



Australian Government

Australian Education International

# 2006 International Student Survey

English Language  
Intensive Courses for  
Overseas Students  
Summary Report

September 2007

[aei.dest.gov.au](http://aei.dest.gov.au)

## About this report

In 2005, Australian Education International (AEI) commissioned research to assess the overall satisfaction of international students studying in Australia. The research was conducted by Ipsos and focussed on international students in their final year of study. The research included all four sectors – Higher Education, Vocational Education and Training, Secondary Schools and English Language Intensive Courses for Overseas Students (ELICOS).

This report relates to students from the ELICOS sector only.

## About Australian Education International (AEI)

AEI is the international arm of the Australian Government Department of Education, Science and Training (DEST). AEI promotes the export of Australian education and training services. It works to attract students from around the world to study in Australia and to ensure that international students have a successful and enjoyable study experience. For further information, please visit [www.dest.gov.au](http://www.dest.gov.au) or [www.aei.dest.gov.au](http://www.aei.dest.gov.au). DEST/AEI owns exclusive usage rights to this study unless otherwise noted or agreed.

## Ipsos Australia Pty Ltd

Ipsos Australia Pty Ltd is a public opinion, market and social research firm. The Ipsos research team involved in the preparation of this report included: Erik Okerstrom, Wendy McInnes, Graeme Peacock, Stanislav Bondjakov and Preslav Bondjakov.

## Acknowledgements

AEI would like to thank Ipsos Australia Pty Ltd for undertaking this study, the Australian educational institutions and peak bodies who participated in the research project and all individuals who contributed by agreeing to interviews, supplying data and information and otherwise assisting in the conduct of the research.

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## Executive summary

In 2005, Australian Education International (AEI) commissioned Ipsos Australia Pty Ltd to conduct a survey of international students who completed a course of study in Higher Education, Vocational Education and Training, Secondary School or English Language Intensive Courses for Overseas Students (ELICOS) in Australia in 2006.

The 2006 International Student Survey (ISS) sought to obtain a comprehensive, up-to-date measure of the experience of international students in Australia. Data were collected from 582 ELICOS students nationwide.

This report relates to students from the ELICOS sector only.

### Pre-arrival experiences and selection process

ELICOS respondents were generally satisfied with the pre-arrival information they received. This was especially the case in relation to fees and cost of living. It was suggested that better information about costs would help students with their budgeting. There is also a need for information that is clear and easy to understand, perhaps in the students' own language, and distributing it efficiently to all who require it.

### Competitive positioning of Australia international education

Australia ranks second to the United Kingdom (UK) as the country that has the best quality English language courses. Twenty-nine percent of respondents listed the UK as 'Number 1' and 14.3% nominated Australia. The United States of America (USA) was a close third with 13.8% of respondents naming it as 'The Best'. Canada followed in fourth place, with 6.3%.

### Influencers in deciding to come to Australia

Eighty-four percent of ELICOS respondents reported Australia was their first country of choice for overseas study. The overriding factors for choosing Australia included:

- being an English speaking country (77%);
- having a beautiful natural environment (60%);
- being a safe place to live (55%);
- the weather (43%);
- low cost of education compared to other countries (38%);

- friendly people (36%); and
- having a high educational standard (27%).

When applying for the ELICOS course, nearly all respondents (95%) indicated that the quality of education was an extremely important or important factor in their decision. Other factors which were extremely important or important were that the course would increase their chances of employment (77%) and that the Education Services for Overseas Students (ESOS) Act protects international students (68%).

ELICOS respondents were also attracted by Australia's 'aesthetic assets' such as the natural environment, as well as being an English speaking country and having a high educational standard.

## Use of agents

Seventy-six percent of ELICOS respondents used an agent to help them with their arrangements in coming to Australia. Most of these (83%) were education agents. Asian respondents were the heaviest users of education agents, with up to 97% of South Korean respondents having used an education agent, compared to 58% of European respondents. European respondents made the greatest use of travel agents (35%).

## Student visas

Pre-arrival difficulties relating to visas also varied widely. Eighty-one percent of European respondents were satisfied with the ease of obtaining a visa. This was a high proportion compared to Asian respondents with some countries reporting satisfaction levels as low as 51%. Also, respondents with working holiday or tourist visas were generally more satisfied with the ease of obtaining a visa (84% and 81% respectively) than respondents with ELICOS plus further study or ELICOS only student visas (69% and 58% respectively).

## ELICOS students' satisfaction with education and study in Australia

### Study satisfaction and recommendations

Importantly for most ELICOS respondents, studying in Australia (as distinct from living in Australia) was also a very positive experience, with 79% being satisfied or very satisfied overall with their ELICOS course with only 5% being very dissatisfied.

A high number of international respondents expressed willingness to recommend friends or family to study in Australia (85%), however fewer were prepared to recommend their ELICOS institution (70%) or their course (64%).

## Support services

In general, support services were utilised by around half of all respondents. The specific support services used were: induction/orientation (49%), ILC (Independent Learning Centre)/self study (48%), assistance with accommodation (48%) and airport service pickup (47%). All services were rated as very useful/useful by over 90% of all users, with the exception of religious support services (used by only 5% of respondents).

## ELICOS students' satisfaction with living in Australia

Overall, the majority of ELICOS respondents (86%) were either satisfied or very satisfied with their living experiences in Australia, while only 2% were very dissatisfied.

## Cost and work related factors

While 40% of ELICOS respondents were satisfied with the cost of living in Australia, 26% were dissatisfied. Twenty-seven percent were satisfied with the cost of their course; however 29% were dissatisfied with the cost.

Out of the 17% of ELICOS respondents who had a paid job in 2006<sup>1</sup>, nearly one-third worked five to ten hours per week with the remaining two-thirds working between 11 and 20 hours per week.

Many students that chose to work did so in order to support themselves and fund travel throughout Australia.

## Work-study balance

Forty-five percent of working respondents surveyed found it relatively easy to balance working with study, while 25% found this difficult to achieve.

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<sup>1</sup> By way of comparison, AEI data reports that 18% of ELICOS students were employed in 1999 and 8% in 1996



## Integrating into the Australian community

The key advantage of home-stay for ELICOS respondents was that it provided an opportunity for students to experience life within a typical Australian household and to practise their English. However, improvements could be made in the home-stay family's involvement in helping students to 'settle in', for them to be 'shown around', to possibly meet new people and thereby expand their network of friends in Australia. Nearly all (91%) ELICOS respondents would like to have more Australians as friends.

ELICOS respondents felt they were treated with more respect inside the classroom than general in the community. Around eight in ten respondents believed they were generally treated with courtesy and respect by teachers (85%) and fellow international students (80%). However, only 72% felt they were treated with respect from school administrative staff and only 65% felt they were treated with respect by members of the Australian community (e.g. shop assistants, landlords and neighbours).

## Key drivers of Overall Stay Satisfaction

ELICOS students reported a high level of overall satisfaction with their stay in Australia. The main drivers of satisfaction are listed (in order of importance) in Table 1. The standardised beta score indicates the level of 'influence' on Overall Stay Satisfaction. The higher the beta scores, the greater the influence.

*Table 1: Drivers of Overall Stay Satisfaction in order of importance*

Drivers of satisfaction	Mean scores (1-10)	Beta (standardised)
Expense perceptions after arrival	6.12	0.32
College and course satisfaction	8.01	0.30
Australians attitudes towards students	7.11	0.22
Students attitudes towards Australians	8.01	0.12
Home-stay satisfaction	9.01	0.10
Overall Stay Satisfaction	8.27	

Although the mean score for Overall Stay Satisfaction is a very positive 8.27 out of a possible 10, some additional focus may be required on perceptions of expense after arrival; and factors that affect the students' perceptions of Australians' attitudes towards them.

## Future career plans and aspirations

### Work prospects

Overall 70% of respondents felt that their ELICOS course would help them get a good job. Ten percent believed that it would not and 20% did not know.

European respondents had a slightly greater belief that their English language course would help them get a job (75%). This is a view that was shared by Latin American or Middle Eastern respondents (86%), with Asian respondents (65%) having lower expectations.

### Future study course plans

Thirty-six percent of ELICOS respondents planned to enrol in further study immediately after completing their course. Eighty-two percent of ELICOS respondents intending to complete further study planned to do so in Australia, with 65% planning to attend university and 16% intending to take a VET course.

Seventy-four percent of all ELICOS respondents believed their English had improved either some (49%) or a lot (25%). It is to be noted that at the time of completing the survey, respondents were at various stages of their courses, which differed in duration from one week to over six months. Furthermore, the vast majority (82%) believed that their English language course will help them complete future studies.

Fifty percent of all ELICOS respondents intend sitting an IELTS (International English Language Testing System) or similar test.

### Permanent residence

Interest in making Australia their home was common to 23% of ELICOS respondents. One fifth stated they plan to apply for permanent residency whilst 3% had already applied. Respondents aged over 30 years were more likely to seek permanent residency compared to younger respondents (33% compared to 21%).

In summary, it is clear that for ELICOS students, costs, study/course experiences and social contact are critical in forming their overall opinion about Australia. This, in turn, impacts on the way they talk about Australia, both as a place to visit and as a study destination when they return to their home country. Much of their overall satisfaction is connected to the extent to which they are 'allowed' to 'immerse' themselves in Australian culture and not 'get stuck' in groups comprising solely other international students. Such a lack of exposure to Australian culture also affects the way they perceive Australians and how they in turn think they are perceived by Australians.

High levels of satisfaction with living and studying in Australia among ELICOS students can be maintained through enhancing and facilitating their experience of Australian culture, language and social interactions. These aspects are among ELICOS respondents' core motivations for choosing Australia, and where expectations should be met, or even better, exceeded. Focus on these aspects would encourage the spread of positive word-of-mouth by students in their home country. Through recommending Australia to friends and family, these students are promoting the country and encouraging others to come and study here.

# 1. Background and objectives

Australia is the world's fifth largest provider of education to international students, following the USA, UK, Germany and France<sup>2</sup>. Australian Education International's (AEI) mission is to promote and protect Australia's reputation as a provider of quality education and training to international students. AEI commissioned Ipsos Australia Pty Ltd to conduct the International Student Survey (ISS) to obtain a comprehensive, up-to-date measure of the experiences of international students in Australia and to ascertain their future career or study plans and aspirations.

Information from the ISS will help identify current strengths and key issues that can be addressed to enhance the quality of the study experience for international students in Australia.

The ISS involved surveying four education sectors, Higher Education (HE), Vocational Education and Training (VET), Secondary Schools (Schools) and English Language Intensive Courses for Overseas Students (ELICOS). The research involved three phases: qualitative research, a pilot quantitative survey and the main quantitative survey. In late 2005, qualitative research was conducted among HE, VET, Secondary School and ELICOS students and at that time also conducted a pilot quantitative survey of international and Australian students who were completing a course of study at VET institutions in Australia. The pilot study tested the methodological approach proposed for the conduct of the ISS including the design of the survey instrument.

The ISS will provide valuable information on the experience of international ELICOS students in Australian education institutions. The results will assist to identify areas where the level of services provided to students are well regarded and where more can be done to respond to international student needs.

The data contained in this document are reported from a national perspective.

**This report details the findings regarding the experiences of international students enrolled in ELICOS institutions.**

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<sup>2</sup> Source: UNESCO Institute for Statistics – UIS/FS/05/02 (Updated Nov 2005) [www.uis.unesco.org](http://www.uis.unesco.org)

## 1.1 Research objectives

The main objectives for the ISS research project were:

- to obtain information about international students' experiences before arriving in Australia with respect to their choices to study in Australia;
- to measure international students' level of satisfaction with education, pastoral and support services, social integration and overall satisfaction with their stay in Australia; and
- to ascertain the future career plans and aspirations of international students subsequent to completion of the studies.

## 1.2 The ELICOS sector<sup>3</sup>

AEI data showed that in 2006, enrolments and commencements in the ELICOS sector were higher than ever before. Enrolments for the sector were 77,468 and commencements 59,615; a growth of 19.2% and 19.4% respectively on 2005. Growth in enrolments for 2006 was four times that of the previous year, which was in turn a recovery from the negative growth experienced in the sector two years previously.

The largest markets for ELICOS students were China, South Korea and Japan. Twenty-two percent of enrolments were from China and, together with those from South Korea and Japan, these accounted for 49% of all enrolments.

While China, and in particular South Korea, recorded good growth in 2006, Japan continued the decline that has been evident since 2004. Brazil was Australia's fifth largest ELICOS market in 2006, when enrolments were up by 47% and commencements were up 38% compared to 2005.

Just under three-quarters of ELICOS enrolments were with non-government providers. Growth in enrolments and commencements at non-government providers was double that of government providers. At the end of 2006 there were 49 government providers and 180 non-government providers delivering ELICOS to students studying in Australia on a student visa. See Appendix A for the full AEI Research Snapshot. AEI data shows students on a student visa only. However, the English Australia 2006 survey indicated that 48% of students were on a student visa, 29% were on a visitor visa and 21% were on a working holiday or other visa.<sup>4</sup>

<sup>3</sup> Source: this section is an extract from the Research Snapshot series no. 21, AEI, 2006.  
<http://aei.dest.gov.au/AEI/PublicationsAndResearch/Default.htm>.

<sup>4</sup> English Australia Survey of Major ELICOS Regional Markets in 2006, June 2007 – English Australia.

## 2. Research method

### 2.1 Research method and sample

#### 2.1.1 Qualitative phase

The purpose of the qualitative research was to provide an in-depth understanding of the attitudes and experiences of international students in Australia and their ongoing support needs. The qualitative research also guided the design of the quantitative questionnaire.

Key issues explored in the qualitative research included:

- students' choice sets and decision processes in deciding to study in Australia;
- main influences on their decision, including family, friends and intermediaries, such as Australian Education Centres and broader media;
- alternative study destination options, and their relative strengths and weaknesses compared to Australia;
- satisfaction with information provided to them before their arrival and during their stay, and ways that this could have been improved;
- level of satisfaction with education, pastoral and support services received during their stay in Australia and specific ways that these could have been improved;
- level of social integration and overall satisfaction with their stay in Australia and how it can be improved;
- future career plans and aspirations once they complete their course of study;
- preferred employment and further education outcomes;
- other key issues that students faced in Australia and ways in which their time in Australia could have been improved; and
- whether they would recommend Australia to other people from their country for study (including reasons for and against).

Focus group discussions were held with ELICOS students, comprising students from all over the world with Europe, Latin America, Asia, and the Middle East all represented. There were three groups containing 6 to 8 international students each. Focus groups were conducted in Sydney and in Melbourne, involving all student types with an additional Melbourne group focussed on pathways students.

## 2.1.2 Quantitative research

A self-completion survey was developed from the results of the qualitative research and previous research in the area of international student markets. The survey comprised 44 multi-part questions and took respondents approximately 30 minutes to complete. A copy of the questionnaire is at Appendix B.

ELICOS surveys were administered in two ways:

- via self-completion in the classroom, with a consultant available to answer any queries or address any difficulties (n=290 or 50% of the total base); and
- via a self-completion mail-back survey (n=292 or 50% of total base).

## 2.2 Response rates

An excellent overall response rate of 72% was achieved, with a total of 804 surveys dispatched to ELICOS students resulting in 582 responses. Table 2 shows survey responses by State. At a 90% confidence interval, the results based on the sample size had an accuracy of plus or minus 3.4%.

The response rate for classroom completion was naturally the highest with 90% completing the survey. Mail survey responses were still relatively high at 61%.

Non-respondents who were mailed hard-copy questionnaires were all sent a reminder/thank you card to help boost response. Cash incentives were also offered to all survey participants to help increase the response rate.

*Table 2: ELICOS surveys dispatched and responses by state (includes classroom completion and mail surveys)*

State	Target response (AEI)	Surveys dispatched	Surveys returned	Response rate
<b>NSW</b>	207	355	205	58%
<b>QLD</b>	168	240	176	73%
<b>VIC</b>	95	113	109	96%
<b>WA</b>	68	68	66	97%
<b>SA</b>	28	28	26	93%
<b>Total</b>	<b>566</b>	<b>804</b>	<b>582</b>	<b>72%</b>

*NB: No quotas were set for surveys dispatched to TAS, ACT & NT for ELICOS students, as numbers were very small.*

The overall response rate for the ELICOS survey was 72%.

## 2.2.1 Sample characteristics

Forty-four percent of ELICOS respondents were aged between 18 and 23 years, with a total of 88% under 30 years of age. Females accounted for 57% of the sample and males 43%. Sixty-one percent of respondents had been in Australia less than 6 months, 29% between six months and a year and the remaining 10% over one year.

The largest proportion of ELICOS respondents were studying in New South Wales (34%), with 31% in Queensland, 19% in Victoria, 11% from Western Australia and 5% in South Australia.

As at the time of the survey, 45% of ELICOS respondents were completing an intermediate level of ELICOS study, while 34% were undertaking an advanced/academic level course and 16% were taking an upper intermediate level course.

Respondents were from 43 different countries. Sixty-eight percent were from Asian countries; 61% respondents were from North-East Asian countries such as South Korea, Japan, Taiwan, Hong Kong and China; while 7% were from South-East Asian countries such as Thailand, Indonesia, Malaysia, and Philippines. Twelve percent were from North-West European countries such as Switzerland, Italy, Germany and the Czech Republic. Latin American countries, such as Brazil, Colombia, Chile and Mexico also accounted for 12% of ELICOS enrolments. Middle Eastern countries formed the smallest group at 3% of respondents. Note that for the vast majority of respondents, there was no difference between permanent residence and country of citizenship. For this study the country of permanent residence has been used.



Table 3 lists the top five countries represented by ELICOS and the number of surveys returned.

*Table 3: Top 5 ELICOS survey responses by country of permanent residence*

Country of permanence	Number of respondents	% of total
<b>South Korea</b>	148	25%
<b>Japan</b>	109	19%
<b>Taiwan</b>	47	8%
<b>Brazil</b>	42	7%
<b>China</b>	40	7%
<b>Other</b>	196	34%
<b>Total</b>	<b>582</b>	<b>100%</b>

In addition, respondents were asked a series of questions about the number and duration of previous ELICOS courses they may have studied:

- Eighty-three percent of respondents reported that this was their first English language course.
- Sixty-three percent of respondents planned to complete just one course in Australia while 24% intended to complete two courses. The remaining 13% intended to undertake three or more courses.
- Thirty-six percent of respondents had previously studied English (other than their current course) for less than five weeks, 40% had studied English for between 11 and 30 weeks and 6% had studied over 30 weeks.
- Forty-six percent of respondents who had completed a previous ELICOS course studied that course at their current institution.
- Of respondents that had studied in another country apart from their home country or Australia, 44% had previously studied an ELICOS course, 22% participated in study tours, and 28% had been an exchange student or attended secondary school in another country.

## 2.3 Comparative data

Where possible, comparisons have been made throughout this report to previous studies on the international student market in Australia. Comparisons between years have not always been possible, due to varying scales and differing measures (e.g. mean scores vs. percentages) between surveys.

Reports from which comparisons have been derived include:

- *A Study of the ELICOS Industry in Australia 1996*, AEI, ELICOS Association Limited, Sept 1997.
- AEI – International Education Network, (2003). *Why Choose Australia? Insights from a Survey of International Students who Commenced Study in 2000*.
- Australian Education International, (May 2002). *How international students view their Australian experience: A survey of international students who finished a course of study in 1999*.

## 3. Choosing to study in Australia

*Objective 1: Obtain information about the factors influencing ELICOS students' decisions to study in Australia and their experiences before arriving in Australia.*

This section details the findings relating to pre-arrival processes including:

- the factors in deciding to choose to study in Australia;
- satisfaction with pre-arrival information;
- use of and satisfaction with agents; and
- satisfaction with visa processes.

### 3.1 Factors in deciding to choose Australia

Australia was 'top of the list' for ELICOS respondents, with 84% choosing Australia to study English over other countries. This compares with 70% in 1999 and 72% in 2002<sup>5</sup>.

As illustrated in Figure 1, 77% of respondents chose to study in Australia because it was an English speaking country. The second highest reason related to Australia having a beautiful natural environment (60%); followed by being a safe place to live (55%), the weather (43%), low cost of education compared to other countries (38%) and friendly people (36%).

Aside from Australia being an English speaking country, many ELICOS respondents also appeared to be motivated by the aesthetic aspects of Australia's natural environment. Other more practical factors were lower cost of living (32%), relatives had recommended Australia (29%), high quality of education (27%), the ability to work part-time (26%), the ability to combine English study with travel (26%) and having relatives/friends living in Australia (20%).

Sixty-three percent of ELICOS respondents indicated a friend/relative recommended Australia as a place to study. Thirty-six percent were recommended by agents. Approximately 19% of ELICOS respondents had accessed the Study in Australia website ([www.studyinaustralia.gov.au](http://www.studyinaustralia.gov.au)); however, far more (31%) accessed information about Australia via other websites.

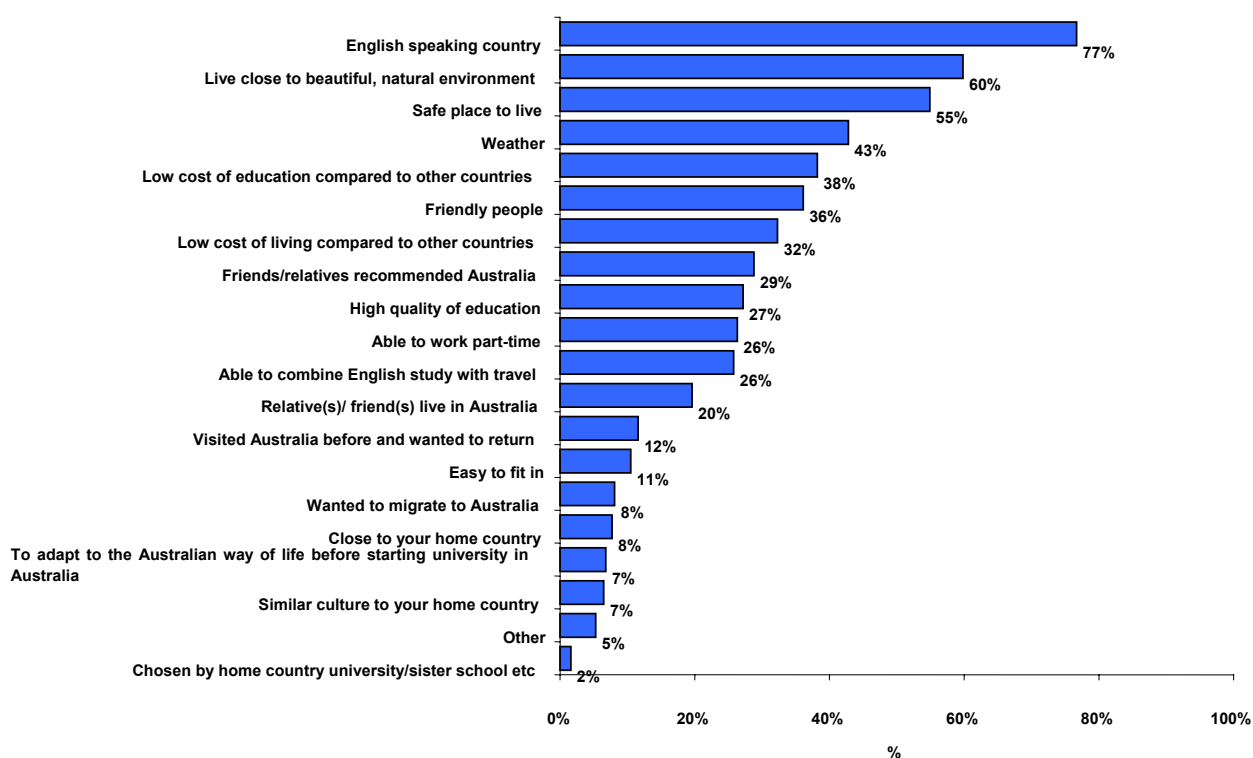
<sup>5</sup> Comparison data were sourced from: 1) *A Study of the ELICOS Industry in Australia 1996*, AEI, ELICOS Association Limited, Sept 1997. 2) *How International Students View Their Australian Experience, A survey of international students who finished a course of study in 1999*, AEI, DEST, May 2002. 3) *Why Choose Australia: Insights from a survey of international students who commenced study in 2000*, AEI, 2003.

Respondents were asked about other countries they considered studying in. Eighty-four percent of ELICOS respondents reported that Australia was their first country of choice for overseas study and 24% of respondents did not consider any other countries when deciding to study overseas. When other countries were considered Canada (38%), USA (35%), UK (34%) and New Zealand (14%) were the top four.

Forty-seven percent of all respondents indicated their motivation for choosing the institution where they are currently studying was based on a recommendation from an education/study agent. Thirty percent had received advice from friends and relatives, while the reputation of the college in their home country was a motivational factor for 20% of respondents. Support services and ‘packaging’ ELICOS with other study courses were key decision factors for 14% and 11% of respondents respectively.

Factors behind the choice of city in which to study their ELICOS course were perceived safety of the location (43%), being a ‘quieter’ city than other cities (30%), plenty of entertainment (22%) and being a low cost Australian city (19%). Continuing study in their current city and ease of flying to their home country were also important decision factors (18% and 15% respectively).

*Figure 1: Important factors in deciding to apply for a course in Australia*



When applying for the ELICOS course nearly all respondents (95%) indicated that the quality of education was either an important or extremely important deciding factor in choosing their current ELICOS course. Other factors respondents found important or very important when applying were: perceptions that the course would increase their chance of employment (77%); the Education Services for Overseas Students (ESOS) Act protects international students (68%); and the course was not available at home (32%).

Sixteen percent of respondents who wanted to study in another country but decided to come to Australia were primarily motivated by financial reasons. Among this group, 33% mentioned the cost of studying in Australia was lower than the two main alternatives, the USA and the UK. For these respondents, accessibility and flexibility-related issues weighed in Australia's favour, namely, ease of visa application (8%), being closer to their home country (7%) and the ability to work while studying (4%).

Respondents were asked which countries they perceived to be more expensive to live and study in. The UK and USA were perceived most costly by 52% and 19% of respondents respectively. Only 3% believed that Australia was the most expensive country (refer to Table 4).

*Table 4: Country perceived to have the most expensive education costs*

This country has the most expensive English language courses	Total agree (n=558)
<b>UK</b>	52%
<b>USA</b>	19%
<b>Australia</b>	3%
<b>Canada</b>	1%
<b>New Zealand</b>	1%
<b>Don't know</b>	24%
<b>Total</b>	<b>100%</b>

Base: All respondents, n=582. Q21: In your opinion, please select from the list below the country to which each of these statements apply...This country has the most expensive English language course. (Tick one box only).

Sixty-six percent of respondents reported having an ELICOS only visa or an ELICOS plus further study visa; 30% had a visitor/tourist visa or a working holiday visa. This reflected the qualitative research, which revealed two distinct segments within the ELICOS respondent market, each with very different motivations and needs:

- 1. Pathways students who were undertaking an ELICOS course with the very specific goal of passing the IELTS (International English Language Testing System).** These students were focused on doing well in their language course, and getting the points required for entry into their preferred university. Some had deliberately chosen a language course that is offered by a well known university in the hope it would give them a 'foot in the door' to that university. Eighty-one percent of respondents indicating they planned further study had an

ELICOS only visa or an ELICOS plus further study visa.

*“I was told I need to do this to do my Masters in Australia.”*

- 2. Students that have come to Australia to learn English, but also to travel and see the world.** Among this group, a student visa was an attractive (although expensive) alternative to a working holiday visa. For example, it allowed them to work part-time, and to travel in the region for a short time. This was considered a great option for young adults, particularly those from Latin American countries and other countries that do not have working holiday arrangements with Australia. Of the total respondents indicating they planned to travel or have extended time off, 60% had an ELICOS only visa or an ELICOS plus further study visa while 30% had a visitor/tourist visa or a working holiday visa.

*“The main reason to come was to get to know Australia. This was the easiest way to get a visa.”*

*“I’ve finished Uni in Chile, and want to increase my chances of getting a job (by learning English).”*

*“Main reason is to combine study and travel. I plan to go travelling afterwards, throughout Australia and Asia.”*

Analysis of the focus groups also showed that students who were planning to combine study at an ELICOS centre with travel were far more likely to be influenced by Australia’s image as an exciting and popular tourist destination than its reputation for quality education. Australia’s appeal over other English speaking countries (predominantly the UK, USA, New Zealand and Canada) appeared to be:

- a huge diversity of things to do and see;
- ease and safety of travel;
- relatively low cost of living; and
- its popularity with backpackers and young student travellers from around the world.

Another key attraction was that international respondents are allowed to work for up to 20 hours per week. Not only was this considered a useful source of pocket money, working was also viewed as an important part of an Australian experience. Indeed, coming to Australia as a student was seen by some respondents as the next best thing to getting a working holiday visa.

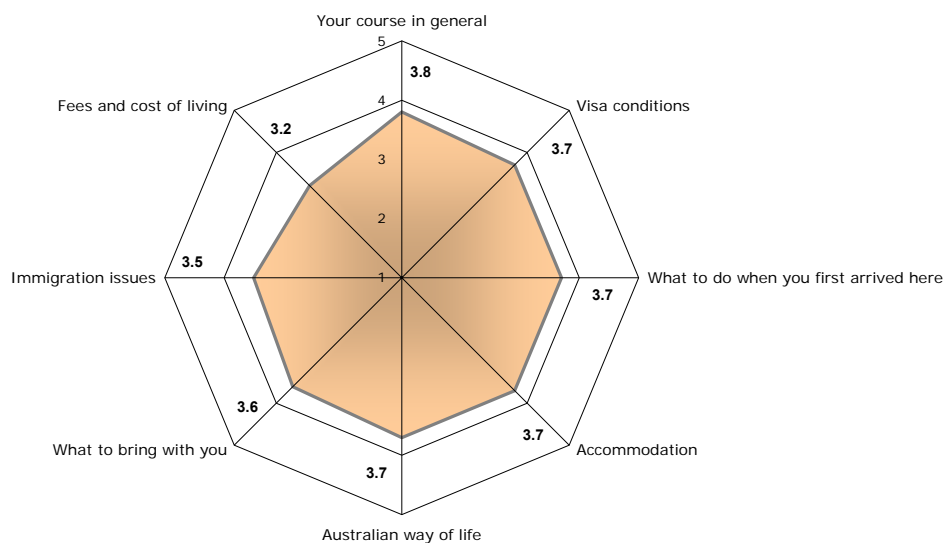
*“In other countries it’s illegal to work.”*

*“It’s becoming very popular in Czech to study overseas, but particularly Australia.”*

## 3.2 Satisfaction with pre-arrival information

ELICOS respondents were generally satisfied with the pre-arrival information they received, as indicated in Figure 2.

*Figure 2: Satisfaction mean scores among international ELICOS students with pre-arrival information*



*Base: All respondents (n=582).*

*Q19a: How satisfied were you with the information you received before you arrived in Australia on this visit, on each of the following (Tick only one box per row). Rating scale: 1= low satisfaction to 5= high satisfaction.*

Respondents were satisfied or very satisfied with the following:

- the course in general (75%);
- visa conditions (69%);
- what to do when they first arrive (67%);
- accommodation (65%);
- the Australian way of life (65%);
- what to bring with them (58%); and
- immigration issues (51%).

There are, however, opportunities for improvement. For example, it appears that better information is

required in relation to the fees and cost of living, with only 42% respondents being satisfied or very satisfied with the information provided before they arrived.

Dissatisfaction with information about fees and cost of living was more likely to be reported by international respondents from South Korea or Japan. Thirty-three percent of respondents who did not have Australia as their first choice of country were dissatisfied or very dissatisfied with information relating to fees and the cost of living.

The findings suggest that accessible, clear and easy to understand information, perhaps in the students' own languages, is needed. It is also necessary to distribute this information efficiently to all those that require it. Focus group analysis indicated that pre-arrival information can be a powerful tool in forming international students' first impressions of Australia, reducing unnecessary anxiety and aiding in forming their expectations of the life and study experience in Australia.

The results also indicated that some students did not fully understand their study and visa options before coming to Australia. The answer to improving this may be by ensuring education agents are provided with clear updated information.

*“Once I arrived, I heard that this was the best one in Australia, but I didn't really know or care before I got here. The study agent made the recommendation and I just followed it.”*

### 3.3 Application process

Over three-quarters of ELICOS respondents used an agent to help with their arrangements in coming to Australia; of these 83% were education agents. Table 5 shows a further split of channels used by respondents in making their enrolment applications by visa type. Asian respondents were the heaviest users of education agents with up to 97% of South Korean respondents, for instance, having used agents compared to 58% of European respondents. European respondents made the greatest use of travel agents (35%).

Seventy-seven percent of ELICOS respondents who had used agents rated the service of the agent as good (33%), very good (27%) or excellent (17%). Up to three-quarters of Asian respondents (75% for Japan) rated their agent's service from good to excellent, compared to 89% of European respondents.

Overall, 92% of ELICOS respondents did not have difficulty in arranging their study in Australia from their home country. Most demographic profiles were 'on par' with the overall proportions of those that found it difficult (8%). However, student profiles that were overrepresented in experiencing difficulty were Japanese respondents (11%) and respondents aged over 30 years (12%).



Table 5: Method of applying to an ELICOS institution by type of visa

Methods of applying to study at ELICOS institution	Total (n=554)	Type of visa			
		Student visa English language (ELICOS) plus further study (n=130)	Student visa English language (ELICOS) only (n=231)	Working holiday visa (n=72)	Visitor or tourist visa (n=89)
Through another education/study agent in your home country	52%	53%	57%	57%	37%
Direct application to the English Language (ELICOS) college	13%	13%	10%	10%	20%
Through a school, college or university in your home country	10%	3%	13%	3%	17%
Through a Government Agency or scholarship donor in your home country	6%	10%	6%	3%	5%
Through IDP Education Australia in your home country	6%	9%	7%	4%	1%
A friend or relative in Australia applied for you	4%	2%	1%	8%	10%
Through a school, college or university in Australia	2%	5%	1%	1%	2%
Education/study agent in Australia	2%	2%	1%	11%	0%
Through your employer in your home country	1%	0%	2%	3%	0%
Other	6%	6%	3%	1%	9%
<b>Total</b>	<b>103%</b>	<b>103%</b>	<b>101%</b>	<b>101%</b>	<b>101%</b>

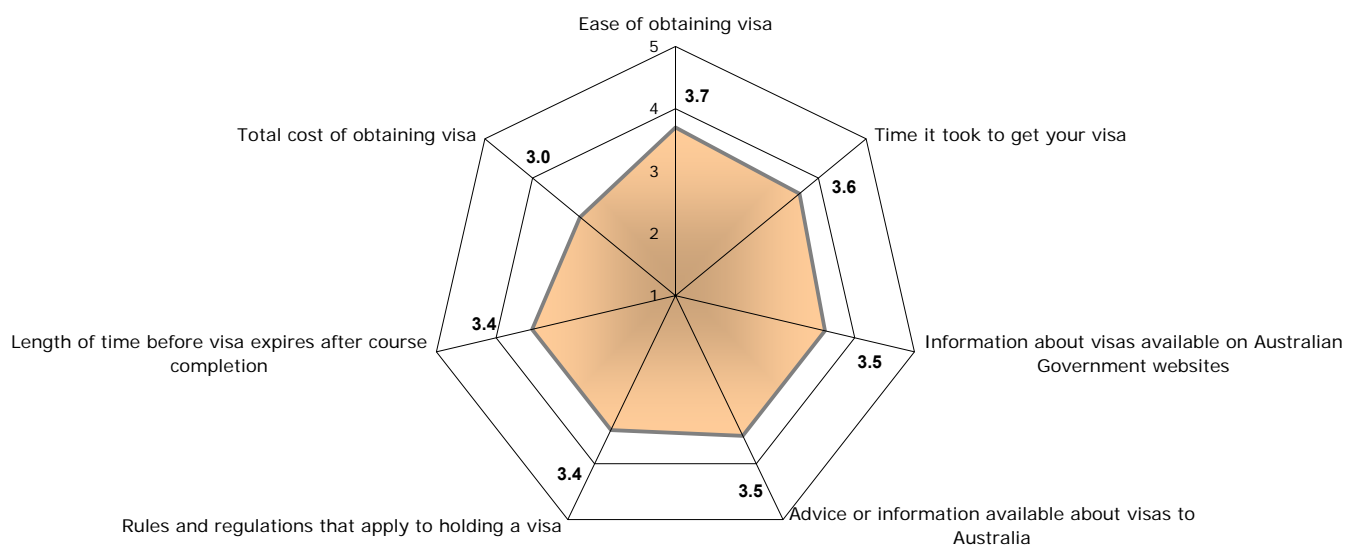
Base: n=554 Note: The total percentage may not add up to 100% due to rounding. Thirty two respondents did not answer this question.

Q18a How did you apply to study at your English Language (ELICOS) college?

### 3.3.1 Visa application process

In general, international respondents were reasonably satisfied with most aspects of the visa application process. Figure 3 shows major areas of concern regarding the visa application process. Notably, respondents have become less satisfied with visa costs with only 34% being satisfied/very satisfied with this aspect, compared to 40% in 1999.

*Figure 3: Mean satisfaction rating among international ELICOS students with aspects relating to their student visa*



Base: n=582. All respondents

Q20b: How satisfied were you with the following aspects relating to your visa? (Tick only one box per row). Rating scale: 1= low satisfaction to 5= high satisfaction.

Respondents were most satisfied with:

- ease of obtaining visa (68% satisfied/very satisfied); and
- time it took to obtain the visa (62% satisfied/very satisfied). This was a slight improvement from 60% in 1999.

Respondents were least satisfied with:

- total cost of obtaining a visa (33% dissatisfied/very dissatisfied);
- length of time before visa expires after course completion (17% dissatisfied/very dissatisfied); and
- time it took to get the visa (16% dissatisfied/very dissatisfied).

Eighty-one percent of European respondents were satisfied or very satisfied with the ease of obtaining a visa compared to Asian respondents (65%). Also, respondents that had working holiday or tourist visas were generally more satisfied with the ease of obtaining a visa (84% and 81% respectively) than respondents with ELICOS plus further study or ELICOS only visas (69% and 58% respectively).

Table 6 shows mean satisfaction scores (ranging from 1 to 10) of respondents from the top five responding countries.

*Table 6: Mean satisfaction scores with visa application process (top five respondent countries)*

Country of permanent residence	Mean satisfaction scores	n = 582
Taiwan	7.0	46
China	6.9	37
South Korea	6.7	141
Japan	6.6	103
Brazil	6.3	42
Other	6.9	213
<b>Overall mean satisfaction</b>	<b>6.9</b>	<b>369</b>

Base: n=582

Q4b. What is your country of citizenship, that is the country that issued the passport that you used to enter Australia?  
Rating scale: 1= low satisfaction to 10= high satisfaction.

Most respondents who received any advice about their student visa did so from an agent of some kind (64%), as per Table 7 (note that this was an open ended response and therefore percentages may vary from similar multiple choice questions). The internet was also considered to be a reasonable source of information, with 15% having used some sort of website with friends/relatives accounting for 9%.

*Table 7: Sources of advice related to visa applications*

Provided advice by	n=175
Agent/agency (unspecified)	45%
Website/Internet	13%
Education/student agent/study agent	10%
Friend/relative/colleague	9%
Travel agent	7%
Australian Embassy	3%
Australian Immigration/Immigration office/DIMIA	3%
IDP Education/IDP	3%
Australian agency	2%
Teacher/tutor	2%
Own research/myself	2%
Australian Immigration website	1%
Australian Government website	1%
Answer not applicable	7%

Base: n=175, Respondents who have been provided advice or information available about visas to Australia

Note: The total percentage does not add up to 100% due to multiple responses allowed  
Q20b Who provided this advice?

Australia was nominated as the easiest country to obtain a visa from by 31% of respondents, as shown in Table 8. South Korean respondents had the largest proportion of any group nominating Australia as the easiest (45%). However, a large proportion of respondents also nominated that they did not know (47%), and as 84% of respondents had never studied in another country before, a higher proportion of ‘don’t knows’ would be expected.

*Table 8: Australia’s ranking as the easiest country to obtain a visa from*

This country is the easiest to obtain a visa to study	Total Agree (n=554)
Australia	31%
New Zealand	10%
UK	6%
Canada	5%
USA	2%
Don't know	47%
Total	101%*

Base: All Respondents (n=554) \*The total percentage may not add up to 100% due to rounding.

Q21 In your opinion, please select from the list below the country to which each of the statements apply - This country is the easiest to obtain a visa to study

In summary, the main factors in deciding to choose to study in Australia (aside from being an English speaking country) were the natural environment, safety and the weather. Better communication of information about the cost of living and expenses should be integral at the pre-arrival stage. Of respondents who used an agent, most were satisfied with the agent they used. Although the ease of obtaining a visa seemed reasonable, the cost was a concern and length of time allowed to stay seemed limiting.

## 4. Study in Australia

*Objective 2 (Part A): Measure ELICOS students' level of satisfaction with education, pastoral and support services and overall study in Australia.*

This section details ELICOS respondents' study experiences in Australia, satisfaction with the college, support services, extent of improvement in English, and a willingness to recommend Australia as a destination of study.

### 4.1 Study satisfaction

For most ELICOS respondents, studying in Australia was a very positive experience, with 79% being satisfied/very satisfied with their ELICOS course overall and only 5% very dissatisfied. A high number of ELICOS respondents were willing to recommend study in Australia (85%) to friends or family; however they were less willing to recommend their ELICOS institution (70%) or their course (64%). Additionally, most ELICOS respondents (70%) felt that their studies would be helpful in getting them a good job, 10% indicated that it would not and 21% were unsure.

#### 4.1.1 The best place to study English

As shown in Table 9 Australia ranks second to the UK as the country that has the best quality English language courses. Twenty-nine percent of respondents listed the UK as 'Number 1' and 14.3% nominated Australia. The USA was a close third with 13.8% of respondents naming it as 'the best'. Canada followed in fourth place with 6.3%.

*Table 9: Ranking of the country with the best quality English language course*

The country that has the best quality English language courses	Total Agree (n=552)
<b>UK</b>	30%
<b>Australia</b>	14%
<b>USA</b>	14%
<b>Canada</b>	6%
<b>New Zealand</b>	0%
<b>Don't know</b>	36%
<b>Total</b>	<b>100%</b>

Base: All respondents, n=552.

Q21 In your opinion, please select from the list below the country to which each of the statements apply - This country has the best quality English language courses

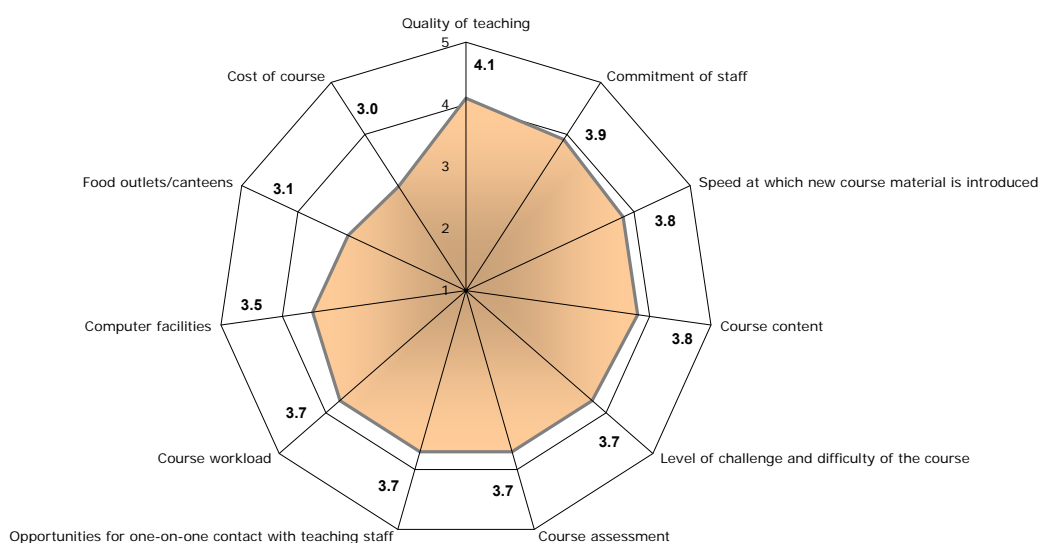
## 4.1.2 Satisfaction with the college

As outlined in Figure 4, in evaluating specific aspects of the college in which they studied, moderate to high numbers of ELICOS respondents were satisfied with education delivery aspects.

Almost all respondents were satisfied or very satisfied with the quality of teaching (83%), while over 69% were satisfied with the level of challenge and difficulty of the course. The majority of respondents were also satisfied with course content (69%), speed at which new course material is produced (68%) and course assessment (66%). In other positive results, 66% of respondents were satisfied with the commitment of staff, 63% with opportunities for one-on-one contact with teaching staff, 62% with the course workload, and 59% computer facilities.

European, Latin American and Middle Eastern respondents' satisfaction levels were generally around 10 percentage points higher than the overall averages listed above, except in the case of satisfaction with computer facilities which were around 20 percentage points higher.

*Figure 4: Mean satisfaction ratings among ELICOS students with aspects of their college*



Base: n=582

Q27a How satisfied are you with each of the following aspects of the college at which you are studying? (Tick only one box per row) Scale: 1=low satisfaction, 5=high satisfaction

Lower levels of satisfaction with aspects were found in areas such as:

- food outlets and canteens (32%); and
- cost of the course (27%).

Dissatisfaction in all of the above measures tended to be recorded by Asian respondents as opposed to

European, Latin American or Middle Eastern respondents. There was unanimity among all respondents regarding satisfaction or dissatisfaction with food outlets and canteens.

### 4.1.3 Support services

Services listed in Table 10 were at best utilised by 49% of respondents. The specific support services used were: induction/orientation (49%), ILC/self study (48%), assistance with accommodation (48%) and airport service pick-up (47%). All services were rated as very useful/useful by over 90% of all users with the exception of religious support services. Services could perhaps be made better known to ELICOS students and stronger use encouraged, as most respondents who have needed these services find them very helpful.

*Table 10: Services used by students and rated usefulness*

Support services you have used at your current college (n=515)	% Students that have used service	Rating of usefulness of service		
		Very useful	Useful	Not useful
Induction or orientation programme	49%	58%	34%	8%
Independent Learning Centre (ILC)/self study centre	48%	45%	47%	8%
Assistance in finding suitable accommodation	48%	37%	54%	9%
Airport pick-up service	47%	38%	58%	4%
Social activities organised by the college	41%	55%	38%	7%
Student Centre/administration	37%	56%	40%	4%
Course counselling service	25%	54%	37%	9%
Personal counselling service	18%	45%	47%	8%
Religious support services*	5%	41%*	35%*	24%*

Base: n=582 Note: The total percentage does not add up to 100% due to multiple responses allowed

\*Caution very low sample for this item

Q26b How useful have you found each of the support services you have used?

As reinforced by the focus groups, one of the difficulties international students have in adapting to Australian life is getting used to the early closing times of shops and services. Getting around can also be difficult on public transport late at night and at weekends.

*“It gets lonely. It’s a bit quiet. There’s nobody on the road after midnight and the shops close too early.”*

Another major issue raised was that international students are not eligible for public transport concessions, even with an international student card (this was the case in Sydney and Melbourne



only). This was felt to be very unfair, adding considerably to their cost of living.

Many students that participated in the research also felt that the following services may help ELICOS students get the most out of their stay in Australia:

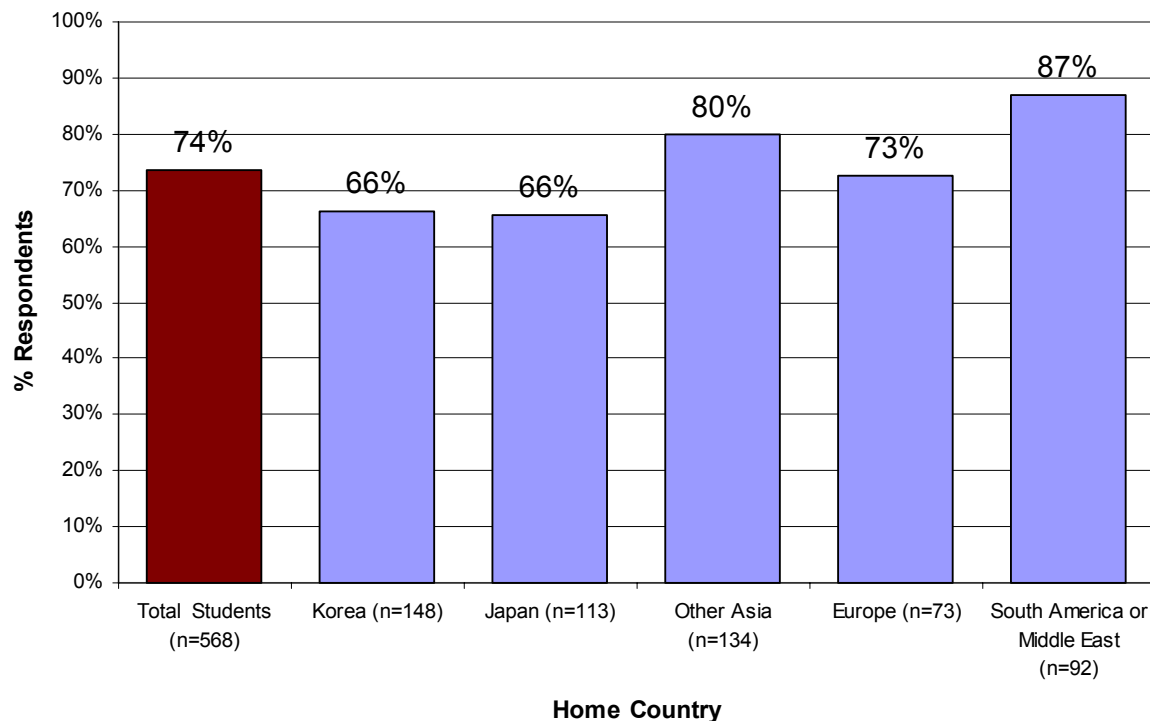
- job notice boards (listing suitable part-time work, and student friendly employers);
- accommodation services;
- a regularly updated guide to the local area recommending good places to shop and tips on how to get around; and
- social and sporting activities encouraging interaction with local students (not just other international students).

## 4.2 English speaking skills

Seventy-four percent of all ELICOS respondents believed their English had improved either some (49%) or a lot (25%). However, 25% of respondents reported little (24%) or no (1%) improvement at all to their English skills, and 3% did not know.

It should be noted that, at the time of completing the survey, respondents were at various stages of their courses, which differed in duration from one week to over six months. Of the 25% of respondents reporting little or no improvement in their English, 75% had been studying three months or less, with 40% having studied for only one month or less. Respondents from Latin American or Middle Eastern countries reported the highest levels of overall improvement (87%).

*Figure 5: Improvement (some or a lot) in English proficiency (student self-assessment)*



Base: All respondents n=568

Q28 So far, how much has your current English Language (ELICOS) course improved your English?

Eighty-two percent of ELICOS respondents believed that their English language course would help them complete future studies. More Asian respondents held this belief (up to 89% amongst South Korean respondents), as did Latin American or Middle Eastern respondents (83%), with European respondents having lower expectations (66%).

Refer to Section 6 for further details about the usefulness of ELICOS and future plans.

On the other hand, European respondents had a slightly greater belief that their English language course would help them get a job (75%). This is a view that was shared by Latin American or Middle Eastern respondents (86%), with Asian respondents (65%) having lower expectations.

### 4.3 Willingness to recommend study in Australia

The majority of respondents (85%) indicated that they would recommend studying in Australia to friends and family, while 70% would recommend the college and a lesser proportion (64%), the course. These compare to 90%, 85% and 84% respectively in 1999 – all relatively lower proportions.

The latest results are still positive, however there are definite areas for improvement. Nearly one in five respondents were unwilling to recommend their course, one in seven respondents were unwilling to recommend their college and that one in ten believed that their studies would not be helpful in getting a good job. These proportions are roughly similar between Asian, European and Latin American and Middle Eastern respondents, although European, Latin American and Middle Eastern respondents were slightly more likely to recommend their course to others. Seventy nine percent of respondents said they were satisfied with the quality of their course compared to 87% in 1999. Notably in the latest results, about one in ten indicated that they would not be willing to recommend their course.

In summary, Australia was placed second behind the UK as the best country to study English. The USA was a close third. ELICOS respondents were generally satisfied with the teaching quality as well as the challenge offered by, and quality, of the course. Around half of respondents had used available support services, and most who did found them helpful. The majority of respondents reported satisfactory improvement in their ability to speak English. Those who did not had only been in Australia for a relatively short time. Overall, the majority of respondents would recommend Australia to their friends and family as a place to study English.

## 5. Living in Australia

*Objective 2 (Part B): Measure ELICOS students' level of satisfaction with accommodation, work, social integration and overall satisfaction with their stay in Australia.*

This section details findings with regard to ELICOS students' overall satisfaction with living in Australia, as well as their satisfaction with their educational experience and the associated services provided by institutions.

### 5.1 Overall satisfaction with living in Australia

Overall, ELICOS respondents expressed a high level of satisfaction with their experience in Australia. Eighty-six percent were satisfied or very satisfied with their living experiences in Australia, while only 2% were very dissatisfied. European respondents were the most satisfied with their stay, with 97% stating that they were satisfied or very satisfied. Fifty percent said they were very satisfied with their stay, which was up to four times the rate of Asian respondents.

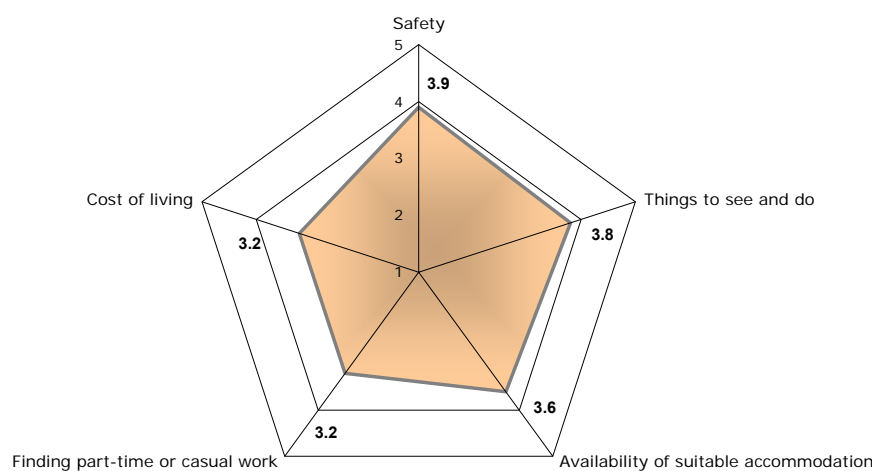
Seventy-five percent of ELICOS respondents were either satisfied or very satisfied with the level of safety in Australia. As shown in Figure 6, this was the most prominent of all the measured aspects of their stay. Other areas where a high proportion of respondents were either satisfied or very satisfied were things to see and do (68%) and the availability of accommodation (59%).

In contrast, categories where respondents reported lower proportions of either satisfied or very satisfied related mainly to finding work, particularly:

- finding part-time or casual work (23%) with 12% dissatisfied or very dissatisfied ; and
- cost of living (40%) with 26% dissatisfied or very dissatisfied. This compares to 57% satisfied/very satisfied in 1999.

Asian respondents were generally more dissatisfied with finding part-time or casual work, with up to 15% (South Korea) dissatisfied or very dissatisfied compared to their European counterparts (4%). Asian respondents were also more dissatisfied/very dissatisfied with the cost of living, with up to 33% (Japan) compared to 17% of European respondents.

*Figure 6: Mean satisfaction ratings among international ELICOS students with aspects of living in Australia*



Base n=582

Q39a How satisfied are you with the following aspects of your stay in Australia? Scale: 1= low satisfaction to 5= high satisfaction.

Refer to Section 7 for further analysis of ELICOS respondents' overall satisfaction with their stay in Australia.

## 5.2 Life in Australia

### 5.2.1 Accommodation and living conditions

In total, 16% of ELICOS respondents lived by themselves. Fifty-seven percent of respondents shared accommodation with Australian families or other Australian respondents mixed with international students. Thirty-six percent of respondents stayed in home-stay accommodation with an Australian family not related to them (see Table 11), while 25% shared accommodation with other international students only.

Ninety-three percent of home-stay respondents believed their host families to be helpful in making them feel welcome. However, only seven in ten felt that host families were helpful in showing them around. Eighty-eight percent of respondents received help from host families in settling in, and 82% felt that their home-stay provided opportunities to practise English.

Overall, 78% of home-stay respondents felt their living conditions were either good or very good and 79% said they would recommend their home-stay family to other international students. European respondents were especially positive about these aspects of their experience (97% and 94% respectively good or very good).

*Table 11: Type of student accommodation during studies*

Where mostly lived during studies	Total (n=562)
Home-stay with an Australian family not related to you	36%
House/apartment shared with international students only	25%
House/apartment by yourself/with other members of your family	16%
House/apartment shared with Australians and international students	13%
Student residence (hall or college) on or near college	6%
House/apartment shared with students from Australia only	1%
Backpacker/hostel	1%
Home-stay with (own nationality) family	1%
Other	5%
<b>Total</b>	<b>103%*</b>

Base: All Respondents n=582 \*The total percentage may not add up to 100% due to rounding.

Q32a Where did you mostly live while doing your current studies in Australia?

The qualitative research also revealed that the key advantage of home-stay for ELICOS students is that it provides opportunities for students to experience life inside a typical Australian household and practise their English.

The key disadvantages found from the qualitative research were:

- home-stay arrangements (for example timing of meals) are often inflexible, and do not fit with the student's timetable or plans;
- home-stay is more expensive than living in shared rented accommodation;
- students feel pressure to be 'on their best behaviour' at all times when staying as a guest in someone else's home; and
- students were reluctant to complain if they were not happy with the food or facilities, or if they were disturbed by the activities of other members of the household or pets.

*“It’s hard to get a place, because you can’t really rent your own place because you’re not here for all that long.”*

Finding affordable accommodation that is not too far from the college was one of the most difficult challenges for ELICOS respondents. Some were fortunate to have friends or family members they could stay with, at least for a short while. Others had arranged home-stay accommodation with an Australian family, whilst others had managed to find a place in a shared house with other international students.

## 5.2.2 Work

Out of the 17% of ELICOS respondents who had a paid job in 2006<sup>6</sup>, nearly one-third worked five to ten hours per week with the remaining two-thirds working between 11 and 20 hours per week. Forty-five percent of working respondents surveyed found it relatively easy to balance working with study, while 25% found this difficult to achieve.

Table 12 lists the top five reasons for not getting a paid job by respondents who tried to get a job but were unsuccessful (note that the responses for this question were open ended).

*Table 12: Main reason for not getting a job; although tried to get one*

Rank of mentions	The main reason for not getting a paid job, although trying to get one	Total (n=62)
1	<b>No jobs available</b>	23%
2	<b>Concentrating on studies</b>	16%
3	<b>Language problem/lack of fluency with English</b>	16%
4	<b>No experience/work experience</b>	13%
5	<b>Time here/not here long enough</b>	13%

*Base: Those that tried to get a job n=69*

Q38c. *What was the main reason you did not get a paid job in 2006, although you tried to get one?*

Qualitative research revealed two key reasons why ELICOS students were keen to find work. The main reason was to support themselves financially during their stay (and perhaps even save up enough money to go travelling when they finish their course). The second reason was that working is a good way to meet people and become a part of the local community.

<sup>6</sup> For comparison, AEI data reports that 18% of students were employed in 1999 and 8% in 1996

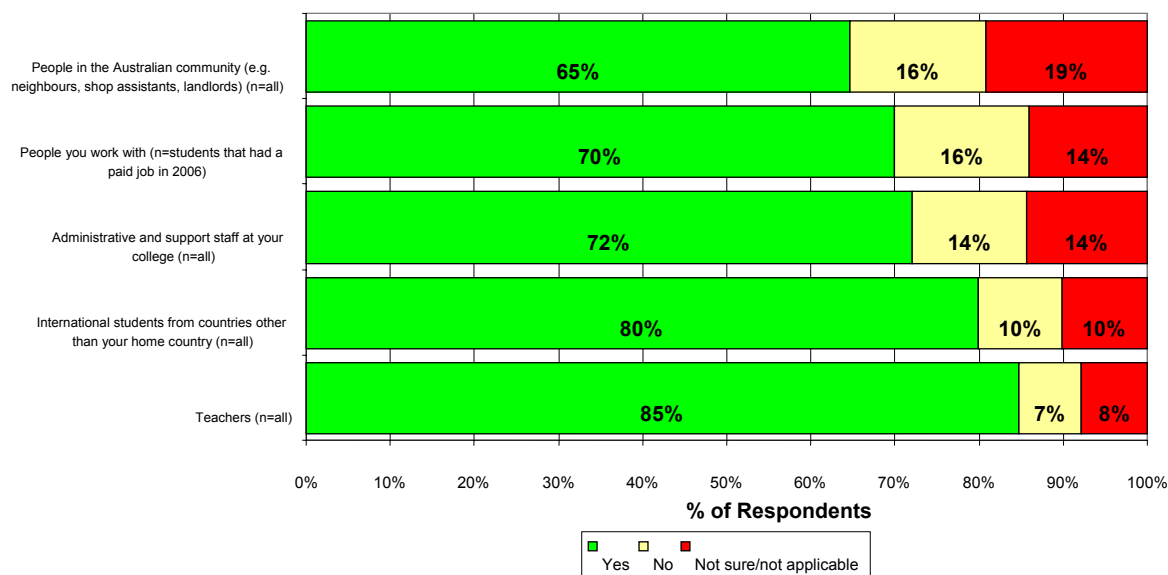
Due to the relatively short time they intend to stay in Australia and their limited language skills, ELICOS students were mostly satisfied with casual, (relatively) unskilled work such as dishwashing, or cleaning. In capital cities, this type of work was quite easy to find. However, some complained that employers were reluctant to hire staff who did not intend to stay on for the long term and were restricted by the number of hours they could work.

### 5.2.3 Respect and courtesy

ELICOS respondents felt as though they were treated with more respect by people inside the classroom than in the broader community. As shown in Figure 7, around eight in ten respondents believed they were generally treated with courtesy and respect by teachers (85%) and fellow international students (80%).

By contrast, a lower proportion (72%) of respondents felt they were treated with respect by school administrative staff, and 65% by members of the Australian community such as shop assistants, landlords and neighbours. A similar proportion of respondents with paid employment during 2006 also felt they were generally treated with respect and courtesy by co-workers (70%).

Figure 7: Generally being treated with courtesy and respect



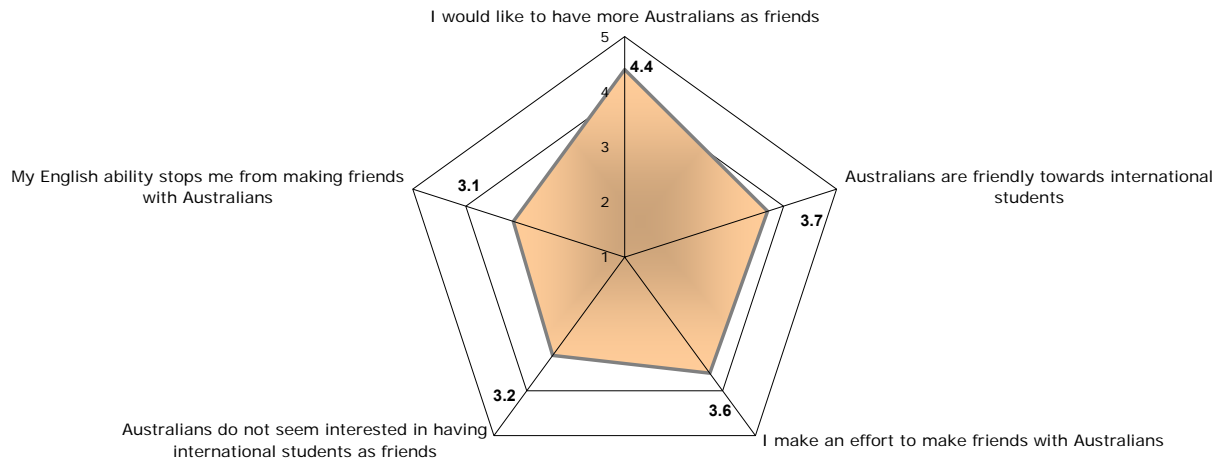
Base: n=582

Q37 Generally, have you been treated with respect and courtesy by each of the following groups during your stay in Australia? (Tick one box only for each group of people)

As shown in Figure 8, 91% of all ELICOS respondents would like to have more Australians as friends. Asian, Latin American and Middle Eastern respondents were especially keen to extend their networks (up to 97% Japanese and 96% Latin American or Middle Eastern) compared with European respondents (86%).



*Figure 8: Making friends in Australia (mean level of agreement)*



Base: n=582

Q33 Here are some statements about making friends with Australians. Please indicate your level of agreement or disagreement with each statement. 1 = low agreement to 5=high agreement.

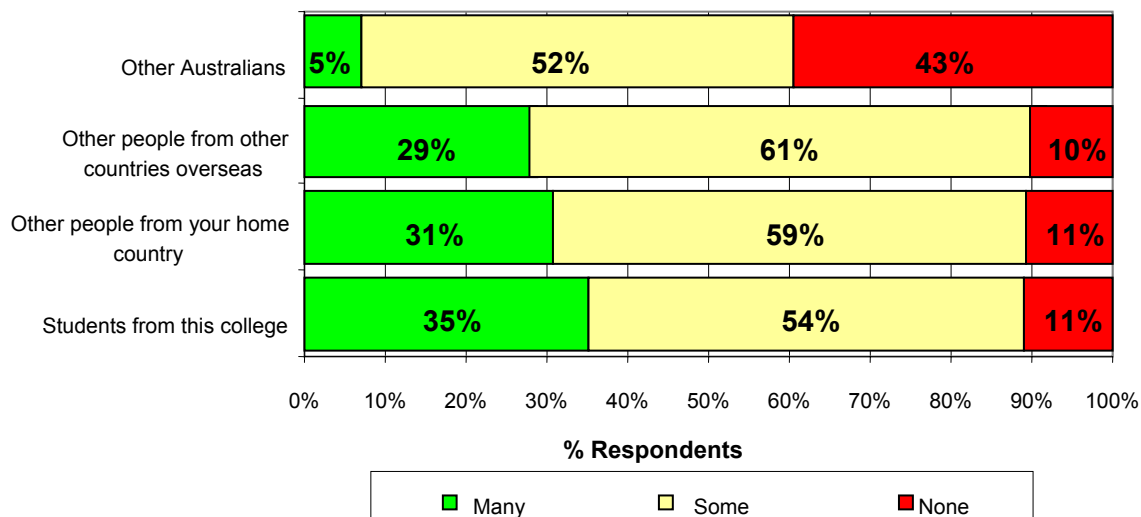
Thirty nine percent of ELICOS respondents agreed with the statement that Australians do not seem to want international students as friends. This was felt most among Asian respondents (up to 55%; South Koreans) but was significantly lower among European respondents (18%). Although 61% of respondents agreed that Australians are very friendly towards international students, again this is least felt by Asian respondents (as low as 48% for South Koreans) versus 64% of Latin American and Middle Eastern respondents and 89% of European respondents.

Thirty-six percent of respondents believed that their ability to speak English was directly related to their ability to make Australian friends. Respondents under 30 years of age believed this to be a greater barrier (38%) than respondents over 30 years (24%). Again, Asian respondents felt this more (up to 45% of Japanese respondents) than Latin American and Middle Eastern respondents (29%) or European respondents (17%).

When it comes to making an effort to make friends with Australians, 55% of all respondents agreed that they make an effort. Asian respondents (up to 62% for Japanese respondents) and Latin American and Middle Eastern respondents (59%) reported making more of an effort compared to 39% of European respondents.

Figure 9 shows 57% of ELICOS respondents made close friends with Australians. Fifty-two percent had some Australian close friends but few had many (5%). Many more, around 90% of ELICOS respondents, made close friends among other students at the college they attended, with people from either their own country or people from other countries.

Figure 9: Friends made in Australia



Base: n=582

Q34 How many close friends do you have from the following groups of people in Australia?

Time spent with Australians was also relatively low with 11% of respondents often spending time with their ‘Aussie’ friends compared to an average of 34% often spending time with other international students. Study habits are similar; a large portion of respondents (84%) often or sometimes studied with other international students but to a slightly smaller extent (68%) with students from their own country.

In 1999, 87% of respondents said they were satisfied/very satisfied with their treatment by Australians compared to 65% in the 2006 survey.

The qualitative research conducted also revealed that practising English and experiencing the Australian way of life were often the main reasons why ELICOS students decided to come to Australia. In reality, their main day to day contact was with other international students. This is not at all surprising, as most ELICOS institutions are populated solely by international students. It can be very difficult for ELICOS students to meet Australians in this environment, let alone develop meaningful friendships. When they do encounter Australians, it is often at a cursory level.

*“It’s not easy meeting Australian people. People are chatty, but it’s hard to make friends.”*

*“People talk to you, but it’s very superficial.”*

*“The only people I know are other international students, which is great, but not so good for my English.”*

In summary, almost all ELICOS respondents felt that their host families made them feel welcome and most said that their living conditions were good. A small proportion of students worked in unskilled jobs to support themselves and to provide extra earnings for travel. Low English speaking ability proved a challenge in trying to obtain employment. ELICOS respondents were generally treated with respect by the community, although most would have liked to have more Australian friends. The majority of respondents mainly socialised or studied with other international students.

## 6. Future career plans and aspirations

*Objective 3: Ascertain the future study and career plans and aspirations of ELICOS students before they return to their home countries.*

This section covers details of ELICOS respondents' future intentions after completing their ELICOS course, including future study and/or plans of living permanently in Australia.

Twenty-three percent of ELICOS respondents had not studied previously in Australia. Seventy-six percent of respondents had previously studied an intermediate or advanced ELICOS course, with 14% having previously completed a beginner or elementary ELICOS course. Eight percent of respondents had previously attended university in Australia; 6% secondary school; 2% foundation studies; and 2% had completed a TAFE course.

Thirty-six percent of ELICOS respondents indicated that they were planning to enrol in further study, which ranged across more than 50 different areas. The top seven areas reported have been listed in Table 13. These were predominantly business and technology-related courses.

*Table 13: Intended areas of study*

Intended area of study	Total (n=164)
<b>Business studies/business</b>	31%
<b>Computer science/IT</b>	10%
<b>Engineering</b>	6%
<b>Hospitality/hospitality management</b>	4%
<b>Marketing</b>	4%
<b>Education/teaching</b>	4%
<b>English education/ESL</b>	4%
<b>Other</b>	37%
<b>Total</b>	<b>102%*</b>

Base: n=164 - students that intend further study in Australia.

\* Note rounding error

Q44c What will be your main area of study? (e.g., IT, Hospitality, Business Studies, Beauty Therapy etc)

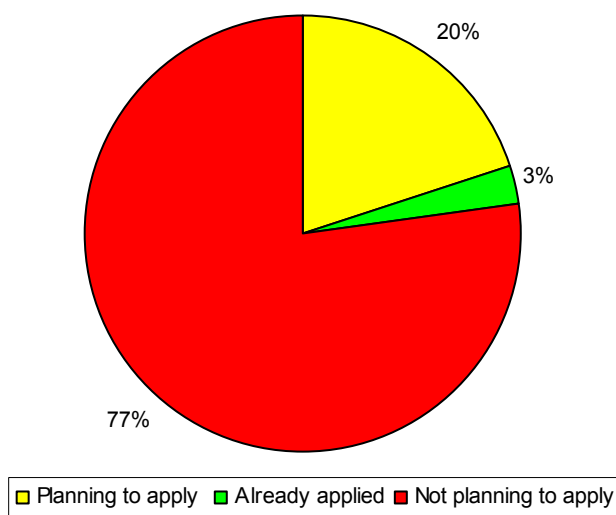
The majority of ELICOS respondents (82%) intending to complete further study planned to do so in Australia. Sixty five percent of respondents planned to attend university, 16% intended doing a VET course and 1% intended to undertake secondary schooling. Twelve percent planned to enrol in a university course in their own country, while 3% planned to enrol in a university overseas.

Respondents not planning further study after completing their ELICOS course intended to travel or have extended time off (22%), return to their home country (no further plans, 19%) or find a job (19%).

Forty-six percent of the respondents who intended to find a job planned to do so in Australia. Others intended to work in their home country (45%), while 8% intended to work in another country overseas. Of those who planned to find work, 45% expected to work for a private company, 20% expected to work for a public or government organisation while 7% were joining the family business. Twenty-eight percent did not know as yet in which area they would work.

Interest in making Australia their home was strong for 23% of ELICOS respondents. Twenty percent of ELICOS respondents stated they planned to apply for permanent residency whilst 3% had already applied. Respondents aged over 30 years were more likely to seek permanent residency compared to respondents aged under 30 years (33% versus 21% respectively).

*Figure 10: Intention to apply for permanent residency*



Base: n=548

More Asian respondents (up to 38%) and Latin American and Middle Eastern respondents (32%) reported the intention to migrate compared to European respondents (12%). Eighty four percent of all ELICOS prospective immigrants intended to do so within the next three years.

Fifty percent of ELICOS respondents intended to sit the IELTS test or similar. IELTS scores are prominent features on visa eligibility/assessment scales. International students wishing to study in Australia must have a certain level of English proficiency, depending on the country they are from. Fifty-four percent of Asian, 46% of Latin American and Middle Eastern respondents intended sitting the test while with only 37% European respondents were less likely to do so. As shown in Table 14, 53% of respondents intending to take an English proficiency examination planned to take the IELTS test.

*Table 14: Intended areas of study*

Type of English language test likely to take	Total (n=245)
International English Language Testing System (IELTS)	53%
Test of English for International Communication (TOEIC)	21%
Cambridge First Certificate in English (FCE)	9%
Test of English as a Foreign Language (TOEFL)	8%
Cambridge Certificate in Advanced English (CAE)	5%
Cambridge Business English Certificate (BEC)	1%
Cambridge Preliminary English Test (PET)	1%
Cambridge Certificate of Proficiency in English (CPE)	1%
Other	2%

Base n=245: Respondents who are likely to sit an English language test

*Q42 Which English Language test are you likely to take? Base: those answered 'yes' to Q 41 After you have finished this English course will you sit an English language test such as IELTS, or similar?*

In summary, it appears a large number of ELICOS respondents intended to extend their stay in Australia, either to continue studying (mainly in the business and technology areas). Others intended to find a job (many in Australia), travel or settle permanently in Australia. Approximately half of respondents intended to take an English proficiency exam such as IELTS or similar.

## 7. Overall satisfaction with stay in Australia

This section should be read in conjunction with the technical details in Appendices C through F.

Multivariate analysis was used to derive key variables and explore their relationship to overall satisfaction with students' stay in Australia. The following is a summary of the analysis conducted.

### 7.1 Relationship of pre-arrival and post-arrival factors with overall satisfaction

Overall Stay Satisfaction is the measure of students' overall satisfaction with their stay in Australia.

A simple correlation matrix was constructed in an initial examination of the inter-correlation between all the variables as well as to examine the variables' relationship to Overall Stay Satisfaction (refer to Appendix F for full correlation matrix). Table 15 shows a list of correlation coefficient scores (Pearson correlation coefficients) for all measure variables as they relate to Overall Stay Satisfaction.

The results of the preliminary analysis suggest that some of the major factors contributing to Overall Stay Satisfaction for ELICOS students are related to:

- information provided before arrival;
- course and college satisfaction;
- their experience of the cost of studying in Australia (living and course costs);
- their perceptions of Australian attitudes towards them; and
- home-stay experience (if they had one).

These variables had moderate to strong correlations of greater than 0.3.

Table 15: Correlation of composite variables to Overall Stay Satisfaction

Variable	Overall Stay Satisfaction	Arrival	Strength of correlation	
Information pre-arrival	0.49	Pre	Green	<b>Strong</b>
College and course satisfaction	0.47	Post	Green	
Expense perceptions after arrival	0.46	Post	Green	
Australian attitudes to students	0.39	Post	Green	
Home-stay satisfaction	0.34	Post	Green	
Visa process satisfaction	0.29	Pre	Yellow	<b>Moderate</b>
Australian lifestyle	0.28	Pre	Yellow	
Course outcome satisfaction	0.26	Post	Yellow	
Agent service	0.25	Pre	Yellow	
Support services	0.23	Post	Yellow	
Integration	0.22	Post	Yellow	<b>Weak</b>
Ease of making arrangements	0.15	Pre	Red	
Student attitudes towards Australians	0.15	Post	Red	
Connection to Australia	0.09	Pre	Red	
Study future	0.03	Post	Red	
Lived with Australians	0.03	Post	Red	
Permanent residency intentions	0	Post	Red	
Work future	-0.04	Post	Red	
Worked while doing course	-0.04	Post	Red	
Lived with Internationals	-0.04	Post	Red	
Expense perceptions (pre-study)	-0.07	Pre	Red	

\* Red category variables have correlation coefficients below 0.2 (weakly correlated). Yellow category variables have correlation coefficients between .2 and .3 (Moderate correlation). Green category variables are strongly correlated (.3+).

Secondary factors relating to overall student satisfaction were:

- the visa experience;
- their initial perceptions of the Australian lifestyle (environment and people);
- the extent to which they feel studying has improved their English for future use;
- agent performance (if used);
- usefulness of support services provided by the college; and



- the extent to which they had friendships with Australians.

The above analysis showed the impact that different groups of variables had on overall student satisfaction but did not identify the drivers of satisfaction.

## 7.2 Key drivers

Further statistical techniques (stepwise regression<sup>7</sup>) were applied to the data to produce a series of index values which enabled the determination of the relative importance of the key drivers. Table 16 lists the post arrival factors as an independent variable and the Overall Stay Satisfaction as the dependent variable.

*Table 16: List of composite post-arrival variables to Overall Stay Satisfaction*

Composite variables	
1	College and course satisfaction
2	Expense perceptions post-arrival
3	Australian attitudes to me
4	home-stay satisfaction
5	Course outcome satisfaction
6	Support services
7	Integration
8	Attitudes towards Australians
9	Study future
10	Lived with Australians
11	Permanent residency Intentions
12	Work future
13	Worked while doing course
14	Lived with internationals

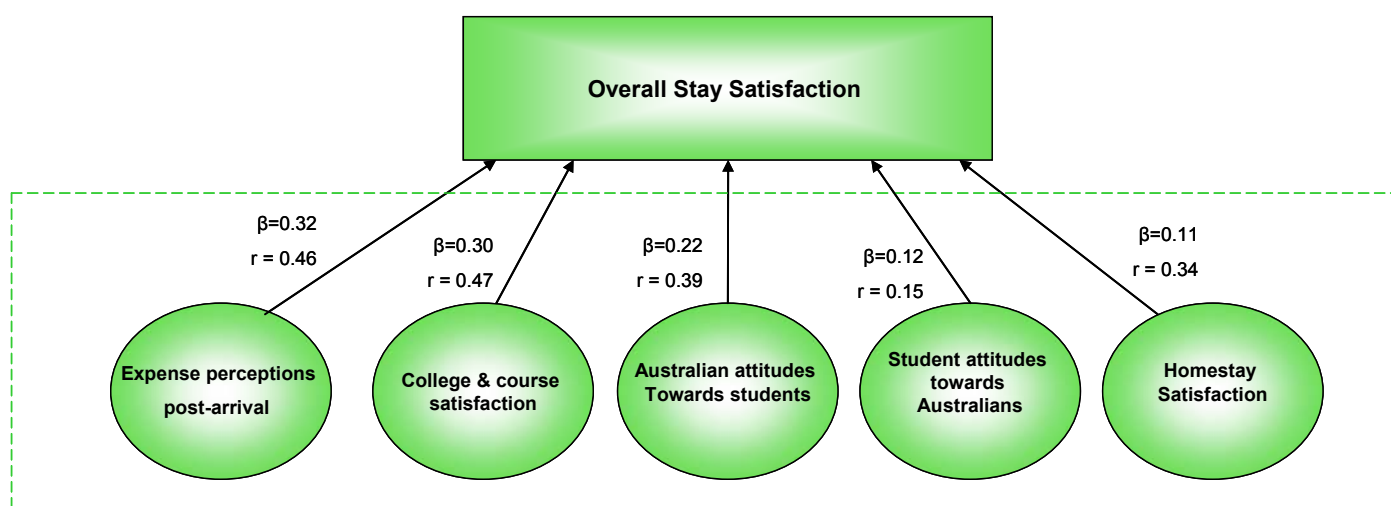
Figure 11 summarises the output of the analysis and lists the variables that contribute most to overall satisfaction.

Two key factors arose from the analysis: expense perceptions after arrival and satisfaction with the college and the course. Both of these measures were approximately the same in terms of importance.

<sup>7</sup> Stepwise regression is a method that calculates the optimum 'mix' of variables required in a given model for maximum predictive quality.

It is also interesting to note that ELICOS respondents' beliefs about Australians attitudes towards them, as well as their own attitudes towards Australians, are critical factors in overall satisfaction. Home-stay experiences also involve Australians, so the overall importance of the interaction with Australians appears to be very high.

Figure 11: Regression model summary



Model variance explained: R Square (Adjusted) = 0.40

$\beta$  = standardised regression coefficient  $r$  = Pearson correlation coefficient

How to interpret  $\beta$ : The higher the  $\beta$  the higher the contribution of the driver to improving the level of the satisfaction outcome.

Table 17 lists the mean scores as a measure of performance for each key attribute. Mean scores are between 1 and 10. The higher the score, the better the performance of that particular attribute. Variables are also listed in order of their influence on Overall Stay Satisfaction.

Table 17: Mean scores of key drivers of Overall Stay Satisfaction

Rank influence on Overall Stay Satisfaction	Composite variables	Performance (mean scores 1-10)
1	Expense perceptions post-arrival	6.12
2	College and course satisfaction	8.01
3	Australians attitudes towards students	7.11
4	Student attitudes towards Australians	8.01
5	Home-stay satisfaction	9.01
	<b>Overall Stay Satisfaction</b>	<b>8.27</b>

Base: n=582

Implications of these findings will be discussed in more detail in the following sections, although a reasonable conclusion from the ELICOS respondent's perspective, could be:

"I am most happy with my overall stay if the costs relating to my course and stay are as expected, the quality of the course in terms of content and teaching is of a high standard, and the facilities and services of the college are also of a high standard. Secondly, it makes for the best experience if Australians are friendly and welcoming and my accommodation or home-stay arrangements are good."

The following sections relate directly to each of the key variables that contribute to Overall Stay Satisfaction.

## 7.3 Key drivers/demographic differences

Gender, visa type, country of permanent residence and age variables were examined in the analysis (regression modelling process) but were not found to be strong predictors to overall satisfaction. Differences between demographic groups, where found to exist, have been examined in this section and throughout this report, where applicable.

### 7.3.1 Country of permanent residence

Table 18 lists mean scores for overall satisfaction with stay in Australia and all key underlying attributes by country of permanent residence. Notably, Brazil recorded the highest in overall satisfaction, as well as topping three of the five key attributes. Small sample sizes prevent reliable interpretation of the data.

*Table 18: Mean scores - Overall Stay Satisfaction & key attributes by country of permanent residence*

	Sample size n=	Country of permanent residence	Drivers of Overall Stay Satisfaction					
			Overall Stay Satisfaction	Expense perceptions post-arrival	College and course satisfaction	Australian attitudes students	Attitudes towards Australians	Home-stay satisfaction
1	148	South Korea	7.89	6.02	7.78	6.46	7.89	8.43
2	109	Japan	8.19	5.88	7.72	7.18	8.37	9.25
3	47	Taiwan	8.11	5.41	8.13	6.86	8.07	9.05
4	42	Brazil	8.82	6.28	8.55	7.49	8.05	8.42
5	40	China	8.16	5.89	7.99	7.36	8.18	8.37
6	30	Thailand	8.02	6.13	7.62	6.34	7.90	9.08

Legend	
1st	Highest mean score
2nd	Second highest mean score
3rd	Third highest mean score

Base: n=582

Q4a. What is your home country, that is, your country of permanent residence?

### 7.3.2 Age

As highlighted in Table 19, there was little difference between age groups regarding overall satisfaction. Only a small variation exists between key attributes.

*Table 19: Mean scores – Overall Stay Satisfaction and key attributes by age*

Sample size n=	Age	Overall Stay Satisfaction	Drivers of Overall Stay Satisfaction				
			Expense perceptions post-arrival	College and course satisfaction	Australian attitudes students	Attitudes towards Australians	Home-stay satisfaction
246	<b>18-23 years</b>	8.32	6.17	8.00	7.13	8.06	9.15
245	<b>24-29 years</b>	8.23	6.10	7.98	7.08	7.99	8.85
69	<b>30+ years</b>	8.27	6.00	8.13	7.16	7.93	8.71
	<b>Overall</b>	<b>8.27</b>	<b>6.12</b>	<b>8.01</b>	<b>7.11</b>	<b>8.01</b>	<b>9.01</b>

Legend	
1st	Highest mean score

Base: n=582

Q7age\_range. Age of respondent.

### 7.3.3 Gender

Gender differences in Overall Stay Satisfaction model were non-existent, although females had slightly lower mean scores relating to expenses and relating to satisfaction with the college or course. Males had lower means scores for home-stay and lower means scores for their attitudes towards Australians than their female counterparts. Both male and female respondents had the same mean scores in their perceived attitudes of Australians towards them.

*Table 20: Mean scores - Overall Stay Satisfaction & key attributes by gender*

Sample size n=	Gender	Overall Stay Satisfaction	Drivers of Overall Stay Satisfaction				
			Expense perceptions post-arrival	College and course satisfaction	Australian attitudes towards students	Student attitudes towards Australians	Home-stay satisfaction
246	<b>Male</b>	8.27	6.34	8.13	7.09	7.90	8.77
325	<b>Female</b>	8.26	5.96	7.90	7.10	8.07	9.16
	<b>Overall</b>	<b>8.27</b>	<b>6.12</b>	<b>8.01</b>	<b>7.10</b>	<b>8.01</b>	<b>9.01</b>

Legend	
1st	Highest mean score

Base n=582

Q5. Are you male or female?

### 7.3.4 Expense perceptions post-arrival

The composite measure, Expense Perceptions Post-Arrival was ‘top of the list’ of variables that influenced ELICOS respondents’ overall satisfaction with their stay in Australia. Table 21 is a summary of measures that were combined to form this variable and the individual performance of those measures. The overall attribute score is 6.12 out of a maximum of 10, clearly indicating some room for improvement.

*Table 21: Expense Perceptions Post-Arrival*

Expense perceptions after arrival	% Satisfied	% Dissatisfied
<b>Q39a How satisfied are you with the following aspects of your stay in Australia? - Cost of living</b>	40%	26%
<b>Q27a How satisfied are you with each of the following aspects of the college at which you are studying? - Cost of course</b>	27%	29%

Base: n=582

Q39a How satisfied are you with the following aspects of your stay in Australia? - Cost of living. Net *satisfied* or *very satisfied*  
Q27a How satisfied are you with each of the following aspects of the college at which you are studying? - Cost of course Net *satisfied* or *very satisfied*

While 40% of ELICOS respondents were satisfied with the cost of living in Australia, 26% were dissatisfied with this aspect. Twenty-seven percent were satisfied with the cost of their course; however 29% were dissatisfied with the cost. ‘Pre-information’ about the real cost of living in Australia should be clearly communicated to prospective students, as there can sometimes be unforeseen additional expenses, for example, the lack of transport concession in some States.

Another issue related to expenses was obtaining part-time or casual work where only 23% were either satisfied or very satisfied. Asian respondents were generally more dissatisfied with the unavailability of part-time or casual work, with up to 15% (South Korea) dissatisfied or very dissatisfied compared to their European counterparts (4%). More Asian respondents were either dissatisfied or very dissatisfied with the cost of living, with up to 33% (Japan) compared to 17% for European respondents.

The data suggest that satisfaction with the cost of living (a main driver of satisfaction with stay in Australia) could be improved by ensuring there are more employment opportunities for students so they can support themselves throughout their studies and enjoy a reasonable standard of living. Paid employment and the associated increased social interaction with Australians would also help improve the overall satisfaction through better perceptions of Australians attitudes towards international students and vice versa, the students’ attitudes of Australians as discussed further in Section 7.3.6 and Section 7.3.7.

Dissatisfaction with the cost of the course could most likely be overcome by clearly communicating to students the value for money of the course as well as its benefits, in addition to providing a realistic 'picture' of what the costs of living are.

### 7.3.5 College and course satisfaction

College and course satisfaction was one of the primary drivers of the overall satisfaction of stay in Australia. Table 22 provides a summary of the scale measures and their relative performance.

Notably, the distinction between 'the college' and 'the course' was not clearly discernible. For example, with regard to the quality of the teaching staff, while being a feature of the college, it also had a bearing on the quality of the course. In many such cases college and course variables could be perceived as one and the same and were thus combined into one variable.

Overall performance in most areas, listed in Table 22, is good. However, there was only one aspect, quality of teaching, where over 80% of respondents were satisfied or very satisfied. Proportions of less than 90% satisfied or very satisfied generally indicate that there is 'room for improvement'. Most items listed are management related issues that do not require capital expenditure (compared to, for example, improving computer facilities or quality of food outlets/canteens). Many relate to quality control and work practice standards.

**Refer to Section 4.1 relating to the background and performance of these specific measures.**

Males are slightly more satisfied overall with aspects of college and courses than females and respondents over 30 years of age were slightly more satisfied than respondents under 30 years old.

*Table 22: Satisfaction with course/college aspects*

Aspects of course/college	% Satisfied*
Quality of teaching	83%
Commitment of staff	75%
Level of challenge and difficulty of the course	69%
Course content	69%
Speed at which new course material is introduced	68%
Course assessment	66%
Opportunities for one-on-one contact with teaching staff	63%
Course workload	62%
Computer facilities	59%
Food outlets & canteens	32%
Cost of the course	27%

*Base: n= 582 \* net satisfied or very satisfied*

*Q27a How satisfied are you with each of the following aspects of the college at which you are studying?*

*(Tick only one box per row)*

### 7.3.6 Australians' attitudes towards international ELICOS students

It is interesting to note that international respondents' belief in how they are perceived by Australians, contributes significantly to their Overall Stay Satisfaction.

A significant proportion of ELICOS respondents (39%) agreed or strongly agreed with the statement that Australians do not seem interested in having international students as friends and 38% were neutral with respect to this statement. Sixty-one percent of ELICOS respondents however, agreed that Australians were friendly towards international students and 65% affirm that they have generally been treated with respect and courtesy by people in the Australian community (e.g. neighbours, shop assistants and landlords).

Table 23 lists the measures that were combined to form this variable.



*Table 23: Attitudes of Australians towards students*

Attitudes of Australians towards students	% Agree	% Disagree	Neutral
<b>Q33(2) Australians do not seem interested in having international students as friends</b>	39%	21%	38%
<b>Q33(3) Australians are friendly towards international students</b>	61%	6%	32%
	Yes	No	Neutral
<b>Q37 Generally, have you been treated with respect and courtesy by each of the following groups during your stay in Australia?</b>	65%	16%	19%

Base: n= 582

*Q33 Here are some statements about making friends with Australians. Please indicate your level of agreement or disagreement with each statement. Net 'agree' or 'strongly agree'*

*Q37 Generally, have you been treated with respect and courtesy by each of the following groups during your stay in Australia? (Tick one box only for each group of people)*

### 7.3.7 ELICOS students' attitudes towards Australians

The attitude of ELICOS students towards Australians is the fourth most 'influential' variable on Overall Stay Satisfaction. Table 24 shows the outcomes of responses to the questions forming this measure.

Ninety-one percent of ELICOS respondents were 'keen' to make friends with Australians; however 55% indicated that they make an effort to do so. This is most likely due to ELICOS schools having mainly international students on campus and limited exposure to other Australians except teachers and campus staff.

ELICOS respondents who had shared accommodation with other Australians or with other international students reported the most positive attitudes towards Australians, whereas respondents that lived in residence at the college or nearby had less positive perceptions.

The findings suggest that the opportunities for ELICOS students to assimilate are related on their accommodation arrangements (especially living with Australians) and through paid employment.

Refer to Section 5.2.3 for further discussion relating to respect, courtesy and other performance measures relating to this issue.

*Table 24: Attitudes of ELICOS students towards Australians*

Student attitudes towards Australians	% Agree	% Disagree
<b>Q33(1) I would like to have more Australians as friends</b>	91%	1%
<b>Q33(5) I make an effort to make friends with Australians</b>	55%	8%

Base: n= 582

Q33 Here are some statements about making friends with Australians.

Please indicate your level of agreement or disagreement with each statement. Net 'agree' or 'strongly agree'

Table 25 shows the mean scores of international respondents' attitudes towards Australian students by living arrangement. The results suggest that international students living with other Australian students or in a mix of international and Australian students have a better attitude towards Australians than ELICOS students living in other arrangements. This is perhaps mostly due to living with a group of people their own age.

*Table 25: Mean scores: attitudes of ELICOS students towards Australians by living arrangements*

Living arrangements	Mean	Number
<b>House/apartment shared with students from Australia only</b>	8.57	7
<b>House/apartment shared with Australian and international students</b>	8.24	71
<b>House/apartment shared with international students only</b>	7.99	140
<b>Home-stay with an Australian family not related to you</b>	7.99	199
<b>House/apartment by yourself/with other members of your family</b>	7.98	87
<b>Student residence (hall or college) on or near college</b>	7.81	31
<b>Other</b>	7.52	21
<b>Total</b>	<b>8.00</b>	<b>556</b>

Base: n= 582

Q32a. Where did you mostly live while doing your current studies in Australia?  
Scale 0= least positive attitude 10= most positive attitude.

## 7.3.8 Home-stay satisfaction

Home-stay satisfaction is a measure of students' satisfaction with their living arrangements particularly related to the home-stay program where students live with Australian families for the duration of their stay.

Table 26 shows the results of the measures combined to form the home-stay satisfaction variable.

For more details of student satisfaction with home-stay and various aspects of accommodation refer to Section 5.2.1.

*Table 26: Home-stay satisfaction*

Home-stay satisfaction (32b)	Helpful	Not helpful
Q32b(1) Making you feel welcome	93%	6%
Q32b(2) Showing you around	71%	21%
Q32b(3) Helping you to settle in	88%	9%
Q32b(4) Providing opportunities to practise English	82%	11%
Home-stay satisfaction (32c)	Good	Not good
Overall living conditions	78%	5%
Home-stay satisfaction (32d)	Yes	No
Propensity to recommend home-stay family	79%	10%

Base: n=199; Respondents who have home-stayed with an Australian family not related to them

Q32b Overall, has your home-stay family with an Australian family not related to you - been helpful in...?

Q32c How are the overall living conditions (e.g. your bedroom, the house, food, the yard) of your home-stay environment? Net 'good' or 'very good'

Q32d Would you recommend your home-stay family to other international students?

## 7.4 Overall performance summary table

Table 27 is a summary of key variables ranked by their influence on Overall Stay Satisfaction. The performance of their corresponding variable components is also shown. The table is colour coded to represent the level of influence and performance levels.

Table 27: Overall summary of performance

Composite variable	Mean score	Beta index	Variable components	Component ratings
Expense perceptions post-arrival	6.12	30%	<b>Expense perceptions after arrival</b>	<b>Satisfied</b>
			Q39a Cost of living	40%
			Q27a Cost of course	27%
College and course satisfaction	8.01	29%	<b>Aspects of course/college</b>	<b>Satisfied</b>
			Q27a Quality of teaching	83%
			Q27a Commitment of staff	75%
			Q27a Level of challenge and difficulty of the course	69%
			Q27a Course content	69%
			Q27a Speed at which new course material is introduced	68%
			Q27a Course assessment	66%
			Q27a Opportunities for one-on-one contact with teaching staff	63%
			Q27a Course workload	62%
			Q27a Computer facilities	59%
			Q27a Food outlets & canteens	32%
Australians attitudes towards students	7.11	21%	<b>Attitudes of Australians towards students</b>	<b>Yes</b>
			Q37 Generally, have you been treated with respect and courtesy by each of the following groups during your stay in Australia?	65%
				<b>% Agree</b>
			Q33(3) Australians are friendly towards international students	61%
Student attitudes towards Australians	8.01	11%	Q33(2) Australians do not seem interested in having international students as friends	39%
			<b>Attitudes towards Australians</b>	<b>% Agree</b>
			Q33(1) I would like to have more Australians as friends	91%
Home-stay satisfaction	9.01	9%	Q33(5) I make an effort to make friends with Australians	55%
			<b>Home-stay satisfaction</b>	<b>Helpful</b>
			Q32b(1) Making you feel welcome	93%
			Q32b(3) Helping you to settle in	88%
			Q32b(4) Providing opportunities to practise English	82%
				<b>Yes</b>
			(32d) Propensity to recommend home-stay family	79%
				<b>Good</b>
(32c) Overall living conditions	78%			
Home-stay satisfaction	9.01	9%		<b>Helpful</b>
			Q32b(2) Showing you around	71%

For component ratings green= >60%, Yellow = 50% to 59%, Red = <50%

For Beta Scores Green = High influence on Overall Stay Satisfaction, Yellow = Medium Influence on Overall Stay Satisfaction, Red = Lowest Influence on Overall Stay Satisfaction

## 8. Conclusions

The results of the ISS ELICOS survey indicate that ELICOS respondents' experiences of studying and living in Australia were very positive overall. Generally international respondents were highly satisfied with their stay in Australia, particularly on key drivers of satisfaction such as college and course satisfaction, attitudes towards Australians and home-stay experience (where relevant).

Many respondents were attracted to Australia as a study destination by the natural environment, the weather, safety, relatively low cost of education and reputation of the quality of education in Australia. On these counts, most appear to have had their expectations met. Consequently, the majority were willing to recommend Australia as a study destination to friends and family in their home country. As word-of-mouth recommendations are extremely important in choosing a place of study, this is a positive finding. In addition, many ELICOS respondents planned to extend their stay by continuing further studies, finding a job or applying for permanent residency.

Despite these positive results, the findings also indicate that more can be done by the industry and Australia in general to improve international ELICOS students' experiences both during the pre-arrival stage (particularly the application process) and during their stay in Australia.

In terms of ELICOS respondents' pre-arrival experience, areas for improvement that were identified included services provided by education and migration agents, the visa application process, and pre-arrival information. More specifically, problematic aspects of the visa application process were the cost, ease, time it takes and the rules and regulations to obtain a visa.

The findings suggest that more pre-arrival information is required in relation to the fees and cost of living and immigration issues. However, the overall ratings also indicated that respondents were 'merely satisfied' at best, meaning that there are no real 'standout performers' on any of the pre-arrival measures. Better information about costs would help students with budgeting as many are surprised at the 'real costs involved' in living in Australia. Additionally, there is a need for immigration information that is clear and easy to understand, perhaps in the students' first language, and to distribute it efficiently to all those who need it. The comprehensiveness and accuracy of pre-arrival information is critical in forming ELICOS students' first impressions of Australia, in reducing unnecessary anxiety, and in the development of realistic expectations of life and study in Australia. For example, letting international students know that they are not eligible for public transport concessions in some States is a simple yet easy way to help reduce any dissatisfaction that might arise by finding out about this after arrival in Australia.

Expanding the opportunities for students to interact with people outside their course or institution would also address some of the concerns of international students that were identified in the survey results. ELICOS students arrive with the expectation of socializing and working with English

speaking Australians. This has proved a challenge for many. As the primary aims of students are to meet Australians, understand the culture, enjoy the natural assets Australia has to offer and by this process, increase their English proficiency, programs that enable international students to mix with Australian students should be developed and students participation in them encouraged. The selection of home-stay host families based on their ability to introduce ELICOS students to their own community or work related networks would be a useful approach to take.

The level of dissatisfaction with expenses after arrival (the main driver of satisfaction with stay in Australia) could be improved by ensuring there are more employment opportunities for students so they can support themselves throughout their studies and enjoy a reasonable standard of living. Dissatisfaction with the cost of the course could be overcome by clearly communicating to students the value for money of the course as well as its benefits, in addition to providing a realistic 'picture' of the cost of living. Care will need to be taken when communicating these costs as they can appear relatively more expensive than other countries, and potentially discourage otherwise 'keen' applicants. When presenting this information to potential students and their parents, the cost effectiveness of Australia compared to other countries should be demonstrated.

It is also important that support services are promoted among international ELICOS students so that they can be assured that they will be assisted with the inevitable challenges of studying abroad especially in the areas of employment and financial management. Almost all respondents that do use support services find them helpful so encouragement of their use may be a cost effective way of using existing infrastructure to increase overall satisfaction.

In summary, it is important to recognise that the study experiences of ELICOS students are critical in forming their overall opinion about Australia and this in turn impacts on the way they talk about Australia after they return to their home country, both generally and as a study destination. Much of this is connected with the extent to which they are 'allowed' to 'immerse' themselves in Australian culture, and not 'get stuck' in groups comprising mainly international students. It is therefore vital to maintain and perhaps improve on the high levels of satisfaction among ELICOS students through enhancing and facilitating their experience of Australian culture and language. This was generally their core motivation for choosing Australia and therefore a major expectation that should be exceeded. Doing this should encourage the spread of positive recommendations by word-of-mouth to friends and family about Australia, in effect promoting the country and encouraging others to come to study here.



**Appendix A –  
ELICOS International students  
research snapshot**

**Information from Australian Education  
International**



## International Student Enrolments\* in ELICOS in 2006

In 2006, enrolments and commencements in the English Language Intensive Courses for Overseas Students (ELICOS) sector were higher than ever before. Enrolments for the sector were 77,468 and commencements 59,615; a growth of 19.2% and 19.4% respectively on 2005.

Enrolments growth for 2006 was four times that of the previous year, which was in turn a recovery from the negative growth experienced in the sector two years ago.

The largest markets were China, South Korea and Japan. One in five (22.1%) enrolments were from China and, together with those from South Korea and Japan, accounted for about half (49.4%) of all enrolments.

While China, and in particular South Korea, recorded good growth in 2006, Japan continued the decline which has been evident since 2004. Brazil continued to be Australia's fifth largest ELICOS market in 2006 when enrolments were up by 46.7% and commencements 38.4% on 2005.

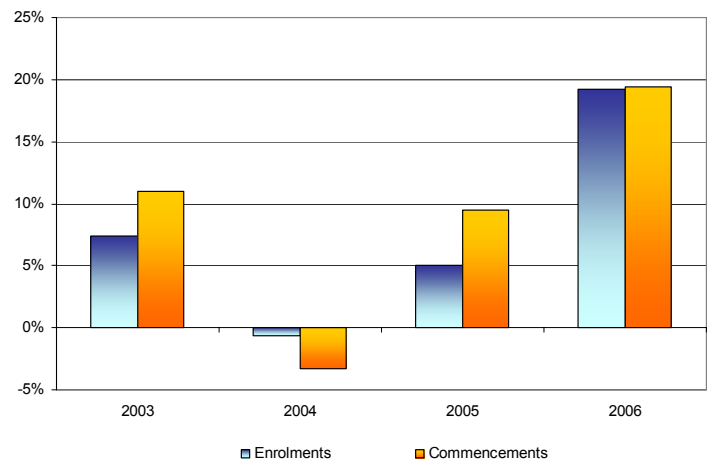
Two in five ELICOS students from China and a similar proportion from South Korea and Brazil enrolled with providers in New South Wales. That State was also the most popular with Thai students. Victoria was the leading destination for enrolments from India and Malaysia. It was also the second most popular with Chinese and Thai students. Queensland was the favoured study destination for students from Japan. Almost one-third of Japanese enrolments were recorded in the state. Queensland was the second most popular State with students from South Korea and Brazil.

Almost eighty-five percent of student enrolments were in New South Wales, Queensland and Victoria. All three States recorded strong growth in enrolments and commencements in 2006. Western Australia and South Australia also recorded good growth on the previous year.

Just under three-quarters of ELICOS enrolments were with non-government providers. Growth in enrolments and commencements at non-government providers was double that of government providers. At the end of 2006 there were 49 government providers and 180 non-government providers delivering ELICOS onshore to students studying in Australia on a student visa.

**International Student Enrolments & Commencements—ELICOS**

Percentage growth on previous year



State/Territory	Enrolments			Commencements	
	2006 (number)	Growth on 2005	% of 2006	2006 (number)	Growth on 2005
NSW	31,247	22.2%	40.3%	24,279	22.4%
Qld	17,541	18.7%	22.6%	13,476	17.3%
Vic.	16,527	20.6%	21.3%	12,684	23.6%
WA	7,201	11.4%	9.3%	5,465	11.0%
SA	3,404	14.6%	4.4%	2,644	13.1%
Tas.	801	-3.8%	1.0%	533	-9.8%
ACT	678	7.3%	0.9%	468	-0.8%
NT	69	68.3%	0.1%	66	65.0%
<i>Provider type</i>					
Non-government	55,122	22.8%	71.2%	42,447	23.1%
Government	22,346	11.2%	28.8%	17,168	11.0%
<b>Total Australia</b>	<b>77,468</b>	<b>19.2%</b>	<b>100.0%</b>	<b>59,615</b>	<b>19.4%</b>

Nationality	Enrolments					Commencements				
	Growth on 2002	Growth on 2003	Growth on 2004	Growth on 2005	2006 (number)	Growth on 2002	Growth on 2003	Growth on 2004	Growth on 2005	2006 (number)
China	5.4%	0.5%	5.5%	7.6%	17,126	12.5%	-5.2%	10.5%	4.6%	13,104
South Korea	37.3%	6.4%	10.4%	22.9%	13,879	64.3%	-0.2%	19.1%	20.9%	10,458
Japan	10.2%	-0.7%	-11.5%	-10.6%	7,250	8.9%	-3.5%	-12.7%	-10.2%	5,142
Thailand	-2.3%	-12.4%	3.9%	18.2%	6,218	-4.3%	-13.3%	5.8%	18.3%	4,812
Brazil	-20.1%	31.5%	67.7%	46.7%	5,855	-22.4%	35.5%	72.0%	38.4%	4,778
<i>Sub-total</i>	9.6%	1.2%	6.3%	12.9%	50,328	14.8%	-2.9%	11.0%	11.3%	38,294
Other	3.3%	-4.2%	2.4%	32.9%	27,140	3.8%	-4.0%	6.1%	37.4%	21,321
<b>Total</b>	<b>7.4%</b>	<b>-0.6%</b>	<b>5.1%</b>	<b>19.2%</b>	<b>77,468</b>	<b>11.0%</b>	<b>-3.3%</b>	<b>9.5%</b>	<b>19.4%</b>	<b>59,615</b>

\* AEI data relate to international students in Australia on a student visa and only data on these enrolments and commencements are included in the above analysis. A 2005 *English Australia* survey of major ELICOS markets found that 49% of all ELICOS students travel to Australia on a student visa.



For further information about this Research Snapshot or the Research Snapshot Series contact: Ms Mandy White, International Research and Analysis Unit on telephone (02) 6240 5693 or email [mandy.white@dest.gov.au](mailto:mandy.white@dest.gov.au). The Research Snapshot Series can be accessed from <http://aei.dest.gov.au/AEI/PublicationsAndResearch/Default.htm>.



**Appendix B –  
International student ELICOS  
questionnaire**



Australian Government



Australian Education International

## Survey of English Language Intensive Courses for Overseas Students (ELICOS)

### INTERNATIONAL STUDENTS Completing an English Language (ELICOS) Course in Australia during 2006

# 2006



Australian Education International (AEI) is an arm of the Department of Education, Science and Training (DEST) and promotes the export of Australian education services. It works to attract students from around the world to study in Australia and to ensure that international students have a successful and enjoyable study experience.

AEI is researching the experiences and views of international English Language (ELICOS) students who are completing a course of study in Australia during 2006.

***This questionnaire is to be completed by international English Language (ELICOS) students only.***

***This questionnaire will take approximately 30 minutes to complete.***

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# 2006 ELICOS Survey

Dear Student,

Thank you for agreeing to participate in this important survey.

This research will provide valuable information to industry and Government on the experience of international ELICOS students in Australian education institutions.

The survey results will assist institutions to enhance the level of services provided to students and to be responsive to their needs.

I hope your studies in Australia have been enjoyable and rewarding and I wish you every success in your future endeavours.

Fiona Buffinton  
Chief Executive Officer  
Australian Education International

Dear Fellow Student,

The National Liaison Committee for International Students in Australia (NLC) is pleased to support this survey.

The NLC believes that the information gathered will help improve the services provided for international students in Australia. We encourage you to give your views, and to complete and return the survey form as soon as possible.

Your feedback will make a difference.

Eric Yenz Pang  
National Convenor  
National Liaison Committee for International Students in Australia Incorporated  
[www.nlc.edu.au](http://www.nlc.edu.au)

- *If you cannot give an exact answer to any question, please provide your best estimate.*
- *For questions with boxes, please tick the appropriate box.*
- *There is space at the end of the survey to write any comments you may have about your studies or experiences at your college.*

## About this survey

The information from this survey will be used by Australian Education International (AEI) and will be published in a report.

The information we gather from you and other students will give us a better understanding of the student experience and help to enhance the level of services provided to international ELICOS students.

AEI has contracted Ipsos Australia to conduct the survey. Please complete the questionnaire and hand it back to the survey coordinator.

## Privacy

You do not need to give your name or any other information which can identify you on the survey form (and we will not release any data which will allow individuals to be identified).

However, if you wish to enter the draw for cash prizes (see below), you will need to complete the optional section at the end of this survey and fill in your contact details.

We will make sure that your responses are treated in strict confidence and you can be assured that the content of individual responses will not be divulged.

Any personal information collected will not be disclosed to any third party.

## Cash prizes

6 cash prizes will be offered to randomly selected eligible respondents (with contact details) in 2006.

The prize winners in 2006 will be contacted by Ipsos by both letter and email by December 2006. The prizes will be delivered to the mail addresses provided. All eligible students submitting a completed questionnaire with contact details will be included in the prize draw.



## Need further information?

If you have any questions about this survey, or completing this questionnaire, please call Preslav Bondjakov, Project Manager at Ipsos Australia on 1800 791 000 or email [preslav.bondjakov@ipsos.com.au](mailto:preslav.bondjakov@ipsos.com.au)

## 1. Your Background

**We'd like to start by asking you some questions about your background. Your responses to the following questions will be treated as anonymous and confidential.**

**Q1a** What is the **name** of the English Language (ELICOS) college at which you are studying? *(Write in the box below)*

**Q1b** Where is the English Language (ELICOS) college you are studying at **located**? *(Write in the boxes below)*

City or Town

State

**Q2** How many weeks will your current English Language (ELICOS) course take you to complete? *(Write in the box below)*

 Weeks

**Q3** How many weeks of your current English Language (ELICOS) course have you completed so far? *(Write in the box below)*

 Weeks

**If you expect to complete your current English Language (ELICOS) course after December 2006, you DO NOT need to fill in and return this survey. Thank you for your help.**

**Q4a** What is your **home country**, that is your **country of permanent residence**? *(Write in the box below)*

**Q4b** What is your **country of citizenship**, that is the country that issued the passport that you used to enter Australia? *(Write in the box below)*

**Q5** Are you male or female? *(Tick one box only)*

Male  Female

**Q6** What was the **highest qualification** you achieved **before** you came to Australia to study this current English Language (ELICOS) course? *(Write in the box below)*

**Q7** What is your month and year of birth? *(Write in the boxes below)*

Month

Year

**Q8** In total, how long have you been in Australia **on this visit**? *(Tick one box only)*

Less than six months

Between six months and less than one year

Between one year and less than two years

Between two years and less than four years

Four years or more

**Q9a** Was Australia your country of **first choice** for taking your current English Language (ELICOS) course? *(Tick one box only)*

Yes  **GO TO Q10**

No  **GO TO Q9b**

**Q9b** Which country was your **first choice** for taking your current English Language (ELICOS) course? *(Write in the box below)*

**Q9c** What were the main reasons that you **did not** study in the country of your **first choice**? *(Write in the box below)*

**Q10** Please specify your level of study in your current English Language (ELICOS) course. *(Tick one box only)*

Beginner

Elementary

Intermediate

Advanced/Academic

◀ Other, *(please specify)*

Don't know

**Q11a** Apart from in Australia, have you ever studied any other course **outside your home country**? *(Tick one box only)*

Yes  **GO TO Q11b**

No  **GO TO Q12**

**Q11b** Apart from in Australia, what other countries have you studied in **outside your home country**? *(Write in the box below)*

**Q11c** Apart from in Australia, **outside your home country** did you study...? *(Tick as many as apply)*

As part of study tours

As an exchange student

As a scholarship holder

At a primary school

At a secondary school

At an English Language (ELICOS) school / college

At a polytechnic or vocational institution

At a university

Other *(please specify)*

## 2. Deciding to Study in Australia

**Now we would like you to think back to the time when you were deciding to come to Australia.**

**Q12** What **other countries** did you consider for your current English Language (ELICOS) course? *(Tick as many as apply)*

Canada

New Zealand

United Kingdom

USA

Other *(please specify)*

No other country

**Q13** Why did you choose to **study in Australia**?  
(Tick as many as apply)

English speaking country	1	<input type="checkbox"/>
High quality of education	2	<input type="checkbox"/>
Low cost of education compared to other countries	3	<input type="checkbox"/>
Safe place to live	4	<input type="checkbox"/>
Live close to beautiful, natural environment	5	<input type="checkbox"/>
Relative(s)/ friend(s) live in Australia	6	<input type="checkbox"/>
Friends/relatives recommended Australia	7	<input type="checkbox"/>
Low cost of living compared to other countries	8	<input type="checkbox"/>
Similar culture to your home country	9	<input type="checkbox"/>
To adapt to the Australian way of life before starting university in Australia	10	<input type="checkbox"/>
Friendly people	11	<input type="checkbox"/>
Easy to fit in	12	<input type="checkbox"/>
Close to your home country	13	<input type="checkbox"/>
Weather	14	<input type="checkbox"/>
Able to combine English study with travel	15	<input type="checkbox"/>
Able to work part-time	16	<input type="checkbox"/>
Visited Australia before and wanted to return	17	<input type="checkbox"/>
Wanted to migrate to Australia	18	<input type="checkbox"/>
Other (please specify)	19	<input type="checkbox"/>

**Q14** When you were **deciding** to apply for your current English Language (ELICOS) course in Australia how important were each of the following factors in your decision?  
(Tick only one box per row)

	Extremely important	Important	Neither/nor	Not important	Not at all important	Don't know/not applicable
Quality of education	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Course will improve your chances of employment	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Education Services for Overseas Students (ESOS) Act protects international students	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Course was not available at home	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Other (please specify ▼)	(Please rate below ▼)					

**Q15** How did you **hear** about studying in Australia?  
(Tick as many as apply)

Friend/ relative recommended Australia	1	<input type="checkbox"/>
Agent recommended Australia	2	<input type="checkbox"/>
Brochure	3	<input type="checkbox"/>
Media article	4	<input type="checkbox"/>
Educational fairs and exhibitions	5	<input type="checkbox"/>
IDP Education Australia in my home country	6	<input type="checkbox"/>
Other education/study agent	7	<input type="checkbox"/>
Study in Australia website	8	<input type="checkbox"/>
Other information on the internet	9	<input type="checkbox"/>
Promotion and advertising of English Language (ELICOS) course in your home country	10	<input type="checkbox"/>
Other (please specify)	11	<input type="checkbox"/>

**Q16** Why did you **choose the college** you are in now?  
(Tick as many as apply)

Friend/relative recommended college	1	<input type="checkbox"/>
IDP Education Australia recommended college	2	<input type="checkbox"/>
Another education/study agent recommended college	3	<input type="checkbox"/>
Good student support services	4	<input type="checkbox"/>
I have friends/relatives living nearby	5	<input type="checkbox"/>
I have friends studying English at this college	6	<input type="checkbox"/>
The college is well known in my country	7	<input type="checkbox"/>
This English Language (ELICOS) course is part of a package to do further studies in Australia	8	<input type="checkbox"/>
Other (please specify)	9	<input type="checkbox"/>

**Q17** Why did you **choose this city** for your English Language (ELICOS) course? (Tick as many as apply)

It is easy to fly directly from my country to this city	1	<input type="checkbox"/>
This city has lots of entertainment	2	<input type="checkbox"/>
This city is quieter than bigger cities	3	<input type="checkbox"/>
It is easy to find part-time work in this city	4	<input type="checkbox"/>
This city is a low cost Australian city	5	<input type="checkbox"/>
This is a safe city to live in	6	<input type="checkbox"/>
I am continuing my further studies (after English) in this city	7	<input type="checkbox"/>
The city was not important in my choice of an English Language (ELICOS) college	8	<input type="checkbox"/>
Other (please specify)	9	<input type="checkbox"/>

**Q18a** How did you **apply to study** at your English Language (ELICOS) college? (Tick one box only)

Direct application to the English Language (ELICOS) college	1	<input type="checkbox"/>
Through a Government Agency or scholarship donor in your home country	2	<input type="checkbox"/>
Through IDP Education Australia in your home country	3	<input type="checkbox"/>
Through another education/study agent in your home country	4	<input type="checkbox"/>
Through your employer in your home country	5	<input type="checkbox"/>
Through a school, college or university in your home country	6	<input type="checkbox"/>
Through a school, college or university in Australia	7	<input type="checkbox"/>
A friend or relative in Australia applied for you	8	<input type="checkbox"/>
Other (please specify)	9	<input type="checkbox"/>

**Q18b** Did you use an **agent** to help you with your arrangements in coming to Australia? (Tick one box only)

Yes	1	<input type="checkbox"/>	GO TO Q18c
No	2	<input type="checkbox"/>	GO TO Q19a

**Q18c** Was your agent an...?  
(If you used more than one agent, please choose the one you used the most. Tick one box only)

Education/study agent	1	<input type="checkbox"/>
Migration agent	2	<input type="checkbox"/>
Travel agent	3	<input type="checkbox"/>
Other (please specify)	4	<input type="checkbox"/>

**Q18d** How would you rate the **overall service** provided by the agent? (*Tick one box only*)

Excellent	1	<input type="checkbox"/>
Very good	2	<input type="checkbox"/>
Good	3	<input type="checkbox"/>
Average	4	<input type="checkbox"/>
Poor	5	<input type="checkbox"/>

**We would like to understand how easy or difficult it was for you to make arrangements to study in Australia.**

**Q19a** How satisfied were you with the information you received **before you arrived in Australia on this visit**, on each of the following? (*Tick only one box per row*)

Information about:	Very satisfied	Satisfied	Neither/nor	Dissatisfied	Very dissatisfied	Don't know/not applicable
Immigration issues	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Visa conditions	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
What to do when you first arrived here	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
What to bring with you	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Accommodation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Your course in general	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Fees and cost of living	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Australian way of life	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>

**Q19b** How did you find making arrangements from your home country to study in Australia? (*Tick one box only*)

Very easy	1	<input type="checkbox"/>
Easy	2	<input type="checkbox"/>
Neither easy nor difficult	3	<input type="checkbox"/>
Difficult	4	<input type="checkbox"/>
Extremely difficult	5	<input type="checkbox"/>

**Q20a** What **type of visa** do you have? (*Tick one box only*)

Student visa: English Language (ELICOS) plus further study	1	<input type="checkbox"/>
Student visa: English Language (ELICOS) only	2	<input type="checkbox"/>
Working holiday visa	3	<input type="checkbox"/>
Visitor or tourist visa	4	<input type="checkbox"/>
Other ( <i>please specify</i> )	5	<input type="checkbox"/>
		▼
		<input type="checkbox"/>
Don't know	99	<input type="checkbox"/>

**Q20b** How satisfied were you with the following aspects relating to your **visa**? (*Tick only one box per row*)

	Very satisfied	Satisfied	Neither/nor	Dissatisfied	Very dissatisfied	Don't know/not applicable
Ease of obtaining visa	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Time it took to get your visa	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Total cost of obtaining visa	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Rules and regulations that apply to holding a visa	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Length of time before visa expires after course completion	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Information about visas available on Australian Government websites	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Advice or information available about visas to Australia	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Who provided this advice? ( <i>Write in the box ►</i> )						

**Q21** In your opinion, please select from the list below the country to which each of the statements apply (*Tick one box only for each statement*)

	Canada	USA	UK	New Zealand	Australia	Don't know
This country is the <b>easiest</b> to obtain a visa to study	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
This country has the <b>best</b> quality English language courses	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
This country has the <b>most</b> expensive English language courses	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>

### 3. Study in Australia

**Q22** Is this your first English Language (ELICOS) course in Australia? (*Tick one box only*)

Yes	1	<input type="checkbox"/>
No	2	<input type="checkbox"/>

**Q23** How many English Language (ELICOS) courses have you completed or are you likely to complete **in Australia on this visit**? Please include the course you are currently taking. (*Tick one box only*)

One	1	<input type="checkbox"/>	► GO TO Q26a
Two	2	<input type="checkbox"/>	► GO TO Q24
Three	3	<input type="checkbox"/>	► GO TO Q24
Four	4	<input type="checkbox"/>	► GO TO Q24
More than four	5	<input type="checkbox"/>	► GO TO Q24

**Q24** On this visit to Australia how many weeks of study have you already completed in previous English Language (ELICOS) courses (**not including** the one you are taking now)?  
(Write in the box below)

	Weeks
--	-------

**Q25** Did you take the previous English Language (ELICOS) course/s at this college? (Tick one box only)

Yes	<sup>1</sup> <input type="checkbox"/>
No	<sup>2</sup> <input type="checkbox"/>

**Now we'd like you to think about the support services provided by your current English Language (ELICOS) college in Australia.**

**Q26a** Please tick the support services you **have used at your current college** in the first column below.

**Q26b** How **useful** have you found each of the support services you have used? (Please tick the box on the same row to rate the usefulness of each service)

	Q26a	Q26b		
	Please tick <b>only</b> if you used the service	Please rate services you have used		
	Yes	Very useful	Useful	Not useful
Airport pick up service	<sup>1</sup> <input type="checkbox"/>	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>
Assistance in finding suitable accommodation	<sup>2</sup> <input type="checkbox"/>	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>
Induction or orientation programme	<sup>3</sup> <input type="checkbox"/>	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>
Social activities organised by the college	<sup>4</sup> <input type="checkbox"/>	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>
Religious support services	<sup>5</sup> <input type="checkbox"/>	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>
Student Centre/administration	<sup>6</sup> <input type="checkbox"/>	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>
Personal counselling service	<sup>7</sup> <input type="checkbox"/>	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>
Course counselling service	<sup>8</sup> <input type="checkbox"/>	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>
Independent Learning Centre (ILC)/self study centre	<sup>9</sup> <input type="checkbox"/>	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>

**Now we'd like you to think about your academic experiences in Australia.**

**Q27a** How satisfied are you with each of the following aspects of the college at which you are studying?  
(Tick only one box per row)

	Very satisfied	Satisfied	Neither/nor	Dissatisfied	Very dissatisfied	Don't know/not applicable
Speed at which new course material is introduced	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Quality of teaching	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Level of challenge and difficulty of the course	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Course assessment	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Commitment of staff	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Opportunities for one-on-one contact with teaching staff	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Course content	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Course workload	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Food outlets/canteens	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Computer facilities	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
Cost of course	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>3</sup> <input type="checkbox"/>	<sup>4</sup> <input type="checkbox"/>	<sup>5</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>

**Q27b** Overall, how satisfied are you with your **current course**?  
(Tick one box only)

Very satisfied	<sup>1</sup> <input type="checkbox"/>
Satisfied	<sup>2</sup> <input type="checkbox"/>
Neither/nor	<sup>3</sup> <input type="checkbox"/>
Dissatisfied	<sup>4</sup> <input type="checkbox"/>
Very dissatisfied	<sup>5</sup> <input type="checkbox"/>
Don't know	<sup>99</sup> <input type="checkbox"/>

**Q28** So far, how much has your current English Language (ELICOS) course improved your English?

A lot	<sup>1</sup> <input type="checkbox"/>
Some improvement	<sup>2</sup> <input type="checkbox"/>
A little improvement	<sup>3</sup> <input type="checkbox"/>
No improvement	<sup>4</sup> <input type="checkbox"/>
Don't know/not sure	<sup>99</sup> <input type="checkbox"/>

**Q29** Would you **recommend** each of the following to friends or family? (Tick only one box per row)

	Yes, would recommend	No, would not recommend	Don't know/not applicable
Studying in Australia	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
The college	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>
The course you are completing	<sup>1</sup> <input type="checkbox"/>	<sup>2</sup> <input type="checkbox"/>	<sup>99</sup> <input type="checkbox"/>

**Q30** Do you think your current English Language (ELICOS) course will be **helpful in getting you a good job** in the future? (Tick one box only)

Yes, helpful	<sup>1</sup> <input type="checkbox"/>
No, not helpful	<sup>2</sup> <input type="checkbox"/>
Don't know	<sup>99</sup> <input type="checkbox"/>



**Q31** Do you think your current English Language (ELICOS) course will be **helpful in assisting you to complete your future studies?** (Tick one box only)

Yes, helpful	1	<input type="checkbox"/>
No, not helpful	2	<input type="checkbox"/>
Don't know	99	<input type="checkbox"/>

#### 4. Life in Australia

**Now we would like you to think about your living experiences in Australia.**

**Q32a** Where did you mostly live while doing your current studies in Australia? (Tick one box only)

Student residence (hall or college) on or near college	1	<input type="checkbox"/>	▶	GO TO Q33
House/apartment by yourself or with other members of your family	2	<input type="checkbox"/>	▶	GO TO Q33
House/apartment shared with international students only	3	<input type="checkbox"/>	▶	GO TO Q33
House/apartment shared with students from Australia only	4	<input type="checkbox"/>	▶	GO TO Q33
House/apartment shared with Australian and international students	5	<input type="checkbox"/>	▶	GO TO Q33
homestay with an Australian family not related to you	6	<input type="checkbox"/>	▶	GO TO Q32b
Other (please specify)	7	<input type="checkbox"/>	▼	GO TO Q33

**IMPORTANT: IF YOU DID NOT LIVE IN A HOMESTAY, PLEASE GO TO Q33 ▶**

**Q32b** Overall, has your **homestay family** been helpful in...? (Tick one box per row)

	Helpful	Not helpful	Don't know/not applicable
Making you feel welcome	1 <input type="checkbox"/>	2 <input type="checkbox"/>	99 <input type="checkbox"/>
Showing you around	1 <input type="checkbox"/>	2 <input type="checkbox"/>	99 <input type="checkbox"/>
Helping you to settle in	1 <input type="checkbox"/>	2 <input type="checkbox"/>	99 <input type="checkbox"/>
Providing opportunities to practise English	1 <input type="checkbox"/>	2 <input type="checkbox"/>	99 <input type="checkbox"/>

**Q32c** How are the **overall living conditions** (e.g. your bedroom, the house, food, the yard) of your homestay environment? (Tick one box only)

Very good	1	<input type="checkbox"/>
Good	2	<input type="checkbox"/>
Average	3	<input type="checkbox"/>
Not very good	4	<input type="checkbox"/>
Poor	5	<input type="checkbox"/>

**Q32d** Would you **recommend** your homestay family to other international students? (Tick one box only)

Yes, would recommend	1	<input type="checkbox"/>
No, would not recommend	2	<input type="checkbox"/>
Don't know/not sure	99	<input type="checkbox"/>

**Q32e** Do you have additional comments about your homestay experience? (Write in the box below)

**Now we'd like you to think about the people you know in Australia.**

**Q33** Here are some statements about making friends with Australians. Please indicate your level of agreement or disagreement with each statement. (Tick one box only for each statement)

	Strongly agree	Agree	Neither/nor	Disagree	Strongly disagree
I would like to have more Australians as friends	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
Australians do not seem interested in having international students as friends	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
Australians are friendly towards international students	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
My English ability stops me from making friends with Australians	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
I make an effort to make friends with Australians	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

**Q34** How many **close friends** do you have from the following groups of people in Australia? (Tick one box only for each row)

	Many	Some	None
Students from this college	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Other people from your home country	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Other people from other countries overseas	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Other Australians	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>

**Q35** How often do you spend **social time** with the following groups of people in Australia? (Tick one box only for each row)

	Often	Sometimes	Never
Students from this college	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Other people from your home country	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Other people from other countries overseas	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Other Australians	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>

**Q36** How often do you **study** with the following groups of people in Australia? (Tick one box only for each group of people)

	Often	Sometimes	Never
Students from your home country	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Other international students	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>

**Q37** Generally, have you been treated with respect and courtesy by each of the following groups during your stay in Australia? (Tick one box only for each group of people)

	Yes	No	Not sure/not applicable
International students from countries other than your home country	1 <input type="checkbox"/>	2 <input type="checkbox"/>	99 <input type="checkbox"/>
Teachers	1 <input type="checkbox"/>	2 <input type="checkbox"/>	99 <input type="checkbox"/>
Administrative and support staff at your college	1 <input type="checkbox"/>	2 <input type="checkbox"/>	99 <input type="checkbox"/>
People you work with	1 <input type="checkbox"/>	2 <input type="checkbox"/>	99 <input type="checkbox"/>
People in the <b>Australian</b> community (e.g. neighbours, shop assistants, landlords)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	99 <input type="checkbox"/>

Here are some questions about working in Australia.

**Q38a** Did you have a paid job at any time during your course time in 2006? (Tick one box only)

- Yes 1  ► GO TO Q38d  
No 2  ► GO TO Q38b

**Q38b** Did you try to get a paid job in 2006? (Tick one box only)

- Yes 1  ► GO TO Q38c  
No 2  ► GO TO Q39a

**Q38c** What was the main reason you did **not** get a paid job in 2006, although you tried to get one? (Write in the box below)

**NOW, PLEASE GO TO Q39a**

**Q38d** On average, how many hours did you do paid work per week in 2006 during your course time? (Tick one box only)

- 5 hours or less per week 1   
6 to 10 hours per week 2   
11 to 15 hours per week 3   
16 to 20 hours per week 4

**Q38e** If you did paid work during your course time in 2006, how did you find balancing your study and your paid job? (Tick one box only)

- Very easy 1   
Easy 2   
Neither/nor 3   
Difficult 4   
Very difficult 5

**Q39a** How satisfied are you with the following aspects of your stay in Australia? (Tick one box per row)

	Very satisfied	Satisfied	Neither/nor	Dissatisfied	Very dissatisfied	Don't know/not applicable
Finding part-time or casual work	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Availability of suitable accommodation	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Safety	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Cost of living	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>
Things to see and do	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	99 <input type="checkbox"/>

**Q39b** Overall, how satisfied are you with your stay in **Australia**

Very satisfied	1 <input type="checkbox"/>
Satisfied	2 <input type="checkbox"/>
Neither/nor	3 <input type="checkbox"/>
Dissatisfied	4 <input type="checkbox"/>
Very dissatisfied	5 <input type="checkbox"/>
Don't know	99 <input type="checkbox"/>

## 5. Future Plans

Now we'd like you to think about your plans for the future.

**Q40** Please indicate which course(s) you have studied in the **past in Australia**, if any, and which one(s) you are planning to study in the **future in Australia**, if any. (Tick as many as apply)

	Q40(a) Studied in previous years	Q40(b) Planning to study in the future
School or secondary college studies	1 <input type="checkbox"/>	
Foundation studies	2 <input type="checkbox"/>	1 <input type="checkbox"/>
English Language (ELICOS) course – Beginner	3 <input type="checkbox"/>	2 <input type="checkbox"/>
English Language (ELICOS) course – Elementary	4 <input type="checkbox"/>	3 <input type="checkbox"/>
English Language (ELICOS) course – Intermediate	5 <input type="checkbox"/>	4 <input type="checkbox"/>
English Language (ELICOS) course – Advanced/Academic	6 <input type="checkbox"/>	5 <input type="checkbox"/>
Technical or vocational training (TAFE or Private VTE college)	7 <input type="checkbox"/>	6 <input type="checkbox"/>
University	8 <input type="checkbox"/>	7 <input type="checkbox"/>
None in Australia	9 <input type="checkbox"/>	8 <input type="checkbox"/>

**Q41** After you have finished this English course will you sit an English language test such as IELTS, or similar? (Tick one box only)

- Yes 1  ► GO TO Q42  
No 2  ► GO TO Q43a  
Don't know 99  ► GO TO Q43a

**Q42** Which English Language test are you likely to take? (Tick one box only)

- IELTS: International English Language Testing System 1   
TOEFL: Test of English as a Foreign Language 2   
Cambridge Preliminary English Test (PET) 3   
Cambridge First Certificate in English (FCE) 4   
Cambridge Certificate in Advanced English (CAE) 5   
Cambridge Certificate of Proficiency in English (CPE) 6   
Cambridge Business English Certificate (BEC) 7   
TOEIC: Test of English for International Communication 8   
Other (please specify) 9

**Q43a** Are you planning to apply, or have you already applied for a permanent residency (PR) in Australia? (Tick one box only)

- Yes, you are planning to apply 1  ► GO TO Q43b  
Yes, you have already applied 2  ► GO TO Q44a  
No, you are not planning to apply 3  ► GO TO Q44a

**Q43b** When are you planning to apply for a permanent residency?  
(Tick one box only)

In the next year  <sup>1</sup>

In the next 2 to 3 years  <sup>2</sup>

In the next 4 to 5 years  <sup>3</sup>

In the next 6 years or more  <sup>4</sup>

**Q44a** Immediately after you complete your current English Language (ELICOS) course, what is the next thing you are most likely to do? (Tick one box only)

Enrol for further studies  <sup>1</sup> ► GO TO Q44b

Find a job  <sup>2</sup> ► GO TO Q44d

Travel or have extended time off  <sup>3</sup> ► GO TO Q45

Return to home country, no plans for the future  <sup>4</sup> ► GO TO Q45

Other (please specify)  <sup>5</sup>

► GO TO Q45

**Q44b** Where are you planning to enrol for further studies?  
(Tick one box only)

At a university in Australia  <sup>1</sup>

At a technical or vocational training provider (TAFE or private VTE college) in Australia  <sup>2</sup>

At a university in your home country  <sup>3</sup>

At a polytechnic in your home country  <sup>4</sup>

At a university in another country overseas  <sup>5</sup>

At a polytechnic in another country overseas  <sup>6</sup>

Other (please specify)  <sup>7</sup>

**Q44c** What will be your main area of study? (e.g., IT, Hospitality, Business Studies, Beauty Therapy etc.)  
(Write in the box below)

**NOW, PLEASE GO TO Q45**

**Q44d** Where are you planning to find a job? (Tick one box only)

Australia  <sup>1</sup>

Your home country  <sup>2</sup>

Another country overseas  <sup>3</sup>

Other (please specify)  <sup>4</sup>

**Q44e** Once you complete your current course, where are you likely to work? (Tick one box only)

Your own business  <sup>1</sup>

Family business  <sup>2</sup>

Other private company  <sup>3</sup>

Public/Government  <sup>4</sup>

Don't know  <sup>99</sup>

## Your Comments...


**Q45** If you would like, please write in the box below any other comments about your studies or experiences in Australia, including suggestions for what could be improved.

**Thank you for completing this survey!**

We can assure you that your personal details will not be identified

**Please complete the following page if you would like to enter the cash prize draws**

## Optional Section



Complete if you wish to be included in cash prize draws in 2006

### What to do now!

Please hand back your completed survey.

In this section we ask you to provide your contact details. Please provide your contact details **only** if you wish to be included in the cash prize draw.

**Remember, providing your contact details is entirely voluntary.**

### *Your Privacy*

**Your personal details will be treated in strict confidence**, and will only be used by Australian Education International and Ipsos for the purpose of the cash draw.

Names and contact details provided by you **will be kept in a secure password protected file** and will not be shared with any government or educational institution. No responses will be linked with individual respondents.

**All of your personal details will be deleted once the prizes are drawn.**

Your name (first name and surname)

Present mailing address

Permanent address in Australia (if different)

Overseas residential home address

Main email address

If you have more than one email address, please specify a second email address in the box below:

Other email address

Telephone number in Australia

Telephone number overseas

Mobile phone number in Australia

Mobile phone number overseas

Thank you for completing this survey!



**Appendix C –  
Technical notes on statistical  
modelling; regression output**

## Notes on multivariate analysis used in this research

A number of ‘data summarising’ (data reduction) techniques were used in the formulation of a model relating to aspects of respondents’ stay in Australia, their experiences and overall satisfaction levels. Principle Components Analysis (PCA) was conducted along with a method of deriving ‘composite measures’. ‘Composite measures’ refers to the practise of manually selecting certain questions within a questionnaire to form scale items for a theme or themes in a manner that has ‘Face validity’<sup>8</sup>. These variables are also known as ‘derived variables’ as they are literally derived from a combination of closely related question items, collapsed into one overriding variable. This technique was adopted due to problems with factor integrity encountered using PCA. The following is an outline of the analysis conducted.

All analysis in this report was conducted at the 90% confidence level.

### Principal components analysis (PCA)

A number of survey questions had varying scale point measures. Variable scales were transformed into uniform scales (see Appendix E for method used to transform scales) in order to perform a PCA on the data.

PCA did not yield clear factor items. Many variables ‘loaded across’ more than one factor and the scale items did not group on clearly identifiable themes for each factor. A further analysis of scree plots, a charting technique used to identify the number of factors present, indicated only a very small number of factors in the data. Since factor stability was problematic, an alternate technique of data reduction was used to form ‘composite measures’ from derived scales that were later used in regression analysis. An outline of steps taken in the analysis conducted involving composite measures follows.

### Composite measures/derived variables

Questions relating to particular aspects of student experiences were identified within the questionnaire and combined into logical groups to form scale measures for certain experience attributes such as support services, overall course satisfaction, expense perceptions after arrival, and home-stay, plus many more groups. (Refer to composite measures and scale items in Appendix D). One or more questions may have been combined to form a composite measure of experience attributes.

Questions of varying scale points were converted to a uniform 10 point scale. These scale measures were then subjected to reliability testing using ‘Cronbach’s Alpha’. Correlation matrices were also used to screen for moderate to high relationships between question variables used to form each

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<sup>8</sup> Face Validity refers to a type of data verification that is dependent on the judgment of the analyst (involving consultation with a panel of experts) as to whether the combination of variables ‘makes sense’ or is logical.

composite measure. The mean score of all the questions relating to a particular composite measure formed that composite measure's overall mean (refer to Appendix E, for mean score calculation details).

Tables A and B list the composite variables derived via the process outlined. For detailed information of the various questions combined to form these variables refer to Appendix E.

The overall satisfaction with 'stay in Australia' was the primary dependent variable in this research, however, it was also found to be a composite measure formed by several related satisfaction questions.

*Table A: Pre-arrival composite variables*

	<b>Composite variable</b>	<b>Description</b>
<b>Independent variables</b>	Agent service	Education and Migration Agent performance
	Information pre-arrival	All aspects of information provided before they arrived on the visit
	Ease of making arrangements	Overall ease of making arrangements from their home country
	Visa process satisfaction	Satisfaction measure
	Connection to Australia	Focus is on the people/ family/friends links
	Expense perceptions – pre-arrival	Pre-visit reasons for choice covering perceptions of the low cost of living in Australia and cost of education.
	Australian lifestyle	Reasons for choosing Australia covering, environment and the friendly people aspects. Excludes costs and family/ friends aspects

NB: some variables listed as independent variables may be used as dependent variables in other "drill down" areas of analysis.

*Table B: Post-arrival composite variables*

	<b>Composite measure</b>	<b>Description</b>
<b>Independent variables</b>	Expense perceptions after arrival	Actual expense perceptions/experiences post choice- covers course cost and cost of living
	Support services	Measures the extent to which services were useful
	College and course satisfaction	Includes aspects of the course and college but excludes the course cost issue
	Course outcome satisfaction	Outcomes to date in terms of English improvements
	Home-stay satisfaction	All aspects of home-stay experience
	Australian attitudes to students	Perceived attitudes of Australians towards student
	Student attitudes towards Australian	Student attitude to Australians
	Integration	Had close friends or socialized with Australians
	Worked while doing course	Whether or not the student has worked or not during their course.
	Permanent residency intentions	Have or intend to apply for Permanent Resident status
	Study future	Intend to study in Australia
	Work future	Intend to find a job in Australia
	Lived with Australians	Lived more directly in the Australian community
	Lived with internationals	Lived with family or other international students
<b>Dependent variable</b>	Overall Stay Satisfaction	Overall satisfaction with stay

NB: some variables listed as independent variables may be used as dependent variables in other “drill down” areas of analysis.

## Notes related to statistical modelling procedures

### Pre and post-arrival variables

Post-arrival variables were used exclusively in modelling influencing factors of Overall Stay Satisfaction as they are specifically to do with the actual experience in Australia. Pre-arrival data is useful for rating performance of pre-arrival measures by referring to their respective mean scores. Though there are some strong correlations observed between pre-arrival data and Overall Stay Satisfaction, these relationships should not be interpreted as causal. It should also be noted that the pre-arrival data was actually collected in Australia on the same survey and may be greatly influenced by the actual stay in Australia.



## Notes on model interpretation

The results of the regression model reveal a similar picture to the correlation table (Table 27) in Section 7.1. While this correlation table showed the relationship between each variable on its own with Overall Stay Satisfaction, the regression model summary shows the contribution each variable makes to overall satisfaction in relation to the other variables. This is an important distinction as high individual correlation does not necessarily mean that a variable is of more ‘influence’ on satisfaction, when ‘mixed in’ with other influencing variables.

## Standardised beta scores and beta index

Note when reading the Regression Model Summary (Figure 11) in Section 7.2 that a variable’s standardised beta score indicates the level of contribution to overall satisfaction. The higher the beta score, the higher the contribution.

Beta scores were totalled and expressed as an index by dividing each individual beta score into the total. This is an acceptable method of communicating the relative importance of each variable. Therefore high percentage scores also indicate high contributions to overall satisfaction.

It should be noted that beta index percentage scores do not reflect the actual percentage each variable contributed to overall variance- it is an index designed to demonstrate relative importance/contribution of the factors only.

## Regression output

Composite variables	Beta (standardised)	Impact (beta Index)	t	Sig.
Expense perceptions post-arrival	0.315	30.0%	2.857551	0.004
College and course satisfaction	0.302	28.7%	9.328436	0.000
Australian attitudes to students	0.22	20.9%	8.675668	0.000
Student attitudes towards Australians	0.115	10.9%	6.494677	0.000
Home-stay satisfaction	0.099	9.4%	3.561448	0.000
<b>Total</b>	<b>1.051</b>	<b>99.90%</b>	<b>3.061289</b>	<b>0.002</b>

*Model variance explained: R square= .40 (Adjusted)*



## Appendix D – Composite measures

## The composite measures defined

The following tables outline the experiences before and after commencing study in Australia. In each case the questions included are given as well as the method of calculation. Cronbach's alpha scores are listed for each scale where applicable. Scales with scores above 0.7 are considered suitable; however please note that questions were combined into scales in some cases based on face validity.

### Overall Stay Satisfaction

Short name	Full name	Questions composing scale	Number of items	Comments	Cronbach's alpha
Overall	Overall Stay Satisfaction	Mean of Q39a(1-4), Q39b, Q29(1)	3 component items	Overall Stay Satisfaction	0.7

### Pre-arrival variables

Short name	Full name	Questions composing scale	Number of items	Comments	Cronbach's alpha
Agent	Agent Service	Q18d	1	Education and Migration Agent performance	n/a
Inform	Information pre-arrival	Q19a(1-8)	8	All aspects of information provided before they arrived on the visit	0.7
Ease	Ease of making arrangements	Q19b	1	Overall ease of making arrangements from their home country	n/a
Visa	Visa process satisfaction	Q20b(1-7)		Satisfaction measure	0.8
Connections	Connection to Australia	Q13(6,17), Q16(5,6)	4	Focus is on the people/family/friends links	n/a
Expensepre	Expense Perceptions –pre study	Q13(3,8), Q17(5)	3	Pre visit reasons for choice covering perceptions of the low cost of living in Australia and cost of education.	.6
Austlife	Australian Lifestyle	Q13(4,5,11,1)	4	Reasons for choosing Australia covering, environment and the friendly people aspects. Excludes costs and family/friends aspects	.5

## Post-arrival variables

Short name	Full name	Questions composing scale	Number of items	Comments	Cronbach's alpha
Expense	Expense perceptions post- arrival	Q39a4,q27a1	2	Actual Expense perceptions/experiences post choice- covers course cost and cost of living	.5
Support	Support services	Q26b(1-9)	9	Measures the extent to which services were useful	.8
CollCourse	College and course satisfaction	Mean of Q27a(1-10) Q27b, Q29(2,3)	3 component items - Mean of all items in Q27a (1-10), Q27b, Q29 (2,3). Thus used overall mean of Q27a as one item.	Includes aspects of the course and college but excludes the course cost issue	.9
Edcourse	Course satisfaction	Q27b, Q29(3)	2		.6
Edresult	Course outcome satisfaction	Q30,Q31,Q28	3	Outcomes to date in terms of English improvements	.4
Home-stay	Home-stay satisfaction	Mean of Q32b(1-4) Q32c,Q32d	Mean of 3 component items. Used overall mean of Q32b as one item	All aspects of home-stay experience	.7
Acc1	Lived with Australians	Q32a(1,4,5,6)	Binary 0/1 where 1= applies	Lived more directly in the Australian community	n/a
Acc2	Lived with Internationals	Q32a(2,3)	Binary 0/1	Lived with family or other international students	n/a
Austatt1	Australian attitudes to me	Q33(2,3),Q37(5)	3 items	Attitudes from Australians	.7
Austatt2	Attitudes towards Australians	Q33(1,5)	2 items	Student attitude to Australians	.3
Workhere	Worked while doing course	Q38a	Binary 0/1	Whether or not the student has worked or not during their course.	n/a
Integration	Had Australian friends	Q34(4),Q35(4)	2 items	Had close friends or socialized with Australians	.8
PRfuture	PR intentions	Q43a(1,2)	Binary 0/1	Have or intend to apply	n/a

Short name	Full name	Questions composing scale	Number of items	Comments	Cronbach's alpha
				for PR status	
Studyfuture	Study future	Q44b(1-2)	Binary 0/1	Intend to study in Australia	n/a
Workfuture	Work future	Q44d(1)	Binary 0/1	Intend to find a job in Australia	n/a



## **Appendix E – Scale conversions and mean scores**

## Method of calculation of mean scores

Each measure was scored out of 10. This was done simply by multiplication rather than recoding of each of the score items. If the measure was on a 5 point scale the measure was simply multiplied by 2. Two point scales were multiplied by 5 to give a score maximum of 10 and so on.

Scales have been reversed so that 10 = high satisfaction levels or degree of the measure.

Note also in the table that some measures were the average of some summary items. For example in college satisfaction the mean scores of several items of Q27a are taken and this is treated as one item, the overall mean of this measure, whilst Q27b, and Q29(2) yields the overall college satisfaction measure.

In addition binary measures have been used in the form of *applies/does not apply* for some measures.

## Example of compute statements used

```
COMPUTE Edcoll = Mean((6-mean(Q27a_1 to Q27a_10))*2,(3-Q29_2)*2) .  
COMPUTE homestay = Mean((3-mean(Q32b_1 to Q32b_4))*5,(6-Q32c)*2,(3-Q32d)*5) .  
COMPUTE OverallQ39 = Mean((6-Q39a_1)*2,(6-Q39a_2)*2,(6-Q39a_3)*2,(6-Q39a_4)  
*2,(6-Q39a_5)*2,(6-Q39b)*2) .
```

## Mean scores

Variable	n =	Minimum	Maximum	Mean	Std. deviation
Overall Stay Satisfaction	567	3.67	10	8.26	1.09
Agent service	353	2	10	6.72	2.18
Information pre-arrival	544	2	10	7.24	1.09
Ease of making arrangements	550	2	10	7.35	1.65
Visa process satisfaction	558	2.57	10	6.88	1.38
Connection to Australia	570	0	n/a binary	n/a	n/a
Expense perceptions (pre- study)	570	0	na/ binary	n/a	n/a
Australian lifestyle	570	0	na/ binary	n/a	n/a
Expense perceptions after arrival	564	2	10	6.11	1.60
Support services	484	3.33	10	7.71	1.63
College and course satisfaction	567	3.6	10	8.00	1.23
Course outcome satisfaction	565	2.5	10	8.66	1.38





## Appendix F – Correlation matrix

## Correlation matrix

Variable	Overall Stay Satisfaction	Agent service	Information pre-arrival	Ease of making arrangements	Visa process satisfaction	Connection to Australia	Expense perceptions (pre-study)	Australian lifestyle	Expense perceptions after arrival	Support services	College and course Satisfaction
Overall Stay Satisfaction	1	0.25	0.49	0.15	0.29	0.09	-0.07	0.28	0.46	0.23	0.47
Agent service	0.25	1	0.39	0.08	0.2	0.04	-0.05	0.09	0.21	0.14	0.36
Information pre-arrival	0.49	0.39	1	0.23	0.44	0.09	-0.08	0.13	0.37	0.28	0.43
Ease of making arrangements	0.15	0.08	0.23	1	0.31	0	-0.1	0.06	0.11	0.01	0.09
Visa process satisfaction	0.29	0.2	0.44	0.31	1	0.07	-0.15	0.05	0.3	0.17	0.26
Connection to Australia	0.09	0.04	0.09	0	0.07	1	0.03	0.06	0.06	0.01	0.08
Expense perceptions (pre-study)	-0.07	-0.05	-0.08	-0.1	-0.15	0.03	1	0.16	-0.03	-0.02	-0.1
Australian lifestyle	0.28	0.09	0.13	0.06	0.05	0.06	0.16	1	0.1	0.19	0.15
Expense perceptions after arrival	0.46	0.21	0.37	0.11	0.3	0.06	-0.03	0.1	1	0.22	0.3
Support services	0.23	0.14	0.28	0.01	0.17	0.01	-0.02	0.19	0.22	1	0.31
College and course satisfaction	0.47	0.36	0.43	0.09	0.26	0.08	-0.1	0.15	0.3	0.31	1
Course outcome satisfaction	0.26	0.25	0.28	0.03	0.11	0.1	0.01	0.05	0.31	0.21	0.47
Home-stay satisfaction	0.34	0.07	0.27	0.12	0.23	0.04	0	0.15	0.12	0.15	0.24
Lived with Australians	0.03	0.02	-0.06	0.04	-0.01	-0.03	0.06	0.17	0.05	0.07	0
Lived with internationals	-0.04	-0.04	0.05	-0.01	0.01	-0.02	-0.05	-0.15	-0.05	-0.09	-0.03
Australian attitudes to me	0.39	0.17	0.32	0.05	0.23	0.04	-0.04	0.19	0.18	0.16	0.29
Attitudes towards Australians	0.15	0.05	0.02	0.08	0.01	-0.02	0.12	0.06	0.02	0.12	0.01
Worked while doing course	-0.04	0.07	-0.02	-0.07	-0.1	-0.1	0.07	-0.06	-0.02	-0.05	-0.05
Integration	0.22	0.15	0.1	0.08	0.09	0.1	0.03	0.13	0.17	0.08	0.1
PR intentions	0	-0.08	0.01	-0.06	0	0.08	0	-0.01	0.03	-0.03	0
Study future	0.03	0.05	0.05	-0.06	0.03	0	0.07	-0.07	0	0.03	-0.04
Work future	-0.04	-0.09	0.04	0.01	0.07	-0.04	0	-0.02	0.03	0.04	-0.03

## Correlation matrix (continued)

Variable	Course outcome satisfaction	Home-stay satisfaction	Lived with Australians	Lived with internationals	Australian attitudes to me	Attitudes towards Australians	Worked while doing course	Integration	PR intentions	Study future	Work future
Overall Stay Satisfaction	0.26	0.34	0.03	-0.04	0.39	0.15	-0.04	0.22	0	0.03	-0.04
Agent service	0.25	0.07	0.02	-0.04	0.17	0.05	0.07	0.15	-0.08	0.05	-0.09
Information pre-arrival	0.28	0.27	-0.06	0.05	0.32	0.02	-0.02	0.1	0.01	0.05	0.04
Ease of making arrangements	0.03	0.12	0.04	-0.01	0.05	0.08	-0.07	0.08	-0.06	-0.06	0.01
Visa process satisfaction	0.11	0.23	-0.01	0.01	0.23	0.01	-0.1	0.09	0	0.03	0.07
Connection to Australia	0.1	0.04	-0.03	-0.02	0.04	-0.02	-0.1	0.1	0.08	0	-0.04
Expense perceptions (pre-study)	0.01	0	0.06	-0.05	-0.04	0.12	0.07	0.03	0	0.07	0
Australian lifestyle	0.05	0.15	0.17	-0.15	0.19	0.06	-0.06	0.13	-0.01	-0.07	-0.02
Expense perceptions after arrival	0.31	0.12	0.05	-0.05	0.18	0.02	-0.02	0.17	0.03	0	0.03
Support services	0.21	0.15	0.07	-0.09	0.16	0.12	-0.05	0.08	-0.03	0.03	0.04
College and course satisfaction	0.47	0.24	0	-0.03	0.29	0.01	-0.05	0.1	0	-0.04	-0.03
Course outcome satisfaction	1	0.05	-0.05	0.04	0.1	0.06	0.02	0.07	0.02	0.05	0.04
Home-stay satisfaction	0.05	1	0.02	-	0.19	-0.02	-0.05	0.18	-0.17	-0.11	0.02
Lived with Australians	-0.05	0.02	1	-0.86	0.07	0.04	-0.11	0.12	-0.04	-0.15	-0.11
Lived with internationals	0.04	-	-0.86	1	-0.09	-0.01	0.17	-0.14	0.07	0.21	0.12
Australians attitudes to me	0.1	0.19	0.07	-0.09	1	0.1	-0.09	0.31	0.01	-0.08	0.02
Attitudes towards Australians	0.06	-0.02	0.04	-0.01	0.1	1	0.04	0.18	0.02	0.06	0.06
Worked while doing course	0.02	-0.05	-0.11	0.17	-0.09	0.04	1	0.03	0.09	0.14	0.06
Integration	0.07	0.18	0.12	-0.14	0.31	0.18	0.03	1	0.02	-0.04	0.05
PR intentions	0.02	-0.17	-0.04	0.07	0.01	0.02	0.09	0.02	1	0.28	0.11
Study future	0.05	-0.11	-0.15	0.21	-0.08	0.06	0.14	-0.04	0.28	1	-0.11
Work future	0.04	0.02	-0.11	0.12	0.02	0.06	0.06	0.05	0.11	-0.11	1