



**Australian Government**  
**Australian Education International**

Studying in Australia:  
Views from six key countries

# Studying in Australia: views from six key countries

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## List of acronyms

AEI	-	Australian Education International
DIAC	-	Department of Immigration and Citizenship
IIE	-	Institute of International Education
UK	-	United Kingdom
US	-	United States

# Executive summary

After years of strong growth in international student visa applications and enrolments, the international education sector in Australia is currently experiencing a downturn in applications. A number of commentators in the media have suggested that one of the main reasons behind the current downturn in interest in studying in Australia is differences between Australia's student visa program and visa programs of Australia's main English speaking competitors, in particular differences around visa costs, processing times and financial requirements.

In December 2010 the Minister for Immigration and Citizenship, the Hon Chris Bowen MP, and the Minister for Tertiary Education, Skills, Jobs and Workplace Relationships, Senator Chris Evans, appointed Mr Michael Knight AO to undertake a review of Australia's student visa program. A discussion paper released by Mr Knight as part of his review posed a number of questions about the student visa program, asking among other things whether Australia's processing times for student visas are too long, whether student visa application charges are too high, and whether the amount of funding that students need to demonstrate or declare they possess puts Australia at a competitive disadvantage.

As part of the Department's input to the Knight review, Australian Education International conducted a survey of more than 1,800 respondents encompassing prospective students, in some cases their parents and a number of alumni who had previously studied in Australia (collectively referred to in the report as the student group). More than 500 major education agents involved in recruiting students for Australian and other countries also responded to the same survey questions.

The survey sought to examine perceptions of studying in Australia, including aspects of education quality, cost of studying and living and the student visa application process. Respondents were asked to compare their perceptions of Australia with its major competitor countries, including the United States of America (US) and the United Kingdom (UK). The survey was conducted in collaboration with AEI education counsellors at post in China, India, Indonesia, Korea, Thailand and Vietnam with the survey made available in Chinese, English, Indonesian, Korean and Vietnamese languages as appropriate.

The main findings of the survey were that quality of education, tuition and living costs were the most important factors influencing where potential students choose to study. For most groups of students and agents across the six countries, the cost of a student visa was among the least important factors influencing decision making.

A majority of students in most countries thought that Australia's student visa costs, tuition costs, living expenses and demonstrated minimum level of funds needed to apply for a visa were the same or lower than comparable costs in Canada, New Zealand, the UK or the US. Education agents were more likely to perceive costs in Australia as being greater than relevant costs in competitor countries.

Students ranked Australia as taking the shortest time to process student visas, and ranked the UK and the US as taking the longest. Students also ranked Australia as having the fastest application and processing times (looking at the time from applying to an education institution through to receiving a final response from the relevant immigration office), and ranked the UK

and the US as having the slowest application and processing times. For education agents, the results varied by country, with some groups of agents ranking Australia as the fastest, while others ranked Australia as slowest (in terms of time taken to process a student visa) or second slowest (in terms of total time taken).

The total time taken to apply for an enrolment and receive a visa to study in Australia was seen as a positive for more than half of Chinese and Indonesian education agents, and more than half of Chinese, Indian and Vietnamese students thought this made prospective students more likely to choose to study in Australia. Less than half of students or agents from any country thought that the total time taken to apply for an enrolment and receive a visa to study in Australia made students less likely to choose Australia as an education destination.

These findings mirror findings in a similar study conducted by the US over 2009 and 2010, which found that prospective students thought that living costs and tuition were cheaper in Australia than in Canada, the UK or the US, and that Australia's visa procedures were less difficult or complex than those in Canada, the UK or the US.

Survey respondents were also asked about the clarity and transparency of the visa processing system as a whole and whether this made students more likely to choose a particular country. Australia's visa process was seen as most likely to positively influence student choice, with more than half of education agents in China, India and Indonesia and more than half of students in China, India, Thailand and Vietnam thinking that Australia's clarity and transparency made students more likely to choose Australia.

The results of the survey suggest that the cost of Australia's student visa may not have a major impact on students' choice of study destination. The survey also shows that when the total length of time taken from starting to apply to an education institution through to having a visa application approved is taken into account, Australia is considered by the sample surveyed to have one of the fastest systems in place. The US is perceived to have one of the slowest systems by many respondents, due in part to the amount of information that needs to be provided as part of the US enrolment process.

The three most important factors in deciding where to study are the quality of education, the cost of tuition and the cost of living. Australia is perceived to be a provider of quality education, but the current high value of the Australian dollar impacts on both the cost of tuition and the cost of living in Australia relative to competitor countries.

## Section 1. Introduction

After years of strong growth, Australia's international education sector is currently experiencing a downturn in numbers, at a time when other countries are seeking to expand their own international education sectors. Commencements (new enrolments) fell by 10 per cent in Australia in 2010, and have fallen a further 8 per cent in the first seventh months of 2011<sup>1</sup>. This fall is seen primarily in the vocational education and training (VET) and ELICOS sectors. To date, higher education commencements have remained steady, with only a slight fall seen (2%). International student visa applications and grants (both lead indicators for the international education sector) suggest that further falls are likely, at least in the short term<sup>2</sup>.

In response to the downturn in international student visa applications and enrolments in Australia, the Minister for Immigration and Citizenship, the Hon Chris Bowen MP and the Minister for Tertiary Education, Skills, Jobs and Workplace Relations, Senator Chris Evans, announced a review of the student visa program in December 2010 along with a package of measures for the international education sector. The Government appointed Mr Michael Knight AO to undertake the review (Knight review) and report to Mr Bowen and Senator Evans in 2011.

Surveys of international students, both in Australia and elsewhere, indicate that international students see the opportunity to learn English, as well as the quality of the institution and of the qualification they are studying towards, to be of primary importance in choosing an international study destination. However, issues such as the cost of studying and living and the cost and time required to receive a confirmation of enrolment and obtain a student visa are also significant<sup>3</sup>.

As part of the Department's input to the Knight review, Australian Education International (AEI), with support from the Department of Immigration and Citizenship (DIAC) and Austrade conducted a survey in six of Australia's largest source countries of international students, to examine perceptions of studying in Australia.

The survey sought feedback on some of the questions posed in the Knight review discussion paper, namely "Are Australia's processing times for student visas too long?", "Is the visa application charge too high?" and "Overseas students are currently required to demonstrate or declare that they have access to \$18,000 in funds to contribute towards living costs for every year of intended study in Australia. Does this put Australia at a competitive disadvantage?"<sup>4</sup>

The survey also sought perceptions about the key issues of the perceived quality of an Australian education and the relative cost of studying and living in Australia. To gain a relative view of how Australia is perceived with respect to competitor countries offering similar education services, survey respondents were asked to rank a range of criteria with respect to student visa issues raised in the Knight review and broader issues of the quality and cost of an international education experience

The findings of this survey, conducted in China, India, Indonesia, Korea, Thailand and Vietnam are examined in this report.

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<sup>1</sup> Australian Education International July 2011 international student enrolment data

<sup>2</sup> Department of Immigration and Citizenship 2011b

<sup>3</sup> Australian Education International 2007, Chow P 2011

<sup>4</sup> Department of Immigration and Citizenship 2011c

## Section 2. Methodology

To examine perceptions of studying in Australia, AEI surveyed education agents, prospective students, parents and alumni in six of Australia's key source countries for international students.

### Selected countries

China, India, Korea, Thailand and Vietnam were Australia's five largest source markets for commencing international students in 2011, while Indonesia was Australia's ninth largest source market. Five of these six markets have seen a fall in commencements in 2011, as shown in table 1 below.

Table 1. Growth in commencements by sector (year to date June 2011 AEI data)<sup>5</sup>

<i>Nationality</i>	<i>ELICOS</i>	<i>Schools</i>	<i>VET</i>	<i>Higher Education</i>	<i>Other</i>	<i>Total</i>
China	-22%	-21%	-8%	0%	-20%	-9%
India	-43%	-20%	-9%	-26%	-56%	-14%
Indonesia	-12%	-16%	14%	7%	-11%	5%
Korea	-23%	-25%	-4%	3%	-23%	-12%
Thailand	-22%	-6%	1%	-12%	-24%	-10%
Vietnam	-28%	-16%	-2%	5%	-46%	-10%

As well as being significant source countries, the DIAC student visas Assessment Levels for these six countries vary, reflecting differing amounts of evidence that visa applicants need to demonstrate to support their visa applications<sup>6</sup>. Table 2 below shows the current Assessment Levels by visa subclass for each country.

Table 2. DIAC Assessment Levels as at 2 April 2011<sup>7</sup>

<i>Nationality</i>	<i>ELICOS</i>	<i>Schools</i>	<i>VET</i>	<i>Higher Education</i>	<i>Postgraduate research</i>	<i>Other</i>
China	3	4	4	3	2	3
India	4	2	4	3	2	3
Indonesia	2	2	2	2	2	2
Korea	2	1	2	1	1	1
Thailand	2	1	2	1	1	1
Vietnam	3	2	3	2	1	3

The six countries were therefore chosen as they represent not only major source markets for Australia's international education sector, but markets facing different rates of growth (or decline) and differing levels of scrutiny and information for student visas.

### Survey respondents

Past AEI surveys of international students<sup>8</sup> have shown that word of mouth (recommendations from friends, parents and alumni) and education agents are two of the most important sources of information for prospective students who are looking to study overseas. For this reason, this research project involved surveying international education agents, prospective students,

<sup>5</sup> Declines in commencements are shaded in red.

<sup>6</sup> DIAC student visa Assessment Levels range from 1 (lowest) to 5 (highest), with the level of scrutiny and information required increasing as the Assessment Level increases.

<sup>7</sup> Department of Immigration and Citizenship 2011a

<sup>8</sup> Australian Education International 2007, Australian Education International 2010



parents and alumni in each country, to examine perceptions of studying in Australia and in Australia’s main English speaking competitors.

Major international education agents were targeted in each country, with an emphasis on those representing institutions from more than one country – as these agents are more likely to have views on the relative differences between education destinations.

Prospective students, students who had previously studied in Australia and parents of prospective students were also targeted, through both existing contact lists and international education exhibitions.

Table 3 shows the number of survey respondents to this research project. In total, more than 1,800 responses were received, including responses from more than 500 education agents across the six countries. For ease of clarity, responses from prospective students, alumni and parents have been aggregated in this report, and will be referred to throughout the report as ‘students’.

Table 3. Survey respondents

	China	India	Indonesia	Korea	Thailand	Vietnam	Total
Education agents	308	64	38	49	30	20	509
Students	676	209	73	189	83	100	1,330
<b>Total</b>	<b>984</b>	<b>273</b>	<b>111</b>	<b>238</b>	<b>113</b>	<b>120</b>	<b>1,839</b>

Education agents and students all answered the same survey, which was jointly developed by AEI and DIAC. The majority of respondents were surveyed using a paper based questionnaire, while a small number of surveys were conducted online or via telephone. Surveys were translated into Chinese, Vietnamese, Korean and Indonesian.

## Section 3. Findings

### Importance of factors

While a number of factors are raised as contributing to the current decline in offshore visa applications (DIAC's June student visa report shows that offshore visa applications declined by 19.8 per cent in 2010-11<sup>9</sup>), the impact of any one of these factors depends in part on the importance placed on that factor by potential students.

To identify the importance of various factors, survey respondents were asked to rank a number of different factors in order of importance to students when choosing an international education destination. Responses to this question are shown below in table 4. The most important factor for each group from each country is shaded green, while the least important is shaded red.

Table 4. Ranked importance of factors when choosing an international education destination (1 is most important, 9 least important)

	Education agent						Students					
	China	Indonesia	Korea	Vietnam	Thailand	India	China	Indonesia	Korea	Vietnam	Thailand	India
Cost of living	5	3	3	3	2	3	3	2	3	3	1	3
Cost of travelling	8	9	9	8	7	9	8	7	8	6	5	9
Cost of tuition	2	1	1	1	1	2	2	3	2	2	2	1
Cost of visa	9	8	8	9	6	8	9	8	9	8	7	8
Funds needed to show	6	7	7	4	8	7	7	9	7	5	8	7
Opportunities to work	7	4	4	5	5	6	6	4	4	7	6	4
Quality of education	1	2	2	2	3	1	1	1	1	1	4	2
Prospects for PR	3	6	5	7	9	4	5	6	6	9	9	6
Safety	4	5	6	6	4	5	4	5	5	4	3	5

As the responses in table 4 show, there was widespread agreement across both education agents and students that the quality of education and the cost of tuition were the two most important factors influencing student decision making. Students generally ranked quality first, while agents generally ranked tuition costs first. The cost of living was also ranked as relatively important by most groups of agents and students.

For most groups, the cost of a visa was one of the least important factors, as was the funds that visa applicants needed to demonstrate that they possessed to meet the financial requirements for visas. This suggests that even though Australia's student visa costs more than visas from Australia's competitors, this is unlikely to have a significant impact on choice of study destination.

Likewise, the relatively low importance placed on the funds that students are required to demonstrate may reflect the fact that these funds ensure that students have enough money to cover their costs of living in Australia. The survey responses suggest that it is the cost of living that is important in choosing a destination, not the requirement to demonstrate funds to cover these costs.

<sup>9</sup> Department of Immigration and Citizenship 2011b

## Relative costs of studying

Survey respondents were asked a series of questions, seeking to find out how respondents perceived the comparative costs of studying in Australia, relative to the costs of studying in Canada, New Zealand, the UK or the US. These questions asked about the perceived costs of student visas, tuition, living expenses, and the amount of money that a visa applicant needed to demonstrate they possessed. In tables 5 through 8 below, cells are shaded red where 50 per cent or more of respondents agreed with the statement.

Table 5. Proportion of respondents who believe that Australia's Student visa costs more than a student visa in Canada, New Zealand, the UK or the US

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Canada	73%	75%	74%	47%	37%	95%	37%	38%	25%	41%	16%	38%
New Zealand	74%	77%	84%	41%	57%	80%	36%	40%	18%	37%	27%	37%
UK	68%	72%	82%	47%	47%	85%	38%	34%	16%	45%	10%	34%
US	74%	70%	74%	47%	30%	95%	38%	38%	25%	47%	11%	56%

Table 5 shows the proportion of respondents who thought that Australia's student visa cost more than student visas for the relevant country (for example, 73 per cent of Chinese agents thought that Australia's student visa cost more than a Canadian student visa). As the table shows, the majority of education agents from China, India, Indonesia and Vietnam thought that an Australian student visa cost more than a visa from any of the competitor countries.

The majority of students thought that an Australian student visa cost the same or less than visas from other countries, with the exception of Vietnamese students, where the majority thought that an Australian visa was more expensive than a visa from the US. Although not shown, more than half of Thai students thought that an Australian student visa was less expensive than a student visa from either the US or the UK.

Table 6. Proportion of respondents who believe that Australia's tuition costs more than tuition in Canada, New Zealand, the UK or the US

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Canada	56%	50%	53%	27%	13%	40%	41%	46%	23%	37%	16%	40%
New Zealand	82%	53%	71%	45%	40%	65%	38%	46%	32%	41%	27%	41%
UK	34%	50%	34%	49%	40%	25%	33%	41%	15%	39%	10%	37%
US	27%	34%	29%	37%	17%	42%	30%	37%	22%	39%	8%	44%

Table 6 looks at perceptions of the relative cost of Australia's tuition. A majority of Indian education agents thought that the cost of tuition in Australia is greater than tuition costs in Canada, New Zealand and the UK. More than half of Chinese and Indonesian education agents thought that Australian tuition was more expensive than tuition in Canada or New Zealand, while more than half of Vietnamese education agents thought that tuition in Australia was more expensive than in New Zealand.

As with table 5, less than half of students from any country thought that tuition costs in Australia were more expensive than in competitor countries. More than half of Thai students thought that the cost of tuition in the UK was greater than in Australia.

Table 7. Proportion of respondents who believe that Australia’s living expenses are greater than living expenses in Canada, New Zealand, the UK or the US

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Canada	45%	59%	39%	29%	10%	55%	37%	40%	21%	38%	16%	36%
New Zealand	71%	61%	71%	51%	50%	60%	35%	39%	29%	39%	25%	42%
UK	24%	56%	26%	41%	17%	35%	29%	36%	10%	38%	10%	35%
US	28%	44%	24%	31%	13%	50%	32%	41%	22%	39%	12%	46%

Table 7 looks at perceptions of the relative costs of living in Australia and in Australia’s competitor countries. A majority of education agents from all six countries thought that the cost of living in Australia was greater than in New Zealand. More than half of Indian education agents also thought that Australia’s living expenses were greater than expenses in Canada and the UK, while a majority of Vietnamese agents thought that Australia was more expensive than Canada and the US. More than half of Thai and Vietnamese education agents thought that the cost of living in Australia was less than in the UK.

Less than half of students from any country thought that Australia’s living expenses were greater than those for any of the four competitor countries. More than half of Indonesian students thought that living expenses in the UK were greater than in Australia, and a majority of Thai students thought that living expenses in Australia were lower than in either the UK or the US.

Table 8. Proportion of respondents who believe that the amount of money a student has to demonstrate possessing to apply for an Australian visa is greater than for a student visa in Canada, New Zealand, the UK or the US

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Canada	34%	58%	42%	33%	13%	55%	32%	43%	8%	28%	12%	35%
New Zealand	66%	56%	61%	35%	23%	60%	30%	39%	14%	25%	6%	34%
UK	60%	61%	50%	37%	20%	75%	33%	43%	5%	32%	4%	33%
US	37%	55%	34%	31%	23%	60%	29%	44%	10%	30%	6%	45%

Applicants for student visas need to demonstrate that they possess a minimum level of funds to support themselves during their study – the level varies by competitor country (and in Australia’s case, by the Assessment Level of the student’s country). Table 8 looks at perceptions of the amount of money that students need to demonstrate they possess in order to be eligible to apply for an Australian visa, versus perceptions of the funds needed for visas in competitor countries. More than half of education agents in India and Vietnam thought that the funds needed for Australia were greater than for any of Australia’s competitor countries, while a majority of Chinese and Indonesian education agents thought that funding requirements for Australia were greater than for either New Zealand or the UK.

Less than half of students from any country thought that the amount of money a student needs to demonstrate to be eligible to apply for an Australian visa is greater than funding requirements for other competitor countries. Likewise, less than half of students from any country thought that Australia’s funding requirements were less than for any other competitor country.

## Sources of information on costs of studying

Both education agents and students were asked to choose the one option from a list of information sources that had the greatest influence on views about costs. Tables 9 and 10 below show the responses for each group (the largest proportion in each column is shaded green).

Table 9. Which one information source has the greatest influence on views about costs of studying in different countries? (Education agent responses)

	Education agents					
	China	India	Indonesia	Korea	Thailand	Vietnam
Government websites with immigration information	11%	17%	13%	10%	0%	25%
Government websites with education information	24%	22%	13%	6%	0%	0%
Education institution websites	18%	6%	26%	8%	7%	5%
Social media (blogs, twitter etc)	1%	6%	0%	2%	0%	0%
Other internet websites	0%	9%	0%	12%	14%	0%
Information from education agents	16%	16%	21%	29%	64%	45%
Information from migration agents	1%	2%	0%	2%	0%	0%
Paper based media	2%	0%	3%	4%	0%	5%
TV news reports	3%	2%	0%	2%	0%	0%
Word of mouth (friends or family)	10%	6%	18%	10%	7%	5%
Word of mouth (former students)	12%	9%	5%	8%	7%	15%
Other	1%	5%	0%	6%	0%	0%

Not surprisingly, education agents tended to think that education agents were one of the most important influences on perceptions of study costs. Information from education agents was the most common response for agents from Korea, Thailand and Vietnam, the second most common response for Indonesian agents, and the third most common for Chinese and Indian education agents. Word of mouth (combining the responses for friends or family and former students) was also a common response, with 20 percent or more of Chinese, Indonesian and Vietnamese agents nominating this as the one source with the greatest influence on views of costs.

Table 10. Which one information source has the greatest influence on views about costs of studying in different countries? (Student responses)

	Students					
	China	India	Indonesia	Korea	Thailand	Vietnam
Government websites with immigration information	9%	13%	3%	3%	2%	3%
Government websites with education information	13%	13%	6%	3%	6%	19%
Education institution websites	15%	17%	10%	10%	17%	15%
Social media (blogs, twitter etc)	8%	5%	3%	12%	0%	0%
Other internet websites	4%	6%	10%	14%	8%	2%
Information from education agents	14%	11%	34%	26%	37%	21%
Information from migration agents	4%	2%	0%	0%	0%	1%
Paper based media	4%	5%	0%	1%	0%	3%
TV news reports	3%	1%	0%	4%	0%	1%
Word of mouth (friends or family)	12%	8%	15%	9%	15%	17%
Word of mouth (former students)	12%	16%	20%	18%	15%	18%
Other	1%	1%	0%	1%	0%	0%

For students, education agents and word of mouth were again considered to be among the greatest influences on perceptions about the cost of study in different countries (although Indian students were the least likely to see education agents as the key source of information about costs).

Despite information from education agents being seen as the greatest influence on costs of studying in different countries for three of the six countries, the perceptions of costs shown in tables 5 through 8 above show a clear difference between the views of education agents on costs (generally showing Australia to be more expensive) and the views of students (generally showing Australia to be the same or less expensive).

## Time taken to apply to an institution and to receive a visa

As noted in the introduction, there are a number of different processes involved in applying for and being granted a student visa, each of which can take varying lengths of time in different countries. In order, these steps are:

- applying to (and being accepted by) an education institution;
- preparing and submitting documentation for a student visa; and
- having that student visa application assessed by the relevant immigration authority.

For tables 11 through 14, the fastest country is shaded green and the slowest is shaded red.

Table 11. Ranking of countries by time taken to have an enrolment application accepted by an education institution (1 is fastest)

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	2	1	1	2	1	1	1	1	1	1	1	1
Canada	4	4	5	3	4	5	3	3	2	2	2	2
New Zealand	1	3	2	1	3	3	2	2	3	3	3	3
UK	3	2	3	4	2	2	4	4	4	4	4	4
US	5	5	4	5	5	4	5	5	5	5	5	5

Survey participants were asked to rank from fastest (1) to slowest (5) each of the five countries in terms of how long they thought it would take to have an enrolment application accepted by an education institution. Table 11 looks at the results for each group.

Among education agents Australia was ranked as the fastest in terms of enrolments by agents from every country other than China and Korea (both of which ranked Australia as second fastest). Education agents from four of the six countries ranked the US as taking the longest to process enrolment applications, with Indonesian and Vietnamese agents ranking the US as the second slowest.

For students, the results were almost uniform – every group ranked Australian education institutions as the fastest in terms of processing applications, with the US ranked slowest and the UK ranked second slowest.

Table 12. Ranking of countries by time taken to prepare documentation for a student visa (1 is fastest)

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	4	5	1	2	2	3	1	2	1	1	1	1
Canada	5	2	5	3	4	5	3	3	2	3	2	3
New Zealand	2	3	2	1	1	3	2	1	3	2	3	2
UK	1	1	3	5	3	2	4	4	4	5	4	4
US	3	4	4	4	5	1	5	5	5	4	5	5

Table 12 shows the rankings for each country in terms of the perceived time taken to prepare documentation for a student visa. There are few clear patterns in terms of responses, with education agents ranking Australia anywhere from fastest (Indonesia) through to slowest (India). Similarly, both the UK and the US are ranked fastest by agents from some countries, and slowest by agents from other countries. The differing rankings for Australia may reflect the different Assessment Levels applying to each country – Assessment Levels for China and India tend to be higher than those for the other four countries, hence requiring more information.

Students from five out of the six survey countries ranked Australia as fastest in terms of time taken to prepare documentation with Indian students ranking Australia second fastest. The US ranked the slowest country by five groups with Korean students ranking the US second slowest.

Table 13. Ranking of countries by time taken to process student visas (1 is fastest)

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	4	5	1	2	1	3	1	1	1	1	1	1
Canada	5	2	5	4	4	5	3	3	2	3	2	3
New Zealand	3	3	2	1	2	4	2	2	3	2	3	2
UK	2	4	4	5	3	2	4	4	4	5	4	5
US	1	1	3	3	5	1	5	5	5	4	5	4

Table 13 shows the rankings for perceptions of the time taken to process a student visa. Education agents in Indonesia and Thailand ranked Australia as the fastest, while Indian education agents ranked Australia as the slowest. As with table 12 above, the rankings for Australia might be explained by the differing levels of scrutiny applied to students in different countries, based on their Assessment Levels.

For students, Australia was ranked as the fastest for processing visas by all countries, with the US and the UK perceived to be the slowest. The consistently high rankings of Australia across all of the student groups is consistent with the results of the university component of AEI's 2010 International Student Survey, where 87 per cent of international student respondents said they were satisfied or very satisfied with the time taken to process their student visas<sup>10</sup>.

Table 14. Ranking of countries by total time taken to be granted a student visa (1 is fastest)

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	4	4	1	3	1	4	1	1	1	1	1	1
Canada	5	2	4	4	4	5	3	3	2	3	2	2
New Zealand	2	3	2	1	3	3	2	2	3	2	3	3
UK	1	1	3	5	2	2	4	4	4	5	4	5
US	3	5	5	2	5	1	5	5	5	4	5	4

Table 14 looks at rankings of countries by the total time taken to receive a student visa, starting with applying to an education institution through to receiving a final response from the relevant immigration office. This incorporates each of the stages ranked in tables 11, 12 and 13.

Education agents from Indonesia and Thailand ranked Australia as the fastest, when looking at the complete application cycle. Agents from Vietnam, India and China ranked Australia as the second slowest. The UK was ranked as fastest by education agents from China and India, while Korean education agents ranked the UK as slowest. Vietnamese education agents ranked the US as the fastest, while Thai, Indian and Indonesian agents ranked the US as the slowest. While some education agents perceive US student visas to be processed quickly (ranking first for three countries in table 13 above), this can come at the end of a relatively drawn out process at the enrolment and preparation stage.

For students, the results in table 14 exactly match those in table 13. Australia is ranked the fastest by all countries, with the US and the UK ranked the slowest.

<sup>10</sup> Varghese M and Brett K 2011



Survey participants were then asked to judge whether, given all of the stages required to gain an enrolment and receive a student visa, the overall time required made a student more or less likely to choose a particular country.

Table 15. Does the overall time required to apply for an enrolment and receive a visa make students more likely to choose that country?

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	50%	39%	58%	33%	10%	45%	65%	59%	42%	34%	28%	68%
Canada	33%	36%	39%	31%	4%	40%	42%	43%	27%	29%	10%	47%
New Zealand	37%	41%	42%	22%	0%	20%	33%	39%	21%	28%	17%	41%
UK	61%	38%	34%	55%	7%	15%	44%	30%	22%	46%	14%	67%
US	57%	33%	47%	43%	3%	20%	49%	35%	30%	46%	16%	73%

As table 15 shows, at least half of Chinese education agents thought that the total time taken to enrol and be granted a visa was a positive for Australia, the UK and the US, making students more likely to choose those countries. More than half of Indonesian education agents thought that the length of time made students more likely to choose Australia, while more than half of Korean education agents thought that timing was beneficial for the UK.

More than half of Chinese, Indian and Vietnamese students thought that the time taken in Australia made them more likely to choose Australia, while a majority of Vietnamese students also thought that the length of time was favourable for the UK and the US as well.

The positive perceptions of Australia for Chinese education agents reflect views stated in a recent Austrade survey of Chinese education agents. This survey found that only five out of thirty Chinese education agents thought that visa processing issues were one of the top concerns for the Study in Australia market<sup>11</sup>.

<sup>11</sup> Austrade 2011

## Information required to apply to an institution and to apply for a visa

Before students have their applications for enrolment and for student visas processed, students need to prepare information to provide with their applications. Survey respondents were asked a series of questions about the information students needed to assemble to apply for an enrolment and for a student visa, and whether this had any impact on a student's likelihood to choose a particular country as a destination.

Table 16. Ranking of countries by amount of information needed to apply to an education institution (1 is least information needed, 5 is most information needed)

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	2	2	3	1	1	4	1	1	4	1	1	1
Canada	4	3	2	3	3	5	3	3	2	3	3	3
New Zealand	1	4	1	2	2	3	2	2	1	2	2	2
UK	3	1	4	5	4	1	4	4	3	4	4	4
US	5	5	5	4	5	2	5	5	5	5	5	5

As the introduction noted, applicants to US institutions have to go through a lengthy process, providing significant amounts of information as part of their enrolment process. Table 16 above largely reflects this, with education agents from four of the six countries and students from every country ranking the US as requiring the most information to apply to an institution. Australia and New Zealand were ranked first or second by most groups of both education agents and students.

Table 17. Ranking of countries by amount of information needed to apply for a student visa (1 is least information needed, 5 is most information needed)

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	4	5	3	2	1	5	1	3	3	1	1	1
Canada	5	2	2	3	3	4	3	2	1	3	3	3
New Zealand	2	4	1	1	2	3	2	1	2	2	2	2
UK	1	1	4	5	4	2	4	4	4	5	4	4
US	3	3	5	4	5	1	5	5	5	4	5	5

Table 17 looks at rankings of countries by the amount of information needed to apply for a student visa. Thai education agents ranked Australia as needing the least information, while Indian and Vietnamese agents ranked Australia as needing the most. Students from four of the six surveyed countries ranked Australia as needing the least information to apply for a student visa. Students from five out of the six countries ranked the US as needing the most information.

Table 18. Does the amount of information needed to apply to an education institution make you more likely to choose that country?

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	49%	38%	53%	31%	10%	20%	63%	54%	40%	28%	23%	64%
Canada	26%	34%	32%	27%	4%	10%	42%	45%	21%	28%	12%	23%
New Zealand	43%	28%	34%	18%	14%	20%	39%	33%	16%	20%	16%	22%
UK	44%	20%	37%	39%	14%	10%	41%	33%	22%	40%	17%	27%
US	31%	28%	42%	37%	10%	10%	41%	31%	25%	40%	17%	41%

More than half of Indonesian education agents and more than half of Chinese, Indian, Thai and Vietnamese students thought that the amount of information needed to apply to an education institution made them more likely to choose Australia. The amount of information needed to apply to an education institution was not seen as a positive for any other country.

Table 19. Does the amount of information needed to apply for a student visa make you more likely to choose that country?

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	42%	36%	42%	31%	10%	20%	62%	49%	32%	29%	30%	65%
Canada	25%	36%	18%	31%	11%	15%	45%	40%	20%	29%	16%	28%
New Zealand	42%	36%	26%	18%	17%	20%	36%	35%	13%	25%	22%	23%
UK	52%	28%	26%	49%	17%	30%	41%	33%	18%	43%	17%	29%
US	41%	22%	34%	39%	14%	35%	39%	33%	22%	43%	17%	41%

More than half of Chinese education agents thought that the amount of information that was needed to apply for a UK student visa made students more likely to choose that country. Although not shown, more than half of Vietnamese agents thought that the amount of information needed to apply for an Australian student visa made students less likely to choose Australia. This perception is directly at odds with Vietnamese students, with almost two thirds stating that the amount of information needed to apply for an Australian student visa made them more likely to choose Australia. More than half of Chinese students also felt the same way about Australia.

Table 20. Does the overall amount of information needed to apply to an education institution and for a student visa make you more likely to choose that country?

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	50%	42%	47%	37%	50%	15%	61%	55%	44%	34%	41%	61%
Canada	31%	34%	32%	37%	57%	15%	44%	42%	19%	33%	22%	26%
New Zealand	44%	39%	26%	29%	50%	25%	36%	37%	14%	24%	22%	24%
UK	51%	30%	37%	53%	47%	30%	40%	33%	22%	41%	29%	27%
US	45%	20%	42%	47%	50%	30%	38%	30%	26%	43%	24%	43%

At least half of all Thai agents thought that the overall amount of information required was a positive for each country other than the UK. Half of Chinese education agents thought that the amount of information needed made students more likely to choose Australia and the UK, while the majority of Korean education agents thought that the UK's information requirements made students more likely to choose the UK as a destination. Not shown in the table, more than half of Vietnamese education agents thought that the overall amount of information needed for Australia made students less likely to choose Australia. This contrasts with the views of a majority of Vietnamese students, who like more than half of Chinese and Indian students, thought that students were more likely to choose Australia as a result of the amount of information needed to apply to an Australian education institution and for an Australian student visa.

## Clarity and transparency of visa processes

The Australian visa application system aims to provide applicants with clarity about all criteria and requirements applicants need to be granted a student visa. In some other countries, immigration officers have more discretion over visa decision making, which while providing more flexibility, lessens clarity and transparency. To assess the impact of this clarity and transparency on visa applications, survey participants were asked whether they thought transparent processes made students more or less likely to choose a particular country.

Table 21, Does the clarity and transparency of visa processes in a country make you more likely to choose that country?

	Education agent						Alumni and students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	63%	53%	50%	37%	44%	35%	64%	69%	49%	42%	83%	76%
Canada	41%	36%	29%	22%	36%	30%	44%	42%	33%	40%	66%	29%
New Zealand	43%	41%	29%	24%	43%	25%	37%	37%	31%	33%	73%	28%
UK	58%	38%	37%	35%	33%	45%	44%	34%	36%	49%	71%	30%
US	54%	22%	47%	39%	36%	45%	43%	37%	35%	49%	71%	48%

More than half of Chinese, Indian and Indonesian education agents thought that the level of clarity and transparency of Australia's visa process made students more likely to choose Australia as a destination. More than half of Chinese education agents thought the same about the UK and US systems. At least half of Vietnamese agents, on the other hand, thought that the level of clarity and transparency in the Australian and Canadian systems made students less likely to choose these countries as a destination.

A majority of Thai students thought that the levels of clarity and transparency in all five destination countries made students more likely to choose studying in those countries. More than half of Chinese, Indian and Vietnamese students thought that the clarity of Australia's visa processes made students more likely to choose Australia as a destination (again, the responses of Vietnamese students run counter to the responses of Vietnamese education agents).

## Quality of education systems

As table 4 showed, both education agents and students think that the quality of education is one of the most important factors for students when choosing an international education destination.

For the survey, respondents were asked to rank each country in order of the perceived quality of their education systems. Table 22 shows the perceived quality rankings for each country.

Table 22. Ranking of the quality of education systems (1 is highest quality)

	Education agents						Students					
	China	India	Indonesia	Korea	Thailand	Vietnam	China	India	Indonesia	Korea	Thailand	Vietnam
Australia	4	2	3	4	3	4	3	3	3	3	3	3
Canada	3	4	4	3	4	3	4	4	4	4	4	4
New Zealand	5	5	5	5	4	5	5	5	5	5	5	5
UK	2	3	2	2	1	2	2	2	1	1	2	2
US	1	1	1	1	2	1	1	1	2	2	1	1

As is to be expected, the UK and the US were viewed as having the highest quality education systems by most groups of education agents and by all groups of students. Australia was ranked third by students from all six countries, while education agents ranked Australia from second (in the case of India) through to fourth (for China, Korea and Vietnam).

## Section 4. International comparisons

In May 2011, the US based Institute of International Education (IIE) released a report titled *What International Students Think About US Higher Education: Attitudes and Perceptions of Prospective Students in Africa, Asia, Europe and Latin America*. For this report, the IIE surveyed prospective students in selected countries in four major regions of the US, with surveys conducted between 2009 and 2010.

Prospective students were asked a series of questions about different aspects of the education systems of major providers of international education, including Australia, Canada, the UK and the US. Selected key results from figure 3 of the IIE report are produced below in table 23<sup>12</sup>.

Table 23. Proportion of prospective students who agree that the statement applies to the study destination

	Australia	Canada	UK	US
Tuition is expensive	17.5%	23.1%	51.0%	60.1%
Difficult or complex visa procedures	10.9%	13.4%	23.2%	49.3%
High cost of living	17.0%	19.7%	53.9%	44.7%
High quality education system	19.2%	33.2%	49.9%	75.6%
Number of responses	8,965	4,153	7,781	9,379

Out of the four major English speaking study destinations included in the IIE report, prospective students were least likely to agree that Australia has a high quality education system (this is a slightly different result to table 22, where students ranked the quality of Australia's education system higher than that of Canada – this may reflect the American-centric focus of prospective students in the IIE survey).

Prospective students were least likely to nominate Australia as having expensive tuition or a high cost of living, and only 11 per cent of prospective students thought that Australia has difficult or complex visa procedures – in contrast, half of all prospective students thought that the US has difficult or complex visa procedures, and more than half of prospective students thought that tuition is expensive in the UK and in the US, and that the UK has a high cost of living.

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<sup>12</sup> Chow, P 2011

## Section 5. Conclusions

While a number of commentators have pointed at Australia's Student visa program as a major reason behind the current decline in international students enrolling in Australia's international education system, the results of this survey suggest that the costs of a student visa is relatively insignificant. Furthermore, the amount of money a student is required to demonstrate to obtain a visa was not among the most important factors in deciding where to study.

Respondents to this survey indicated that the three most important factors in deciding where to study are the quality of education, the cost of tuition and the cost of living. Australia is perceived to be mid-range in terms of the quality of its education, but the current high value of the Australian dollar will be impacting on both the cost of tuition and the cost of living in Australia relative to competitor countries.

An analysis conducted by the John Curtin Institute of Public Policy<sup>13</sup> suggested that processing times for an Australian visa were substantially longer than some of Australia's competitors, namely the United States (US), the United Kingdom (UK), Canada and New Zealand. However, there are substantial differences in the steps that potential students have to take to apply for student visas from these different countries.

For example, applicants for student visas in the US must provide a lot of financial information to the educational institution they are applying to, whereas applicants for student visas in Australia provide this information directly to the immigration department. The relatively short processing times attributed to the US system do not account for the lengthy application process with the education institution that applicants must go through before submitting their visa applications for processing. A more valid comparison of application times involves looking at the complete cycle from first applying to an institution through to being granted a student visa – an approach undertaken within this survey.

The survey shows that when the total length of time taken from starting to apply to an education institution through to having a visa application approved is taken into account, Australia is considered to have one of the fastest systems in place. The US is perceived to have one of the slowest systems by many respondents, due in part to the amount of information that needs to be provided as part of the enrolment application process.

These findings mirror those in the independent IIE study, which found that half of prospective students thought the US had a difficult or complex visa procedure, while only one in ten prospective students thought the Australian visa system was difficult or complex<sup>14</sup>.

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<sup>13</sup> Phillimore, J and Koshy, P 2010

<sup>14</sup> ibid

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