more on the overall student experience.... For example, during the academic year, the Student Accommodation Office at [xxx [Irish HEIs] opens from 9:15 a.m.–5:00 p.m., Monday to Friday only. This is not conducive to international flight arrivals. Also, students find it extremely difficult to get a GNIB/INIS appointment within 30 days of arrival and oftentimes are granted one within weeks of departure (this relates to one semester programmes). I think if we can supply more student accommodation, ideally on-campus, in the future and get the INIS registration sorted out (and INIS are putting tremendous work and effort into this), we should see the sector grow and expand."
[provider respondent ASAPI/EI 2018]

Ireland provides an attractive offer right across the study abroad sector as it stands - possessing as it does the key advantages of English language, safety, travel opportunities, cultural connections and academic quality. As U.S. student outbound mobility increases - albeit more slowly than anticipated - it seems likely that Ireland will benefit from this growth, both in terms of one semester and short-term programmes. For FLPs the relative ease with which these programmes can be organised and implemented is an important draw. Study participants agreed that growth was likely, with a possible boost resulting from Brexit, but emphasised the need for more joined up thinking across the sector and with government, and a more dynamic response to sectoral changes from the larger institutions.

As the study abroad demographic changes, giving way to greater diversity, Ireland's disadvantages in this sphere: high costs; limited study abroad offers in STEM areas and limited short-term offers within Irish HEIs may mitigate against growth amongst this emerging cohort.



Understanding U.S. Study Abroad in Ireland: Economic impact and future possibilities

Chapter Two: The economic impact of U.S. study abroad in Ireland



Introduction

This chapter describes the economic impact of U.S. study abroad in Ireland for the academic year 2016/17.

The contribution of this sector to the Irish economy has been calculated by collating student expenditure on tuition and living, study abroad programme expenditure across all sectors, and visitor spend.⁴⁴ To further develop context and offer a reference point, where possible student expenditure data is matched against the economic impact data published within Ireland's most recent international education strategy document (DES, 2016).ⁱⁱⁱ

In the opinion of the authors the overall figures are likely to reflect a conservative estimate of the economic impact of study abroad in Ireland. Third party providers, U.S. Colleges, FLPs and internship operators are mostly private institutions whose home base is outside Ireland and who therefore had no obligation to respond to this study, at all or in full. Although detailed levels of financial data were generously furnished by most respondents, there were some areas of non-response, particularly in relation to programme expenditure, which were considered commercially sensitive by some of the larger public HEIs and the private institutions both Irish and non-Irish. Also, in some cases, further programme/ tuition fees or costs may have been paid to Irish HEIs but not fully captured by this study. Finally, although at least 30% of tuition income generated through study abroad does not accrue in Ireland - as students attending U.S. colleges pay tuition to the parent institution, and students on FLPs all pay their tuition fees to the home institution - it may be the case that some U.S. institutions based in Ireland are receiving a greater proportion of 'home fees' than uncovered by this study.

Additionally, the figures relating to visitors are believed to be low. Focus group discussions revealed that too many questions here would have resulted in respondent fatigue and a low response rate, so detailed questions about expenditure beyond accommodation were not asked. Further research is required to unearth a clear understanding of visitor spending in Ireland.

Box 6: Summary of research methodology, phase 2

The economic model

The economic impact of study abroad in Ireland is described through an analysis of primary source data gathered directly through detailed surveys of the six study abroad sectors operating in Ireland, and through a further survey administered to students (see figure 3, Chapter 1 for a breakdown of the various sectors operating in Ireland).

For consistency across the international education sector in Ireland this study employed a very similar economic model to that developed by the Department of Education and Skills for its most recent International Education Strategy. Data collected has also been analysed with close reference to both IIE and Central Statistics Office of Ireland (CSO) data as relevant.ⁱⁱⁱ

1. The main body of work for phase 2 involved calculating the 'direct' economic impacts of study abroad on the Irish economy. This was achieved by calculating the number of students and weeks of study under each of the categories (using survey data, IIE Open Doors data, and some estimations based on weighted weeks of study – see Table 2, Chapter 1). The expenditure impacts and jobs created were then calculated for each category and sector.
2. Stage 2 derived the 'indirect' impacts of the study abroad market. This corresponds with the impacts on suppliers to the businesses that have experienced an increase in demand due to the presence of the students. To calculate this, 'indirect' multipliers for different categories of expenditure were applied to the direct expenditure. These multipliers were previously calculated in the International Education Strategy using Central Statistical Office (CSO) data and the same multipliers were employed in this study.
3. Stage 3 was to derive the 'induced' impacts, which are the shifts in spending on goods and services at the household level as a consequence of changes in income of the directly and indirectly affected businesses. This refers to the 'ripple effect' of suppliers having more money in their pocket, which they in turn use to fund their own expenditure and lifestyles. Here, the International Education Strategy/CSO multiplier for the 'Education' category was applied to the direct expenditure.

The same processes were used to derive the indirect and induced impacts on jobs. Accommodation and salary costs were thoroughly researched and matched with CSO data.

⁴⁴ The methodological approach for this phase of the project is summarised in Box 6 and further detailed in Appendix 1.

2.1 The overall economic impact of U.S. study abroad in Ireland

As noted in Chapter 1 and detailed in Table 2 the estimated number of U.S. study abroad students present in Ireland during AY 2016/17 was 11,912 who – across all sectors, spent a total of 95,035 weeks studying in Ireland. Of these the most significant periods of study duration in Ireland were one semester (37%) and two weeks (20%) – with an average overall stay of eight weeks. Tables 5 and 6 provide a summary of the direct, indirect and induced economic impact of these students.

At a glance, the tables immediately highlight the significant contribution of the U.S. study abroad sector to the Irish economy, at almost €100m in direct impacts and €220m overall during the period under discussion. This is equivalent to more than 25% of the impact of both the entire international education sector in Ireland or the English language sector as calculated by DES,ⁱⁱ and is particularly impressive as only two thirds of this cohort pay tuition fees in Ireland (with the balance paying tuition directly to their institution in the U.S.) – normally the most significant single contributor to economic impact when assessing the international education sector.

The DES analysis calculated the direct output of international education at €401m for AY 2014/15.ⁱⁱⁱ The report focused almost entirely on full-time students and one semester U.S. students in Irish universities, not capturing short-term or summer students within Irish HEIs, students on U.S. campuses in Ireland, interns or FLP students. However, the figures generated by the current study – focusing on short-term categories – clearly point to the high value of this sector (and short-term study programmes in general), and the importance of including the entirety of this dynamic arm of international education within the national data in future.⁴⁵

On average, each U.S. study abroad student directly contributes €8,244 to the Irish economy with each study week contributing €1,033. Taking indirect and induced impacts into consideration, each student contributes €18,360 – €2,301 per student week, on average.

Table 5: Total direct economic impact of total U.S. study abroad to Ireland, 2016/17 (€)

Table 5: Total direct economic impact of total U.S. study abroad to Ireland, 2016/17 (€)	
Profile	
Total students	11,912
Total study weeks in Ireland	95,035
HEIs/ALL Provider contribution:	
General expenditure (programme costs)	€9,405,290
Staff salaries	€6,620,656
Staff accommodation (FLP)	€352,624
Visitors to HEIs/providers (accommodation spend only)	€210,044
SUB-TOTAL	€16,588,614.00
Student Contribution	
Tuition fees (Irish HEIs only)	€26,764,371
Student accommodation spend	€22,156,750
Visitors to students (spend, including accommodation)	€11,983,826
Student general (living) expenditure	€11,905,186
Student large one-off expenses	€2,329,387
Student travel abroad - spend in Ireland	€4,139,289
Student travel within Ireland	€2,334,261
SUB-TOTAL	€81,613,070
Total	€98,201,683

Source: ASAPI/EI 2018

45 A report recently published by the HEA on the Internationalisation of Irish Higher Education (2018) made no mention of U.S. study abroad in its detailed report.

Looking across the CSO sectors (see Table 6), it is not surprising that the education sector benefits most from study abroad (37%). Institutional income, which includes tuition and fees paid to Irish HEIs by third party providers and others is the single most important financial category here.

Table 6: Total economic impact of U.S. study abroad to Ireland, 2016/17 (€)

CSO sector	Total direct impacts	Indirect impacts (type 1 multiplier)		Induced impacts (type 2 multiplier)		Total
Accommodation, food & beverages	30,150,073	0.302	9,105,322	0.9853	29,706,867	68,962,262
Cultural & sporting activities	1,607,442	0.0999	160,583	0.4665	749,872	2,517,897
Education (inst. income & staff salaries)	33,590,152	0.228	7,658,555	1.167	39,199,708	80,448,415
Land transport services	2,096,775	0.4377	917,758	1.0984	2,303,097	5,317,630
Public administration	1,321,542	0.3886	513,551	1.0296	1,360,660	3,195,753
Recreation	2,209,286	0.0734	162,162	0.6579	1,453,490	3,824,938
Retail trade (weekly expenditure)	3,033,613	0.3035	920,701	0.8224	2,494,843	6,449,157
Retail trade (large one-off)	5,525,380	0.3035	1,676,953	0.8224	4,544,073	11,746,406
Travel and tourism services activities	18,667,420	0.0737	1,375,789	0.8681	16,205,187	36,248,396
Totals € *figures vary slightly due to rounding	98,201,683		22,491,375		98,017,796	218,710,854

Source: ASAPI/EI 2018

Following on from education, the next most important category is 'accommodation, food and beverages' which accounts for 32% of the total output. As discussed in further detail below, the tourism and travel sector also benefit significantly from international education (accounting for 17% of expenditure), particularly from U.S. study abroad students who travel extensively, and each bring an average of three visitors to the country.

Table 7 shows that the study abroad sector directly supports 187 jobs in Ireland which range from director/manager level to student officers and administrative staff across all providers. The study also included part time Irish-based faculty and lecturing staff at a number of levels who are brought in to support academic programmes in summer schools, FLPs and U.S. colleges. The study does not include Irish HEI permanent lecturing/faculty staff who have study abroad students incorporated into their on-going classes.

Table 7: Total jobs created in Ireland by U.S. study abroad sector, 2016/17

Total direct jobs	187
Irish HEIs	48
Summer schools (FTE)	17
U.S. Campus/3rd party/Internships	114
FLPs	8
Total indirect impacts on jobs	43
Total induced impacts on jobs	218
Total jobs	448

Source: ASAPI/EI 2018

Table 8: Total future jobs supported in Ireland by study abroad (8% growth PA assumed) (est. 2017/18 - 2021/22)

Year	U.S. student Numbers	Jobs supported (cumulative)
2016/17	11,912	448
2017/18	12,865	484
2018/19	13,894	523
2019/20	15,006	563
2020/21	16,206	608
2021/22	17,502	667

Source: ASAPI/EI 2018

The knock-on effects (indirect and induced impacts) generated 261 further jobs, leading to a total of 448 full-time jobs overall signifying that every 27 study abroad students in Ireland are responsible for creating one full-time job, and every 15 one-semester students results in one full-time job. Therefore, assuming an increase of 8% per year, it is reasonable to suggest that within five years, this sector will be supporting 667 jobs, as illustrated by Table 8.

2.2 Programme provider expenditure

Survey instruments were designed and administered to all known study abroad providers in Ireland (Irish HEIs and their summer schools, the third party providers, Internship providers, U.S. colleges with a campus in Ireland and the FLPs). As noted above, it proved difficult to reach all providers, especially some faculty-led programmes and third party providers. Robust data has therefore been assured through the supplementary use of interviews and published data where relevant. In addition to general questions about study abroad programmes and attitudes, the surveys were specifically designed to elicit a comprehensive picture of programme expenditure, staffing and visitors, thus allowing our economic modelling to generate estimates for providers who chose not to respond, or could not be included in the survey. See Table A1-1, Appendix 1 for response rates.

The fact that a considerable portion of study abroad tuition spend does not accrue to Ireland, means that the provider/institutional direct contribution (fees, programmes costs, staff costs...) is less significant to the economy at 16% than might be expected at €16.6m.

When looking at the total economic value to Ireland (including direct, indirect and induced impacts - see Table 6), provider spend becomes very significant, and is especially valuable to the 'education' sector (€80m). These findings are detailed below.

2.2.1 Programme expenditure

Table 9 summarises provider expenditure over the main programme areas (including marketing and operations costs, rent etc.), staffing and programme visitors (academics and study abroad advisors/managers from the U.S.).

Table 9: Total provider expenditure (€)

	Programme expenditure	Staff	Staff accom.	Visitor spend including accom.	Totals
Irish HEIs	592,151	1,958,180		55,369	2,605,700
Irish HEIs - summer school	1,245,007	737,773		17,894	2,000,674
U.S. Campuses, third party & internship providers	2,711,637	3,598,277		136,780	6,446,694
Faculty-led Programmes	4,856,495	326,427	352,624		5,535,546
Total	9,405,290	6,620,657	352,624	210,043	16,588,614

Source: ASAPI/EI 2018

Excluding accommodation, providers are spending almost €9.5m per annum on programme expenditure. Respondents here were asked to include - but were not limited to - staff travel; promotional activities; advertising; airport pick up; orientation; programme excursions; socialising; transport and insurance. As previously discussed, reported programme expenditure in Irish HEIs is lower than anticipated at just under €0.6m compared to €1.25m by their summer schools - less than 20% of the average cost per student of the other sectors. This is due to a number of factors, including hesitation around divulging commercially sensitive information. Irish HEIs indicated that average programme expenditure per student is lower for them than for other providers, as they achieve significant economies of scale within this sphere: they often recruit very large numbers from one U.S. institution; have on-going exchange programmes which do not incur large promotional costs; are not necessarily required to include academic and other costs in their calculations (such as travel and rent/building costs) which come from central institutional budgets beyond the study abroad/international office. Where a U.S. institution or a third party provider sends several students to one Irish institution, there is also a level of burden sharing – these institutions frequently provide their own staff and support mechanisms to manage student (for example) welfare issues and practical aspects such as accommodation, programme trips, orientation etc. This can significantly reduce financial costs for the receiving institution.⁴⁶

2.2.2 Staff expenditure

Across the study abroad sector, providers are spending €6.6m on staff and generating 187 direct jobs as highlighted by Tables 7 and 8. Respondents were asked to indicate the title role of all their study abroad staff and include part time staff,⁴⁷ both administrative and academic. Irish HEIs and their summer schools are responsible for only 37% of direct jobs in the sector, but the study found that these are higher value jobs - a result both of higher salary scales and greater numbers of senior-level staff working within that sector, especially in comparison to third party providers and internship providers (see Table 10). Staff salaries were calculated using public sector/university salary rates, and for the private sector through published data as agreed in consultation with Reference Group members representing this sector.

Table 10: Staff salaries by sector (€)

	Total spend	Average salary
Irish HEIs	€1,958,180	€40,860
Irish HEIs - summer schools	€737,773	€43,398
U.S. campuses in Ireland /third party providers/Internships	€3,598,277	€31,563
FLP (this sector was only asked only for an expenditure figure)	€326,427	
Total (11,912)	€6,620,657	

Source: ASAPI/EI 2018

46 Based on call-backs and other discussions with Irish HEIs, the research team have allowed these figures to stand. Further research is required beyond the international office/study abroad office to uncover the full extent of programme expenditure within large institutions.

47 Positions listed included: director/manager; mobility manager; programme coordinator; senior administrator; international officer; administrative assistant; administrative officer; executive administrator; researcher; teaching assistant; lecturer (at a number of grades); clerical officer; intern, catering and casual.

2.2.3 U.S. study abroad programme visitors

Aside from students, study abroad programmes attract large numbers of visitors. HEI partner institutions and U.S. colleges in Ireland regularly send or receive faculty for curriculum mapping and academic quality assurance, as well as study abroad managers and other staff to ensure all programmes and provisions are in place. Third party providers and internship providers receive visitors from head and associate offices, while FLPs send almost all their required academic and administrative staff to Ireland to accompany their students. These visitors are often accompanied by family or friends and respondents were asked to estimate these numbers. Further research is required to understand fully the importance of this group.

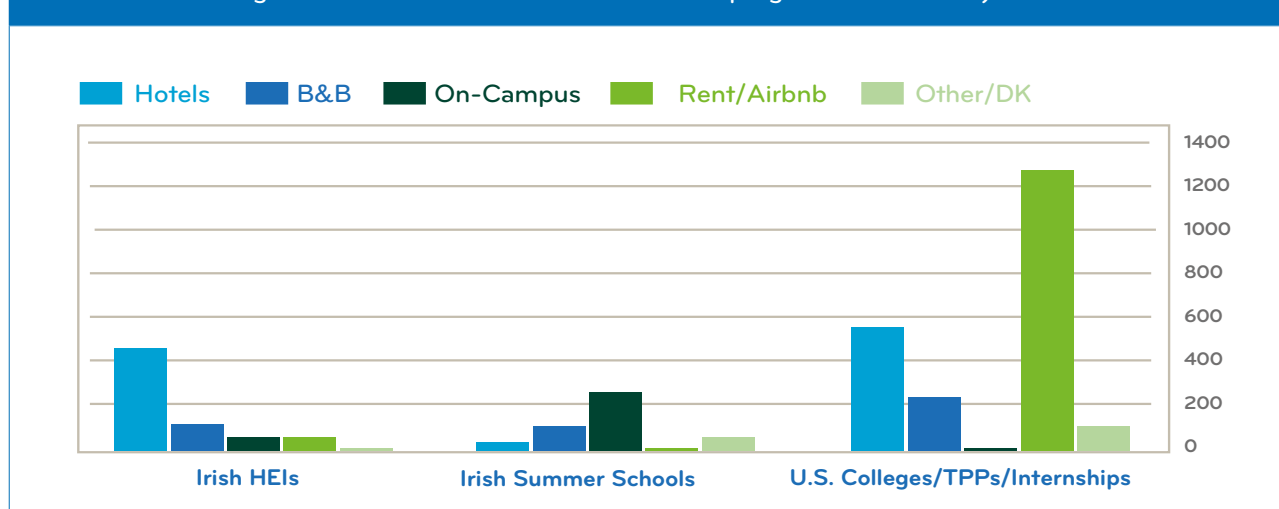
The data in Table 11 refers to the number of known nights spent in Ireland on study abroad business by partner institutions, organisations, prospective students, their parents/guardians and people who are known to have accompanied them. Many of these visitors could have spent longer periods in the country on their personal time, but it was not possible to gather this information. The expenditure figures here focus mostly on accommodation costs, and average at €65.3 per day. Respondents were asked to list the types of accommodation used by their visitors, and as Figure 19 reveals, different types of accommodation are popular with each sector: hotels are favoured by visitors to Irish HEIs; Summer school visitors use on-campus accommodation and renting/Airbnb is most popular with the other sectors. Overall, the average nightly cost of hotel accommodation was €103, €65 for B&B and Airbnb and €40 for renting a room or apartment. On-campus accommodation averages at €30 per night.⁴⁸

Table 11: Programme related U.S. visitors by sector⁴⁹

	Partner/ home institution	Accompanying / other	Total nights	Total spend
Irish HEIs	467	146	613	€55, 369
Irish HEIs - summer schools	375	23	398	€17, 894
U.S. campuses in Ireland/ third party providers/Internships	1, 856	348	2, 204	€136, 780
Total (11,912)	2, 698	517	3, 215	€210, 043

Source: ASAPI/EI 2018

Figure 19: Accommodation used for U. S. programme visitors by sector



Source: ASAPI/EI 2018

48 Average accommodation costs were sourced through CSO for each city.

49 It is estimated that 700 individuals accompanied FLP sector students. These are included under 'student visitors' section 2.4.5 below.

2.3 Student expenditure - overview

As part of this research, surveys were administered to one-semester U.S. students during the first (Autumn) semester of the 2017/2018 academic year. As discussed above, it proved difficult to reach faculty-led programmes and their students, so attempts were made to generate robust data on a specific cohort of students during the survey timeframe and to triangulate the information gathered with data from the HEIs and providers along with available published data where relevant. In addition to general questions about study abroad programmes and student attitudes, the questionnaire was specifically designed to elicit a comprehensive picture of weekly expenditure, thus allowing our economic modelling to generate estimates for other cohorts of students who could not be included in the survey.

The student survey design drew on several other studies and was extensively tested with groups of U.S. students in situ in Ireland who met in focus group settings and who also tested the survey in advance of its roll out. The main areas of enquiry are indicated in Box 7.

The nature of the study abroad sector - where a large proportion of tuition spend does not accrue to the destination country - means that the student contribution (tuition spend, living expenses, travels, visitors...) is more significant to the economy than the institutional contribution (programmes costs, staff costs...). This is clear from Table 5 which shows that 84% of direct expenditure comes from students. Unsurprisingly given the general profile of study abroad students, this cohort was found to be higher spenders than the average international student in Ireland.

As discussed, the only study abroad sector which receives tuition payments within the country are Irish HEIs. Total direct student expenditure here is €27m which calculates as €384 per study week for the HEI study abroad programmes, and averages at €5,800 for a semester programme. It is likely that the increasing importance of exchange programmes to most Irish universities has reduced this average figure, as published one-semester study abroad programmes are often higher than this amount.⁵⁰

Summer school programmes are more expensive, averaging at €907 per study week. Fees charged to summer students are generally inclusive of accommodation, trips and a number of social events. Not including tuition costs but including all living costs and visitor expenditure, U.S. study abroad students are spending an average of €577 per week.

Box 7: Profile of U.S. student respondents and expenditure questions:

- *Students who responded to the survey came from 94 different U.S. universities and colleges across 37 States, with Massachusetts, New York and Illinois being the most significant.*
- *Respondents were all mostly semester students (93%), studying across all seven Irish universities, one private college, and two U.S. campuses in Ireland. The remaining 7% were one year students based in Irish HEIs.*
- *79% of respondents were female.*
- *Respondents ranged in age from 19 to 26 with 80% aged between 20 and 22.*

Students were asked about their programmes their experience in Ireland and their expenditure including:

- *Estimated weekly costs for: Accommodation; food and alcohol; household items; eating out; socialising/cultural; sports/fitness; local transport; books/newspapers/supplies phone & data costs; gifts/souvenirs; insurance (outside of programme insurance); medical and utilities...*
- *Large once-off expenses: Irish immigration fee; accommodation set-up; laptop/computer/phone/other...*
- *Travel within the Republic of Ireland: Number of overnight trips away from base; total spend on trips...*
- *Travel outside the Republic of Ireland: Number of trips taken; total spend in Ireland in relation to trips (e.g. booking flights)...*
- *Visitors to Ireland: How many people visited in total; how many nights did they stay in Ireland; how much on average did each visitor spend...*

Excluding travel costs and visitor expenditure, the weekly expenditure contribution is €383 compared with €198 overall as noted by DES for the general international student population two years previously. This difference is largely accounted for by expenditure on travel costs, and further highlights the value of this sector to the Irish economy.ⁱⁱⁱ

⁵⁰ While exchange students reduce overall income, the partnerships through which they emanate present many other benefits to the institution including research and other partnership opportunities.

When looking at the total economic value to Ireland (see Table 6 - which includes direct, indirect, and induced impacts), student spend becomes very significant, and is especially important to the 'accommodation, food and beverages' sector (€69m), the 'travel and tourism' sector (€36m) and the 'retail trade' sector (€18m). Student expenditure findings are further detailed below.

2.3.1 Accommodation⁵¹

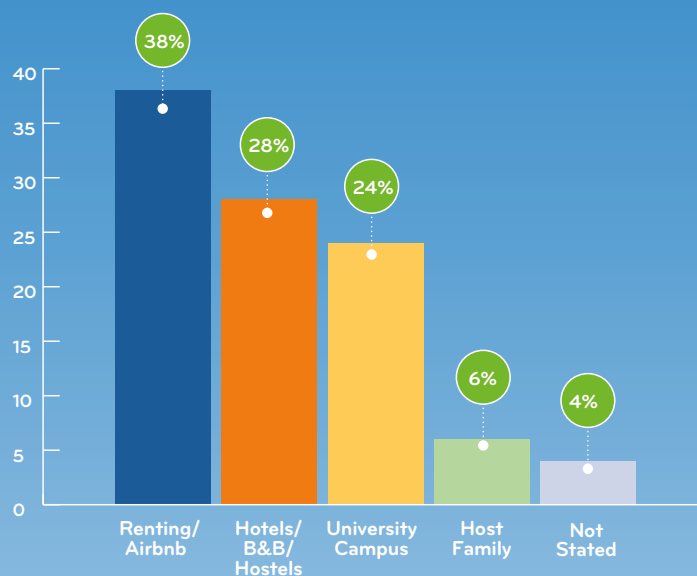
For most categories of U.S. study abroad students in Ireland, accommodation is provided as part of the overall programme package.

U.S. colleges and third-party providers *always* provide accommodation for short- and longer-term students and Irish HEIs always *seek* to provide accommodation for these students (on-campus, if possible). U.S. universities sending large cohorts of students to a university or a city/region often block-book university or other accommodation, (with many employing on-site coordinators to undertake these and other tasks). 'Free-movers' or students who apply directly and independently to an Irish HEI may have to find their own accommodation but will be assisted where possible.

FLPs also provide accommodation, but as Figure 20 shows, the survey results suggest that this is varied, ranging from hostels to hotels and often using a combination of several types of housing.

The majority of student respondents reported - as expected - that they were living on campus during their time in Ireland, and that their accommodation is included in their programme (92%). On average, one-semester students are paying between €2,500 and €4,600 for their accommodation which includes utilities and sometimes other services such as orientation and cultural trips. The 8% for whom accommodation was not directly supplied through their programme were mostly staying in purpose-built student accommodation and paying an average weekly rent of €196.

Figure 20: Accommodation choices, FLPs



Source: ASAPI/EI 2018

⁵¹ The particular combination of factors facing Ireland at present: limited housing supply for the current and increasing population (a result of rising immigration due to both positive economic factors and Brexit); increasing urbanisation and growing domestic and international student populations has acutely affected the international student sector. Issues around accommodation, and their impact on the sector are discussed in Appendix 3 and briefly in Box 3. In interviews with study abroad programme directors a number mentioned that up until 2017, annual rental charge increases of 30%+ were not unusual - especially in Dublin, where rents are now 23% higher than they were in 2008 at the height of Ireland's economic boom.

In addition to students, all surveyed groups were asked to indicate how much they understood their students would be paying on average, per week for accommodation. These results are detailed in Table 12, which shows a variation between on-campus accommodation costs as reported by the institution/organisation and the student: this is accounted for by variances across different campuses and providers and whether HEIs or the students are including utility charges, as well as possible knowledge of actual rental levels. In some cases, the HEI is paying less for the accommodation than the student would directly.

Despite the variations within the sub-sectors, U.S. study abroad students (through their providers and HEIs) are achieving better value with regard to accommodation than is offered in the broad rental market in Ireland. The differences are illustrated in the final column of Table 12 which uses data from Irish HEIs and 2018 'Daft.ie'^{xiv} data for comparison purposes to establish the market cost of a one-bedroom apartment per week. In the case of each city, the student is paying below market rate, this is particularly apparent in Dublin. Student accommodation is of course more restricted than most 'one bedroomed apartments' generally offering shared lounge/living area and kitchen facilities with single en-suite bedrooms.

Respondent	On campus	Off campus renting	Comparison: Open market, average rent
Irish HEIs total (semester/year)	€185	€178	
Dublin (& Maynooth)	€209*	€198	€360
Cork	€170	€160	€206
Galway	€170	€160	€188
Limerick	€160**	€135	€174
Irish HEIs total (summer schools)	€208	All on-campus	Daft.ie ^{xiv}
Students	€208	€177	
U.S. Campuses/third party/Interns	€297		
Faculty-led	€257***		
Overall average	€233	€208	

Source: ASAPI/EI 2018⁵²

Across the entire sector U.S. short-term students are paying an average of €233 per week. This figure is skewed upwards by the FLP sector whose weekly accommodation costs range (according to survey responses) from €50 to almost €600, averaging at €257/week, depending on the choice of accommodation. The overall direct accommodation spend is €22m.⁵³

52 Table 13 notes: * Includes six HEIs. **Includes two HEIs. *** There is deep variation within this sector: at the lower cost end, participants are staying in hostels, or sharing rented accommodation, at the higher end participants are staying in hotels for the duration of the programme (see Figure 8).

53 A small number of student responses included a comment indicating the cost of their study abroad package including accommodation. This ranged from €2,500 to €4,666 per semester (2017) with an average of €3,436. The larger amounts included are likely to include other services or events. Generally an Irish university charges between €2,800 - €3,000 for accommodation.

New private sector purpose-built student accommodation costs between €240 and €265 per week in Dublin on a 40 or 41 week contract for the cheapest single ensuite bedroom.

2.3.2 General expenditure – living costs

Beyond accommodation, the main areas of investigation within the student survey centred around general living expenses, travel and visitors (see Box 7 for details of questions included).

Across the country, student respondents reported that they are spending an average of €125 per week on living expenses (with a median expenditure of €119). This category excludes accommodation costs, large once off expenses (which are detailed below) and travel costs. This figure equates very closely to cost of living guides published for Ireland. For example, Dublin Institute of Technology's cost of living guide for students which is the result of considerable research suggests students will spend about €121 per week (excluding rent, utilities and student charges).⁵⁴ In 2014/15, DESⁱⁱⁱ calculated the median expenditure on 'non-tuition' items as €115/per week.

As is the case internationally, and as Table 13 highlights, food is the most significant weekly cost for students, accounting for almost 30% of expenditure - a further 20% of the weekly spend goes on 'eating out' which includes takeaway meals, tea and coffee. Under the food category, respondents were asked to include items bought for cooking and consumption and to include alcohol. This expenditure ranged from €6 per week to €100, averaging at €35. Overall U.S. study abroad students spent €3.4m on food and alcohol, and €2.3m on eating out/takeaways in 2017.

- *In 2014, DESⁱⁱⁱ calculated the median expenditure on food and drink items as €35.40 per week (some of the expenditure under 'eating out/takeaways' in the current study may have fallen under 'food and/or 'social activities' in the DES calculations).*

Table 13: Estimates of weekly student expenditure by sector

Item	%	€
Food & alcohol (purchased)	28	35.30
Eating out	19	23.80
Socialising	18	23.20
Local transport	9	10.80
Gifts/souvenirs	6	8.20
Household items	6	7.10
Phone/data	5	5.70
Other	9	11
Total	100	125.10

Source: ASAPI/EI 2018

54 <http://www.dit.ie/campuslife/studentssupport/costoflivingguide/>, www.educationinireland.com and www.icosirl.ie. UCD's cost of living guide comes in at a higher level of €156/per week but includes high estimates for travel and books which study abroad students are not incurring (at €119 and €71 respectively). If these are reduced to the average rates found here, the weekly spend averages at €115, but does not include insurance and gifts etc. <http://www.ucd.ie/international/study-at-ucd-global/coming-to-ireland/living-costs/>



Most study abroad programmes include arranged social and cultural events for students which are paid for by the HEI or provider (this expenditure is captured under 'general expenditure' in Table 5 above and totals €9.4m. Beyond these organised excursions and social events, student's direct spending on social and cultural events averages out at €23 per week, accounting for 18% of expenditure overall. This category includes expenditure in pubs, attending concerts, shows, theatre, cinema, museums, exhibitions and other social/cultural activities. Eating out is not included here. Overall U.S. study abroad students spent €2.1m on social and cultural pursuits in 2017.

- *In 2014, DESⁱⁱ calculated the median expenditure on 'social activities' as €25.30 per week (some of the expenditure under 'eating out/takeaways' in the current study may have fallen under 'social activities' in the DES calculations).*

The three categories of food and alcohol, eating out and social/cultural activities in total accounts for over two thirds (69%) of weekly expenditure, at an average of €82 per week. The figures approximate closely student guidelines for studying in Ireland provided by organisations and institutions.⁵⁵

Transport (local) was the next most important expenditure category for respondents, averaging at €11 per week. As many students live on campus, 22% reported that they did not incur any weekly transport costs on average. A further 46% reported spending €10 or less per week and 32% were spending €11 or more per week on local travel. Overall U.S. study abroad students spent €1.1m on local transport in 2017.

- *In 2014, DESⁱⁱⁱ calculated the median expenditure on 'Transport' as €13.60 per week. It is not clear if 'travel' costs are included in this DES figure, however a large percentage of these students would not have been living on campus, so daily commutes would be higher.*

Other weekly expenditure items:

- Expenditure on household items (defined for the purposes of the study as 'household utensils, toiletries, cleaning products and similar') was low at 6% of expenditure/an average of €7 per week. Overall U.S. study abroad students spent €0.7m on household items in 2017.
- Expenditure on utilities was also low for this group - this is mainly because the vast majority of students live in fully equipped apartments and pay an accommodation fee which includes utilities.
- Phone and data expenditure averaged €5 per week, with most students paying a bill of around €20/month. Overall U.S. study abroad students spent €0.6m on phone and data costs in 2017.
- Insurance is generally provided as part of the study abroad programme, but 39% of the respondents indicated that they were paying some additional travel or health insurance in Ireland. Insurance costs averaged at €4/week and ranged from €2 per week for travel insurance to €56 for medical insurance paid by one student.
- Gift and souvenir expenditure is relatively high. Thirty-one percent of respondents indicated a spend of between €1 and €5 per week on these items while 38% spent between €6 and €20 per week under this category - an average of around €8. Overall U.S. study abroad students spent €0.7m on gifts and souvenirs in 2017.
- On a weekly level, respondents recorded low levels of expenditure on books, academic texts, stationery and newspapers/magazines. Only 32% of respondents highlighted expenditure here, which ranged from €0.50 to €25, with an average spend of €2 per student.
- Similarly, only 22% of students indicated that they had weekly medical expenses. Reported amounts ranged from €1 to €50.⁵⁶ As noted above, this expenditure is lower than for most domestic and other international students. DIT, UCD and ICOS⁵⁷ for example estimate that students will spend an average of €70 on books and €40 on medical (and other items) per month.

55 All outlying or unusual expenditures under this and all categories were double checked directly with the respondent to ensure accuracy. If they could not be contacted, or could not explain the figures, their survey response was deleted from the study. In some cases errors had been made and these were altered. In the case of 'food', it was the case that students who spent very little money buying food to prepare had higher expenditure under 'eating out' and vice versa.

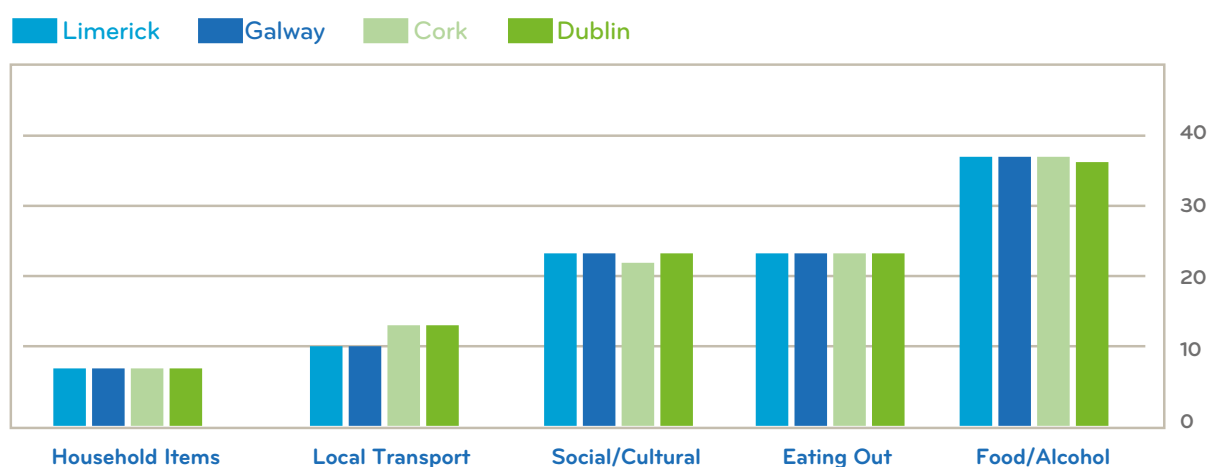
56 The higher costs were queried with respondents and proved to be ongoing prescription costs for eight students ranging from €16 to €50/week.

Using general expenditure data from the surveys and grossing up for each sector by student numbers and weighted weekly figures provides a total living cost spend of €12m. The students based in Irish HEIs – by virtue of the longer duration of their stays are responsible for almost 50% of this expenditure.

- *In 2014, DES⁵⁷ calculated the median expenditure on 'shopping' and 'other' as €40.40 per week, compared to €32 in this study). However, it is not clear from the DES report what items are covered here and whether this category includes phone and data costs, medical costs, insurance etc...*

A particularly interesting finding was that students reported almost no variance in weekly expenditure across the four cities covered under this study (Dublin, Cork, Galway and Limerick). This is highlighted by Figure 21 which reveals that expenditure patterns are almost identical, with the exception of slightly lower amounts spent on socialising in Cork (where the average is €22 per week compared with €23 nationally). Students spent, on average €1 less on local transport in Galway and Limerick (€10/week) than in Dublin or Cork (€11/week).

Figure 21: Average U.S. student weekly expenditure across four cities (€)



Source: ASAPI/EI 2018

2.3.3 Once off expenditures

Student respondents were asked to detail 'significant once off' expenditures in relation to their spending in Ireland, these include the Irish immigration fee, costs around accommodation set-up, laptops and phone purchases.

Overall, student respondents reported that they had spent an average of €528 on 'once off' purchases or items.

For this cohort of students, by far the most significant once-off expenditure was the Irish Naturalisation and Immigration Service (INIS) fee of €300.⁵⁷ While U.S. citizens do not require a visa to enter or study in Ireland, permission to stay in Ireland is required if the duration of stay is in excess of 90 days. This requirement therefore applies only to one-semester (or longer-term) students and incurs a fee of €300. Only 15 (9%) survey respondents did not pay this fee as they possessed Irish or EU citizenship. Assuming that 91% of the total one semester/one-year students in Ireland in 2017 (n = 4,574), were eligible for the INIS fee, this cohort would have paid €1.24m in immigration fees to INIS, over 25% of all fees generated by INIS by international students.

57 See Irish Immigration and Naturalisation Website: <http://www.inis.gov.ie/en/INIS/Pages/Immigration%20information>

- Forty percent of students reported expenditure on accommodation set-up. The expenditure ranged from €10 to €500 with an average spend of €58. Overall U.S. study abroad students spent €0.7m on accommodation set-up in 2017.
- Thirty percent of students surveyed had purchased a phone while in Ireland at an average cost of €101. Overall U.S. study abroad students spent €0.4m on phones in 2017.
- Twenty-five percent of students listed 'other significant once-off expenditures'. Of those who specified the expenditure 10% stated it was gifts/souvenirs (at an average of €136 per person) and five specified medical/dental expenditure (each spending an average of €173). Overall U.S. study abroad students spent €0.4m on these items in 2017.
- Twelve percent of students had purchased a laptop whilst in Ireland at an average cost of €900. Overall U.S. study abroad students spent €0.7m on laptops in 2017.

2.3.4 Travel

As discussed above (see Figure 10), following English language, student respondents cited ease of travel as the second most important reason for choosing Ireland as their study destination (weighted 4.2/5 on the Likert Scale). Given these responses, it is unsurprising that only 6% of respondents (all one-semester students) had not taken a trip away from their base in Ireland or had not taken a trip outside Ireland.

2.3.4.1 Travel within Ireland

The survey revealed that the number of nights students spend away from their study base in Ireland ranges from 1 to 25, with an average of 4.8 nights and a median of 3 nights,⁵⁸ spending an average of €79 per day away, a total of €2.3m. Respondents were asked to include transport, accommodation, food and drinks, socialising, admission costs to tourist/cultural areas. When quizzed on these trips in focus groups and during follow-up calls following questionnaire completion, respondents indicated that they stayed with friends studying in other parts of the country, or in hostels, and spent as little as possible on these trips.

2.3.4.2 Travel outside Ireland

The study found that U.S. study abroad students on one semester/one year programmes spent more time travelling outside Ireland than within Ireland. However, they spent almost twice as much money in Ireland arranging travel to other countries than they did on their Irish trips (i.e. purchasing airfares, transport to airports, duty free etc.) Focus group discussions with students and study abroad managers corroborated this finding, with several interlocutors suggesting that some students travel outside of Ireland almost every weekend. The findings show that respondents take an average of five trips each spending an average of €128 per trip in Ireland. This amount includes air or ferry fare, transport to airport or port, spending in the airport and duty-free. **Students were not asked for information on expenditure outside of Ireland.**

As is the case for travel within Ireland, one semester/one-year students took more trips abroad than shorter-term students and spent a total of €4.1m. Discussions with FLP directors and leaders confirmed that many participants use the opportunity of being in Ireland to travel to other European countries once their programme is completed, in addition to taking further trips within Ireland – however we were unable to capture data on these trips.⁵⁹

- *The DESⁱⁱⁱ economic analysis does not include expenditure on travel within Ireland or expenditure in Ireland on travel to other countries.*

58 These refer to personal trips – not trips included within the study abroad programme. All outlying numbers in data responses (such as 25 trips within Ireland and 30 trips outside Ireland) were double-checked with respondents. Any who could not confirm their numbers were excluded from the survey.

59 In addition, some FLPs include one or two other countries as part of the programme.

2.3.5 Visitors to U.S. students in Ireland

Family and friends visiting students in Ireland is a significant revenue generator, especially for one semester/one-year students.⁶⁰ Eighty percent of student respondents reported that they have been visited by family and/or friends during their time in Ireland. Overall study abroad students of one semester or more each attract three visitors to Ireland. This appears to be slightly higher than the global norm. A similar study undertaken in Italy in 2013 found that each student who spends a semester or more in Italy attracts 2.4 visitors.^{xv} Ireland draws visitors for many of the same reasons which attracted the student originally: it is English speaking, safe, and importantly for those with Irish ancestry, a trip offers an opportunity to visit relatives or research family history.

Student respondents indicated that visitors stay for an average of 2.9 days (ranging from one to nine days). Spending by visitors to students was lower than the CSO average for U.S. visitors at €73/day, compared to €103 for U.S. visitors across the country. Survey respondents were asked to include visitor expenditure on transport, accommodation, food and drinks, socialising and admission costs to tourist/cultural areas. Feedback from student focus groups, and call backs to respondents indicated that student visitors (often friends studying abroad in another European country) tended to spend very little during their trips to Ireland (for example, between €50 and €200 for a weekend), as they generally did not incur accommodation costs, ate cheaply and did not travel around the country. On the other hand, family members coming to visit tended to stay in hotels, hire cars and travel around Ireland for extended periods, spending up to €4,000 per trip (as reported by students).

Table 14 employs visitor data from the surveys and grosses up for each sector by student numbers and weighted weekly figures to show the total annual expenditure of €12m broken down by sector. Discussions with summer schools and FLP directors and leaders confirmed that many participants (particularly with respect to the former) are accompanied on the trip by a relative or friend, or joined by them after the programme, to travel around Ireland, or go to another country, or both.

The overall value to the economy of student travel and that of their visitors is at least €36m, this includes direct, indirect and induced impacts.

The foregoing discussion reveals that the economic impact of U.S. study abroad to Ireland is substantial and more significant than previously understood. However, the study abroad sector also uniquely offers other advantages to Ireland such as a broad regional distribution of programmes and several 'intangible' benefits. These are discussed in sections 2.4 and 2.5 which follow.

Irish HEIs (direct)	€5,218,893
Irish HEIs (via third party providers)	€2,005,478
Irish HEIs - summer school	€543,234
U.S. campuses in Ireland	€1,513,270
Faculty-led Programmes	€1,889,361
Internship programmes	€813,590
Total	€11,983,826

Source: ASAPI/EI 2018

60 Students on one-year programmes had an average of six visitors compared to 2.8 for one semester students.

2.4 Regional benefits of U.S. study abroad

In Ireland the most significant economic, social and cultural benefits of international education accrue to Dublin and beyond than to the four major cities of Cork, Galway, Limerick and Waterford,⁶¹ with few smaller urban or rural areas benefitting from international students. However, one of the interesting findings of this research is that U.S. study abroad, beyond the traditional one-semester model within Irish HEIs, is characterised by its geographical spread, offering economic and other benefits across the country, and with potential to do so much more (see Box 8 for a discussion of the impact of study abroad on one rural community).

For example:

- U.S. campuses in Ireland do not automatically locate in Dublin, with several quite large and established programmes located in Kerry, Galway, Mayo, Wicklow and Waterford.
- Irish HEIs summer schools and U.S. campus programmes almost always include one or more trips to other parts of the country: often with several overnight stays, thus contributing significantly to the local economy.
- The 39 FLPs who responded to this study are concentrated in Dublin, Galway and Cork, but operate across 22 counties, with several visiting many counties across the country during their short programmes, as the adjoining map (Figure 22) and comments from the survey illustrate:

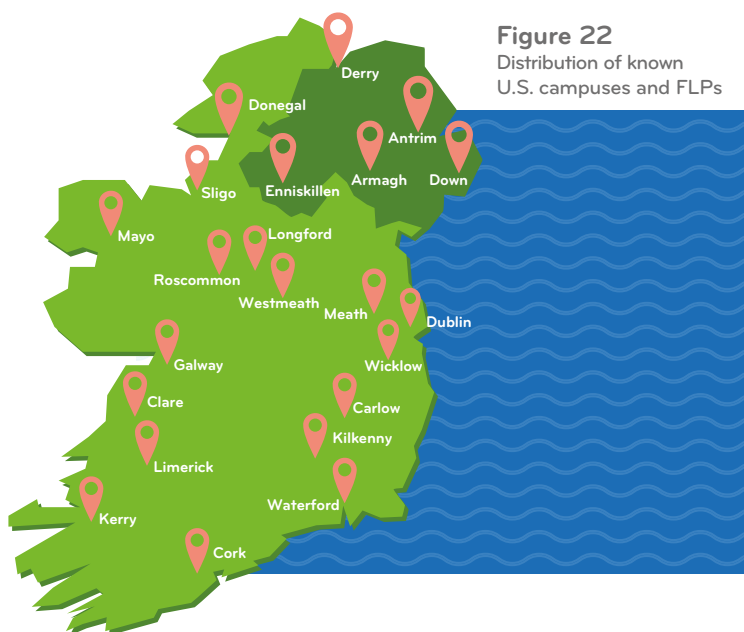


Figure 22
Distribution of known U.S. campuses and FLPs

"Our program is a travel program throughout Ireland. We visit 3 to 4 universities/colleges during the tenure in Ireland."

"Our groups tend to spend the majority of their time based in Dublin but will spend the second of their 2 weeks traveling to various locations (depending on class need)."

"XXX's [Irish private HEI] experience over the past 24 years has shown that about 60% of U.S. students come partly because of their Irish heritage but increasingly seeking an alternative model of education, an escape from the heavily structured, busy, anonymous systems of U. S. colleges. While Ireland's reputation in business, technology and biomedical sciences can continue to attract international students to the larger universities and urban centres, an opportunity exists to focus on Ireland as a location of reflection, of creativity, of questioning the status quo, of offering alternative models. This could broaden the reach outside of cities, providing appropriate economic development and revitalisation of rural areas."

[provider respondents ASAPI/EI 2018]

A significant proportion of programme travel for U.S. campuses, third party providers, Irish HEI summer schools and FLPs includes counties in Northern Ireland. Many of these programmes also operate across the Island of Ireland collaborating with institutions in the North and the South of the country, thus representing one of the few known elements of international education actively responding to the DES aspiration of "North-South cooperation promoting a 'whole of Ireland' approach to internationalisation." (iii, p40).

⁶¹ Dublin and its environs has the largest concentration of HEIs in the country with four universities, four institutes of technology and several large private and independent HEIs, all of which host significant populations of international students. This study has found for example that over 60% of all one-semester students are based in Dublin. Maynooth University in Co. Kildare is included here as it is less than 30 kilometres from Dublin city centre. International students are located in IoTs throughout the country including those in Athlone, Dundalk, Sligo, Tralee and Letterkenny. However, these institutions host negligible numbers of U.S. study abroad students.

Box 8: The Burren College of Art – how U.S. study abroad can positively impact a rural community and economy

The Burren College of Art (BCA) based near Ballyvaughan in Co. Clare provides a powerful example of how U.S. students can bolster a local economy and community. BCA has developed a strong offering over the last 25 years attracting one-semester and short-term U.S. students to its campus within the Burren. In a recent study exploring BCA's impact on the local economy (AY 2015/16), it was found that U.S. short-term students directly contributed €108,000 to the local economy, with their visitors contributing a further €40,000. Rent paid by students and by BCA to local providers amounted to a further €35,000. Local service providers directly positively impacted by the presence of the students included local hotels, shops, garages, bars, taxis, bus-hire, the post office, tradespeople, and tourist businesses (€50,000+). In addition, BCA provided local employment worth €400,000.

Furthermore there have been important social benefits to an area which is generally expected to conform to a pattern of net migration. Families have moved to the area from Ireland and elsewhere, because of the colleges and some have established businesses. Marriages and partnerships have taken place between local residents and international students, enriching the social and cultural life of the area.

Overall (and including 34 one-year students), BCA's U.S. students contributed over €700,000 to the local economy of an area which otherwise might perhaps have seen some tourism benefits, but none of the educational benefits of study abroad, which as we have seen pay much higher dividends.

Source: Burren College of Art (2017). Included with permission. www.burrencollege.ie

2.5 The intangible benefits of U.S. study abroad

"An intangible measure is simply one that you purposefully don't give a financial figure for because doing so would be meaningless...While it might be tempting to ignore intangible benefits, it's a mistake to do so because they can often be just as important and illustrative as tangible benefits".^{xvi}

In addition to the economic benefits described here, U.S. students bring a range of benefits that are difficult to measure and define in monetary terms. Chapter 1 of this study underscored the multiple benefits of international experience for the U.S. (or any international) student, including the development of intercultural skills: **"a set of cognitive, affective and behavioural skills that support effective and appropriate interaction in a variety of cultural contexts."**^{xvii} The reverse is also true: the presence of the U.S. student in the Irish classroom helps to develop intercultural competency, critical thinking ability and communication skills amongst domestic students, as the key factor in the development of these skills is the experiencing of other cultures.⁶²

U.S. (and other international) students also benefit Irish HEIs by ensuring that many programmes remain viable which in turn offers domestic students greater choice. International students also increase the social and cultural diversity of Irish HEIs and their programmes, enriching the teaching and learning environment.

Most importantly, as they return home U.S. students increase the country's 'soft power' becoming informal ambassadors for Ireland and Irish institutions, and ultimately strengthening cultural, trade, research and diplomatic links. This impact is bolstered by the dual facts that most have had a highly positive experience whilst in Ireland and have been directly responsible for at least three other people visiting the country. As well as remaining life-long friends of Ireland and being likely to visit again during their lifetimes, some will return to Ireland for further studies, or possibly to employment, generally in high value positions.

62 The presence of international students changes classroom teaching and is impactful in that sense alone. There is some debate about 'ghettoisation' of international students: it is a commonly heard complaint amongst international students that it can be challenging to interact with domestic students.

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Understanding U.S. Study Abroad in Ireland: Economic impact and future possibilities

Annex to main document





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References



Appendix 1: Research Methodology

The methodological approach for this research was designed by Southern Cross Consulting in consultation with the *Study Reference Group* which included Education in Ireland (representing its members: government recognised higher education institutions in Ireland) and ASAPI (representing its members: U.S. colleges in Ireland, Third Party Providers and internship providers).

Understanding and modelling the sectoral breakdown

The first step was to understand and describe the study abroad landscape in Ireland. This proved to be a complex tableau incorporating several of modes of logistical and academic delivery – many of which interact with each other.

Students can choose their engagement via a number of routes and an array of programmes across varying timescales. However, the main modes of study abroad were identified as follows:

1. Irish Higher Education Institutions (HEIs):

Those studying in Irish HEIs are received directly through partnerships with U.S. institutions, arrangements with third party providers and direct application. The majority of these students within Irish HEIs are in situ for one semester;

.....

2. Irish HEI summer schools:

Summer school students are received through partnerships with U.S. institutions, arrangements with third party providers and direct application (often as a result of promotional activities). Programme durations range from one to eight weeks;

.....

3. Third party providers:

These organisations are often (but not exclusively) colleges or private organisations which channel students to both Irish HEIs and to their own institutions (if they are also a college with a campus in Ireland). These providers can also be considered facilitators of study abroad as they can recruit students from a variety of U.S. institutions to participate in programmes linked to an Irish institution, or solely through the third party's Irish-based programme. Most students coming to Ireland through third party providers remain for one semester, but a considerable range of durations was observed;

.....

4. U.S. campuses in Ireland:

These are Irish based campuses which are owned and operated by an established U.S. university or college, these programmes may recruit exclusively from their home campus or may also attract students from other U.S. institutions. The term can be deceptive as some 'campuses' operate on a 'fly-in' basis and have no permanent physical location or staff based in Ireland;

.....

5. Internship providers:

Internship providers are generally commercial organisations who offer 'for-credit' internships to study abroad students, however Irish HEIs, third party providers and U.S. campuses can also offer internships.

.....

6. U.S. Faculty-led programmes:

This involves U.S. academic staff leading a study abroad programme to Ireland. These programmes are usually of a short duration.

The research team were extremely fortunate to receive strong cooperation and assistance from all study abroad sectors in Ireland, thus allowing a high level of confidence in the data collected. Assistance from Education in Ireland resulted in a 100% response rate from Irish Higher Education Institutions (as Table A1-1 reflects). This census-like data allowed an accurate mapping of study abroad students located in these HEIs.

Working with ASAPI members allowed the research team to accurately estimate the balance of study abroad students within U.S. colleges, third party providers and internship providers who did not respond to the survey.¹ In addition, the research team was extremely fortunate to elicit 39 usable FLP survey responses in total representing an estimated 31% of this sector operating in Ireland under the period under review. This was achieved through internet searches of U.S. colleges offering FLPs in Ireland, through IIE Passport and through Irish HEIs who helpfully agreed to pass on the survey to known FLPs who worked with them or used their campus accommodation.

Overall, through the surveys and the methods described above, the location of 71% of all study abroad students in Ireland in 2016/17 were captured directly – a much higher percentage than was anticipated.

Programme type	Known number active	Response rate
Irish HEIs AY	11	100%
Irish HEIs Summer*	10	100%
U.S. Colleges in Ireland*	17	61%
Third party providers*	20	35%
FLP*	124	31%

Source: ASAPI/EI 2018

Irish HEIs had been asked to indicate the numbers of their students which came through third party provider routes and similarly, third party providers were also asked to provide this information. This ensured that there was no double counting of students.

Development of baseline

The Institute of International Education's (IIE) Open Doors Reportⁱⁱⁱ been collecting data on U.S. study abroad annually since 1986 and is internationally recognised as the gold standard for such data. The decision was therefore taken to use 2015/16 IIE data (the latest available) as a baseline for estimating the number of U.S. students in Ireland for the academic year (AY) 2016/17.² According to IIE, Ireland hosted 11,070 study abroad students in AY 2015/16. Historical IIE data suggests that the number of students choosing Ireland has increased by an average of 10% each year for the past five years, and assuming continued growth of 8%, it is estimated that there were 11,912 U.S. study abroad students present in Ireland during the 2016/17 academic year. This figure is used throughout the study.

1 See Table A1-2 below for a full list of known study abroad providers in Ireland.

2 The Irish Higher Education Authority (HEA) is responsible for collecting data on international students in Ireland. HEA data is not generally utilised within this study as it is considered incomplete at this time. This is as a result of systems issues within Irish HEIs, and also because no mechanism currently exists to capture data on short-term (less than one semester) academic programmes or summer school students – the fastest growing study abroad categories. Additionally, the HEA also does not capture data from private HEIs and cannot generate data on non-Irish HEIs operating in Ireland or on U.S. faculty-led programmes (FLPs).

Data collection instruments for primary source data

Original source data was gathered through a series of surveys which were designed specifically to capture student information and identify the unique features of each study abroad sector operating in Ireland:

1. Irish higher education institutions
2. Irish HEI summer schools
3. U.S. colleges based in Ireland
4. Third party providers
5. Internships providers
6. U.S. Faculty-led programmes (FLPs)

Extensive consultation was undertaken across the study abroad sector to ensure that questionnaires were both comprehensive and user-friendly. Focus groups and interviews were held with U.S. students, Irish HEI study abroad managers, administrators of U. S programmes (both colleges and third-party providers) and faculty-led programmes. Following rigorous testing, surveys were administered across categories 1-6 above in a rolling fashion from July 2017 to February 2018. The data was requested for the period May 1, 2016 to May 1, 2017 (academic year (AY) 2016/17, and summer 2016 in the case of Irish HEI summer-schools).

The surveys and other instruments administered to the study abroad sector gathered data on student numbers and profile (origin/gender/fields of study/duration etc.), programme management, programme expenditure, accommodation, staffing (and expenditure), visiting staff or partners from the U.S., general visitors, attitudes to operating in Ireland and views around the future of study abroad in Ireland.

A student survey was administered in November/December 2017. The questionnaire was specifically designed to elicit a comprehensive picture of **weekly** expenditure (covering twenty categories), thus allowing our economic modelling to generate estimates for other cohorts of students who could not be included in the survey. These questions were carefully refined to capture as much valuable information as possible without engendering respondent fatigue. Respondents were provided with clear instructions around what should be included under each category. The questionnaire also sought information on the origin of students and their home institution, gender, age, fields of study, accommodation, travel within Ireland, travel outside Ireland, visitors, satisfaction levels and impressions of studying in Ireland.

The economic model

For consistency across the international education sector in Ireland this study employed a similar economic model as that used by the Department of Education and Skills for its most recent International Education Strategy document.ⁱ

1. The main body of work involved calculating the 'direct' economic impacts of study abroad on the Irish economy. This was achieved by calculating the number of students and weeks of study under each of the categories (using survey data, IIE Open Doors data, and some estimations based on weighted weeks of study). The expenditure impacts and jobs created were then calculated for each category and sector. An Excel workbook was built to run all calculations and ensure their accuracy and robustness.
2. Stage 2 derived the 'indirect' impacts of the study abroad market. This corresponds with the impacts on suppliers to the businesses that have experienced an increase in demand due to the presence of the students. To calculate this, 'indirect' multipliers for different categories of expenditure were applied to the direct expenditure. These multipliers were previously calculated in the International Education Strategy using Central Statistical Office (CSO) dataⁱ and the same multipliers were employed in this study.
3. Stage 3 derived the 'induced' impacts, which are the shifts in spending on goods and services at the household level as a consequence of changes in income of the directly and indirectly affected businesses. This refers to the 'ripple effect' of suppliers having more money in their pocket, which they in turn use to fund their own expenditure and lifestyles. Here, the International Education Strategy/CSO multiplier for the 'Education' category was applied to the direct expenditure.

The same processes were used to derive the indirect and induced impacts on jobs. Accommodation and salary costs were thoroughly researched and matched with CSO data.

Desk based research and secondary data

In order to deepen our understanding of study abroad as a sector and to contextualise the findings, a considerable amount of desk research was undertaken. Documents consulted and data sources employed are all referenced throughout the report. IIE also provided bespoke analysis of Ireland and other top European destinations for this study.

Assumptions and challenges

1. Assumptions:

- That IIE data was correct in describing U.S. study abroad student numbers in Ireland. IIE data is generated through self-reporting by U.S. universities. In the case of internships abroad, the home university may not be aware that the student is participating in such a programme, although this is less likely for internships for academic credit.

The figures generated by the study suggest that for some components of the study abroad sector, student numbers may in fact be higher than those provided by IIE, especially with regard to internships and FLPs which are growing rapidly but can be difficult to quantify.

- That respondents were providing reasonably accurate information (an assumption and a challenge)

Instruments were carefully tested, and resultant data was thoroughly checked and quality controlled, with many call backs to all sectors and students undertaken to clarify responses.

In the opinion of the authors the overall figures are nevertheless likely to reflect a conservative estimate of the economic impact of study abroad in Ireland. U.S. Colleges, third party providers, FLP and internship operators are mostly private institutions whose home base is outside Ireland and who therefore had no obligation to respond to this study, at all or in full. Although detailed levels of financial data were generously furnished by most respondents, there were some areas of non-response, particularly in relation to programme expenditure, which was considered commercially sensitive by some of the larger public HEIs and the private institutions (both Irish and non-Irish). Additionally, in some cases, further programme/tuition fees or costs may have been paid to Irish HEIs but not fully captured by this study.

Finally, although at least 30% of tuition income generated through study abroad does not accrue in Ireland - as students attending U.S. colleges pay tuition to the parent institution, and students on FLPs all pay their tuition fees to the home institution - it may be the case that some U.S. institutions based in Ireland are receiving a greater proportion of 'home fees' than uncovered by this study.

2. Challenges:

- The surveys to the providers and students generated enormous quantities of data which had to be cleaned and analysed within a reasonably short time-frame.
- Student responses were disappointingly low
- *The student surveys were administered once all sectoral data had been analysed, and a required student sample for each institution had been calculated. To ensure data protection and confidentiality, student questionnaires were administered directly by the HEI/organisation and returned online directly to the research team. However, despite at least four requests for completion from each institutional partner, student completion levels remained low at under 200. For this population size a sample of 250-280 would have been ideal. When all data was cleaned, the final usable number of surveys totalled 171 (providing a 6% margin of error). While the number of responses is lower than anticipated, the population was homogeneous (in terms of the study abroad expenditure and experience) and the responses corresponded directly to the national and international profile. The survey returns were very thoroughly checked with call-backs made to student respondents in the cases of any queries. High levels of consistency were noted across all categories and the team maintains a high level of confidence in the findings.*³
- The FLP sector is extremely difficult to describe yet based on data generated through this study is estimated to account for well over one third of study abroad students in Ireland.

U.S. citizens do not require a visa to enter Ireland unless they are staying for more than 90 days, therefore there is no source of data on these students. FLPs operate in a variety of ways, sometimes interacting with Irish HEIs, sometimes entirely independently. We were extremely fortunate to elicit 39 usable FLP survey responses which captures almost 1,500 of their students).

Table A1-2 Key organisations/institutions in study abroad in Ireland

Irish Institutions	
Burren College of Art	NUI Galway
Dublin Business School	Trinity College Dublin
Dublin City University	University College Dublin
Griffith College Dublin	University College Cork
Maynooth University	University of Limerick
Mary Immaculate College (UL)	
Third Party Providers	
Academic Programmes International (API)	EUSA - Academic Internship Experts
American Institute for Foreign Study (AIFS)	Foundation for International Education (FIE)
Arcadia University	Global Experiences
Athena Study Abroad	IES Abroad
BCA Study Abroad	Institute for Study Abroad - Butler University
Boston College	Institute of Study Abroad Ireland
Boston University	International Studies Abroad (ISA)
CAPA - The Global Education Network	KEI Abroad
Cultural Experiences Abroad (CEA)	CIS Abroad

³ A survey of U.S. students in Ireland in 2011 had resulted in 1,000 respondents and the team made the assumption based on this that responses would be high. Survey fatigue is a recent, but globally recognised phenomenon, especially amongst students.

Table A1-2 Key organisations/institutions in study abroad in Ireland (continued)

Third Party Providers(continued)	
College Consortium for International Studies (CCIS)	University Studies Abroad Consortium (USAC)
Council on International Educational Exchange (CIEE)	World Endeavors
University of Minnesota	
U.S. Institutions with a base in Ireland	
American College Dublin	Duquesne University (Dublin)
Aquinas College (Galway)	Lourdes University (Galway)
Arcadia University (Dublin)	Mercyhurst University (Waterford)
Boston College (Dublin)	Sacred Heart University (Kerry)
Boston University (Dublin)	Taylor University (Wicklow)
Butler University (Dublin)	University of Minnesota (Dublin) / Rianta
Champlain College (Dublin)	University of Nebraska - Kearney (Galway)
College of St. Benedict - St. John's University (Galway)	University of Notre Dame (Dublin & Galway)
College of St. Scholastica (Mayo)	
Known FLPs (responded to survey)	
Auburn University	Rianta
College of Saint Benedict/Saint John's University	Rochester Institute of Technology
Drew University	Rosemont College
Eastern Michigan University	San Jose State University
Georgia Institute of Technology	School of the Art Institute of Chicago
Glendale Community College	St. Lawrence University
Juniata College	Stephen F. Austin State University
Learn International	The Cooperative Center for Study Abroad
Lehigh University	Transylvania University
Louisiana State University	University of Mass. Amherst
Marquette University	University of Arkansas
Mesa Community College (Maricopa County Community College District)	University of Missouri
Milwaukee Institute of Art & Design	University of New Hampshire
Mississippi University for Women	University of North Carolina at Pembroke
Murray State University	University of Oregon
Old Dominion University	University of South Florida
Rhode Island School of Design	University System of Georgia



Appendix 2: Expanded discussion on the barriers to and benefits of study abroad for U.S. students

“Although the total number is at an all-time high, it is still the case that only about 10 percent of all U.S. undergraduate students (including community college students) will study abroad by the time they graduate. The fact that 90 percent of all American undergraduate students enrolled in U.S. higher education are graduating without an international experience means that there is still a long way to go. For students pursuing a Bachelor’s degree, approximately 15.5% studied abroad before graduating.”ⁱⁱ

1. The benefits of studying abroad

An abundance of international research studies over the last decade have conclusively established the multiple advantages of an international education experience for the individual. Longitudinal studies show that the skills developed while studying abroad (such as intercultural competence, confidence, independence, foreign language proficiency, and adaptability) are transferrable to the workplace and provide graduates with a competitive advantage when seeking employment. Students with international experience display stronger career aspirations, achieve greater levels of success, are likely to attain stronger academic results and demonstrate greater personal confidence. Studies in the U.S. further suggest that this impact is magnified for under-represented groups.^{4, iii, iv}

1.1 Improved career and employment opportunities:

Findings unambiguously signify that *“study abroad has an overall positive impact on the development of a wide range of 21st century job skills”*.⁴ Employers have a preference for graduate staff with study abroad/international experience.

- IIE’s report on the impact of study abroad on employment found that studying abroad for longer periods of time has a high impact on subsequent job offers and career advancement: among alumni who studied abroad for one academic year, 68% reported studying abroad had contributed to a job offer or promotion, compared to just 43% of alumni who studied abroad for fewer than eight weeks.ⁱⁱⁱ
- The QS Employer Global Study,^v the biggest-ever survey on the subject, found that six out of ten employers globally give extra credit for an international student experience, and more than 80% said they actively sought graduates who had studied abroad:

“This result is significantly more positive for the United States than previous studies on the same topic... [and] may indicate a shift in hiring practices, as organisations in the U.S. become more outward-looking in the face of global competition... Intercultural communication is very important in the recruitment process, and there is general support for internationally educated recruits outperforming their non-mobile peers...support for international learning mobility should be boosted in the U.S. as there appears to be increased recognition from industry”. (ibid p16).

1.2 Higher education performance:

Mobile students are more likely to attain enhanced academic results and improved academic performance. Recent research by the IIE in the U.S. found the impact of a study abroad period included higher four-year graduation rates and that the correlation between study abroad graduation is particularly significant for minority students.ⁱⁱⁱ

⁴ For a useful summary of recent reports on the value of study abroad in terms of academic achievement, life skills and future employment opportunities see Generation Study Abroad’s (GSA) review of eight such studies: <https://tinyurl.com/ybpybxlq> ⁱⁱⁱ.

1.3 Personal development

Internationally, known drivers of mobility include personal development and an interest in foreign cultures and studies. A meta-analysis of studies in the U.S. found that a study abroad experience impacted positively on student engagement, confidence and determination all of which have a positive impact on learning outcomes.ⁱⁱⁱ As noted above, these outcomes lead to skills being developed by students that are attractive to employers.

"Studying abroad gave interviewees both a broader understanding of career possibilities, and the confidence to pursue these career paths. The survey data and the information gleaned from interviews suggest that studying abroad had unintended benefits in terms of not only developing skills and shifting attitudes, but also opening career pathways and opportunities that had been either previously unknown or simply unconsidered..." (ibid, p5).

1.4 The development of language skills

Although not relevant to U.S. students who choose Ireland, it is widely recognised that the development of foreign language skills helps students better understand and navigate other cultures and appropriately interpret political and social situations. Although there is less research on this aspect of study abroad for U. S students, research from the EU Eurydice Network strongly suggests that the development of language skills has significant implications for the future employment of students.⁵

2. Barriers to studying abroad

The impediments to study abroad as viewed by U.S. students and their families include the actual and perceived costs of such mobility, an absence of prior international exposure, inadequate information, weak faculty engagement and concerns over security and health.ⁱⁱ

As is the case in Europe and globally, the cost of studying abroad is the predominant factor which prohibits U.S. students from considering study abroad.^{vi} Most U.S. students shoulder significantly greater debt-burden than European students, and while study abroad tuition is generally covered through existing tuition payments, there are – as this and many other studies show – significant costs associated with studying abroad. IIE point out that U.S. students are increasingly balancing work and family commitments with their education (with 38% of full-time four-year students and 45% of two-year students working part or full-time).ⁱⁱ Concerns about foregone income and the possibility of having no job to return to, combined with family commitments represent serious obstacles to mobility, especially with respect to programmes which require a longer absence.

Semester-long programmes in Ireland arranged through third party providers generally cost a U.S. student between \$14,500 and \$25,000. The variation is based on provider, services, destination city, and Irish HEI host institution. The cost always includes housing and some support services.

U.S. campuses operating abroad most often charge the same tuition as the student would be charged at the home campus for the semester. This amount varies significantly by institution, but in some cases can be \$25,000 or more. In the case of most U.S. campuses there is the benefit of existing scholarships and financial aid also applying to the semester abroad.

For those seeking an international experience, yet facing financial constraints, a short-term programme offers a viable option (for example, 90% of community college students who studied abroad in 2015/16, chose a short programme – *ibid p11*). Other options to lower or overcome financial barriers include scholarships and fee waivers, work, internships, serviced learning/volunteering opportunities and exchange programmes – all of which are growing in significance.

⁵ The Eurydice Network supports and facilitates European cooperation in the field of lifelong learning by providing information on education systems and policies in 38 countries and by producing studies on issues common to European education systems. http://eacea.ec.europa.eu/education/eurydice/index_en.php

The majority of students who study abroad at all global destinations today are characterised by their high socio-economic status, are predominantly white (72%), female (67%), attend doctorate-granting or masters colleges or universities (85%) and one third originate from just five States (California, New York, Pennsylvania, Massachusetts, and Ohio).ⁱⁱ

Latest figures suggest increasing diversity amongst the study abroad population, but progress is slow. The proportion of underrepresented races and ethnicities attending U.S. higher education institutions has increased over the last decade from 17% to 28% - with Hispanic or Latino students now representing 19% of undergraduate enrolment. While the balance is shifting, this diversity is not yet represented in the study abroad population with this group making up slightly under 10% of the cohort, and Black or African American students just 6% (while representing 14% of new U.S. undergraduates). The pattern is different for Asian American students who account for 7% of undergraduates and 8% of the study abroad population (*ibid p11 and p85*).

These and other underrepresented clusters (such as those from lower socio-economic groups, disabled students and athletes) often also face the most challenging financial obstacles, may have less exposure to the culture of international travel, are less clear of the benefits of study abroad and how academic/credit systems interact, and may harbour concerns around acceptance or racism.^{6, vii}

Studies have shown that these students require readily accessible information and high levels of support from the home and the visiting institution.^{vii, viii} Education institutions can often unwittingly create barriers for students through weak or poorly disseminated information on the advantages conferred by study abroad and on the available opportunities. In a paper on obstacles to international education NAFSA argue that unmotivated and poorly engaged faculty is the primary impediment to study abroad, stating:

"While colleges and individual departments must decide whether to grant credit for courses and work done overseas, most faculty keep their distance. They make sure that the work done abroad is minimally acceptable, but they do not see it as their responsibility to ensure that study abroad is carefully integrated with the offerings on campus. Colleges often provide too few incentives for faculty to work closely with students on planning, supervising and assessing the study abroad experience. Moreover, junior faculty may be reluctant to take on assignments that cut into the time available for writing and research activities that colleges reward with tenure and promotion".^{vii}

In recent years issues around safety and security have become paramount.⁷ An analysis of the data suggests that security, political instability and natural disasters do not serve as a barrier per se for U.S. students, but have an impact on decision making with regard to destination. For example following the Ebola outbreak in West Africa in 2013, student numbers to that region fell by 68%, but are now climbing back up. Similarly, following terrorist attacks in Paris in 2015, there was a 5% decline in students choosing France (see Figure 13b in main document).ⁱⁱ

Table A2-1 is taken from the Forum on Education Abroad's 'State of the Field Survey' 2017^{ix} and neatly summarises the barriers described above, and their varying significance to the three sectors who make up Forum members.ⁱⁱ

6 In exploring study abroad obstacles for African American students Hillis et al (2015) noted: "researchers found that African American students face barriers that hinder their involvement in studying abroad above and beyond those of other students. Even removing financial barriers, the researchers have preliminarily found themes relating to lack of encouragement and support in decisions to go abroad; fears of racism or criticism of race while abroad; lack of interest; lack of support from family; and little knowledge of what academic, personal, and future career gains can be attained by going abroad..." (Hillis, E. et al. p2).^{vii}

7 At present Ireland scores particularly well with regard to safety – ranking as the 10th safest country in the world, well ahead of other top European competitors in the study abroad sphere. 2018 Global Peace Rankings: https://en.wikipedia.org/wiki/Global_Peace_Index

Table A2-1: Top five barriers to increasing the number of students participating in education abroad

Rank	U.S. Institutions	U.S. Programme Providers	Overseas institutions & organisations
1	Competition with home campus activities, sports and U.S. internships	Geopolitical environment (including travel advisories)	Lack of portability of financial aid, tuition waivers, scholarships, work, study, jobs or other benefits from the home country
2	Rising cost for programme operation, marketing & administration	Resistance from student's families, fear, lack of encouragement	Not enough support from or access to institutional leaders
3	Lack of portability of financial aid, tuition waivers, scholarships, work, study, jobs or other benefits from the home country	Competition with home campus activities, sports and U.S. internships	Not enough interest on the part of faculty members and professors to integrate education abroad into degree requirements for credit transfer
4	Resistance from student's families, fear, lack of encouragement	Rising cost for programme operation, marketing & administration	Not enough faculty or staff interested in leading experiences or teaching courses abroad
5	Not enough interest on the part of faculty members and professors to integrate education abroad into degree requirements for credit transfer	Not enough support from or access to institutional leaders	Competition with home campus activities, sports and U.S. internships

Source: Forum on Education Abroad, 2018

3. Addressing the international education deficit in the U.S.

The relatively low levels of international exposure have raised concerns at both educational and government levels that U.S. graduates may be less well prepared for entry into a globalised workforce and demonstrate a weaker understanding of international issues than their European or Asian counterparts. This concern has led to the development of a number of important initiatives to promote study abroad amongst students – especially 'non-traditional' cohorts, to develop enabling policy and to encourage higher education institutions to commit to developing and promoting such programmes.⁸

⁸ See discussion above. In summary, a 'non-traditional' student (who does not study abroad in representative numbers) includes 1) minority and disabled students, 2) financially challenged students, 3) students whose U.S. curriculum may make it difficult for a semester away (e.g. IT and engineering), 4) and students with jobs, 5) students with campus commitments such as student government and 6) student athletes.

a) Generation Study Abroad (GSA)

The most significant development has been IIE's Generation Study Abroad (GSA) initiative. GSA was established in 2014 to: *"encourage meaningful, innovative action to drive up the number of U.S. students who have the opportunity to gain international experience through academic study abroad programmes, internships, service learning, and non-credit educational experiences"*

GSA's ambitious target was to double the number of U.S. college students studying abroad to 600,000 by the end of decade and diversify the demographic. Four years on GSA can boast some impressive achievements including:⁹

- 4,000 U.S. higher educational institutions setting targets and actions to significantly expand study abroad. 10 GSA partner campuses considering making study abroad a requirement and 12 reportedly reaching 2020 study abroad targets by 2014/15;
- 740+ Worldwide Partners pledging to boost and broaden participation in study abroad (including 19 Country Partners of which Ireland was the first);
- Almost 80% of partner study abroad offices at U.S. higher education institutions engaging with their career office to help students articulate the value of study abroad and working to integrate study abroad into curriculum. In addition, GSA report that 65% of international partners are collaborating with U. S partner institutions to improve credit transfer;
- \$55m in student scholarships raised by the Generation Study Abroad network and \$2.7m in faculty grants.^x

b) U.S. State Department Study Abroad Office

GSA and related activities have been supported at federal level by the establishment of the U.S. State Department's Study Abroad Office and its new portal promoting study abroad. This government site attempts to pull together all aspects of study abroad for the U.S. student and faculty member with a strong focus on the benefits of study abroad and clear links to government funding possibilities, such as Fulbright and Gilman scholarships and federal aid support.¹⁰

c) The Senator Paul Simon Study Abroad Program Act

A further significant development has been the recent introduction of the Senator Paul Simon Study Abroad Program Act to the U.S. House of Representatives and the Senate. The bill, introduced in September 2017, is aimed at expanding study abroad opportunities for undergraduate students, authorising the U.S. Department of Education to award grants to higher education institutions or consortia to provide and expand study abroad opportunities for undergraduate students.

According to NAFSA *"the bipartisan bill would significantly increase education abroad opportunities for U.S. undergraduate students, providing more graduates with the global and cultural competencies they need to compete in the increasingly interconnected global economy."*^{xi}

The bill has four goals:

1. One million U.S. college students will study abroad annually for academic credit within 10 years
2. The diversity of study abroad participants will reflect the U.S. undergraduate population
3. A significantly greater proportion of study abroad will occur in non-traditional destinations
4. Higher education institutions will make study abroad a critical component of a quality higher education

Under the proposed model, higher education institutions would apply for competitive grants. The bill has been referred to the Senate Committee on Health, Education, Labour, and Pensions.

9 These figures refer to 2016 which are the latest available from the GSA website. <https://www.iie.org/Programs/Generation-Study-Abroad>.

10 See: <https://studyabroad.state.gov/> and <https://iew.state.gov/>.

d) The Forum on Education Abroad

The Forum on Education Abroad is a membership association which brings together study abroad practitioners from both public and private institutions. The Forum provides training and resources to education abroad professionals and has developed *Standards of Good Practice* which are internationally recognised as the gold standards for good practice in the field.

The Forum undertake a 'State of the Field' survey every two years which reflects the concerns of study abroad practitioners. The report (based on survey returns from over 200 HEIs) serves today as a quasi-monitor of GSA and other targets and aspirations. The 2017 'State of the Field' Report^{xii} finds that 89% of U.S. institutions aspire to increase study abroad numbers (99% of public and 81% of private institutions). Of these 13% saw a significant increase in numbers over the last year but a further 13% saw a decline in numbers suggesting that overall, little growth was attained amongst U.S. institutions within the study and serving as a reminder that high level aspirations can take some time to filter down to the programme level.¹¹ Forum members note for example that limited endowment or scholarship funding and the lack of funding (federal and institutional) for summer, cultural and language programmes serve as a continuous barrier to growth and acts as a particular deterrent to attracting diverse populations of students.

Of further interest was the finding from the 2015 report that 70% of U.S.-based institutions are now working on increasing financial support for students (in 2013, no respondents selected this answer option) – this is a very positive indication of the growing value being placed on international education at institutional level and correlates with GSA commitments. However, the State of the Field Reports also highlight the uneven nature of the field and the frustrations this can cause.

e) The CASSIE Project

A number of research initiatives which aim to support the argument for greater levels of study abroad, and to influence national policy have recently been funded. One of the largest is the CASSIE project (The Consortium for Analysis of Student Success through International Education)^{xiii} which aims to illustrate the return on investment in international education.

CASSIE, led by the University System of Georgia in coordination with the IIE, and with financial support from the U.S. Department of Education, is a research partnership established to study the impact of international education experiences on student success outcomes.

The project aims to harness *"the power of "big data" from across many institutions to create an evidence base to address key questions that have not previously been explored in a rigorous way"*.

Box A2-1: Top concerns of study abroad staff / practitioners (summary)

1. Crisis and risk management
2. Need for better funding
3. Adequate preparation of students
4. Supporting underrepresented students
5. Academic quality
6. Helping students maximize their experience
7. Current political climate
8. Programme costs
9. Student support services related to disability, wellness or mental health
10. General health and safety
11. Compliance with U.S. federal mandates (titles IX, Clery, etc.)
12. Curriculum integration
13. Commodification of education abroad
14. Disparity between student expectations and the reality of the experience
15. Increasing participation on short-term programmes
16. Career integration
17. Fears of terrorist attacks abroad
18. Parent involvement

The Forum on Education Abroad's 'State of the Field' survey report 2017 (p7)^{ix}

<https://forumea.org/wp-content/uploads/2018/03/ForumEA-State-of-the-Field-18-web-version.pdf>

¹¹ Forum members include over 700 U.S. institutions, programme providers and overseas institutions and organisations. The 2017 survey found that programme providers had experienced 19% growth over the last year. <https://forumea.org/>

Many of these questions are currently viewed as potential deterrents to study abroad, such as:

- *Is the positive impact of study abroad on graduation rates similar for private institutions as well as for public? For smaller colleges as well as for large research universities?*
- *Does studying abroad impede timely graduation for students majoring in "lock step" STEM majors? How well represented are students receiving need-based financial aid among world language majors, and how does choosing such a major affect the likelihood that they will graduate within four years?*
- *When students double-major in a world language plus another academic area, do their grades suffer, or does additional language study instead boost achievement in their other academic area?'.^{xiii}*

In addition to the large programmes highlighted here, there are innumerable initiatives on-going at many levels to support study abroad growth in the U.S. Achievements to date are notable, but the targets are highly ambitious and will not be achieved within the timeframe set (600,000 students abroad per year by 2020 for GSA and one million per year within 10 years of the Senator Paul Simon Bill being enacted). As studies undertaken by the Forum of Education Abroad, NAFSA and others evidence, there are profound obstacles to address within the education institutions, in addition to the well-established barriers which have to be overcome from the personal to the policy level. While the timeframe and goals require readjustment, the GSA and other programmes described are nonetheless essential – laying the groundwork for growth and developing proactive initiatives in tandem with education institutions and government.

A myriad of funding models for study abroad *within* and *between* institutions is evident with many considered (by Forum respondents) as inadequate to develop programmes – often despite the espoused strategic aspirations of the institution.^{12, xiv} For most, this manifested as concern around insufficient staffing, inadequate numbers of academic advisors available and mismatched faculty engagement to manage and support the increased student numbers that the promotional efforts are attracting.



12 U.S. institutional study abroad funding and management models are multiple and complex, however, many offer a variation on a model which involves "Charging [the student] 'home school fees,' adding a study abroad fee [and] negotiating a discount with a program provider...".^{xiv} Institutions also take an array of approaches to developing and overseeing curriculum, credit arrangements and partnerships. Although this section aims to provide an understanding of the imperative for study abroad from the U.S. perspective, these models are not explored in detail within this study, the key aim of which is to develop an understanding of how U.S. study abroad impacts Ireland. Further details on U.S. funding and management models can be found at www.forumea.org and <https://ejournals.bc.edu/ojs/index.php/ihe/article/download/8005/7156>.

Appendix 3 : Expanded discussion on student accommodation issues in Ireland

The current severe accommodation shortage across most of Ireland's cities has led to spiralling rental charges with increases noted for the last 24 consecutive quarters, with rents today 23% higher than during the height of Ireland's economic boom in 2008. Average rents for quarter 1 2018 have risen by 11.5% overall. Table A3-1 summarises the average monthly rental costs in the main cities for one-bedroom apartments.

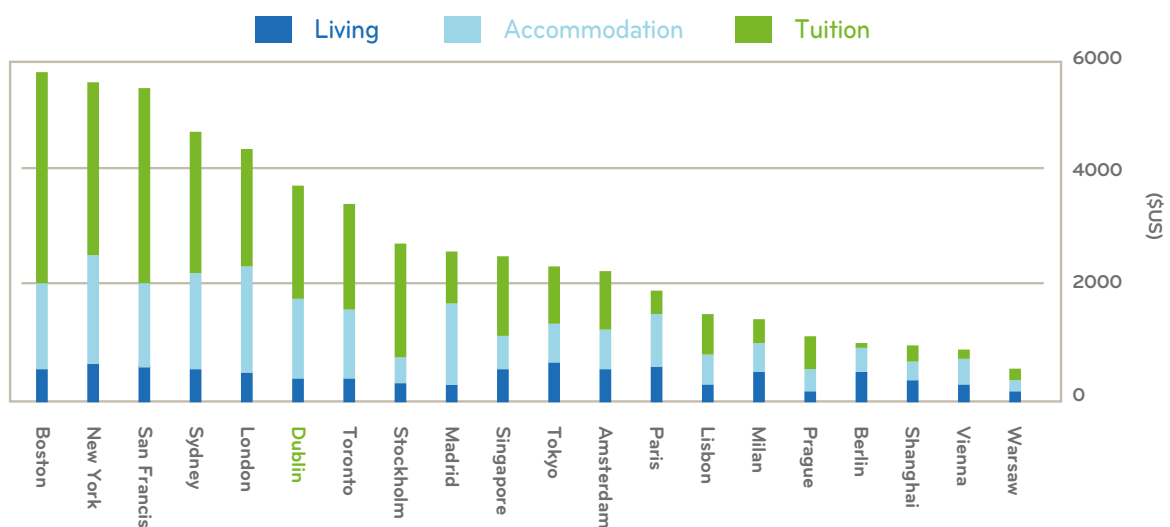
Dublin in particular is an expensive choice for students as illustrated by Table A3-1 and the graphic below - extracted from Savill's World Student Survey Report 2017^{xvi}. According to this study, Dublin is currently the most expensive European city to study in after London, ranked closely to the most expensive study locations globally: top tiered U.S. cities and Australia.

Despite the crisis, U.S. student respondents in this study appeared unconcerned about accommodation issues and/or costs, as they generally do not have to find accommodation themselves, thus differing from most other international students in Ireland. Students were generally happy with accommodation with 58% scoring their accommodation as either 'excellent' or 'very good', 25% as 'good', 14% as 'fair' and only 2% indicating 'poor'.

Table A3-1: Average monthly rental costs (1 bed apt) & increases in Ireland [Q1 2017- Q1 2018]^{xv}

City	Average Rent	Average Increase
Dublin (city centre)	€1,158-1,875	13.8%
Cork	€913	9.2%
Galway	€834	13.5%
Limerick	€769	17.4%
Waterford	€644	15.0%

Figure A3-1: Savills World Student Housing Report 2017:
Monthly cost of international student living & study.



Source: Savills World Research, Student.com

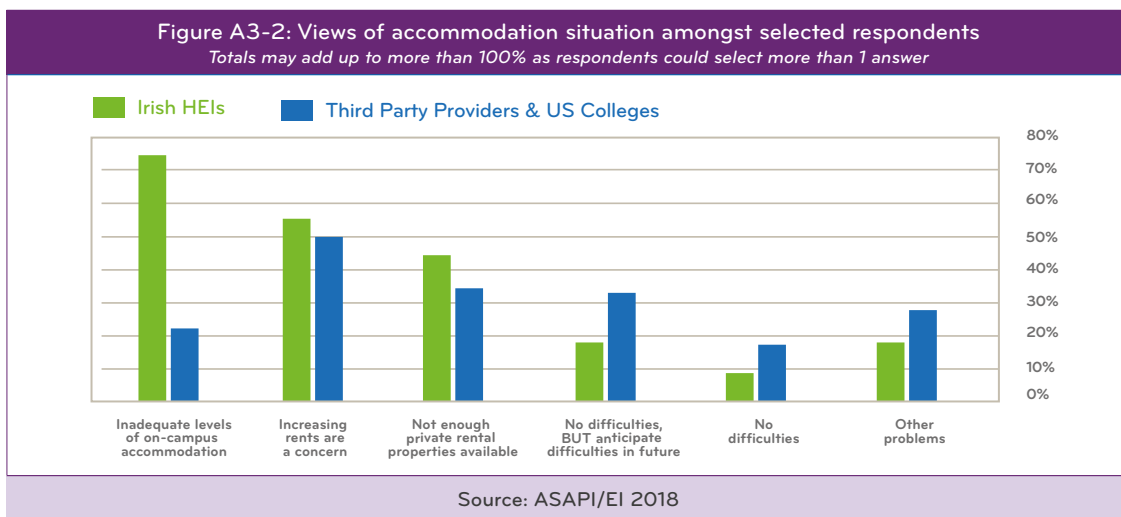
Non-EU international student on non-specialist STEM undergraduate degree course at a top institution, residing in purpose built accommodation August 2017 exchange rates.

Study abroad directors and managers across all programmes however shared significant concern about accommodation; the impact it was having upon the sector, and its potential to negatively affect reputation and growth. Amongst Irish HEIs, the accommodation crisis was considered the greatest immediate threat to U.S. study abroad growth, with only one respondent (based in a rural area) indicating that they did not experience difficulty accommodating students, as Figure A3-2 reveals. Most HEIs were concerned about the availability of on-campus accommodation and both the availability and costs of rented accommodation:

"While growth in numbers from the U.S. studying abroad in Ireland has continued, we have concerns relating to the impact that the lack of availability of good quality accommodation will have on this cohort." [Irish HEI respondent]

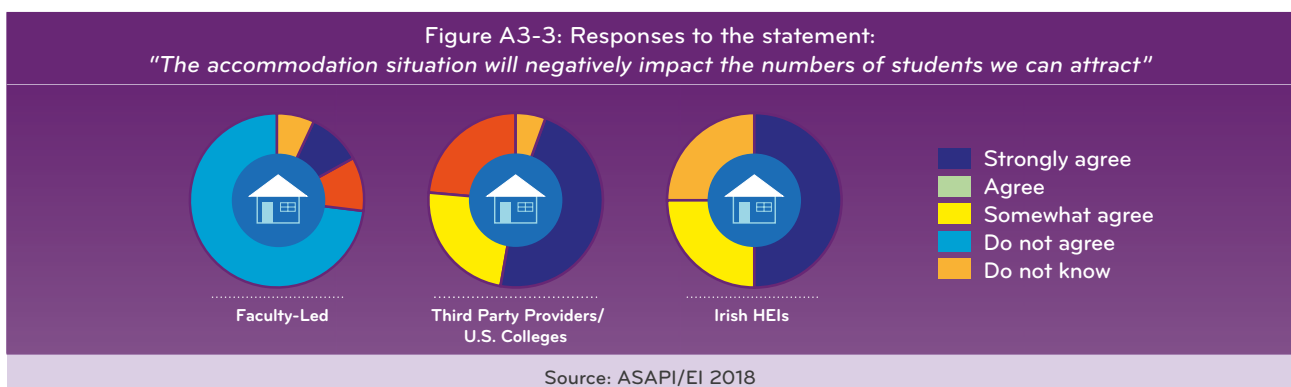
Third party providers and U.S. Colleges, generally operating within the private market expressed strong concern about increasing rents and low supply, and less concern about on-campus accommodation. 'Other problems' in the main refer to the difficulty in securing accommodation for short periods. One respondent commented:

"Our enrolment numbers are capped at the moment due to lack of available student accommodation. We would like to grow our programmes but cannot presently solely due to a lack of available student accommodation". [Irish third party provider respondent]



While the accommodation discussion at the national level often focuses upon Dublin, the HEIs noted that the accommodation situation in other cities is significant and that in some cases has led to a reduction in U.S. study abroad numbers for the 2017/18 academic year.

When asked to rate the statement "The accommodation situation in Ireland will negatively impact the numbers of students we can attract to Ireland" there was a difference of opinion across the sectors. The majority of Irish HEIs and third-party providers/U.S. Colleges strongly agreed with this statement as Figure A3-3 shows. However, faculty-led programmes, who accommodate around 70% of their students in hotels, B&Bs, hostels or rented properties (often outside major cities) are not experiencing problems. Irish HEI summer school programmes who avail of on-campus accommodation outside term time are also, in the main (78%) not experiencing issues around accommodation.



Government response

With almost 64% of Irish second-level students transferring into domestic third level education per year (expected to increase to 70% by 2029), plus an anticipated annual increase in international students of 25% over the same period, the Higher Education Authority have estimated that the increase in full-time enrolments will result in a requirement for approximately 25,000 more beds for students in Ireland. The reports note that at present the shortage of accommodation is most critical in Dublin, where both domestic and international students are competing in a high-cost rental market with families and workers.^{xvii, xviii}

In this context, and aligned with the national "Rebuilding Ireland" programme,^{xix} the Irish government published the National Student Accommodation Strategy in July 2017 which is:

"...designed to support the delivery of an increased level of supply of PBSA [purpose-built student accommodation] to reduce the demand for accommodation in the private rental sector by both domestic and international students attending our HEIs. ...

The analysis undertaken for the development of the strategy shows that there is a significant pipeline of PBSA developments coming on-stream nationally ... [and] there is now an identified potential for an additional 10,770 PBSA bed spaces to be developed by 2019 ... Through the implementation of this plan we are aiming to deliver an additional 21,000 purpose-built student accommodation bed spaces places by 2024.

The National Student Accommodation Strategy includes 8 key targets and 27 actions to support the delivery of an increased level of supply of Purpose Built Student Accommodation and an increase in take-up of digs accommodation."^{xv, xvi}

As a result of the Strategy and easing of some regulations, a large number of new student-only properties are being developed or nearing completion in Dublin with an estimated 6,000-8,000 beds coming on stream over the next 12-18 months (including 3,000 at UCD). Not all survey respondents felt that this approach was an adequate answer to the long-term problem:

"The new luxury student housing developments are a short-term fix to a long term problem and only benefit providers who can afford the rates. It's a short term answer to a problem that is getting worse and is punishing students who can't afford it, both local and international."

Rent for a single ensuite bedroom with shared lounge and kitchen facilities in new purpose built student accommodation complexes in Dublin generally range from 240 to 265 Euro per week for a 40 or 41 week contract (2018-19 academic year costs).

Table A3-2: Housing costs at purpose built student accommodation - 2018-19 fees (€)

Location	Cost of cheapest single ensuite room/week €
Dorset St., Dublin 3	245
Bonham St., Dublin 8	240
Summerhill, Dublin 1	240
Mill St., Dublin 8	260
Arran Quay, Dublin 7	265
Point Village, Dublin 1	230
Thomas St., Dublin 8	260
Church St, Dublin 7	265
Phibsborough Rd., Dublin 7	236
Western Road, Cork	210
Copley St., Cork	200

Source: Company websites

Interviews with third party providers and U.S. college programme directors in Dublin indicate that for the first time in four to five years, they have noted increased property availability since early 2018, with some suggestions that there may even be an over-supply of student housing by 2019 in the capital. While general housing availability remains at critically low levels within Dublin and other cities, it appears that student housing is an attractive prospect for developers (and has attracted a number of private international operators and investors) as a number of requirements associated with general housing developments such as reserved social housing for 10% of any development over nine houses/apartments and the required inclusion of adequate parking for all residents, does not apply to these developments. The Strategy also allows for PBSA across Cork, Galway, Limerick and Waterford and these also progressing towards development, but at a slower rate than across the capital.

Accommodation is not the only factor which results in Ireland ranking as one of the most expensive countries for international students. ValuePenguin^{xvi} ranks Ireland as the 5th most expensive country to study in, highlighting (in addition to rent and utilities), the high costs of socialising, local transport and phone costs. These rankings are a concern for Ireland, as programme and living costs - discussed in the main report - are the key barriers to study abroad.

Student respondents to this study - while acknowledging that Ireland was an expensive country - had relatively little to say of a negative nature about cost, appearing to agree that taking the decision to study abroad would incur high costs and they had prepared for this.

Appendix 4: Additional Data Tables and Figures

Table A4-1: Study abroad duration – all countries

Duration of Study (%)	2006 / 2007	2007 / 2008	2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013	2013 / 2014	2015 / 2016	2016 / 2017
1 Semester	36.3	35.5	37.3	35.8	34.5	35.0	33.6	31.9	31.8	31.9
8 weeks or Less	9.8	11.0	11.7	11.9	13.3	14.4	15.3	16.5	16.7	17.4
less than 2 weeks	-	-	-	-	8.3	7.9	8.4	9.9	10.2	10.8
2-8 weeks	-	-	-	-	5.0	6.5	6.9	6.6	6.5	6.6
January Term	6.8	7.2	7.0	6.9	7.1	7.0	7.1	7.5	7.4	7.4
Summer: less than 2 weeks	-	-	-	-	3.3	3.7	4.1	4.6	5.4	5.0
Summer: 2-8 weeks	-	-	-	-	34.4	33.4	33.7	33.5	30.9	30.4
Summer: Over 8 weeks	-	-	-	-	-	-	-	-	2.7	2.6
Other	4.0	4.0	4.0	3.6	3.6	3.2	3.0	3.0	2.6	3.0
Full year	4.4	4.2	4.2	3.9	3.8	3.3	3.2	3.0	2.6	2.4
Total numbers	241,791	262,416	260,327	270,604	273,996	283,332	289,408	304,467	313,415	325,393

Source: IIE 2017

Metropolitan areas of origin: Ireland and other top five European countries of destination.

The information provided below represents the full data set provided by IIE/Open Doors comparing metropolitan areas of origin for students which choose Ireland and the other five top European destinations.

Table A4-2: Top 6 European destinations by top 20 metropolitan areas sending U.S. students abroad for academic Credit, 2015/16

Metropolitan Areas	U.K.	Italy	Spain	France	Germany	Ireland
Boston-Cambridge-Newton, MA-NH Metro Area	1,932	1,325	1,254	599	420	512
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metro Area	1,200	1,372	695	354	261	376
New York-Newark-Jersey City, NY-NJ-PA Metro Area	2,737	2,973	1,089	1,585	644	360
Los Angeles-Long Beach-Anaheim, CA Metro Area	2,065	1,211	1,053	770	646	336
Pittsburgh, PA Metro Area	349	558	240	134	140	266
Washington-Arlington-Alexandria, DC-VA-MD-WV Metro Area	925	843	794	422	221	244
Providence-Warwick, RI-MA Metro Area	339	662	349	173	168	147
Minneapolis-St. Paul-Bloomington, MN-WI Metro Area	577	477	377	155	136	136
Atlanta-Sandy Springs-Roswell, GA Metro Area	310	326	361	775	177	135
Chicago-Naperville-Elgin, IL-IN-WI Metro Area	655	706	616	445	276	119
San Francisco-Oakland-Hayward, CA Metro Area	489	323	371	299	92	118
Columbus, OH Metro Area	606	146	220	62	122	94
Seattle-Tacoma-Bellevue, WA Metro Area	312	473	335	126	70	79
Ann Arbor, MI Metro Area	208	212	409	188	214	71
Cincinnati, OH-KY-IN Metro Area	298	337	285	188	136	65
Dallas-Fort Worth-Arlington, TX Metro Area	486	568	370	203	158	65
College Station-Bryan, TX Metro Area	156	316	328	107	332	53
Austin-Round Rock, TX Metro Area	536	362	764	331	113	51
Durham-Chapel Hill, NC Metro Area	484	217	321	159	98	49
San Diego-Carlsbad, CA Metro Area	421	374	586	216	203	43

Source: IIE Open Doors 2017 – special analysis

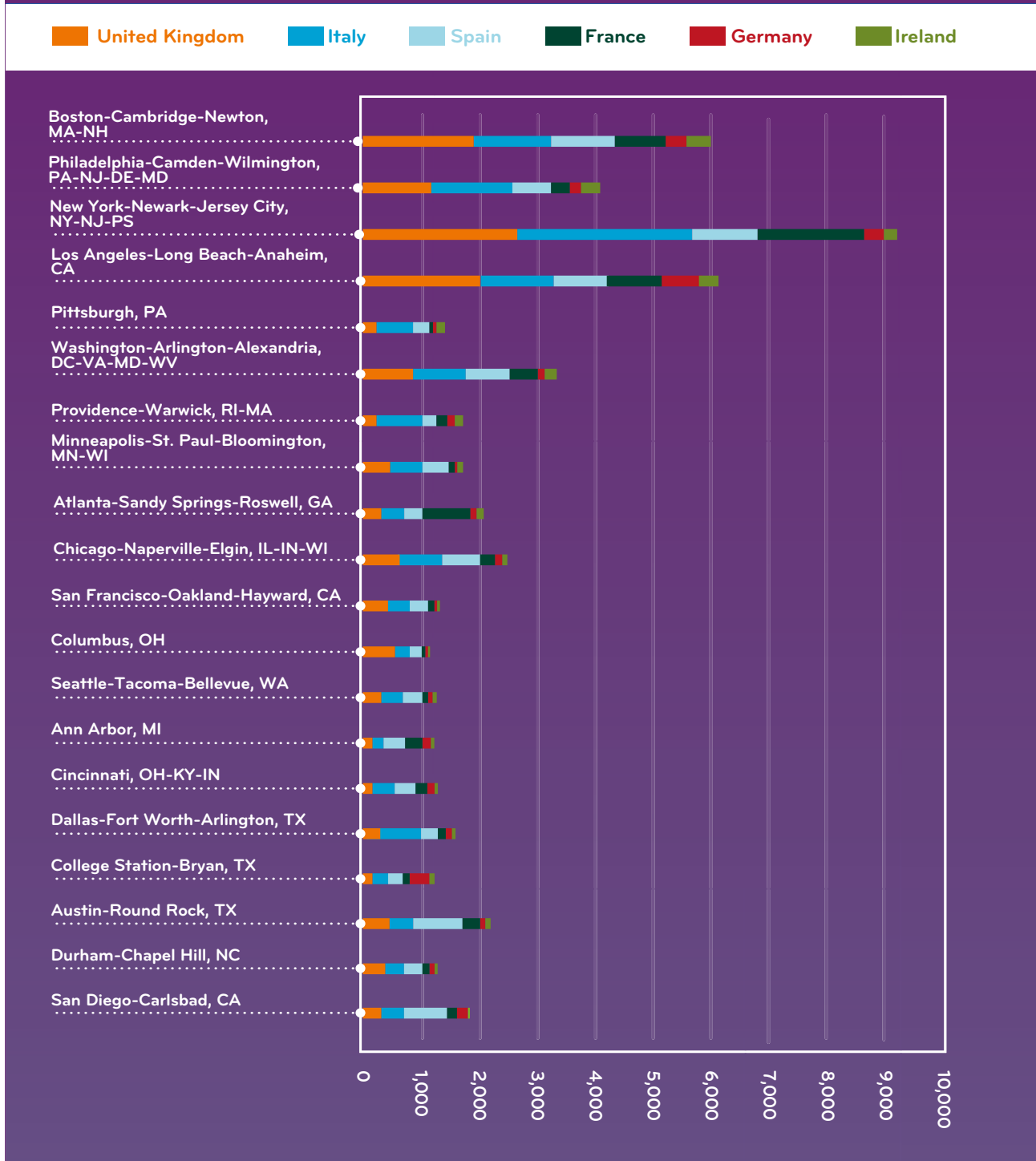
Table A4-3: Top 6 European Destinations by top 20 metropolitan areas sending U.S. students abroad for academic credit 2010/11

Sorted in descending order by Ireland

Metropolitan Areas	U.K.	Italy	Spain	France	Germany	Ireland
Boston-Cambridge-Newton, MA-NH Metro Area	1,553	1,175	1,035	901	416	419
New York-Newark-Jersey City, NY-NJ-PA Metro Area	1,488	2,217	861	1,066	336	263
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metro Area	1,232	1,187	555	477	144	243
Chicago-Naperville-Elgin, IL-IN-WI Metro Area	438	853	502	557	257	156
Washington-Arlington-Alexandria, DC-VA-MD-WV Metro Area	929	714	698	557	185	145
Providence-Warwick, RI-MA Metro Area	299	742	369	232	143	145
Los Angeles-Long Beach-Anaheim, CA Metro Area	1,805	966	898	574	426	131
Minneapolis-St. Paul-Bloomington, MN-WI Metro Area	472	485	285	174	79	128
Seattle-Tacoma-Bellevue, WA Metro Area	285	471	233	161	61	118
Pittsburgh, PA Metro Area	328	414	257	168	111	111
Columbus, OH Metro Area	350	161	129	90	142	97
College Station-Bryan, TX Metro Area	69	162	298	99	166	74
San Francisco-Oakland-Hayward, CA Metro Area	345	388	292	306	95	72
Cincinnati, OH-KY-IN Metro Area	362	256	207	193	124	55
Atlanta-Sandy Springs-Roswell, GA Metro Area	316	284	283	466	125	46
Ann Arbor, MI Metro Area	138	210	278	122	200	32
Austin-Round Rock, TX Metro Area	331	248	416	341	70	27
Durham-Chapel Hill, NC Metro Area	316	285	326	114	72	21
San Diego-Carlsbad, CA Metro Area	294	218	415	150	137	17
Dallas-Fort Worth-Arlington, TX Metro Area	331	397	256	146	66	13

Source: IIE Open Doors 2017 – special analysis

Figure A4-1: Top 20 sending metropolitan areas for U.S. students in Ireland 2017



Source: IIE Open Doors, special analysis for Ireland, 2017

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