International education data gaps: Sector perspectives

Consultation report
June 2018

Table of Contents

1. Glossary

ABS	Australian Bureau of Statistics
ACPET	Australian Council for Private Education and Training
AGSI	Australian Government Schools International
ASQA	Australian Skills Quality Authority
AUIDF	Australian Universities International Directors' Forum
COPHE	Council of Private Higher Education
DET	Department of Education and Training
DHA	Department of Home Affairs
IEAA	International Education Association of Australia
ISB	International Student Barometer
ISCA	Independent Schools Council of Australia
EA	English Australia
ELICOS	English Language Intensive Courses for Overseas Students
MIP	Market Information Package
NCVER	National Centre for Vocational Education Research
OSHC	Overseas Student Health Cover
PRISMS	Provider Registration and International Student Management System
PSWR	Post Study Work Rights
TDA	TAFE Directors Australia
TEQSA	Tertiary Education Quality and Standards Agency
UA	Universities Australia
VET	Vocational Education and Training

2. Executive summary

This community and industry consultation report has been prepared by IEAA, as deliverable six in the project Data Stocktake and Data Gaps Analysis (2017/08a) under the *Australian International Education: Enabling Growth and Innovation* programme. This project sought to gain a provider perspective of the current state of play in international education data.

IEAA undertook a consultation process with the international education sector between October 2017 and April 2018, engaging with almost 200 stakeholders. This included a widely distributed online survey, as well as face-to-face focus groups where providers were asked to share their experiences with using existing data sets, views on opportunities for improvement and where they see critical gaps that would benefit from a coordinated approach.

Key findings

During the consultation process, stakeholders were given the opportunity to provide feedback on eight broad areas of data that measure and evaluate the international education ecosystem. The most commonly cited requests throughout the consultation process concerned:

- Reducing time lags, improving accessibility of existing data sources, especially enrolments/commencements and visa data
- More publicly available data – at more granular levels of detail. For example, more detailed geographical information on particular provinces and states in China, India etc.
- Meaningful benchmarking and standardised performance metrics of existing data. In particular, mobility and student experience to help providers set actionable goals
- Better communicating data on the benefits of international education to the economy, in order to mitigate potential 'bad press' messages around risks and threats
- Improved student outcomes data – longitudinal data, particularly for job outcomes, noting difficulties in capturing and tracking
- Regular and publicly available student mobility data (particularly outbound), including by mode of study.

Overall, the research found that Australian international education data is well regarded within the sector, and generally considered excellent by world standards. However, there are a number of areas of frustration for data users, where even small changes could have a significant impact:

Recommendation 1: Improve awareness and accessibility of international education data
- Establish a single comprehensive repository or portal for all available data sets
- Provide more detailed technical notes and user guides for existing data
- Provide data in more accessible formats

Recommendation 2: Expand data sets where critical gaps or insufficiencies exist
- Improve the timeliness, accessibility and granularity of visa data
- Improve the timeliness, accessibility and granularity of enrolments and commencements data
- Invest in new data sets

Recommendation 3: Increase support for interpretation of existing data
- More closely align the DET and DHA data sets
- Provide more support for analysis of data
- Maintain ongoing dialogue between the sector and data custodians.

Many of the findings presented in this report are not surprising or new. However, they have been gathered from an extensive consultation process with stakeholders across the sector. The findings provide a collective perspective of where the data currently lets education providers down, and where the sector believes there is most urgency and greatest potential impact for coordinated improvements in significant national data sets and national surveys, on a Commonwealth or state and territory level.

IEAA would like to extend its appreciation to those who gave their time to participate in the consultation workshops, interviews and online survey. IEAA acknowledges the support of ACPET, AGSI, AUIDF, COPHE, EA, ISCA, TDA and UA in promoting and participating in the consultation process.

3. Introduction

This consultation report has been prepared as part of project 2017/08a - Data Stocktake and Data Gaps Analysis. The project is supported by the 'Enabling Growth and Innovation' programme under the *National Strategy for International Education 2025*, which is committed to robust and comprehensive measurement of the sector and its component parts (pillar one 'strengthening the fundamentals').

The project consisted of two stages. An initial desktop scan and background paper was prepared in October 2017, which identified current data sources used by the international education sector in eight broad categories and possible areas for discussion with stakeholders. The current report provides the findings and insights from stage two, an extensive consultation process conducted across the Australian international education sector over the last six months. The consultations involved a widely distributed online survey, as well as discussion-based workshops with data users and experts over the period February-April 2018, to calibrate and validate the strength and direction of views collected in the survey responses.

This report presents the collective views from this consultation process. It does not provide insights from individuals, nor present a technical assessment of data sources. Instead, it summarises the consistent themes and messages raised throughout the consultation process. The report assumes readers are familiar with international education data.

4. Background

International education delivers economic, social and cultural value to Australia, generating significant export income and jobs, strengthening global networks, building global citizenship capability in the Australian workforce and enriching the social and cultural vibrancy of local communities. There is considerable data and research available which can be used to measure the size, scale and value of the sector. However, different sources offer complementary perspectives on different pieces of the overall picture, and there are a number of areas where data is imprecise. Limitations exist through gaps in significant data sets, data that is not currently captured and deficiencies in reporting.

International education in Australia is highly responsive to broader social and technological changes. The sector is currently adapting to accommodate growing mobility and demand for education services, increasingly aggressive global competitors, shifting student needs and the changing nature of work. It is therefore critical that the sector more fully understands the outputs and outcomes, to ensure its true value and potential are considered in future policy and business decisions.

To ascertain the current state of play of international education data, the Commonwealth Department of Education and Training (DET) is undertaking an international education data audit. DET engaged IEAA to consult with the sector to determine provider perspectives on the utility of existing data and perceived data gaps.

This project complements a concurrent process of consultation with state and territory governments, being led by DET and Austrade, to inform future data improvements and developments.

5. Consultation scope and objectives

The purpose of the current study was to identify the main areas where education providers feel that international education data lets them down and to inform recommendations for investment in potential improvements that would have the greatest impact for providers.

The main objectives of this project were to identify, from an education providers' perspective:

- The extent to which current available international education data is used
- Critical gaps in data and research in international education
- Priority areas where data is limited or requires improvement
- Opportunities to improve on existing national data sources
- Directions for potential new data sets to collect or report.

To support these objectives, IEAA consulted directly with the international education sector – including data users, data experts and peak bodies – to define and test key issues and concerns relating to sector data. Through this process providers identified the data sources most used, critical gaps and priority areas for improvement. Consultation included representatives from higher education, VET, ELICOS and schools, and focused on publicly available data sources.

6. Consultation overview

Consultation was conducted from October 2017 to April 2018, via an online survey and face-to-face workshops. The consultation aimed to collect feedback that enabled recommendations for improvements that would be both useful and feasible, as opposed to data that is merely 'good to know' or impractical to attain.

6.1 Consultation methodology

The project employed a combination of quantitative and qualitative data gathering methods:

- An online survey consisting of eight questions was designed to allow a broad range of responses that could be gathered and compared from a large number of respondents. The survey was distributed and promoted via the IEAA newsletter, website and social media channels. A link to the survey was also distributed to a broader network via peak bodies (ACPET, AGSI, AUIDF, COPHE, EA, ISCA, TDA) to ensure responses were captured from across the sector.
- To gain a more in depth understanding of the issues and concerns, a series of face-to-face interviews and focus groups were held with selected data experts and industry professionals.

Where necessary, IEAA also approached peak body colleagues (ACPET, AGSI, AUIDF, COPHE, ISCA, EA, TDA) for advice and assistance to identify the most appropriate people from their sectors to be invited to the workshops. Interviews were guided by open-ended questions which sought participants' views on their most frequently used data sources, main frustrations and thoughts on critical barriers and most important areas for improvement.

- Focus groups were held in Adelaide, Brisbane, Melbourne, Perth and Sydney. Sessions were 90 minutes and included a mix of group activities and smaller group discussions. Focus groups were structured and supported by a set of key activities and questions to guide discussion and allow for exploration and clarification where necessary.

The table below summarises the three ways in which the international education sector was involved.

Table 1: Stakeholder engagement and consultation				
Method of engagement	**Consultation period**	**Stakeholders involved**	**Time taken**	**No. of participants**
Online survey	October 2017 – March 2018	Broad IEAA membership and industry professionals	20 mins	118
Face-to-face focus groups	February 2018 – March 2018	International education data users, peak bodies	90 mins	approx. 60
Individual interviews	Ongoing	Data experts, peak bodies, regional perspectives	60 mins	5
				Total= approx. 183

6.2 Participants

Over 180 stakeholders were engaged throughout the consultation process (see table 1) representing data users from higher education, VET, ELICOS and schools. Figure 1 provides a sectoral breakdown. IEAA drew upon its extensive network of members, as well as state and territory governments and peak body colleagues to assist in ensuring that sectors and regions were fairly represented.

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Figure 1: Consultation participants by sub-sector
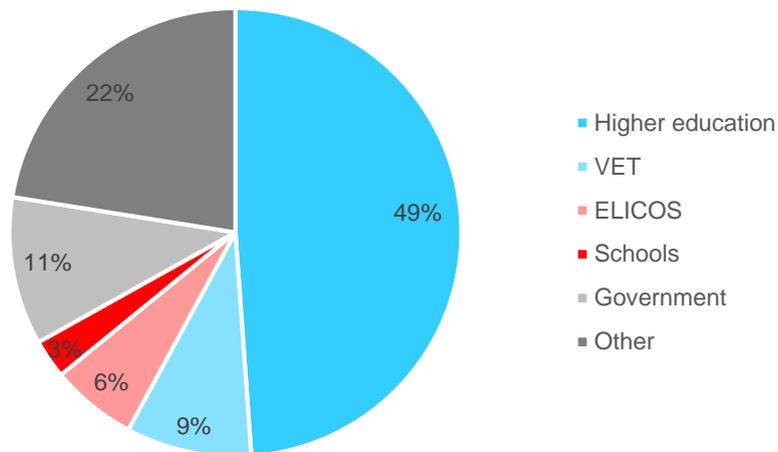
7. Findings

The following section provides an outline of the key themes identified throughout the consultations undertaken. Key themes were defined as commonly cited points or central discussion threads among participants.

7.1 Priority areas for improvement

During the focus groups, respondents prioritised the areas for data improvement discussion, with results shown in figure 2.

Figure 2: Priority areas for data improvements
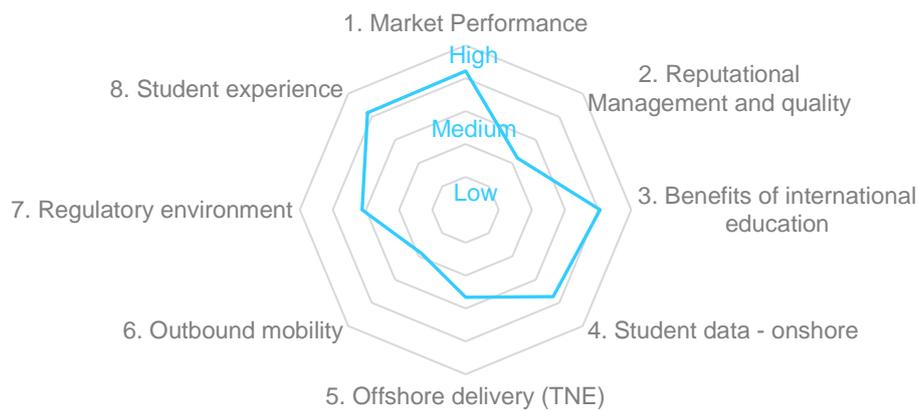
Through the focus groups some high priority areas emerged, where small improvements could have high impact results. In particular, participants believed the most relevant areas for data improvement are market performance, benefits of international education and student experience. This aligned with the results of the online survey. These results may reflect the high proportion of respondents who worked in marketing and recruitment.

7.2 Adequacy of the most commonly used data sources

Based on feedback from the 180+ stakeholders consulted, IEAA has completed a 'traffic light' representation of stakeholders' perceptions of the adequacy of the most commonly used sources, across four dimensions of quality: timeliness, coverage and completeness, accessibility, and interpretability and accuracy (see table 2).

Table 2: Commonly used data sources

Data custodian	Data source	Quality dimensions			
		Timeliness	Coverage and completeness	Accessibility	Interpretability and accuracy
ABS	Education-related travel services • 5368.0.55.003 - International Trade: Supplementary Information, Financial Year • 5368.0.55.004 - International Trade: Supplementary Information, Calendar Year	Strong	Some issues	Strong	Strong
Austrade	Market Information Package (MIP) (3 levels – basic, standard, detailed)	Some issues	Strong	Major concerns	Strong
	MIP country snapshots	Some issues	Strong	Some issues	Strong
	MIP Orbis	Strong	Strong	Some issues	Strong
Department of Education and Training	Higher Education Information Management System (HEIMS) (overseas students/offshore data)	Some issues	Some issues	Some issues	Some issues
	International student data	Major concerns	Strong	Strong	Strong
	International education research snapshots	Strong	Some issues	Some issues	Strong
	International student data visualisations	Strong	Some issues	Strong	Some issues
	PRISMS	Some issues	Some issues	Major concerns	Some issues
Department of Home Affairs	Student visa and Temporary Graduate visa program reports	Major concerns	Some issues	Major concerns	Strong
NCVER	NCVER Total VET Activity	Some issues	Some issues	Some issues	Some issues

Strong | Some issues | Major concerns

Note:
1. Timeliness – refers to the delay between reference period and public release of data and the frequency of data collection
2. Coverage and completeness – refers to the extent to which the data accurately measure the concept/trend/event they are supposed to
3. Accessibility – refers to the capacity of users to identify and access relevant information in a convenient and suitable format. This includes the extent to which data is publicly available; restricted information, paywalls, and formats such as pivot tables and spreadsheets.
4. Interpretability and accuracy – refers to consistency over time and comparability

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7.3 Key findings by category

1. Market performance

Market performance and business intelligence were considered a priority data area for improvement. Providers actively access and analyse currently available data to respond to a rapidly transforming global marketplace.

Key source markets such as China, India, Vietnam and Indonesia are geographically diverse, with different levels of mobility and opportunity depending on the region, state or province students are from. Current data is not provided at this level and does not enable providers to fully understand whether they are under- or over-performing in certain segments or markets.

Equally, more information about the regions that students are choosing within Australia would have a significant impact on understanding delivery needs, as well as provide direction for strategies and services. A state breakdown is available to MIP subscribers, but this is of little use in place-based engagement.

Another key issue cited was the lack of publicly available data and a general lack of awareness of what is available. For example, only basic information can be accessed through the MIP without a paid subscription or special request, so providers require at least the standard level of access to gain any meaningful insights.

The prevailing view was that difficulties in accessing and interpreting data sometimes led to providers making decisions without an adequate evidence base, which can limit their ability to respond to market changes and effectively employ resources for long term results.

Category includes	Global market positioning; demand for international education; market intelligence and competitor insights
Most used data sources	• MIP (enrolments, commencements, country snapshots) • Student visa data
Data limitations	• Enrolments and commencements data is not fully accessible, requires a paid subscription for detailed data • MIP competitor reports are dated (up to four years old) and not always available for priority countries • Key data sets are time consuming for users to find and marry up. DHA, DET and ABS data are released in different formats, referencing different time periods (e.g. calendar vs financial year) via multiple sites and sources • No measure of national value or demand for online and emerging models

Priorities for improvement	• Provide enrolment and commencement data by region/province/ state for key source countries • More granular student visa data (including more information on interpretation and extrapolation) e.g. to allow for calculation of visa refusal rates • Aligning timing and/or presentation of key data sets (DET and DHA) to enable more leading indicator information (opposed to lagging)

2. Reputational management and quality

Reputational management and quality did not rate highly as an area for data improvements. Broadly there was an understanding that rankings are proxy measures of quality, but this was not considered problematic by respondents in either the survey or focus groups. Most institutions collect and manage their own data in this category.

The International Student Barometer was not cited as a key data source in consultations. This is likely because it is considered an 'internal' quality indicator by institutions, even though government support has been instrumental in extending its use.

Category includes	Brand awareness; rankings; proxy measures of quality
Most used data sources	• Worldwide rankings measures • Quality Indicators for Learning and teaching (QILT) • Own administrative sources
Data limitations	• Global rankings of institutions are limited to HE and focused on research and reputation more than student experience • International Student Survey results published by DET are limited and there is little benchmarking against other destinations • Private providers maintain that QILT is not an effective indicator because many international students return home and do not complete the Graduate Career Outcomes Surveys
Priorities for improvement	• Publish more detailed national data from the International Student Barometer and the Transnational Education Barometer, to allow for international benchmarking • Ensure QILT adequately captures and reports on international student experience, both onshore and offshore

3. Benefits of international education

There is broad agreement among governments, institutions and the community that international education generates significant economic, social and cultural returns. While the existing data that measures the economic value of onshore international students was considered robust and of high quality, there is very little data on broader contributions of international education to the Australian community. Providers noted that the enduring social and cultural value of the sector is neither fully understood nor accurately measured, and they often rely on anecdotal accounts rather than robust evidence. To fully grasp the value of the sector, a holistic picture of international education is necessary, encompassing broader economic flows, including:

- links with tourism
- offshore delivery of education
- business investment and talent attraction, and
- social and cultural benefits.

A 'one-stop-shop' approach to providing this data, or better communication about how and where to access such information, was suggested.

It was duly noted that the above concepts are difficult to quantify, alongside others that have clearer or more easily measured financial returns. Nonetheless we need to recognise the full impact of international education on our local communities and to Australia more broadly. Providers considered that more comprehensive, accurate information is required to support policy development and planning by local, state and national governments and other stakeholders. Providers were particularly keen to better understand economic value of international education at state and local government areas and by source country.

Category includes	Economic value; number of jobs supported; indirect benefits; value of visiting family and friends
Most used data sources	- Austrade MIP - ABS Trade in Services Credits - Value of international education in Australia (Deloitte) - International Visitor Survey (Tourism Research Australia)
Data limitations	- No single consistent and complete measure of economic value - Some of the information around inclusions and exclusions is murky and difficult to navigate for the average data user - The Deloitte report commissioned by DET was helpful but is now dated – updated information is not provided on a regular basis - Fee revenue and living expenditure data is available for onshore international students, however more granular reporting by region, sector and source country was considered an important next step in understanding and communicating economic impact

	• Contributions of international education to other sectors (e.g. tourism, retail) are not fully understood or able to be measured by available data • The value of family and friends visiting international students is not known, but should be an important measure for the sector • The International Visitor Survey does not include study tours or under 15s • There is very little information available on alumni size and significance, apart from institutions' own sources and the new NCP network • There is little data on the social impact of various forms of international education • Current information on the benefits of international education is not reaching the broader community, which does nothing to dispel myths or mitigate negative media
Priorities for improvement	• Expand the suite of economic indicators to include a wider range of contributions and more detail on source region and study location • Develop measures of broader social impact of various forms of international education

4. International students onshore

DET international student enrolment and commencement data (onshore student visa holders only) are available as detailed pivot tables in the Austrade MIP, and referenced extensively by education providers across all sub-sectors. However, a major frustration reported across the board was the inability to segment source countries by state/province which would assist providers to focus efforts and activity.

An almost universally reported issue with onshore student data was the timeliness of both the DET international student data and DHA student visa data. Providers reported time lags in both data sets (up to three months for DET and up to two years for DHA). Providers in the higher education and VET sectors were particularly interested in the potential for real-time visa data. Further, the current format of visa data provision (locked pivot tables) is not user-friendly, with providers frustrated by the 'one size fits all' approach to data reports and availability.

A number of components of the international education market are not visible in current national data capture, either through lack of data availability or inability of existing data sources to reflect emerging trends. This has led to what stakeholders refer to as a 'hidden market' in international education comprising non-student visa holder study activity, incoming study tours and executive and leadership training.

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Given the tendency of a significant proportion of international students to undertake multiple courses in Australia, the lack of detailed pathways data to better quantify transitions between sectors (including from offshore to onshore) was also considered a critical gap in current data.

Category includes	Enrolments and commencements; number of students; current and future growth trends, hidden market
Most used data sources	- Austrade MIP and Orbis - DET HEIMS/Ucube - DET International Student Data - TEQSA - PRISMS - English Australia (national market and non-visa data)
Data limitations	- While the MIP Orbis is a valuable visualisation tool, the reports are standard and cannot be changed according to the variables providers are interested in, limiting its usefulness - The DET HEIMS and Ucube data (provider identified data) and DET international student data are not directly comparable and are subject to misinterpretation due to lack of information around definitions of offshore/overseas/international students - HEIMS and MIP access is restricted by a paywall, and both sources require payment to access information at a level of detail that is meaningful for analysis - DET data experience time lags, with no regular date of publication. Often by the time a full year of data is published, it already lags by months (and up to two years for HEIMS), limiting its usefulness in decision-making. - Lack of granularity in DET data set, particularly province/regional data – both for source country and Australian destination - Lack of granularity in DHA data set, particularly approvals, rejections, cancellations by province/region and splits by provider type (government/private), which was considered to be particularly important to the VET sector - Some categories are meaningless on their own, but cause data to skew (e.g. category not defined) - Sponsored students and the scholarships market is not well understood or documented - English Australia data is based on a non-compulsory collection method, and therefore cannot be linked with other data sets (such as visa)
Priorities for improvement	There is a need for a centralised data hub which collates all the disparate sources into one easy to access location to improve awareness of available data and accessibility

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- Better integration and linkages between major data sets to enable a more joined up analysis
- Breakdowns of categories within the DET international student data and Austrade pivot tables:
  - Add province and regional data to enable greater segmentation and nuanced understanding of geographically diverse source markets
  - Split the Non-award category to distinguish between exchange/study abroad and Foundation studies
  - Include undergraduate and post-graduate totals in Level of Study
- Number of students by sub-sector should be available in an easy to access time series (currently only via DET data visualisation)
- Access to real-time data and user driven data reports
- Improved capture and reporting of the non-student visa students, study tours, executive and leadership training
- Robust and reliable pathways data – transitions between sub-sectors and locations (investigate the extension of the Unique Student Identifier to all students undertaking Australian qualifications onshore and offshore)

5. International students offshore (TNE)

Offshore delivery will be an important component of future international education offerings, and being able to respond to the changing needs of students is critical for education providers to adapt and thrive. Austrade's Australian International Education 2025 roadmap includes an aspiration for Australia to reach over 100 million 'borderless' students, yet the data on how many students globally are being reached at any point in time is not complete (or not captured) and there is no way of assessing progress in meeting such targets.

In consultations participants lamented that the International Links report, published by Universities Australia to provide information on Australian university offshore programs, is no longer being produced. No quality data is collected or published on offshore higher education; the QILT website excludes students studying outside Australia from its reports on student experience, graduate employment, graduate satisfaction and employer satisfaction.

Some enrolment data for offshore higher education and VET is available but with much less granularity than for onshore students. No national data is available on students in Australian secondary qualifications or ELICOS programs offered transnationally.

Capacity constraints relating to onshore student growth, coupled with increasing global demand for education, provide a fertile ground for growth in offshore delivery for some Australian providers. There is certainly appetite in the sector for better data on offshore higher education, VET and schools programs, comparable with that routinely collected and published for onshore delivery. The lack of official reporting on offshore education feeds a perception that such programs and students are of less importance than those in Australia.

Category includes	Value of offshore delivery, online and blended learning, number and types of offshore programs, student experience and outcomes
Most used data sources	- HEIMS/Ucube - NCVER Total VET Activity (TVA) - DET research snapshots
Data limitations	- There is no single, comprehensive source of information about offshore delivery for any of the sub-sectors - HEIMS is the only real source of offshore data for higher education TNE, but lags up to 18 months - There is very little granularity in publicly available data - Non-TEQSA/ASQA accredited courses are not captured - There are quality concerns around the existing publicly available sources, including a lack of clarity around modes of delivery - Existing data is provided to institutions as a raw data flat file which is cumbersome to navigate - There is very little information on TNE in the schools sector, but understanding student flows and pipeline trends from this sector is very important as TNE grows - There is no data on offshore student experience and outcomes in any sub-sector
Priorities for improvement	- Develop a coordinated approach to reporting information on Australian qualifications offered abroad - Publish an analysis of onshore and offshore students by country to inform market intelligence and to assess the impact of host country regulation - Develop DET research snapshots on transnational VET along the lines of those on higher education - Quality indicators for offshore delivery should be captured and published in the same way as onshore delivery

6. Outbound mobility

While many stakeholders working in the mobility space use real-time internal systems for operational purposes, there is little system-wide data in any sub-sector. This is a significant issue considering the central place that outbound mobility has in Australia's engagement with key partner countries.

In the higher education sector, institutions that subscribe to mobility data via AUIDF pay to participate in a survey, currently administered by i-graduate. This AUIDF mobility data is used occasionally by providers for strategic planning and benchmarking purposes. There are frustrations with the availability and access to this information, even for those institutions that subscribe. In particular, providers reported that data received is not in a user-friendly format and they have difficulty in interpreting what the values mean. Very little of this data is publicly available.

No data is collected on outbound mobility of VET and school students.

Category includes	Number of students studying abroad, outcomes of study abroad
Most used data sources	• AUIDF mobility data
Data limitations	• There is no comprehensive, robust and authoritative publicly available data on outbound mobility • Outbound mobility data at state level is not easy to find, but is necessary for telling the soft diplomacy story • There is little information about in-demand locations and study disciplines for higher education and VET • Informal outbound in the schools sector is not captured e.g. study tours, exchanges, summer school, internships etc. • AUIDF mobility data does not include all universities. Coverage is patchy and not publicly available, not timely. • The Open Doors publication which provides information on US students studying abroad is considered a good example of learning abroad data.
Priorities for improvement	• Improve coverage, timeliness and availability of higher education outbound mobility data • Develop appropriate data collection systems for outbound mobility in schools and VET

7. Regulatory environment

Institutions report on their onshore international student operations via PRISMS, however, the general view was that this is more of a compliance tool rather than a helpful tool for benchmarking or analysis. There are a number of reasons for this – firstly, providers receive their own data but in a format that is not suitable for analysis. Secondly, providers would like to be able to compare their data with that of other institutions in their state and sector.

Providers use visa data as leading indicators of trends. However, some reported that visa trends are not adequately reflected in enrolment and commencement data. Further, as previously noted the current format of student visa data (locked pivot tables) was considered cumbersome and not user-friendly.

Essentially, the key improvement sought in this category is that visa data should be provided on a more granular level, to assist providers to better understand and manage risk ratings, attrition rates, student transfers and reasons behind them, in order to continuously improve quality assurance processes and agent relationships. Some providers reported that recent perceived quality issues regarding visa and PRISMS data have led to a lack of faith in this data, and that communication around errors and anomalies would be valued.

Providers understood the confidentiality constraints but feel strongly that they are unable to get their own data back in a suitable format for analysis. Further, providers noted that consolidated reports on a state/sector aggregated basis, would greatly assist in benchmarking and improving their own quality assurance processes.

Category includes	Student visa applications, grants, refusals; post study work rights; study-migration pathways
Most used data sources	• PRISMS • Student visa and Temporary Graduate visa program data
Data limitations	• The best leading indicator of onshore student trends is offshore visa grants, but this information would be much more useful if it was more timely, granular detail and in accessible formats (e.g. ELICOS pathway students are not able to be disaggregated from HE and VET) • The current visa data format does not meet provider needs for their own quality assurance purposes, particularly relating to agent performance, as it is difficult to link refusals with risk factors, or with particular agents • It is not clear where students go after they have left an institution prior to completion, and whether there are agent factors involved. An ability to look at course-hopping trends is an important missing piece • Cancellations are also an early warning, and while individual providers have access to their own data, there is no data available

	on broader trends which would assist providers and other stakeholders with identifying and managing risk • There is currently no mechanism for conveying red flags, anomalies and high/low growth areas etc. in the visa data set. Equally, there is not enough analysis or commentary about trends and emerging issues on a meaningful level (by state, sub-sector etc.) • Lack of synchronicity in data sources – for example visa data defaults to financial year but the DET data is provided on a calendar year basis • Providers have little access to visa data on Genuine Temporary Entrant assessments, so do not feel supported in managing this risk • In PRISMS, certain data items are tracked but not reported to providers, e.g. refusals

Priorities for improvement	• A new PRISMS report focussed on agent data
	• PRISMS and visa reports provided in formats that are fully accessible and allow selection of different variables
	• More granular visa data:
	    o Consolidated/aggregated reporting of visa approval and rejection rates and causes by source country and province, Australian state/region, sector
	    o VET provider types (government and private)
	    o Course hopping/transfers data – better, more timely
	    o Onshore vs offshore reports, and ability to match this up with DET enrolments and commencements data
	    o PSWR tracking – where do graduates go, what do they do, accurately linking graduate outcomes over time
	    o More/better information on agent performance by including more granular information on visa streams and pathways.

8. Student experience

Student experience and graduate outcomes were considered a critical area for data improvement by all sub-sectors. The student experience is integral to attracting students and maintaining a reputation as a safe, quality education destination. Many providers noted that they survey their own students at numerous points in the student journey. There was a desire for a coordinated approach, though providers were cautious of over-surveying students, and of setting up unrealistic student expectations.

The limited public data on graduate outcomes was the key concern in this category, and one of the most cited data gaps across all categories. There was a view that without more investment in graduate outcomes such as employability, Australia is at risk of being left behind in the global marketplace.

Providers are investing heavily in initiatives to enhance employability but need better data on outcomes to assess the effectiveness of these measures. Graduate outcomes were considered to be a key factor in maintaining competitive advantage and strengthening Australia's reputation.

Interestingly, the QILT website was not seen as a useful data source for higher education, despite it being the principle means of reporting student satisfaction nationally. Most likely this is because domestic/international student status is not included in reports on demographic factors, and because it excludes students studying outside Australia.

The issues of class size, student diversity on campuses and staff/student ratios were not considered of high importance for national data collection since these issues are best managed at the provider level and adequate internal data is available.

Category includes	Student satisfaction; complaints; student wellbeing; graduate outcomes
Most used data sources	- i-graduate international student barometers - Internally administered feedback and surveys
Data limitations	- Much of the ISB student experience data relates to campus-based experience but there is limited information about off-campus issues - VET outcomes (into employment, further study, etc.) are underreported. VET ISB is biennial, which does not allow the sector to be fully responsive to student issues and makes trend analysis more difficult - Student experience for students on non-student visas is not captured - The Overseas Student Health Cover data requires a common reporting framework to identify systemic/state issues – currently providers can access their own claims and see trends, but understanding this on a broader level would help inform investments in enhanced student experience
Priorities for improvement	- Extend the International Student Barometer to include school students - Expanding data on regional student experience - Develop data on alumni numbers and outcomes - Improve reporting of onshore international higher education student experience and outcomes in QILT and include offshore students - Improve reporting of onshore international VET student experience and outcomes in the Student Outcomes Survey (SOS) and include offshore students - Coordinated approach to profiling of success stories, including community involvement and volunteering

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7.4 Department of Education and Training priority areas – sector views

Providers were asked to provide their feedback on a number of DET priority areas, with feedback summarised below:

Sustainability and capacity for onshore growth

This is a concern that unsustainable growth 'bubbles' can result in perverse outcomes and can cause damage to the sector's reputation. There is currently little in the way of forecasting or targets at the city and regional level to inform planning at the provider level.

In terms of over-reliance on key source countries, providers noted that current visa settings discourage providers from recruiting students from newer, riskier markets (e.g. Africa), which has implications for diversity going forward.

Accommodation

Shortages of quality student accommodation presents as an issue in certain locations, notably Sydney, which has an action plan and taskforce dedicated to improving supply. In Queensland, where there is a perception that a growing number of students are staying in backpackers and hostel accommodation, participants called for more comprehensive data on student accommodation, including current students' accommodation type, location, price and satisfaction. South Australian stakeholders suggested that while there is no issue with supply at present, all the available data is focussed on purpose built student accommodation (PBSA) and there is a lack of data on students' use of private accommodation.

Better local data on supply and demand for housing was considered important in ensuring positive student experiences, and to assist providers in managing student expectations.

Schools and homestay data was another issue altogether, with different models of accommodation for school students outside of the private rental and PBSA markets, but limited information.

Outbound mobility

See section 7.3, heading 6 outbound mobility in findings above.

Emerging trends, digital, ed-tech

There was some discussion on the changing nature of delivery of qualifications and skill sets, with the rise of micro credentials and non-accredited training in both higher education and VET. There is currently little recognition in current datasets of these types of delivery. There was also an appetite for some collated, reliable best practice information relating to ed-tech models and online delivery.

It was recognised that digital modes are increasingly prominent in international education, and getting on the front foot in terms of understanding trends in this area will help providers stay relevant and competitive. The inability of current data sets to capture innovative modes of delivery is a constraint on innovation.

8 Recommendations

In general, Australia is fortunate to have access to some high quality data, particularly in relation to onshore international students, with many participants noting that Australian data is well ahead of our major competitors. However, consultations with the sector found there are three key areas where improvements can be made that would benefit providers.

Recommendation 1: Improve awareness and accessibility of international education data

Government need not lead on all data or produce all data. Rather, there are opportunities to assist providers in understanding more fully the data that is available. This would help to address the lack of awareness and challenges in locating international education data. While there is plenty of data being collected, there are opportunities for it to be better reported and communicated to the sector, to enable a better understanding of what data is available and where it can be found. This could include:

a) **Establish a single comprehensive repository for all available data sets –** currently data is available via many disparate sources and can be difficult to find. It would be helpful to provide more information and sharing of sources to assist providers in finding and accessing appropriate data for their sub-sector as well as to take a more holistic approach to data analysis than currently exists. Such a resource should provide available data to providers freely, with appropriate measures to protect commercial-in-confidence information. Providers supported development of a portal which could serve as a one-stop-shop for data, research, custom dashboards and market intelligence, accessed via a single log-in.

b) **Provide more detailed technical notes and user guides for existing data –** where institutions have access to data, there is not enough contextualisation or guidance on definitions and comparability.

c) **Provide data in more accessible formats –** in some cases, data is provided in a format that is not easy to apply to individual circumstances, in particular visa data reports and pivot tables. For example, currently data is provided via locked pivot tables and standard template reports with variables that cannot be changed to suit provider needs.

Recommendation 2: Expand data sets where critical gaps or insufficiencies exist

There are key areas where improvements would positively impact on resource and investment decisions, program development and evaluation and quality assurance. From the providers' perspective, greater ability to disaggregate; reduced time lags; and improved accessibility (more publicly available, more appropriate formats) of existing data sources would enable more nuanced interpretations and were considered critical in making data more user friendly and meaningful. This includes:

a) **Improve the timeliness, accessibility and granularity of visa data** – visa data (applications, grants, refusals) by provider type and source country disaggregation

b) **Improve the timeliness, accessibility and granularity of enrolments and commencements data** – providers reported lags in data release of up to three months

c) **Investment in new data sets** – demand forecasting, pathways and graduate outcomes, offshore provision, international students not on student visas, and post-study work rights are key areas where investment in new data would help providers to innovate, compete and grow in a rapidly changing global market.

Recommendation 3: Increase support for interpretation of existing data

Many institutions operate in a 'data-rich, analysis-poor' environment. They often do not have the resources to delve deeply into the data. Equally, in certain streams (marketing, recruitment) staff may not be fully data-capable or have the skills needed to quickly access and interpret complex data sets. There is an appetite for more analysis and insights to assist providers to make decisions and enable greater and more skilful use of key data sets, such as:

a) **More closely align the DET and DHA data sets** – there was general agreement that having a national reporting framework for onshore international students that maximises the utility of existing datasets would enable a more 'joined-up' approach to analysing data, allowing Commonwealth, state and territory governments, education providers and researchers to monitor growth, and better identify and mitigate risks associated with unsustainable rates of growth.

b) **Provide more support for analysis of data** – while providers are largely responsible for their own analysis and insights, the availability of analytical reports (such as the DET research snapshots series and periodic reports on pathways) is highly regarded.

c) **Maintain ongoing dialogue between the sector and data custodians** – throughout the consultation process, there was significant expertise and goodwill shared, with providers keen to continue a dialogue with each other and with government, and to ensure all parts of the system are talking to each other for continuous improvement. A possible forum could be formalising/expanding the pre-EVCC data group or creating an 'international education data advisory' body to exchange information, allow provider input into the research snapshot series, and provide communications and updates to a broader audience.

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9 Conclusion

There are some clear opportunities for strengthened international education data in Australia. From a provider perspective, there are some areas where improvements will have significant impacts on policy, evaluation and quality assurance. The collective views from around the sector make a strong case for making more data publicly available so that users can fully explore the current and future potential of international education in Australia.

The findings outlined in this report have been validated with peak body colleagues and data experts, to ensure that the conclusions and recommendations appropriately reflect the views of stakeholders.

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