



Australian Government

Australian Education International

International Student Survey 2010

Overview Report

November 2010

About this report

In 2009-10, Australian Education International (AEI) commissioned research into the overall satisfaction of international students studying in Australia. The research used i-graduate Australia's, International Student Barometer (ISB) survey instrument and was conducted in collaboration with Universities Australia, English Australia, TAFE Directors Australia (TDA), and the Australian Council for Private Education and Training (ACPET). The surveys, which were conducted in the period late 2009 to mid 2010, sought responses from international students studying on-shore in the Higher Education (HE), Vocational Education and Training (VET), and English Language Intensive Courses for Overseas Students (ELICOS) sectors. A separate survey of international students aged 18 and over studying in Australian secondary schools was also conducted in late 2010.

This overview report, which presents the consolidated results from all of these sectors combined, as well as specific aspects for individual sectors, focuses on the satisfaction levels for key high level indicators. Where sampling, scope, and coverage considerations allow, some indicative comparisons are made to (i) the ISB index (for HE only); (ii) relevant data collected in AEI's 2006 International Student Survey; and (iii) survey results from a restricted control group of Australian domestic students (for selected elements only).

In the case of VET data, comparisons are made primarily with the results obtained from students attending government run Technical and Further Education colleges. Data obtained by ACPET in relation to the private VET sector were collected as part of a separate pilot study. Several references to these data are included in the report where appropriate. In general, the ACPET pilot data show that the satisfaction levels in respect of high level indicators are broadly consistent with the other sectors.

About Australian Education International (AEI)

AEI is the international arm of the Australian Government Department of Education, Employment and Workplace Relations (DEEWR). AEI works to ensure that international students have a successful and enjoyable study experience in Australia. For further information, please visit the website, www.deewr.gov.au or www.aei.gov.au.

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Commonwealth of Australia 2010

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Table of contents

Executive Summary	3
Background and Objectives	5
Scope, Coverage and Research Methodology	5
Key Findings	
Overall satisfaction	8
Satisfaction with support on arrival	9
Satisfaction with living in Australia	10
Satisfaction with the studying in Australia	11
Satisfaction with support services	13
Factors influencing the choice of where to study	14
Explanatory Notes	16
List of Acronyms	17

Executive Summary

In 2009-10, the Commonwealth Department of Education, Employment and Workplace Relations, in collaboration with peak education bodies and state/territory government education departments, conducted a survey of current international students to obtain information about their living and study experience in Australia. The survey instrument for HE, VET and ELICOS sectors was based on the International Student Barometer (ISB) which was used to develop an international benchmark of the experience of international students in major study destinations throughout the world. Use of the ISB enabled comparisons of the experience of international students in Australia with international students studying in other parts of the world. The School sector survey instrument was similar in scope to the survey used in the 2006 ISS for Schools.

The survey results confirmed that a high percentage of international students in Australia are satisfied with their study and living experience. This result mirrored the international benchmark as measured through the ISB, and was an improvement on the levels reported in the last international student survey conducted in Australia in 2006.

Satisfaction with the level of support that international students received on arrival was also high and reflected the results obtained through the ISB.

Respondents in all education sectors indicated that they were satisfied with their overall living experience. In regard to specific aspects of living in Australia where students registered relatively low satisfaction levels (e.g. around *accommodation* and *cost of living*), the ratings were similar to that reported by ISB participants.

Teaching elements within the *Study in Australia* category scored very highly, while ratings were lower for aspects relating to work such as *work experience* and *careers advice*. ISB respondents and Australian domestic students recorded similar satisfaction levels for these elements.

Analysis of the perceptions of respondents in relation to the various support services available to them revealed generally high levels of satisfaction with exceptions being services related to *accommodation* and *careers advice*.

As was the case in the 2006 ISS, the factors identified by survey respondents as being the most important in terms of influencing their decision on where to study were *quality of education*, followed by *the reputation of the qualification from the institution* and *reputation of the institution* itself.

The School sector survey showed that students did not simply want access to high quality education, but also want to gain life experience in living/studying in different country/culture and improve their English. For a large proportion of students, these objectives had been achieved. The survey also found that some support services were highly valued by those who used them, but many students were unaware of such services were available to them.

Overall satisfaction*	Sector			ISB index (for Higher Education only) ¹	Schools**
	Higher Education	VET	ELICOS		
Overall satisfaction with living	86%	88%	86%	86%	74%
Overall satisfaction with studying	84%	85%	86%	86%	76%

*This measure represents the proportion of students who were satisfied or very satisfied with consolidated factors about living and studying in Australia.

**The Schools survey was conducted using a different survey instrument to that used in the other sectors. Hence, these results are not directly comparable.

¹ See explanatory notes for further information. The measured satisfaction levels for higher education differed only slightly from the ISB although the difference is statistically significant.

Background and Objectives

In July 2009, the Commonwealth, State and Territory governments through the Council of Australian Governments (COAG) agreed to the development of an International Student Strategy for Australia. The Strategy sets out the Governments' strategic framework and action plan to support a high-quality experience for international students.

To assist COAG's commitment to improve the experience of international students, AEI, the international arm of the Commonwealth Government Department of Education, Employment and Workplace Relations (DEEWR), commissioned a national survey of international students in late 2009. The survey was designed to obtain a greater understanding of the experiences of current international students living and studying in Australia.

One of the principal objectives of the Australian 2010 International Student Survey (the '2010 survey') was to obtain information about the perceptions current international students have about their study experience in Australia. This information provides government and the international education sector with a valuable indicator 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 2010 survey enabled comparisons to be made against the ISB benchmark index.

The Commonwealth Government on behalf of all Australian governments has committed to undertake another international student survey in 2012. The findings of both the 2010 and 2012 surveys will assist in monitoring the sector over the life of the Strategy and inform future policymaking for international students.

Scope, Coverage and Research Methodology

Scope and coverage

The scope of the 2010 survey was all international students who were:

- on a student visa; and
- studying in Australia at a Commonwealth Register of Institution and Courses for Overseas Students (CRICOS) registered provider in Higher Education (HE), Vocational Education and Training (VET), or in an English Language Intensive Course for Overseas Students (ELICOS) institution during the period of late 2009 to mid 2010.

For the ELICOS sector survey, international students with tourist or working holidaymaker visas were also invited to participate in the survey. As the voluntary survey was conducted online, it was restricted to international students with email contacts.

It should be noted that the scope of the AEI 2006 International Student Survey (ISS) was limited to those students in their final year of study.

The Higher Education sector survey received around 36,308 student responses from 34 of Australia's 39 universities. Around 143,000 international students were studying in Australian universities between March and May 2010. This gave a 25% response rate of participants. The domestic university student data relate to the aggregate of responses received from students at four Australian universities.

Thirty-five (35) of Australia's 59 TAFE institutes from all states and territories (excluding the Northern Territory) participated in the VET (public) sector survey. A total of 5,557 responses were received from participating TAFE international students. The results compiled from the ACPET pilot study were supplemented by data from a separate survey.

The ELICOS sector survey received 10,716 student responses from 57 participating ELICOS institutions across Australia. The response rate was estimated at 30% of the total ELICOS enrolment during the survey period.

The School sector survey sought participation of the final year international students aged 18 or over, studying in Australian secondary schools on a student visa. All CRICOS registered government and non-government secondary schools with five or more international students were invited to participate in the survey. The survey received 1,079 student responses from 153 participating schools. This gives an approximate overall response rate of 40%.

Research Methodology

The 2010 survey was conducted using the tertiary focused instrument, *International Student Barometer (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 original ISB was modified to reflect the Australian education context.

The 2010 survey sought respondents' views on a variety of issues relating to their living and learning experience in Australia. As well as seeking respondents' views on the importance of specific aspects of their living and learning arrangements, participants were also asked to indicate how satisfied they were with different areas of their experience. The degree of satisfaction was calculated on a four (4) point scale with the categories 'satisfied' and 'very satisfied' being combined to provide a percentage figure for 'satisfaction'. Similarly, for some indicators, 'important' and 'very important' were amalgamated to produce a measure for 'importance', and 'useful' and 'very useful' were combined to provide an overall indicator of 'usefulness'.

International students were invited to participate in the survey via e-mail alerts sent from within their institutions to their university/college/centre and/or personal email address. They were able to complete the online survey questionnaire by following a hyperlink included in the invitation letter.

Responses were collected, collated and analysed by i-graduate. Students were offered incentives to respond, with a cash prize draw, as well as a range of options for charitable donations.

The HE and VET sector surveys were conducted in English and the ELICOS sector survey was conducted in 11 different languages.

The School sector survey was also conducted in five different languages: English, simplified Chinese, traditional Chinese, Korean and Vietnamese. The survey questionnaire was based on that used in the 2006 ISS for Schools and made available in both online and hardcopy.

Key Findings

Overall satisfaction

In the 2010 survey, 86% of all international student respondents were satisfied or very satisfied with their overall living experience in Australia and 84% were satisfied with their study experience. This compares to figures of 85% (living) and 84% (study) for international students who participated in the 2006 International Student Survey (ISS).

Higher Education (HE)

Overall 86% of international students at Australian universities who responded to the 2010 survey were satisfied with their living experience and 84% with their learning experience. This percentage was about the same as that reported by HE domestic students who were part of a control group study conducted at a sample of Australian universities in 2009. It also compares to 85% as reported by HE respondents to the 2006 ISS and to 88% of international students who were attending universities elsewhere in the world and who participated in the 2009 i-graduate study (ISB)².

Vocational Education and Training (VET)

Overall 85% of the international students at Australian Technical and Further Education colleges who responded to the 2010 survey were satisfied with their study and living experience. A similar satisfaction rating (86%) was recorded in the ACPET pilot study and compares to a figure of 80% which was recorded for VET (both private and public) respondents to the 2006 ISS.

English Language Intensive Courses for Overseas Students (ELICOS)

Approximately 86% of ELICOS respondents to the 2010 survey were satisfied with their overall experience. This compares to 85% of ELICOS respondents to the 2006 ISS.

Secondary Schools

Almost three-quarters (74%) of School respondents were satisfied with their overall living experience in Australia. This was lower than that in 2006 (82%). The exclusion of students under 18 years of age in the 2010 survey might have a minor impact on the decline. Also, the 2010 survey differs from the 2006 survey with respect to having translated survey questions into different languages.

² See explanatory notes for further information.

Satisfaction with support on arrival

The overall satisfaction with the information, advice and support provided to students on arrival, as reported by both HE and VET respondents to the 2010 survey, was 86%. The HE sector recorded a satisfaction rating of 86%, while the public VET sector recorded 87%, the same as for private VET.

Perceptions about this aspect of the student experience were not collected from students in the ELICOS sector, nor were comparable data obtained in the 2006 ISS.

The overwhelming majority of the elements included under the general category 'Arrivals support satisfaction' recorded high levels of satisfaction. For HE respondents to the 2010 survey, support and advice regarding *Bank accounts* (92%), *Orientation* (87%), *Meeting staff* (86%), and *Email/Internet* (86%) scored the highest degree of satisfaction.

Notable was the significant variation in the level of satisfaction recorded by HE international student respondents to the 2010 survey compared to the ISB results in relation to the provision of information and assistance in establishing *Bank accounts* (92% compared to 71% for the ISB). Other elements where some variations of more than two percentage points were evident between the two surveys were: *Finance office* (85% for the 2010 survey and 80% for the ISB); *Host country friends* (69% and 75%); and *Social activities* (79% and 83%).

Similarly, there was very little difference between the HE and VET sector satisfaction scores for the various elements under the 'Arrivals support satisfaction' with the exception of *Host country friends* (69% for HE and 77% for VET) and *Social activities* (79% and 75% respectively).

The vast majority of the School respondents who had used the arrival support services found the services 'Useful' or 'Very useful' - including the elements *Help from international student coordinators* (94%), *Airport pick-up* (93%), *Orientation program* (89%), *Home stay coordinator* (89%) and *Health service* (85%). However, around one in two students were aware of such services available to them and one in three reported to have actually used the services.

Satisfaction with living in Australia

Eighty-six per cent of international respondents were satisfied or very satisfied with living in Australia. This percentage was also recorded in the ISB and compares to 90% satisfaction for domestic student respondents to the 2009 control group survey and to 85% recorded in the 2006 ISS. High levels of satisfaction were reported by respondents in all sectors (86% by HE, 88% for VET, and 86% for ELICOS).

The 2010 survey results revealed some interesting variations across sectors in relation to specific elements that were included under the 'Living satisfaction' category.

One significant difference that emerged from the survey was in respect of the *Cost of accommodation* where the percentages ranged from 52% satisfaction for ELICOS students, to 72% for VET students. Respondents in the HE sector recorded 60% satisfaction for this element which was similar to the 62% recorded in the ISB. A similar pattern of satisfaction for the sectors was also the case in respect of *Living costs* where figures of 61% for the HE sector (ISB 66%), 73% for VET and 52% for ELICOS, were recorded.

Other areas related to the students living experience that recorded relatively low levels of satisfaction were *Host country friends* (with 67% for the HE sector [ISB 71%], 76% for VET and 69% for ELICOS) and *Opportunity to earn money* (59% for HE [the same as ISB], 63% for VET and 52% for ELICOS) also scored relatively low satisfaction scores. The low score recorded by ELICOS respondents for this element could be due to the relative short duration of their courses which may discourage many ELICOS students from looking for work. Moreover, it is probable that language difficulties would present problems for those ELICOS students who may wish to seek part-time employment.

A comparison of results from the 2010 survey for international students and those obtained through the 2009 study of HE domestic students reveals some variations in the levels of satisfaction for particular elements included in the 'Living satisfaction' category. Most prominent were *Host country friends* (67% for international students and 92% for domestic students), and *Opportunity to earn money* (59% and 69% respectively).

Interestingly, *Safety* recorded high satisfaction levels in respect of both HE cohorts (86% for international students and 94% for domestic students) and compared favourably with the ISB score of 89%. High levels of satisfaction were also recorded for this item in the VET and ELICOS sectors (88% and 80% respectively). These levels of satisfaction represented a marked improvement on those recorded for *Safety and security* in the 2006 ISS (75% for HE respondents, 78% for VET and 75% for ELICOS). The survey of school students (using a different survey instrument) found that 71% of students were satisfied or very satisfied with their safety while living in Australia (compared with 73% from the 2006 survey).

Similarly, in respect of *Accommodation access*, all three sectors surveyed recorded satisfaction levels around 85% in the 2010 survey, a figure which equated with the ISB benchmark score. This level of satisfaction represented a significant improvement on the ratings recorded in the 2006 ISS (64% for HE; 63% for VET and 59% for the ELICOS).

The satisfaction levels reported by HE respondents for most of the elements included in the 'living satisfaction' category generally reflected those recorded in the ISB. Lower levels of satisfaction (by around 5 to 6 percentage points) were reported by 2010 respondents against such elements as *Social facilities*, *Social activities* and *Visa processes*. Slightly higher levels of satisfaction (one percentage point) were reported for *Financial support*, *Accommodation quality*, *Eco-friendly attitude*, and *Similar friends*.

One area where some marked variation on satisfaction levels was evident was in regard to *Internet access*. Respondents from the VET sector recorded 81% satisfaction, while the ELICOS sector recorded 67%. The HE respondents recorded 75% which compared to 83% as reported by participants in the ISB.

The overall satisfaction level by School respondents declined from 82% in 2006 to 74% in 2010. Analysis suggested that this was due to the differences in the survey samples (i.e. exclusion of students under 18 years of age in the 2010 survey). The satisfaction with *School experience* was identified as the primary driver of overall living satisfaction. In comparison, the satisfaction with *Cost of living* was a primary driver in 2006 ISS for Schools.

The School respondents indicated that they had broad interactions with fellow local and international students (and to a lesser extent, with the wider community), but the majority (81%) still would like to have more Australian students as close friends. Lack of interest by Australian students (41%) and English ability (46%) were perceived as barriers in making friends with Australian students.

Satisfaction with studying in Australia

In the 2010 survey 84% of international respondents indicated that they were satisfied or very satisfied with their study experience in Australia. This percentage is identical to that recorded in the ISS in 2006 and compares favourably with 87% satisfaction reported by HE domestic students and 86% in the ISB. High levels of satisfaction were reported by respondents in all three sectors surveyed in 2010 (84% for HE, 85% for VET and 86% for ELICOS).

There was little variation across the sectors in relation to those elements associated with 'teaching' and 'employment' that were included under the broad 'Learning satisfaction' category. High satisfaction levels were recorded against the elements relating to 'teaching' such as *Course content*, and *Course assessment* both of which recorded satisfaction levels in the mid to high 80 per cent range in all three sectors. Ninety-one per cent of respondents were satisfied with their *Teachers and/or lecturers*. It is noteworthy that the satisfaction ratings reported in the 2010 survey were significantly higher than those recorded in the 2006 ISS (68% HE; 67% VET; and 66% ELICOS).

Lower satisfaction levels were expressed by survey respondents in respect of items relating to 'employment' such as *Work experience* where only 60%, of HE respondents reported that they were satisfied with the quantity and quality of the opportunities that were available to them. Seventy-two per cent of international student respondents studying at VET institutions

indicated that they were satisfied with this dimension of their learning experience while ELICOS respondents recorded 67%. In the case of HE, the 60% satisfaction level compared to 64% recorded in the ISB benchmark study. Similarly, *Careers advice* did not receive high satisfaction levels in the HE (65%) and VET (73%) sectors and *Employability* (only for the HE sector) registered 73% compared to 76% for the ISB.

The employment related items *Work experience* (73%) and *Careers advice* (73%) also scored relatively low satisfaction levels among domestic students in the HE sector, although 84% of these respondents were satisfied with their *Employability*.

An examination of the responses of international students in relation to the degree of *Flexibility* available to students in the way they would like to study, reveals that 82% of respondents in the HE and VET sectors were satisfied with this aspect of their study experience compared to 75% in the ELICOS sector. The HE response for this item was similar for domestic students (85%) and the ISB (83%).

There was some variation across sectors in relation to those elements associated with 'support services' that were grouped under the 'Learning satisfaction' category. In particular, *Language support services* received satisfaction ratings of 81% and 85% for HE and VET respectively while ELICOS recorded 75% satisfaction. VET sector respondents also reported higher satisfaction than the HE and ELICOS respondents in respect of *Library facilities* (85% compared to 83% for HE and 81% for ELICOS) and *Learning support* (88% compared to 83% for HE and 85% for ELICOS).

Satisfaction with the quality of *Learning spaces* was high across all sectors (around 84%) and mirrored the ISB benchmark score for this element. In relation to *Technology support* (IT services), satisfaction levels were consistent across the sectors (81% for HE; 82% for VET and 81% for ELICOS) but were lower than that recorded in the ISB survey (85%). These satisfaction levels were a considerable improvement on the ratings recorded in the 2006 ISS for this item with the respective percentages being (76% for HE; 61% for VET and 59% for ELICOS).

In the case of international PhD students, respondents recorded a relatively low level of satisfaction (71%) in respect of the element *Opportunities to teach*. This score was the same as that reported by PhD students who participated in the ISB but was somewhat lower than that recorded for domestic PhD students (78%).

The School respondents were relatively satisfied with their overall school experience (76%). Almost three-quarters (72%) of the respondents rated the teaching at their schools as 'Good' or 'Very good' (an improvement from 53% in 2006).

Prior to coming to Australia and starting their studies, about one-fifth of School respondents considered their spoken and written English (23% and 19% respectively) as either 'Good' or 'Very good'. At the time of the survey, these percentages had increased to 60% and 50% respectively.

Satisfaction with support services

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.

Eighty-six per cent of HE international student respondents to the 2010 survey and 82% of VET respondents were satisfied or very satisfied with the support services provided by education institutions during their stay in Australia. The overall rating was identical to that recorded in the ISB. In the 2006 ISS, the question relating to support services sought information about the usefulness of each of the services available with ratings of usefulness ranging from 80% to 98% for HE and from 83% to 94% for VET.

HE and the VET were the only sectors from which the information was sought.

In general, there were relatively minor variations in the usage of services reported by HE international students who participated in the 2006 ISS and HE respondents to the 2010 survey. Notable exceptions were *Accommodation services* (down from 41% usage in 2006 to 31% in 2010), *Health services* (52% to 36%) and *Financial advice services* (up from 9% to 34%).

The 2010 survey results also revealed differences in the pattern of usage of support services between international and domestic students. *Accommodation services* were used by 31% of international student respondents and 21% of their domestic counterparts, while the respective percentages for *Health services* were 36% and 21%, for *Financial advice services* (34% and 11%) and for *Counselling services* (20% and 12%).

There was little variation in the satisfaction levels recorded by international student respondents in the HE and VET sectors across the various elements included under the 'Support services satisfaction' category. However, in the ELICOS sector, some differences were apparent in respect of several specific support services, namely *Accommodation services*, *Careers services*, and *Counselling services*. While respondents in the HE and VET sectors recorded satisfaction ratings of 80% plus (91% for *Counselling services*) for these elements, ELICOS respondents reported satisfaction levels of 72%, 68% and 73% respectively.

A comparison of the HE 2010 survey results for the individual elements in the 'Support services satisfaction' category against the ISB reveals a remarkable consistency in satisfaction ratings. With the exception of *Catering* (which recorded 74% satisfaction in the 2010 survey compared to 76% for the ISB), *Accommodation services* (80% and 78%) and *Careers services* (81% and 84%), all elements in the 'support services' category recorded satisfaction levels of 85% or more in both surveys. A similar experience was reported by the domestic HE cohort, although ratings for *Catering* and *Accommodation services* were slightly higher (80% and 85% respectively).

In the 2006 ISS a high proportion of respondents in both the HE and VET sectors indicated that the various support services offered by their education providers were useful or very

useful. [It should be noted that there are some differences individual elements included under the general category 'support services' differed between the 2006 and 2010 surveys. For example, *Catering* was included in 2010 but not in 2006.] Areas where there were some reasonably significant variations in the satisfaction ratings recorded between the two surveys were: *Accommodation services* (down from 88% in 2006 to 80% in 2010); *Careers advice* (down from 86% in 2006 to 81% in 2010); and *Financial advice* (up from 80% in 2006 to 88% in 2010).

Some changes to satisfaction ratings between the two surveys was also evident in the VET sector where *Accommodation services* was down from 91% in 2006 to 84% in 2010 and *Careers advice* was down from 90% in 2006 to 82% in 2010.

On average, the School respondents were aware of seven out of the 15 support services asked about in the survey, and have used five of them. *Library* and *English classes* were the two support services that most students were aware of (82% and 66% respectively), have used (75% and 52%), and found most useful (69% and 50%).

Factors influencing the choice of where to study

Across all respondents in the HE and VET sectors, the top four factors that influenced the choice of where to study in Australia were: *Quality of teaching* (with 94% of respondents identifying this factor as important or very important); *Reputation of a qualification from the institution* (93%); *Personal safety* (92%); and *Reputation of the institution* (91%).

These factors were also the top four for HE respondents alone and corresponded closely to the most important considerations identified by ISB respondents.

For the public VET sector the top three remained the same but the 4th most important factor was reported as *Cost of study*. For private VET the top four were *Quality of teaching* (94%); *Personal safety* (92%); *Reputation of the institution* (92%) and, equally, *Cost of study* and *Reputation of a qualification from the institution* (both 90%).

Eighty-six per cent of ELICOS respondents identified *Quality of teaching* as the most important factor influencing their choice of provider.

For HE respondents to the 2010 survey, the five most important factors influencing their decision on where to study were: *Quality of teaching* (with 96% of respondents identifying this factor as important or very important); *Reputation of a qualification from the institution* (93%); *Personal safety* (92%); *Reputation of the institution* (91%); and *Research quality* (90%). Four of these factors (with similar satisfaction scores) featured in the top five most important considerations as recorded in the ISB. The exception was *Personal safety* (84%) which the ISB cohort ranked equal 7th in importance behind *Faculty/Department reputation* (88%) and *Country* (85%).

In the 2006 ISS, HE respondents deemed the most important factors to consider when deciding on a course to be: *Quality of education* (94%); *Improved chances of employment* (90%); *Reputation of the university* (89%); *Reputation of the course* (86%); and *Cost of the course* (75%).

It is interesting to note, in view of the high importance rating achieved by *Improved chances of employment* (90%) in the 2006 ISS, that issues such as *Long-term employment* and *Work opportunities* recorded importance ratings of just 74% and 75% respectively among HE respondents to the 2010 survey. These ratings compared with 61% and 67% for the ISB and 88% and 86% for VET respondents.

In respect of the VET sector, the top influencing factors in choosing where to study as reported by 2010 survey participants were: *Quality of teaching* (95%); *Personal safety* (93%); *Reputation of a qualification from the institution* (92%); *Cost of study* (91%); *Country* (90%) and *Reputation of the institution* (also 90%).

Respondents to the 2006 ISS from the VET sector identified the following factors as the most important in their decision regarding where to study: *Quality of education* (93%); *Improved chances of employment* (86%); *Reputation of the course* (84%); *Reputation of the institution* (83%); and *Cost of the course* (82%).

For ELICOS, the main reasons cited by 2010 survey respondents for choosing a particular English language centre were: *Personal recommendation* (with 42% of respondents indicating that this was a key factor in their choice of school), followed by *Reputation of the school* (selected by 28% of respondents) and *Entry into further study* (21%).

In the 2006 ISS, 47% of all respondents indicated their motivation for choosing the institution where they were studying was based on a recommendation from an education agent. Thirty per cent had received advice from friends and relatives, while the reputation of the college was an important consideration for 20% of respondents.

For Schools, the five most important factors influencing students' decision in choosing to study overseas were to:

- Gain experience living and studying in another country and/or culture (73%);
- Improve English (70%);
- Improve overall studies (55%);
- Obtain a better quality education than is available at home (48%); and
- Improve chances of entering a good university in Australia (48%).

Almost two-thirds (63%) of the School respondents stated that Australia was their first choice for overseas schooling. Top four factors in choosing to study in Australia were: *High quality of education* (56%, up from 53% in 2006); *Safe place to live* (52%, up from 50% in 2006); *Beautiful, natural environment* (48%, down from 53% in 2006); and *Relatives/friends living in Australia* (43%, up from 35% in 2006).

Explanatory Notes

Comparisons over time and between surveys

The focus of this consolidated report is on high level indicators. Where survey response rates, scope, and coverage considerations allow, some indicative comparisons have been made with (i) the ISB (for HE only); (ii) relevant data collected in AEI's 2006 ISS; and (iii) survey results from a restricted control group of Australian domestic students (for selected elements only).

Comparisons of the results derived from different surveys can be problematic due to the different scope of the data collections, the survey instruments used and collection methodologies employed. This is particularly the case in respect of data comparisons between the 2006 (ISS), where the scope was limited to international students who were completing a course of study during the reference period, and the 2010 survey, which included all current (on-shore) international students, and in which the ISB survey instrument was used. It is quite likely, for example that, for some questions, the perceptions of newly arrived students will differ markedly to students who have been in the country for several years. In addition, the results presented in the report could be affected by the use of a four (4) point scale ('very satisfied', 'satisfied', 'dissatisfied', and 'very dissatisfied') as applied in the 2010 survey compared to a (5) point scale that was used in the in 2006 ISS (the category 'neither/nor' was also included).

Notwithstanding these complications and other limitations, analysis of internally consistent elements of survey results can provide reasonably reliable, albeit high level, indicative comparative data.

Timeframe for the 2010 survey

The surveys were conducted during the following periods:

Sector	Timeline
Higher Education	March to May 2010
VET (public)	October to November 2009
ELICOS	July to August 2009
Secondary Schools	August to September 2010

International benchmark (ISB)

The report compares the 2010 survey findings with an international HE benchmark study (ISB) which includes data from ISB surveys run at 162 universities in Europe, North America, South Africa, Singapore, Australia, New Zealand and the United Kingdom in 2009/2010. The size of the ISB survey sample is significant – around 121,834 student responses from 162 participating universities.

Private VET

Pilot surveys of the private VET sector and domestic university student barometer were also conducted in 2009 -10. The private VET sector data represent the aggregate of the international student responses received from 38 Australian Council for Private Education and Training (ACPET) member colleges.

List of Acronyms

ACPET	Australian Council for Private Education and Training
AEI	Australian Education International
AQTF	Australian Quality Training Framework
COAG	Council of Australian Governments
CRICOS	Commonwealth Register of Institution and Courses for Overseas Students
DEEWR	Department of Education, Employment and Workplace Relations
ELICOS	English Language Intensive Course for Overseas Students
ESOS	Education Services for Overseas Students
HE	Higher Education
ISB	International Student Barometer
ISS	International Student Survey
MCTEE	Ministerial Council on Tertiary Education and Employment
TAFE	Technical and Further Education
TDA	TAFE Directors Australia
VET	Vocational Education and Training