



# Connected, Creative, Caring:

## An Australian Strategy for International Education, Consultation Paper

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Submission by QS Quacquarelli Symonds - The world's leading provider of services, analytics, and insight to the global higher education sector

# 1.

## What are the key priorities for a new Australian Strategy for international education?



**To be competitive in the international student recruitment market, Australian higher education institutions must meet this level of interest and provide a diverse range of educational delivery models, while still offering the highly valued in-person teaching that international students seek.**

QS conducts extensive research into the international student market and the needs and priorities of prospective international students.

**Our annual QS International Student Survey compiles and explores insights from more than 105,000 prospective international students across the globe.**

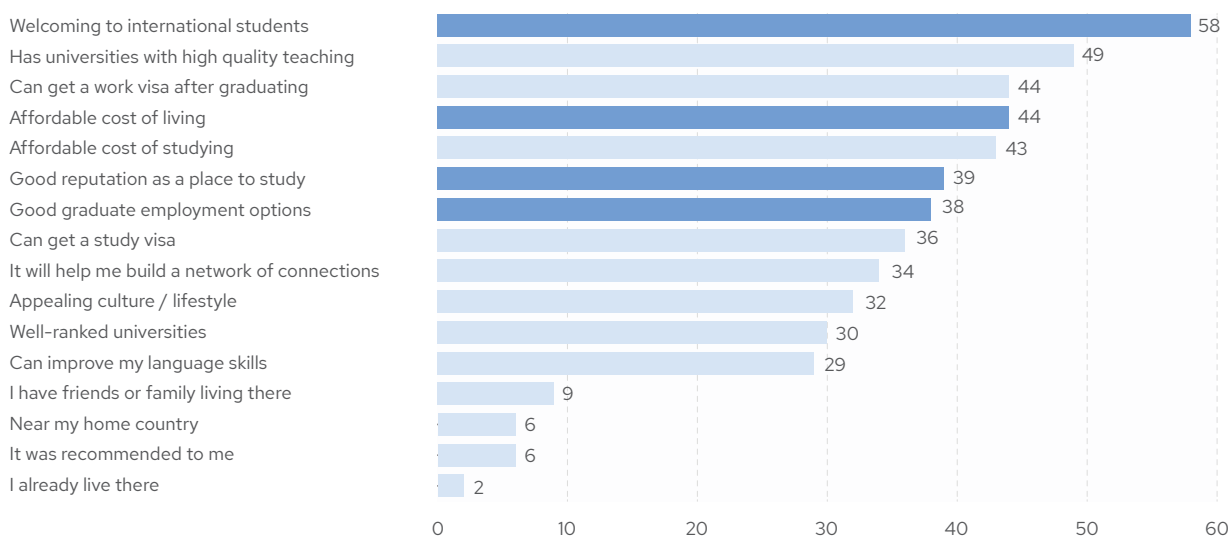
Through this research, we have found that international students are looking for flexibility in educational delivery, a safe and welcoming environment and strong graduate employability.

As we can see in the chart below, when asked what their top three priorities were, prospective international students interested in studying in Australia emphasised the importance of a welcoming environment, with 58% choosing this as the top priority for them.

Additionally, 49% highlighted the importance of a country that has universities with high quality teaching, 44% chose an affordable cost of living and 44% want a country that gives them the opportunity to get a work visa after graduating.

### What five things are most important to you when choosing a country to study in?

Source: QS International Student Survey 2021



In our research, we have also seen interest rise and fall for alternative educational delivery models. While in-person only education has remained steady with 80% of students stating that they are extremely or very interested in this option, the alternative models have fluctuated over time.

In the chart below, we can see that 33% of prospective international students said that they were very or extremely interested in blended learning in 2017, with this rising to 47% in 2020, before seeing a drop to 37% in 2021.

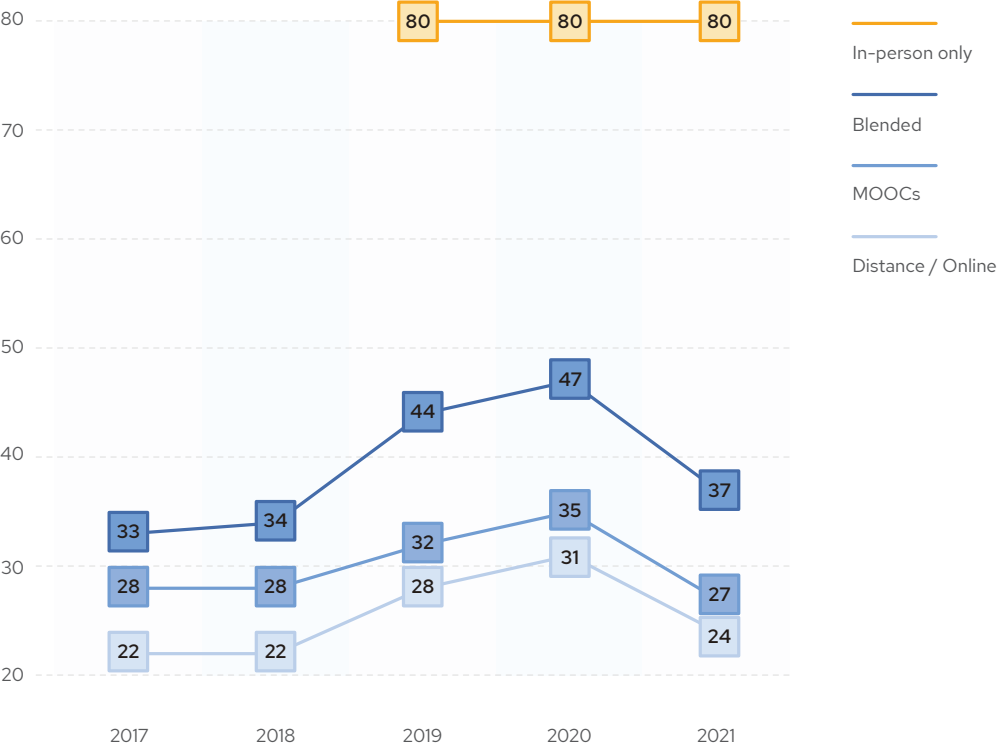
It is interesting to see that all alternative educational delivery models saw a spike in interest in 2020, with distance and online learning rising from 28% in 2019 to 31% in 2020 and Massive Open Online Courses (MOOCs) rising from 32% in 2019 to 35% in 2020. It is also

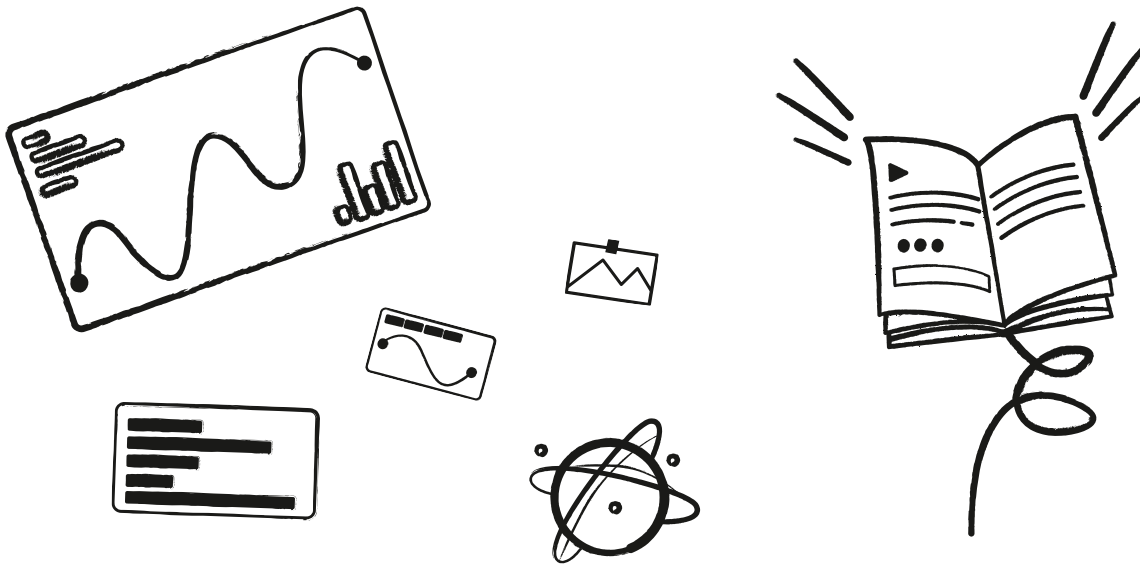
**33% of prospective international students said that they were very or extremely interested in blended learning in 2017, with this rising to 47% in 2020, before seeing a drop to 37% in 2021.**

important to note that each saw a slight dip in 2021, which may suggest that interest is waning slightly.

**How interested are you in the following delivery options?**

Source: 2021 International Student Survey (% very or extremely interested)

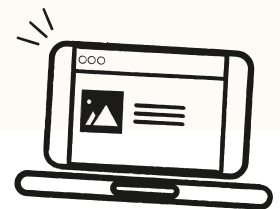




Improving the frequency and variety of direct communications between prospective students is vitally important, as future students are seeking bespoke, personalised information about their future studies – not just mass marketing emails. Our research shows that WhatsApp, Facebook Messenger, Skype and Telegram are the most preferred instant messaging platforms for prospective students to communicate with their destination university.

Prospective students also have high expectations in the manner in which their destination universities respond to their queries, expecting fast turnaround times, a dedicated representative assigned to their application, and flexibility over choice of communications platforms, language, and when they can speak to someone. With most prospective students considering more than one country as a study destination, a positive and timely customer service experience when interacting directly with a university is essential to building positive impressions of Australian universities.

***Our research shows that WhatsApp, Facebook Messenger, Skype and Telegram are the most preferred instant messaging platforms for prospective students to communicate with their destination university.***



## 2.

Students should be at the centre of the new Strategy. How can Australian education providers deliver the best possible student experience both now and in the future?



The most important aspects of the study experience for most international students generally fall into three themes:



### **Affordability:**

Being able to study and live in a reasonably comfortable fashion in their destination country



### **Hospitality:**

Feeling that they are physically safe and are welcomed by their destination country



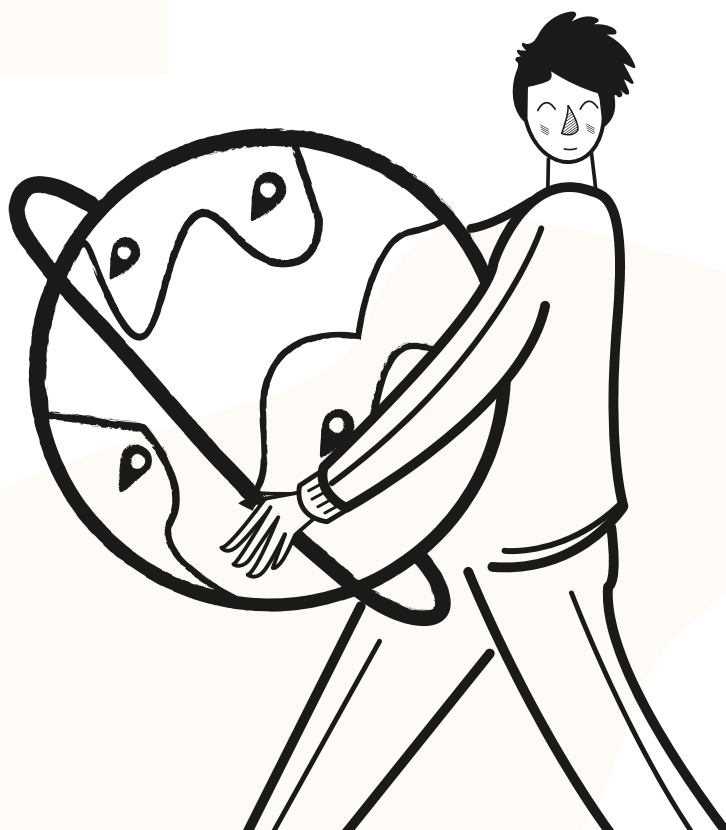
### **Quality:**

Studying at an esteemed institution which will help them achieve their future career aspirations

Using QS data from our annual International Student Survey, we can gain an in-depth understanding of the student decision-making journey.

Firstly, it is important to identify the typical decision-making journey:

- What to study (**course**)
- Where to study (**country**)
- Where to study (**city**)
- Where to study (**university**)



When we explore each of these stages further, we can identify the top five decision-making factors at each stage of the applicant journey:

**The student decision-making process**

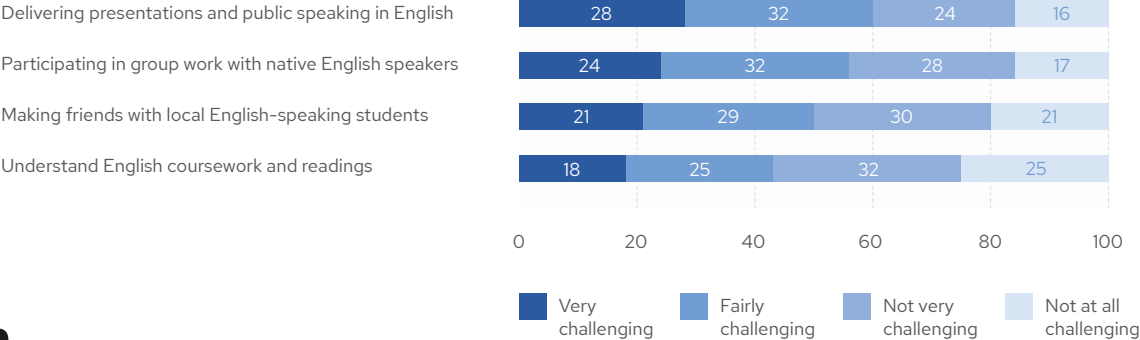
Source: QS International Student Survey 2021

Choosing a country	Choosing a course	Choosing a university	Choosing a city
<ol style="list-style-type: none"> <li>1. Welcoming to international students</li> <li>2. High quality universities</li> <li>3. Cost of studying</li> <li>4. Cost of living</li> <li>5. Overall reputation as a study destination</li> </ol>	<ol style="list-style-type: none"> <li>1. Leads to chosen career</li> <li>2. Personal interest</li> <li>3. University has good reputation</li> <li>4. Course has high quality teaching</li> <li>5. Affordable tuition</li> </ol>	<ol style="list-style-type: none"> <li>1. Scholarships</li> <li>2. High quality teaching</li> <li>3. Welcoming to international students</li> <li>4. Offers the right course</li> <li>5. Good reputation for subject area</li> </ol>	<ol style="list-style-type: none"> <li>1. Safe and welcoming to international students</li> <li>2. Cost of living</li> <li>3. Affordable accommodation</li> <li>4. Ability to work while studying</li> <li>5. Lifestyle and leisure opportunities</li> </ol>

To support students along this journey, Australian higher education institutions must address their key challenges and concerns. In the chart below, we can see that prospective international students would respond positively to robust English language skills support and training, if it was offered to them.

**How challenging do you expect to find the following elements of international study?**

Source: QS International Student Survey 2020



Students place great importance in having access to on-campus support services – particularly relating to visas, careers, housing and finances. Providing easy and low-cost or free access to services which help international students navigate all aspects of their student life – not just those that directly relate to their studies – is essential for building a resilient, resourceful and successful international student cohort.

QS' Student Engagement and Retention data illustrates the important of making students aware of the support services available to them. In 2020, 59% of students were referred to a support service, with the most common services being for Peer Assisted Student Sessions (PASS), student hub/advice services and academic/study support services. For many international students, their reliance of these services will be even greater due to a lack of familiarity with the Australian higher education system, and potentially from increased academic challenges relating to English language abilities.

***QS' Student Engagement and Retention data illustrates the important of making students aware of the support services available to them.***



# 3.

## What changes are needed to make Australia more globally competitive over the next decade?

i. Policy and regulatory flexibility are important in enabling providers to innovate. How can we utilise these settings to pursue opportunities, and in what other ways can we work together to ensure Australia remains globally competitive?



### Australia must invest in marketing and recruitment in the international education space, positioning Australia as an attractive and leading study destination.

The current expectation is that international students will research destinations, application and immigration processes and universities themselves and make their enquiries via aggregator sites or agents.

We should encourage direct enquiries from applicants to place Australia back in the competitive landscape.

**QS research demonstrates that students want more one-on-one communications, and communication across more channels. Australia’s reliance on educational agents in this space is a clear issue.**

QS’ internal data shows that the typical international student will receive an average of 17 inbound or outbound communications from their first enquiry to their eventual enrolment (more than half of which were direct, personalised communications). Furthermore, two-thirds will spend at least seven months in the ‘pipeline’ from the time that they make their first contact to the time that they enrol, while 39% will spend

over a year before enrolling. This reflects the importance of constant and continuous nurturing with relevant information and support over the application process.

Australia’s biggest strengths are its natural environment and reputation as a clean, safe and welcoming destination – these are the attributes that should be emphasised in marketing to international students. Safety is a key point of differentiation and message for the Australian higher education sector, particularly in relation to the coronavirus crisis. This notion is clearly supported by the QS research in the table below:

### Which of the following words would you use to describe Australia?

Source: QS International Student Survey 2020

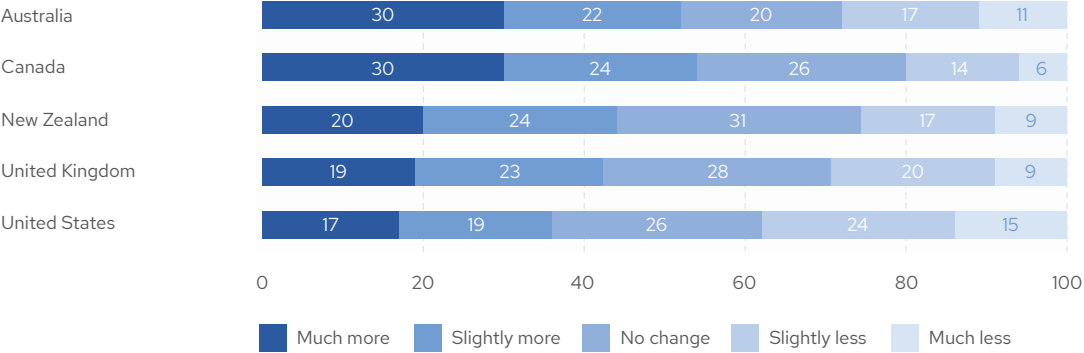
Beautiful	66%
Safe	53%
Clean	53%
Welcoming	51%
Modern	46%
Exciting	39%
Vibrant	30%
Affordable	20%
Artistic	19%



In the chart below, we can see that 30% of respondents believe that Australia is becoming much more welcoming, 22% think it is becoming slightly more welcoming, 20% see no change, 17% think it is becoming slightly less welcoming and only 11% think it is becoming much less welcoming.

**Do you think these countries are becoming more or less welcoming to international students from your own country?**

Source: QS International Student Survey 2021



# 4.

How can providers, governments and stakeholders work together to achieve diversification opportunities (for example of disciplines, source countries, study destinations and delivery models)?



Australia has an outstanding presence in the QS World University Rankings® by Subject 2021 with 45 Australian universities included in the rankings. This includes the presence of 33 Australian universities in the top 100 across all 51 specific subjects and five faculty areas. Thirteen Australian universities ranked in the top 20 in 26 specific subjects, including six in Mineral and Mining Engineering.

The QS subject rankings are a combination of both global recognition and research strength:

The global academic community recognises the scientific excellence and expertise of Australian universities

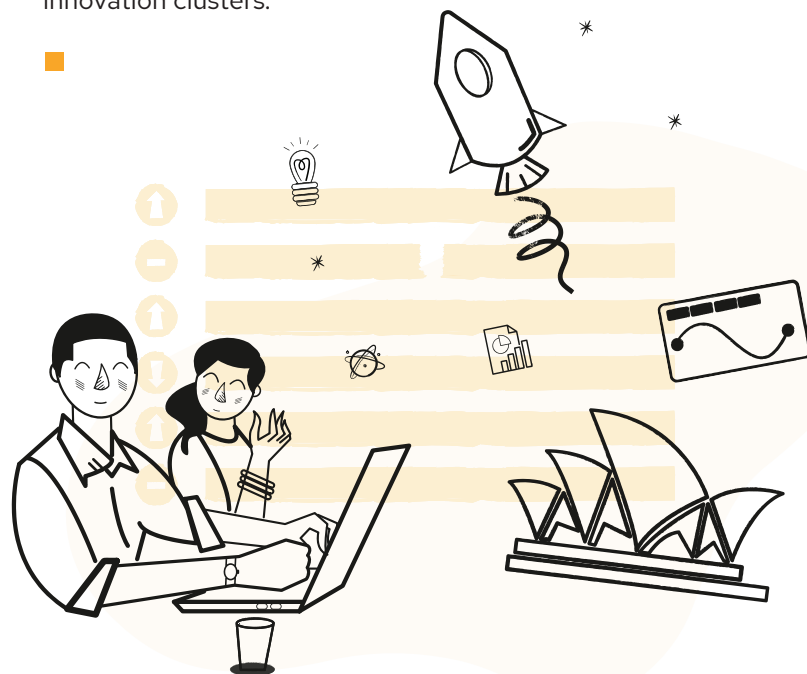
The global employer community recognises the excellence of the professionals who graduated from Australian universities

The research strength highlights the outreach and impact of the Australian scientific publications

The QS World University Rankings® by Subject play a crucial role for prospective students, especially for prospective postgraduate students.

For students, Australia has an opportunity to leverage their subject performance to develop and strengthen their role as a leading scientific powerhouse, high potential return for employability and differentiate further from traditional English-speaking educational destinations based mainly on their learning and living environments.

Beyond students, this remarkable combination of research, learning and working/living environments is a major opportunity to develop further academic partnerships based on science and innovation with universities worldwide but also industry/university partnerships and innovation clusters.



# 5.

## What are the necessary skills for the future that students should be prepared for?



i. How can Australia improve employability outcomes for international students, ensuring they have the necessary skills to compete in a globally competitive labour market?

**The current cohort of university graduates (domestic and international) are consistently failing to meet their employers' expectations in relation to 'non-technical' skills like resilience, communication and problem solving.**

In the QS Global Employer Survey, more than 13,000 employers were asked which skills they find the most important among recent graduates, how satisfied they are with those skills, and the difference between the attributed

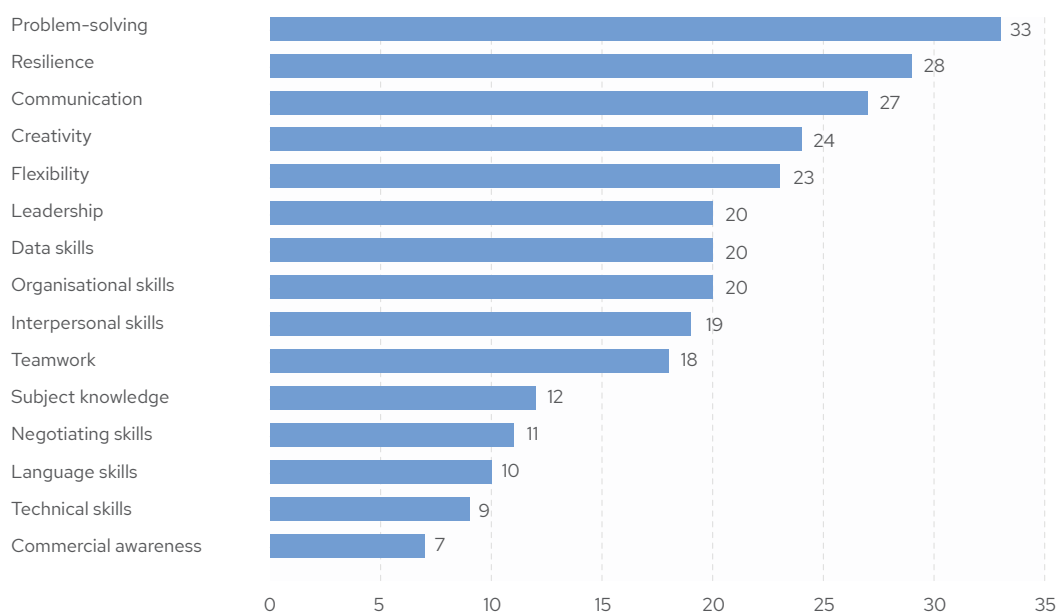
importance of those skills and their expressed level of satisfaction – generating the gap values.

**According to QS data, problem solving, communication, and resilience have high importance but receive low satisfaction scores, generating the biggest skills gaps for employers.**

This result remains unchanged since the first edition of the report in 2018.

### Gap values

Source: QS Employer Insights Report 2020



The consistency of results over recent years might be related to the relationship between these three skills, since finding a solution to a problem is only conceivable when problems are well identified and conceptualised. The process of identifying problems is vital for communication, and resilience grows once individuals overcome problems.

Flexibility was a skill that also generated a substantial gap score. While it was the fourth most important skill identified, it also demonstrated only moderate levels of employer satisfaction. The gap score was 23, making it the fourth largest skills gap identified in the study.

In our QS Employer Pulse Survey, one aspect highly emphasised by employers is the emergence of flexibility as a vital skill with 60% of employers reporting flexibility as a skill which is becoming even more relevant due to the current global health crisis.

Universities need to provide a more robust and well-rounded educational experience which fosters a range of technical and non-technical workplace skills. Internships, placements and work-integrated learning are vital for producing job-ready graduates – particularly for international students wishing to work in Australia post-study.

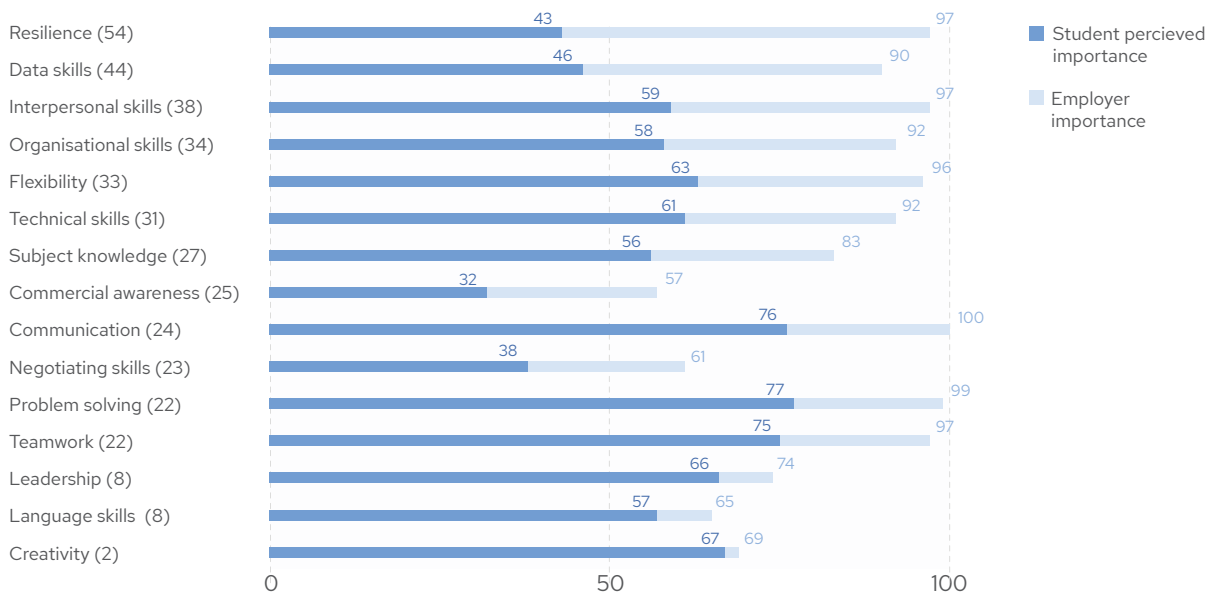
In general, Australian universities perform very well on the QS Graduate Employability Rankings with two institutions in the top 10 and 10 in the top 110. Given that Australia is performing well, the challenge will be equipping students with the varied and robust skill sets that will enable them to become versatile and adaptive workers in the modern workplace.

In the chart below, we can see the perception gap for international students when it comes to what skills they think employers value the most versus how much importance employers place on those skills. We can see that the biggest perception gap is around the skill of resilience, followed by data skills and interpersonal skills.

***Australian universities perform very well on the QS Graduate Employability Rankings with two institutions in the top 10 and 10 in the top 110.***

## Which skills do you think employers value most in new graduates (prospective students) VS how important are the following skills in new graduates (employers)?

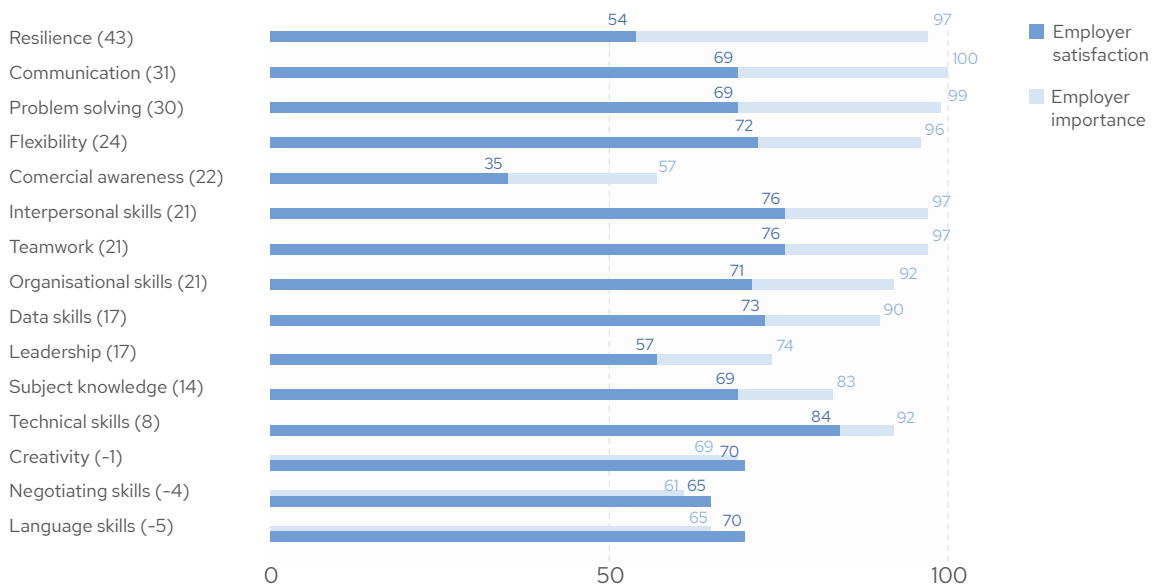
Source: Graduate Employment in Australia: Bridging the Graduate Skills Gap (QS 2019)



In the chart below, we can see that Australian employers also experience significant skills gaps for resilience, communication and problem solving, mirroring the global results mentioned above. This demonstrates that institutions across the globe are missing the opportunity to build these skills in graduates and presents a clear opportunity in the market.

### The employer skills gap

Source: Graduate Employment in Australia: Bridging the Graduate Skills Gap (QS 2019)



# 6.

## How do we create a uniquely Australian education experience?

- i. What is our value proposition for both international and domestic students?
- ii. How do we offer an Australian education experience while complementing the value of Australian offshore and online education?



Australia already has a framework of agencies that develop unique value propositions across the nation. The Australian higher education institutions work closely together to create a national value proposition, however each region has a unique offering to the international and domestic student with diverse study destinations uniquely found in Australia.

Each state and city are supported by their own 'study in' agency, designed in part as a promotional body but also to create the perfect environment for international and domestic students to feel safe, welcome and supported. Australia is home to some of the highest ranked universities globally, with a mix of comprehensive research institutions, as well as those offering a high-quality level of teaching – speaking to both the robust, cutting edge academic research and the pedagogical achievements the country produces. In addition, Australia offers its students access to biodiverse natural environments, amazing scenery, modern and contemporary cities, traditional towns with a relaxed and diverse cultural experience and attractive employability opportunities. In short, a unique and beautiful place to study.

*The value of Australian education is widened by the opportunities that internationalisation and online teaching offer.*

In terms of offering a distinct education experience for students, the value of teaching staff, exposure to reputed faculty, quality of teaching and globally recognised degrees is available to all Australian students – whether studying domestically, offshore or online. In this way, the value of Australian education is widened by the opportunities that internationalisation and online teaching offer – enabling Australian education touch more students than ever before.

# 7.

Community support for the international education sector is important for the sector's social licence. How can the benefits this sector provides to Australia be better understood by wider community?



**Benefits of the international education sector span across various areas including economic; academic; socio-cultural and political. Some of these might be harder to communicate to the wider community.** Economic benefits for example can be the direct financial ones (university fees and consumer expenditures in local economy), and wider society ones such as skilled migration, building research capacity and creating connections of trade and research with countries around the world.

From a wider community perspective however, it would help classifying the impact (positive and negative) in terms of wider awareness. In other words, the awareness axis measures how visible

and discussed this topic is in the public sphere, and the perceived impact looks at whether the wider community would consider this particular issue as a benefit or as causing harm. For example, skilled migration can be looked at as an important positive benefit from international education, but if there are perceptions that international graduates and students are taking local jobs for lower salaries, it will be perceived as a negative impact. Similarly, while inward student mobility has strong impact on the universities in terms of finance, program diversification and campus diversity, it can also be perceived as causing lower academic standards by being more generous in accepting international students with lower academic or language skills.

<p>High awareness Perceived harm</p> <p><b>Measure &amp; clarify</b></p> <p>Quick action</p>	<p>High awareness Perceived benefit</p> <p><b>Reinforce &amp; Promote</b></p> <p>Strong base</p>
<p>Low awareness Perceived harm</p> <p><b>Assess &amp; prepare</b></p> <p>Latent risk</p>	<p>Low awareness Perceived benefit</p> <p><b>Identify &amp; highlight</b></p> <p>Quick win</p>

In order to systematically and effectively address the community, the starting point would be identifying issues of impact on the community. A multi-source approach using expert opinion, community focus group and media and social media scanning would yield a list of issues classified into these four areas of the chart, and each area would demand a different strategy.

1

**Strong base (high-high):** Issues that are perceived as beneficial with high awareness in the community would benefit from promotion and reinforcement strategies. Highlighting examples of such issues in media and in community events would help maintain the positive image in the community.

2

**Quick action (high-low):** Issues that are perceived as not beneficial to the community with high awareness require rapid response after measuring their spread. Focused PR campaigns with participation from community personalities and leaders are essential to clarify ambiguities and rectify misinformation.

3

**Quick win (low-high):** Issues that could be perceived as beneficial to the community but there is lack of awareness about them. These can usually be identified by expert opinions and focus groups and can help in getting community support for the sector. A strong communication plan, that might involve creating new measures and indicators, could help in moving these to the Strong Base corner (high-high).

4

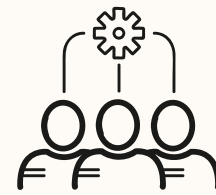
**Latent risk (low-low):** Issues that could be perceived as not beneficial to the community but there is lack of awareness about them. These need thorough expert assessments in order to try to deal with them in the sector, and to be prepared to address them if negative awareness about them increased.





## 8.

What else should the Council for International Education and the Australian Government consider in developing the new Strategy?



In defining the terms of success, all institutions understand how the student perspective plays a vital role in measuring and benchmarking what is achieved. An institution's success is inextricably linked to that of its students. Ensuring that students have the right information to make an informed decision about where to study, and the right support to navigate the complexities of the application and enrolment systems are crucial elements.

*QS can amplify a higher education institution's message – strengthening its offering across the entirety of the organisation's ecosystem and communicating these strengths to key audiences.*

As universities and countries as study destinations seek to thrive – to increase recruitment and build their reputation and standing as a centre for excellence in learning – their ability to provide an exceptional experience for students is a dominant factor, and one that must not be overlooked. But in building a better institution, growing numbers and increasing revenue, ensuring that the quality of the student experience is not compromised is difficult.

QS can amplify a higher education institution's message – strengthening its offering across the entirety of the organisation's ecosystem and communicating these strengths to key audiences. Recruitment, reputation and partner relationships are inextricably linked – each thrives on the others, and in turn feeds into them – forming an intricately connected cycle. For institutions around the world, success depends on being able to fuel this cycle (effective recruitment, enhanced reputation and stronger relationships) to power the engine that keeps universities growing and moving forward.



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