



Australian Government

Department of Education and Training

International Student Survey 2014

Overview Report

April 2015



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ISBN

978-1-76028-136-6 [PDF]

978-1-76028-137-3 [DOCX]



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The document must be attributed as the *International Student Survey 2014 Overview Report*.

Introduction

This report documents research into the experiences of international students studying in Australia. The survey sought responses from international students studying onshore in the higher education, vocational education and training (VET) and English Language Intensive Courses for Overseas (ELICOS) Students sectors, using the International Student Barometer (ISB) survey instrument. A separate survey instrument was used to seek responses from international students aged 16 years or over studying in Australian secondary schools in years 11 and 12.

The 2014 International Student Survey (ISS) follows equivalent surveys conducted in Australia in 2012 and 2010. This 2014 overview report focuses on the satisfaction levels reported by respondents against a number of key indicators. In addition, high-level comparisons are made with 2014 international benchmarks obtained from use of the ISB survey instrument in other major destination countries for international students. Hence the report not only provides information about international students' experience in Australia, but also how their experience compares to international students studying elsewhere in the world.



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List of Acronyms

AQF	Australian Qualifications Framework
CRICOS	Commonwealth Register of Institution and Courses for Overseas Students
ELICOS	English Language Intensive Courses for Overseas Students
ISB	International Student Barometer
ISS	International Student Survey
VET	Vocational Education and Training, comprising both public and private providers



Executive Summary

In 2014, the Department of Education and Training, in collaboration with peak education bodies, as well as state and territory government education departments, finalised a national survey of international students in Australia to obtain information about their living, learning and support experiences here. The survey instrument for higher education, vocational education and training (VET), and English Language Intensive Courses for Overseas Students (ELICOS) sectors was the International Student Barometer (ISB). Use of this tool enables Australia's results to be compared against benchmarks of the experience of international students in major study destinations throughout the world. A separate survey instrument was developed for Australian schools as an ISB-equivalent survey instrument was not available for international school students.

The 2014 International Student Survey (ISS) poses questions regarding aspects of student life including learning opportunities, aspects of living in Australia and question about support for students both on arrival and throughout their time in Australia. It also seeks information on why students chose to study in Australia.

As noted this same survey was conducted in 2012 and 2010 thus allowing comparisons across time. Throughout this report, where appropriate, comparisons are made across the survey years.

The 2014 ISS attracted 55,609 responses across tertiary sector from a total of 205,499 international students studying in participating institutions representing 27% response rate overall.

Results of the 2014 survey once again confirmed that a high percentage of international tertiary students (88%) were satisfied or very satisfied with their overall experience in Australia. This result compares favourably to the findings in the 2012 and 2010 survey (87%, 86% respectively). Australia was the first choice destination for 73% of higher education participants and 80% of VET participants. It was also the first choice for 72% of ELICOS students and for 71% of respondents in the schools sector.

The key findings of the 2014 survey of international tertiary students included:

- The reputation of Australian institutions and the quality of teaching/research along with personal safety (93% each) are the main factors for why students chose Australia over other international destinations.
- 88% of international student respondents continue to be satisfied' or 'very satisfied' with their overall experience in Australia (87% in 2012, and 86% in 2010).
- 89% of international student respondents continue to be 'satisfied' or 'very satisfied' with living in Australia (88% 2012, 86% 2010).
- 87% of international student respondents continue to be 'satisfied' or 'very satisfied' with their study experience in Australia (86% 2012, 84% 2010).

The top five factors that influenced international higher education respondents' choice to study in Australia were found to be:

- Reputation of chosen qualification (95%)

- Reputation of chosen institution (94%)
- Reputation of Australia’s education system (93%)
- Personal safety (92%)
- Quality of research and teaching at chosen institution (91%).

Responses from school students indicated higher satisfaction in all categories in this survey compared to the 2012 survey. In 2014, 82% of all respondents in the schools sector were satisfied with their overall school experience in Australia. This was a considerable increase from satisfaction levels in the 2012 survey that were only at 74%. Possible reasons for this increase in satisfaction are discussed under the specific categories measured. Eighty-one per cent indicated that they were satisfied with their living experience while 77% considered the teaching at their school to be either good or very good. Seventy four per cent were ‘satisfied’ or ‘very satisfied’ with the support services provided to them.

The response rate in all sectors was similar to previous survey years, ranging from 24% in the higher education sector to 64% in the ELICOS sector.



Table 1: Summary of 2014 International Student Survey Results

Satisfaction with learning	2014 survey	2012 survey	2010 survey
Higher education (public and private combined)	86%	85%	84%
VET (public and private combined)	86%	87%	85%#
ELICOS	89%	91%	86%
<i>Total tertiary</i>	87%	86%	84%
ISB index for higher education*	87%	86%	86%
ISB index for VET*	88%	Not available	Not available

Satisfaction with living	2014 survey	2012 survey	2010 survey
Higher education (public and private combined)	89%	88%	86%
VET (public and private combined)	90%	89%	88%#
ELICOS	90%	89%	86%
<i>Total tertiary</i>	89%	88%	86%
ISB index for higher education	88%	86%	86%
ISB index for VET	89%	Not available	Not available

Satisfaction with overall experience	2014 survey	2012 survey	2010 survey
Higher education (public and private combined)	88%	87%	86%
VET (public and private combined)	86%	87%	84%#
ELICOS	88%	87%	81%
<i>Total tertiary</i>	88%	87%	86%
ISB index for higher education	89%	88%	88%
ISB index for VET	89%	Not available	Not available

#The 2010 survey published the information collected from public VET respondents only.

**International benchmarking with the ISB index is only provided for higher education and VET where large numbers of respondents could provide statistical validity.*

About the report

Background

Australia has long been a destination of choice for international students. In 2014, over 450,000 international students were welcomed to our shores¹. International students studying and living in Australia benefit Australia's economy and culturally enrich our education institutions and the wider community. Clearly, this group's satisfaction with studying and living in Australia is of interest. To measure how international students perceive our education system, the Department of Education and Training has supported a series of international student surveys to gain a greater understanding of the experiences of international students studying in Australia.

Objectives

One of the principal objectives of these surveys is to obtain information on the perceptions current international students have about their living and learning experience in Australia. This information provides government and the international education sector with valuable indicators of how well Australian education institutions are meeting the expectations of international students and how resources might best be directed to improve student satisfaction. In addition, the use of the International Student Barometer (ISB) survey instrument in the International Student Survey (ISS) allowed comparisons to be made against responses from international students studying in other countries. Furthermore, the use of the same survey instrument over time enables reliable comparisons between past and present, indicating if Australian institutions are improving their performance in delivering a positive studying and living experience for international students.

The value of the ISS series is recognised by peak education bodies and key stakeholders in Australia.

- Universities Australia released *Making the Most of Your International Student Barometer Data: A Guide to Good Practice*, to inform its members how to use the survey data to improve their practice.
- TAFE Directors of Australia released *Australian TAFE Guide to Recruiting and Supporting International Students* based upon findings from past surveys.
- English Australia released *Maximising the ELICOS Student Experience*, a practical guide to using survey data for marketing, administering, teaching and supporting ELICOS students.
- State and territory education departments, private sector peak bodies and participating schools receive local-level survey data to inform policy development and enhance practice.

¹ Department of Education and Training, [Research Snapshot on International Student Numbers 2014](#), March 2015.

Scope

The scope of the 2014 survey was all international students who were:

- on a student visa and studying in Australia at a Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) registered provider in higher education, vocational education and training (VET) or English Language Intensive Courses for Overseas Students (ELICOS) institutions during late 2013 to mid-2014.
- on tourist or working holiday maker visas and studying ELICOS in the same period.
- aged 16 years or over, in years 11 and 12, studying in CRICOS-registered Australian secondary schools with more than five international student enrolments.

As the voluntary survey was conducted online, it was restricted to international students with email contacts.

The higher education survey received 39,558 student responses from 78 public and private providers. Around 167,000 international students were studying at the participating institutions during the survey period, indicating a 24% response rate of participants.

The VET survey received 5,397 student responses from 52 public and private providers in Australia. Around 22,000 international students were studying at the participating providers indicating a 25% response rate.

The ELICOS survey received 10,654 student responses from 49 English language colleges across Australia. During the survey period, around 16,600 international students were studying at the participating ELICOS providers, indicating a 64% response rate.

The schools survey received 1,225 student responses from 137 participating schools, representing a response rate of 49%.

Research methodology

The 2014 survey was conducted using ISB, developed by the United Kingdom based consultant International Graduate Insight Group (or 'i-graduate'). The ISB was designed specifically for international students and enables key satisfaction indicators to be benchmarked against equivalent indicators measured in other countries.

The 2014 survey sought respondents' views on a variety of issues relating to their stay in Australia including how satisfied they were with various aspects of their living and learning experience. The degree of satisfaction was calculated on a four point scale with the categories 'satisfied' and 'very satisfied' generally being combined to provide one figure for 'satisfaction'. Similarly, 'important' and 'very important' as well as 'useful' and 'very useful' were combined to produce one measure.

The schools survey had a five point 'satisfaction' scale which included the option 'neither satisfied, nor dissatisfied'. For reasons such as this direct comparison between schools with other sector data presented in this report cannot be made.

International students were invited to participate in the survey via e-mail. They were able to complete the online survey questionnaire by following a hyperlink included in the invitation letter. Students were offered incentives to respond, with a cash prize draw, as well as a range of options for charitable donations.

Responses were collected and collated by i-graduate and subsequently analysed for consistency and validity by the Department of Education and Training. As in previous years, the higher education and VET surveys were conducted in English while the ELICOS sector survey was conducted in 11 different languages. The schools survey was conducted in English and four other languages.

The 2014 survey questionnaire for school students closely followed that used in the 2012 and 2010 surveys for schools and was made available both online and in hardcopy.



Key Findings

Overall satisfaction

In 2014, the large majority of international students indicated that they were satisfied with their learning and living experience in Australia.

In the 2014 International Student Survey (ISS), 88% of tertiary respondents were satisfied with their overall experience of international education in Australia, 89% were satisfied with their living experience and 87% satisfied with their learning experience. These very positive figures are similar to previous years findings, suggesting that Australia has maintained a sound global reputation as a quality destination for international tertiary students. Nonetheless, the survey indicates areas where further improvements can be made, as noted in the relevant sections of this overview report.

Satisfaction levels for respondents in Australia were very similar to other international tertiary students around the world who responded to the 2014 International Student Barometer (ISB) survey in other countries. Australia was above the international benchmark in living experience suggesting that the ongoing effort put into improving international students' experiences in Australia is having a positive impact.

The findings of this survey also indicate that Australian marketing strategies to attract international students are working. Nonetheless, international education is a globally competitive area and lessons learned from this survey will help Australia to position itself even better in the coming years.

Higher education

The higher education sector respondents were comprised of students from both public and private higher education providers. China (25%) and India (7%) were the top two nationalities of respondents in higher education. Results of the 2014 survey indicate that students' satisfaction with their experiences in Australia is increasing, with 89% of international students in this sector stating they were satisfied with their living experience (compared to the 88% in 2012 and 86% in 2010) and 86% with their learning experience (85% in 2012 and 84% in 2010). These results suggest Australia continues to be a positive destination for international students.

When compared to international benchmarks, international students in Australia were more satisfied with their living experience (ISB 88%) and nearly as satisfied with their learning experience (ISB 87%).

Vocational education and training (VET)

As with the higher education sector there were also positive findings in the VET sector. Responses again came from students enrolled at both public and private providers. China (33%) and Nepal (7%) were the top two nationalities of respondents in VET.

High satisfaction results suggest that the sector continues to listen and be responsive to student needs. The satisfaction levels reported by 2014 ISS respondents in this sector indicated a high level of satisfaction with living and learning in Australia. Ninety per cent were satisfied or very satisfied

with their living experience (89% in 2012 survey) and 86% were satisfied with their learning experience compared to 87% in 2012 survey.

The global ISB benchmark figures for VET in 2014 were similar as follows: overall experience satisfaction of 89%, living 89% and learning 88%.

English Language Intensive Courses for Overseas Students (ELICOS)

The top two nationalities of respondents in ELICOS sector were China (33%) and Brazil (14%). A substantial 90% of ELICOS respondents to the 2014 ISS indicated that they were satisfied with their living experience and up when compared to the 89% in 2012 and 86% from 2010, while 89% reported that they were satisfied with their learning experience. These positive outcomes are welcome as this cohort often goes onto further study, with the majority studying English as a means of advancing their opportunities for further education. These findings suggest that their first contact with Australia's education system was a very positive one.

Secondary schools

China (56%) remained the top nationality of respondents in the schools sector. Nine per cent respondents were from Vietnam. In the schools sector, positive trends are also evident with a strong increase in satisfaction this year. Eighty-one per cent of school respondents reported they were satisfied with their living experience in Australia. This satisfaction level has increased significantly over the 2012 satisfaction for living experience, which was reported at 72%.

It is interesting to note that 76% of school respondents reported an intention to gain entry to an Australian tertiary institution.

Seventy-seven per cent rated the teaching at their school as either good or very good (up from 69% in 2012). Again, satisfaction with this category has increased significantly from the previous survey in 2012, indicating teaching and learning methods are being employed which takes into account international students specific needs.



Satisfaction with learning in Australia

Australia has a reputation of delivering high quality education. In 2014, satisfaction with learning in Australia is very high across all sectors and survey findings indicate that these levels were on par with international benchmark figures. Respondents in all three sectors reported high levels of satisfaction with learning, 86% for higher education (ISB 87%), 86% for VET (ISB 88%) and 89% for ELICOS.

When the overall learning experience is evaluated, 87% of tertiary respondents in the 2014 ISS indicated that they were satisfied or very satisfied with their overall learning experience in Australia. The indicator for higher education is up slightly from the 2012 and 2010 surveys, which both reported satisfaction levels of 86%.

Both ELICOS and school students report that studying in Australia is a stepping-stone to further education. These high satisfaction ratings would indicate a positive outcome in terms of students continuing study in Australia.

In line with the other ISS results, there was little variation across the sectors in relation to elements associated with *'teaching'* that were included under the broad *'learning satisfaction'* category. For example, survey respondents reported high satisfaction levels for *expert lecturers, course content, and resources such as libraries/laboratories* all of which recorded ratings in the high 80% and low 90% range across all the sectors. These findings indicate a well-developed sector that has the resources required to help student achieve at a high level. They also indicate the sectors have adjusted teaching methods to consider the learning needs of international students, for whom English is a second language.

There was a similar finding for *learning support* where the ELICOS sector (92%) achieved the highest rating in this element followed closely by the VET sector at 90% (ISB 91%), and the higher education sector at 89% (ISB 89%). Again, these high levels of satisfaction may be the result of providers responding effectively to student needs identified in previous surveys.

As in the two previous surveys lower satisfaction levels were reported by the 2014 respondents from the higher education and VET sectors in respect of items related to employment, in particular *work experience, career advice and employability*.

The VET sector gained the highest satisfaction levels for both *work experience* (78%) and *careers advice* (78%), although both these ratings were below the international benchmark which was 80% for both *work experience* and *careers advice*. Students in the higher education sector reported 65% satisfaction for *work experience*, and 68% for *careers advice*. This can be compared with the ISB benchmark of 68% for *work experience* and 72% for *careers advice* in this same sector.

The higher levels of satisfaction reported by VET students may be a result of there being more structured opportunities for work-integrated learning in VET courses compared with higher education courses. The question about *careers advice* focused on the students' plans after graduation.

Another related item where there continues to be variation in satisfaction levels between the sectors was *employability*, which recorded 76% for higher education and 84% for VET. These findings were in keeping with the 2014 ISB benchmark for these categories being 78% for higher education and 84% for VET. The different responses may reflect different student aspirations, where VET students are seeking an immediate path to a vocation, while higher education students early in the program may be less focused on such an outcome.

In respect of international postgraduate research students, respondents reported high satisfaction levels for *managing research* 91%, (slightly up from 90% in 2012 survey response) and the satisfaction level for *topic selection* 91%, up from 88% in the 2012 response. Both these 2014 scores exceed the equivalent ISB benchmarks, which were 89% and 88% respectively. These findings suggest Australia's higher degree programs are well structured and supported. However, as found in previous surveys, for *opportunities to teach*, respondents reported low satisfaction, of 64% in 2014 a further drop from the 2012 survey (67%) and lower than the 2014 ISB benchmark of 75%.

An examination of the responses provided by international students in relation to those elements associated with '*support services*' grouped under the '*learning satisfaction*' category reveals high levels of satisfaction with these elements. Areas such as *learning spaces*, *learning support*, and *language support* recorded ratings in the high 80% to low 90% across all sectors.

In relation to *technology* in learning, satisfaction levels were once again consistent across the sectors with higher education student satisfaction at 89% (up from 87% in 2012 and from 81% in 2010), while VET satisfaction was 86% (consistent with 86% in 2012 but up from 82% in 2010). The 2014 ISB benchmark for *technology* in both higher education and VET sectors was 89%. In the ELICOS sector student satisfaction in this area was 90% up from 86% in 2012 and 81% in 2010.

Across all sectors respondents reported positively when asked to rank how satisfied they felt about *studying with people from different cultures*. For the VET sector this was reported at 92% and 90% for both ELICOS and higher education. These findings suggest that as a multicultural society Australia has much to offer and can effectively present itself to the world as possessing a highly internationalised education system.

Prior to coming to Australia and starting their studies, school sector respondents considered their spoken and written English to be either good or very good (25% and 23%, respectively). The proportion of students reporting their spoken and written English to be good or very good at the time of the survey had increased to 52% and 44% respectively. Seventy-seven per cent of all respondents from the schools sector indicated that the *teaching* they had received was either good or very good with a further 20% rating their experience as average.

This survey indicated learning satisfaction levels in all sectors are high and very positive. Although not specifically addressed in the survey, the ease at which students can follow pathways of study means many respondents may be reflecting upon their overall study experience in Australia, rather than just the specific sector they were studying in at the time of the survey. For example, 41% of VET students, 47% of ELICOS students and 80% of school students reported that they were on a pathway to further study in Australia.

Satisfaction with support on arrival

Arriving in a new country where you may experience language difficulties can be daunting. This category measures specific support on arrival and findings indicate this is a category where Australia is world class.

Feeling welcome provides individuals with a sense of support and acceptance. Tertiary respondents reported a satisfaction rating of 91% with overall support on arrival. This was above the international benchmark for higher education and VET sectors. This is an important satisfaction indicator, as commencing with a good experience reduces the fear of the unknown allowing individuals to feel safe and to focus on study.

Australian tertiary institutions gain from the presence of international students. First experiences are important. As the industry has matured providers have placed a good deal of effort into helping students transition to life and study in Australia and this is being reflected in the positive satisfaction ratings in this category.

[Only those students who had started their first year or short program higher education or VET course were asked to complete the questions relating to satisfaction with support on arrival.]

The majority of the elements measured in *support upon arrival* recorded high levels of satisfaction across the sectors.

Managing the complexity of foreign currency and banking in general can be quite confusing in a new environment. Spending time and energy on these matters can distract from more important activities. Thus, it is a very positive outcome to see that for higher education respondents to the 2014 survey, support and advice regarding *bank accounts* and the *finance office* assistance both received satisfaction ratings of 90%. Other arrival support factors such as *formal welcome*, *internet access*, *support of friends* all received an 88% satisfaction rating. These are similar to the responses in the 2012 survey, which reported the following satisfaction levels, *bank account* (93%) and *formal welcome* (88%).

Areas of dissatisfaction in the higher education sector were *host friends* (69%, ISB 74%) *local orientation* (77%, ISB 86%) and *meeting staff* (79%, ISB 91%). More programs designed to bring domestic and international students together when creating opportunities for meeting staff and at formal orientation events would help in international student orientation since their fellow Australian students could also play a role in helping them understand the context of an Australian education institution. 'Buddy' programs between continuing students and new students may be valuable in assisting international students transition into a new environment and culture, as well as expanding their circle of friends.

In the VET sector comparison between the years indicates a continued improvement in areas such as *accommodation office* (93% in 2014, compared with 91% in 2012 and 77% in 2010) and *welcome/pickup* (86% in 2014, 86% in 2012 and 79% in 2010). The ISB in these areas was 89% and

84%, respectively, thus indicating a positive result for Australia. Comparison with the 2010 survey results is made reservedly as the 2010 survey only included public sector VET students.

Satisfaction levels in areas such as *meeting staff*, *finance office* and *registration* all scoring 91% or over and were on par with the VET ISB benchmark figures for 2014. VET survey respondent satisfaction with elements of *support on arrival* generally exceeded the ISB benchmarks.

In the ELICOS sector the following categories scored above 90% satisfaction from the 2014 respondents, *registration*, *meeting staff*, *school/centre welcome and orientation*, and *formal welcome*. Certainly the ELICOS sector is smaller than the higher education and VET sector and may facilitate more contact between providers and students. Satisfaction levels suggest this is the case.

The overwhelming majority of respondents in the schools sector who had used arrival support services found the services useful or very useful, including *airport pick-up* 93% (down from 97% in 2012), and *orientation program* 94% (up from 91% in 2012).

However, as in previous surveys, many respondents were unaware of *airport pick up services* (48%) and *orientation programs* (51%). This mirrors a key finding from the 2012 and 2010 survey that although students are generally very satisfied with the support services they receive, large proportions of students were not aware that such support services were available to them. This finding suggests that more effort is needed to bring these services to the attention of international students.



Satisfaction with living in Australia

The 2014 survey again demonstrates international students see living in Australia from a very positive perspective. Eighty-nine per cent of tertiary respondents were satisfied or very satisfied with living in Australia. This level of satisfaction was higher than that reported in 2012 (88%) and up from the 86% reported in 2010.

Satisfaction levels differed between the sectors with higher education reporting 89%, VET reporting 90% and ELICOS also reporting 90%. All of these satisfaction levels have increased compared to 2012 where the levels were 88% for higher education, 89% for VET, and 89% for ELICOS. Satisfaction also increased from the 2010 survey, which indicated levels of 86% for higher education, 88% for VET (public VET only), and 86% for ELICOS.

However, the same categories, *cost of accommodation* and *earning money*, continue to indicate lower satisfaction levels. *Accommodation costs*, *living costs*, *earning money*, and *financial support* all scored lower satisfaction levels across the sectors with a range of mid 60% to as low as 49%.

In the higher education sector, the overall satisfaction levels closely aligned with those recorded by participants in the ISB (88%). For Australia, aspects such as *campus environment*, *good place to be*, *eco-friendly attitude* and *safety* all scored above 90% satisfaction.

Satisfaction with *living cost* and *accommodation cost* were down from the 2012 survey, where it was rated at 51% for both categories; in 2014 it scored 50% and 49%, respectively. The 2010 survey rated satisfaction of *living costs* at 61% and *accommodation costs* at 60%. These satisfaction levels could be reflective of the cost of living in Australia compared with home countries for international students. When the information regarding where students reside is broken down, in all categories over 47% of international students are living in private accommodation.



Tables 2 and 3 outline where international students live as reported in the 2014 survey.

Table 2: Tertiary Respondents Accommodation Choices

Accommodation	Higher education	VET	ELICOS	Total tertiary
Friends or relative	20%	33%	18%	21%
Private halls or student hostel	4%	1%	3%	3%
Private rented house/flat/room	55%	47%	51%	53%
Staying with host family	4%	10%	21%	8%
Student house or flat controlled by university	1%	1%	2%	1%
University or College Halls of Residence	11%	4%	4%	9%
Other	6%	5%	2%	5%

(Base: 54,397 respondents)

Table 3: School Respondents Accommodation Choices

Accommodation	Total
Relative/other family member	32%
Boarding school or equivalent	17%
Staying with host family	39%
Other	12%

(Base: 1,225 respondents)

Earning money in the higher education sector was another element where some variation existed between the ISS and ISB participants with ISS respondents in 2014 reporting a satisfaction level of 53% which is better than the ISB rate of 46%, but less than the satisfaction reported in 2012 (62%) and less than the satisfaction reported in 2010 (59%). *Financial support* as noted above reported relatively low satisfaction ratings in the higher education sector of 54% compared to 65% in 2012 and 2010. However, Australia's respondent satisfaction is above the 2014 ISB which was just 52%. Again, language difficulties may make it more challenging for international students to obtain part time work.

For the VET sector the same areas, *good place to be*, *campus environment*, *safety*, and *eco-friendly attitude* all scored satisfaction ratings of 90% or above. Satisfaction levels for *living costs*, *accommodation costs*, *financial support* and *earning money* all scored in the mid 60%, which is higher than the higher education cohort and around the same as the ISB for VET. However satisfaction with *financial support* (69%) and *earning money* (68%) were rated lower in 2014 than in the 2012 survey where the satisfaction levels were 77% and 75% respectively.

The ELICOS sector satisfaction ratings were again similar to the other sectors. *Good place to be*, *campus environment*, *safety*, and *eco-friendly attitude* all scored satisfaction ratings around 90%. The areas with low satisfaction also remained constant with *earning money* and *accommodation costs* scoring 58% and 56% respectively, whereas *living costs* scored 54%. These results are similar to data collected in the 2012 and 2010 surveys.

As shown in Table 4, the importance of working while studying was high for higher education and VET students and moderate for ELICOS students, who are generally studying intensive short courses and may wish to enhance their English proficiency ahead of seeking work. The lower proportions of students actually working in higher education and VET, compared with the proportions who value work, suggests a degree of unmet demand for work.

Table 4: Employment Opportunities

Earning money	Higher education	VET	ELICOS
In paid work directly related to field of study* (Base: 37,787 respondents)	12%	37%	N/A
In paid work NOT directly related to field of study* (Base: 37,765 respondents)	24%	50%	N/A
How important was working while studying a factor when deciding where to study* (Base: 18,730 respondents)	76%	87%	N/A
How important was being able to work in this country following completion of studies (Base: 28,189 respondents)	78%	83%	67%

* ELICOS respondents were not asked these questions. 16% of 10,654 ELICOS respondents reported that they were working part-time during their studies.

As noted above, ELICOS students were not asked as many questions about employment as students in higher education and VET. However, 16% of ELICOS students did report that they were working part-time while they were studying.

Another element under the *living satisfaction* category that recorded relatively low levels of satisfaction across the sectors was *making friends (host country)* with the higher education scoring 69% compared to 74% in the ISB, 80% for VET (ISB 81%) and 73% for the ELICOS sector.

Although satisfied with *internet access* upon arrival, when this aspect is viewed as part of general living satisfaction, access had relatively low satisfaction scores for both higher education and ELICOS students. Higher education sector satisfaction was 76%, (ISB 81%) which was similar to other survey years of 77% in 2012, and 75% in 2010. The ELICOS sector reported a satisfaction level of 73% in 2014 which was down from 76% in 2012 but up from 67% in 2010. The VET sector satisfaction ratings for this category continue to be consistent with the 2014 rating being 83% similar to the 2012 rating of 83% and the 2014 ISB rating of 84%. The question related to this satisfaction merely asks for '*satisfaction with Internet access at my accommodation*'. Cost may be a factor in satisfaction with *internet access*, as well as internet speed. Without a more thorough question there is not enough information in the ISS to delineate why students are not satisfied.

Eighty-one per cent of all schools sector respondents indicated that they were satisfied with living in Australia. As in the other sectors, satisfaction with *safety* was high at 80%. However, only 39% were satisfied with *living costs* and only 48% were satisfied with opportunities for *finding part time or casual work*, with 25% of the school survey cohort reporting that they had gained part-time work.

Eighty-six per cent of international school student respondents indicated they would like to have made more Australian friends. This is similar to the 2012 survey findings and also similar to the experiences of tertiary students outlined above. While 64% of all schools sector respondents indicated that they had made an effort to make friends with Australian students, 39% felt that Australian students were not interested in interacting more with international students and 45% thought that their English ability was a barrier to making friends with Australian students.



Satisfaction with support services

Support services are facilities that make challenging situations better. These include a range of services such as health and disability services, ability to access food outlets on campus to IT support.

As in similar surveys, satisfaction with support services continues to be high across the sectors. In the higher education sector 89%, were satisfied or very satisfied with support service in the 2014 survey similar to the 2012 survey response of 88%. This was up from the 2010 satisfaction of 86%. In the higher education sector Australia was just slightly below the ISB in 2014, which was 90%.

The overall satisfaction in the VET sector was 87% with the ISB benchmark being 89%. The 2014 satisfaction level in this sector was similar to the 2012 survey finding of 87%. In the ELICOS sector satisfaction with overall support is ranked very high at 92%. This is higher than the 2012 survey rating of 83%.

Throughout Australia support services are normal aspect of our tertiary community. They are well utilised by domestic students, and the satisfaction ratings suggest they are also used by International students. In times of fiscal restraint the satisfaction levels in this category suggest these services should not be seen as a luxury but as a necessary part of assisting students to reach their potential.

[Information about how satisfied students were with the various support services offered by education providers was sought from those respondents who had indicated they had used such services.]

The survey findings in this section are similar to the findings in the *living in Australia* section as many of the support services related directly to living satisfaction. Where appropriate more analysis of several of these aspects is found in the *living in Australia* section of this report.

Support services included areas such as *disability support, health centre, student advisory and faith provision*. All of these services recorded ratings in the mid to low 90% in both the higher education and VET sectors. These high satisfaction ratings reflect the extent of services Australia has in place for all students and indicates that international students particularly value them. In many Australian institutions these services are offered in different languages, to further assist international students.

The support service *careers service* was viewed with lower satisfaction levels across the sectors than other support categories. In the higher education sector 83% respondents reported they were satisfied with the service provided. The ISB for this category was 86%. This satisfaction level is down from 2012 in this sector where it was reported at 85%. In the VET sector respondents had satisfaction levels in the 2014 survey of 87% (ISB 89%), also a slight decline from 90% in 2012.

In the area of *counselling services* satisfaction rates were similar to those reported in the 2012 survey with results being higher education 91% (same as 2012), VET 94% (95% in 2012) and ELICOS 82% (80% in 2012). These responses indicate a higher satisfaction with *counselling services* in Australia than the ISB benchmark of 90% for higher education and 92% in VET.

All support services were rated at 80% or above in the higher education and VET sector suggesting respondents were satisfied or very satisfied with providers' efforts in these categories.

Seventy-four per cent of all schools sector respondents reported that they were satisfied with the support services available at their schools (with a further 23% indicating that that they were neither satisfied nor dissatisfied). *Library* (73%) and *English classes* (63%) were the two support services of which most students were most aware. The services that were least well known were *religious support services* (15%), and *clubs and societies* (24%).

The *library* (98% of all schools sector respondents), followed by *student homework/learning centres* (96%), and *international student orientation program* (94%) were considered the most useful services available with *religious support services* (78%) considered the least useful. All other support services that were used scored a usefulness rating of between 84% and 93%. These were similar to the 2012 survey findings, with an improvement in *religious support services* from 65% in 2012 to 78% in 2014. These support services aim to meet specific international student needs and appear to be having a positive impact.



Factors influencing the choice of where to study

Demand for international education is a growing global phenomenon. Presently Australia is the fifth most popular international study destination behind the USA, UK, Germany and France². The top reasons for choosing Australia, identified as important or very important by over 90% of higher education student respondents, were:

- reputation of chosen qualification (95%)
- reputation of chosen institution (94%)
- reputation of Australia's education system (93%)
- personal safety (92%); and
- quality of research and teaching at chosen institution (91%).

In the VET sector the top factors were similar, with reputation of the institution, personal safety and security, reputation of the qualification, reputation of Australia's education system all scoring 93% in the important to very important scale.

For the ELICOS sector *quality of teaching* (97%), *personal safety and security* (95%) and *reputation of the institution* (92%) were all important or very important in study decision choice.

Overall, *Agents, institutional websites and parents* were identified as the most important influences that guided student decisions of where to study.

[Only those students who had started their first year or short program higher education or VET course were asked to complete the questions relating to factors influencing, and helping with, their choice of where to study.]

As noted, *personal safety and security* as a factor influencing where to study ranked very highly by all three sectors (higher education 92%, VET 93%, and ELICOS 95%). This compares with the ISB benchmark of 87% for higher education and 93% for VET.

The high satisfaction with *personal safety and security* follows the efforts of many Australian stakeholders to ensure that international students feel safe and are welcomed into the Australian community.

Over the period 2009-2010, national and international media reported a number of attacks on students from India. This led to an Australian Institute of Criminology report on violence against international students entitled *Crimes Against International Students: 2005-2009*. The report found that over the period 2005-2009, international students were no more likely to be assaulted than the average person in Australia. This investigation was widely publicised to indicate how serious Australia considered this problem. Institutions and providers have also been able to use previous student survey results to reassure the world that Australia remains a safe place to study and the 2014 survey findings suggests this approach has been successful.

² Department of Education and Training Research Snapshot October 2014

In 2014, 50% of higher education respondents reported agents as the major influence on their decision about where to study in Australia. This is higher than previous surveys (was 44% in 2012 and 28% in 2010). This trend suggests education agents have more influence on students who choose to study in Australia than elsewhere and that influence is growing. When asked about the quality of service provided by agents, higher education student responses showed that:

- 90% rated the service they received as good (55%) or very good (35%)
- 93% agreed that the agent provided helpful services for a visa application
- 90% agreed that the agent was well informed about higher education in Australia
- 88% agreed that the agent reduced time and effort needed to complete an application
- 80% agreed that the agent provided helpful pre-departure orientation services.

The top three reasons ELICOS respondents identified for choosing to study in Australia were: *Teaching quality* (97%), *personal safety and security* (95%) and *reputation of the institution* (92%). The ELICOS respondents were influenced by *agents* (63%) and *parents* (25%) followed by *friends* (23%) and *alumni* (22%). These percentages closely align with the findings in the 2012 survey (*agents* 52%, *friends* 25% and *alumni* 21%). These figures also closely align with the 2010 survey responses of *agents* 53%, *friends* 24% and *alumni* 21%. For the VET sector in 2014, 61% of respondents reported that *agents* helped them choose a study destination. Comparable data from earlier surveys was not available.

The five most important factors influencing decisions of all respondents in the schools sector in choosing to study overseas were to:

- improve English (65%);
- gain experience living and studying in another country and/or culture (62%);
- improve chances of entering a good university in Australia (53%);
- improve overall studies (43%); and
- obtain a better quality education than is available at home (40%).

Seventy-one per cent of respondents compared to 70% in the 2012 survey reported that Australia was their first choice for overseas schooling. The top three factors that influenced the choice of country were: *High quality of education* (61%), *safe place to live* (51%), and *live close to beautiful, natural environment* (49%). These factors were consistent with those reported in the 2012 survey.

Forty-five per cent of respondents were influenced in their choice of school by *education agents* closely followed by 43% indicating that they had been influenced by the recommendation of a *friend or relative*. As noted elsewhere in this report, 80% of this cohort want to continue to study which one would expect after completion of Year 12. Given the positive experience in school, it is predictable a large portion of this population will go onto tertiary studies here in Australia.

Table 5 indicates what students plan to do on completion of their study. It indicates over 40% of VET and ELICOS students want to continue studies in Australia, whereas almost a quarter of higher education graduates would like to work in Australia. The table shows that the *other* category received almost 30% and above responses. The addition of more answer options in future surveys may help to gain more useful information from this question.

Table 5: Future Plans

What do you plan to do after your current program of study	Higher education	VET	ELICOS
Employment in Australia	24%	11%	7%
Further study	24%	41%	47%
Employment in home country or other country	14%	3%	7%
Migration	10%	8%	2%
Self-employed*	1%	1%	N/A
Other	27%	36%	38%

**This element was not measured for the ELICOS respondents*

(Base: 48,569 respondents)



Explanatory Notes for 2014 ISS

Comparisons over time and between surveys

The focus of this consolidated report is on high-level indicators. Where survey response rates and scope considerations allow, some comparisons have been made with data collected in the 2012 International Student Survey (ISS) and the 2010 ISS. For higher education and vocational education and training (VET), 2014 international benchmarks were available from the ISB conducted in other countries. The ISB for higher education contains 150,388 student responses from participating universities. The ISB for VET contains 19,588 student responses from participating institutions.

Table 6: Timeframe for the 2014 International Student Survey

Sector	Timeline
Higher Education	April to June 2014
VET	May to July 2014
ELICOS	September to October 2013
Schools	May to August 2014

Table 7: Response Rate for the 2014 International Student Survey

Sector	Number of participating institutions	Number of International student responses received	Estimated number of international students studying at the participating institutions in the survey period (2013-2014)	Response rate
Higher education (public)*	48	38,149	161,432	24%
Higher education (private)	30	1,409	5,547	25%
VET (public)	20	2,391	10,121	24%
VET (private)	32	3,006	11,836	25%
ELICOS	49	10,654	16,563	64%

*Higher education (public) includes all the Australia universities that participated in the survey (regardless of funding source) and other participating public-funded institutions that deliver higher education qualifications.

The schools survey received 1,225 (640 Year 11 and 585 Year 12) student responses from 137 participating schools. This survey response rate was 49% which is calculated by dividing the total number of completed returns received (1,225) by the total number of students for whom a survey ID had been created (2,493).

