PROSPECT
RESEARCH & MARKETING

The Asian Student of 2020

How the market has adapted and refined since 2000; and, where the market is now heading

Produced by

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At the 1999 NAFSA Conference, Rob Lawrence presented a ground-breaking research study into 'The Asian University student of 2000'. Twenty years on, Rob replicated the same study to determine just how much had changed and what factors now influence students from the world's largest source market in 2020. This paper is titled 'The Asian Student of 2020'.

Context

2000 was a turning point for Australia's international education industry. Google had just recently become established. The Sydney Olympics positioned Australia in the eyes of the world. Offshore campuses were beginning to evolve. And the internet was leading to the escalation of comparative provider and directory websites.

Within a few short years other factors came into play, including rankings, pathways, Facebook, YouTube, automated marketing communications and online applications. The role of agents shifted from that of information provider to application facilitator. Access to part-time employment and migration opportunities began to fuel new market segments. And a growing proportion of students had friends and family permanently residing in Australia.

Today, international students are permanently connected through their personal devices. They are conditioned to immediacy and view themselves as having a choice. Today, a substantial proportion of international students have previously visited Australia before commencing their studies. The regulatory environment continues to protect the interests of international students. And as a destination, the predisposition to country has clearly shifted to predisposition to city.

Melbourne and Sydney have more international university students per capita of any city with a population of 250,000 plus in the world.

In 1999 when research into the Asian student of 2000 occurred, international Higher Education enrolments in Australia were dominated by Singapore, Indonesia, Hong Kong and Malaysia; with a large gap then to Japan and South Korea. By 2019, the largest source Higher Education markets for Australia were China, India, Nepal and Vietnam. Further, in 2019, the number of international enrolments was far more diversified than in 1999, despite the well-documented dominance of Chinese students.

Whilst diversification is evident, there are some unique patterns in the context of Australia. For example, there are much larger concentrations of Indian, Nepalese, Sri Lankan and Singaporean students in Melbourne; whereas Sydney has by far the largest number of students from Nepal. Such patterns are a reflection of the importance and influence of residing networks of friends and family, as well as the power and affirmation of social media.

This paper is in three parts. Part one focuses upon market research used to distinguish the changes between 2000 and 2020. Part two explores the implications for Australian providers. Part three examines the dynamics which will impact the drivers to choice for international students by 2025.

Methodology

Research into the Asian Student of 2020 consisted of face-to-face interviews with Asian undergraduates and postgraduates studying at 21 Australian universities and 15 UK universities.

For the purposes of definition, Asian students included those from East and South East Asia (i.e. China, Hong Kong, South Korea, Japan, Singapore, Malaysia, Indonesia, Vietnam, Thailand) and students from South Asia (i.e. India, Pakistan, Bangladesh, Nepal, Sri Lanka, Bhutan).

The universities encompassed various categories, including Group of Eight and Russell Group Universities, Science and Technology universities, universities aged under 50 years and universities located in regional locations.

All of the interviews were conducted as face-to-face intercepts, with responses entered by the participant into a mobile device overseen by the interviewer. This enabled various rankings and comparative measures to be incorporated into the results.

All interviews were conducted in confidence and all participants had to pass a five point screening test to ensure that they were valid students.

For the purposes of reporting, many references are made to 1999 and 2019 – when the research projects were conducted. These were subsequently converted into two reports – the first being ‘The Asian Student of 2000’ and the second, namely this report, being ‘The Asian Student of 2020’.

Part One

Informed by Research

The 1999 story: For the 'Asian Student of 2000'

In 1999, iPads were still a decade away. Online survey methodologies were rudimentary at best. And the most effective platform for conducting surveys was face-to-face interviews, with data then manually imported into such systems as SPSS.

In 1999, the sample was 1,011, split between Australia (300), the UK (365) and the US (346).

In 1999, 45% of international university students in Australia first considered studying overseas more than three years before the commencement of their studies, whereas only 6% looked within a 12-month window. At that time, only 20% and 11% of Asian university students in the UK and USA respectively, gave Australia genuine consideration; with 41% of Asian students in Australia seriously considering the UK.

In 1999, under half of Asian university students in Australia (45%) most wanted to study in Australia, with the major determinants when choosing Australia being comparative affordability and ease of visa access.

In the 1999 research, Asian university students were asked to provide a specific score to determine the relative importance of different variables when choosing their study destination[1]. The highest results were for 'cost of undertaking studies in destination country' (7.4) and 'ease of obtaining work after graduating' (6.9). Significantly, the 'cost of undertaking study' variable was highest for Australia at 7.9, which indicated that Australia was widely considered the more affordable destination. Conversely, 'ease of obtaining work' was highest for the US, at 8.1.

In the 1999 research, the Asian university students were asked to indicate their two most important reasons for finally choosing to study in their destination country. For students in Australia, the highest responses were for 'tuition fees and / or living expenses lower than many other countries', at 31%; followed by 'close to home / convenient location / easily accessible' (24%), 'relatives / friends live in the country' (17%), 'safe country' (13%) and 'family wanted me to study here' (13%).

The 300 Asian university students in Australia were asked how long it took to select their university, having selected their country. A total of 36% indicated 'less than six months'. A further 18% indicated 'six to 11 months' and 24% indicated 'between one and three years'.

In the 1999 research, the 1,011 Asian university students were asked to indicate the two most important considerations when selecting a university. Overall, the stand-out considerations were 'reputation of the university / quality of education' at 60% and, 'offered the course I wanted' (51%). The respective percentages for the Australian sample were 57% and 48%.

[1] The higher the score, the higher the priority or importance.

In the 1999 research, the 1,011 Asian university students were asked to indicate up to two reasons for their choice of university. For Asian students in Australia and the US, 43% indicated 'reputation of the university', compared with 61% for the UK – a result which based upon the 2019 research reflects how far the reputation of Australian universities has since progressed over the past 20 years.

Another significant finding was that only 16% of the 300 Asian students in Australia indicated 'offered the particular course I wanted', compared with 50% in the UK and 35% in the US – another result which shows Australia's product expansion since 1999, with course access and opportunities now considered a major driver of choice.

In 1999, the internet was gaining traction. Approximately 30% of Asian university students indicated that they sourced information through the internet, although this only applied to 10% of Asian students in Australia. Instead, Australia was dominated by a combination of 'education agents' at 37%, 'IDP' (20%), 'word-of-mouth friends' (19%) and 'word-of-mouth family' (12%).

In comparison, for Asian students in the UK, the 'British Council' represented 50%.

Of the 1,011 Asian university students interviewed for the 1999 research, 24% indicated that they used the internet 'a great deal'.

In the 1999 research, Asian university students were asked to nominate the person or people who most influenced their decision around choice of university. For the 300 Asian university students in Australia, 36% indicated 'no-one', followed by 'parents', at 27%.

The 278 Asian students in Australia who used an agent were asked to indicate the type of assistance provided by an agent:

- Provided me with information and brochures relating to universities (54%)
- Provided visa advice (52%)
- Submitted my application to university / universities (51%)
- Gave me advice on which universities to apply to (40%)

Application turnaround times were significantly slower in 1999. For the 300 Asian university students in Australia, 30% indicated 'four to six weeks' and 12% indicated 'seven to 11 weeks'. Approximately 39% indicated 'three weeks or less', although over half of these were in the 'two to three week' category.

For the 1999 research, the 1,011 Asian university students were asked an acceptable time between submitting an application and receiving an offer. In Australia, 36% indicated 'two to three weeks' and 30% indicated 'four to six weeks'. Just 19% indicated 'less than two weeks'.

In the 1999 research, 29% of the 300 Asian students in Australia indicated that they had 'friends or relatives in Australia prior to commencing their studies'.

2019: For the 'Asian Student of 2020'

In the 2019 research, the survey methodology enabled more in-depth analytics, given that the 1,023 participants in Australia and the UK involved interviewers using portable devices.

Why study overseas

As an opening line of enquiry, the Asian university students were asked for up to six reasons for choosing to study 'overseas'.

Table 1: The top six reasons for choosing to study overseas

Top five reasons for choosing to study overseas	TOT	AUS	UK
To improve career/employment prospects	85	81	89
Want to work overseas - in destination	41	53	29
Quality of education overseas	41	39	43
Overseas qualification more highly respected/better reputation	40	39	41
Migration opportunities/post study work rights	37	44	31
Lifestyle - destination country	33	42	24
Friends studying - living overseas	27	30	24
Wanted the experience of living overseas	25	28	22
Higher level of recognition of overseas qualifications	24	21	26
Wished to broaden experience	22	23	21
Impressions of destination country - brand	19	19	19
Family wanted me to study overseas	18	21	16
Access to a highly ranked university	18	21	15
To learn/improve English	14	13	15
Unable to obtain a university place in own country	13	12	15
Obtained scholarship overseas	12	13	10
Previously visited destination country	11	14	8
Previously studied overseas	9	10	8
Family live overseas (in destination)	9	11	7
Particular course wanted to study not offered in own country	2	2	2
Sample size	1023	515	508

Among the 515 students in Australia, the highest reasons were 'to improve employment prospects' (81%), 'to work in Australia' (53%), 'future migration and post study work rights opportunities' (44%), 'lifestyle' (42%), 'overseas qualification being more highly respected than home / elsewhere' (39%) and the 'quality of education' (39%).

The number of reasons cited was greater for the Australian sample compared with the UK.

The decision-making process

Access to the internet, social media and travel, together with generational and cultural characteristics, has narrowed the window when students first thought about studying overseas when compared with 1999. One key reason is that many students now have much greater access to funds to facilitate alternative pathways and opportunities.

Of the 515 Asian university students in Australia, 33% began serious consideration within 12 months of arriving in Australia. The attraction of Australia as a first-choice destination was considerably higher in 2019 compared with 1999, with 67% of Asian university students indicating Australia[2]. Further, 21% of the UK sample also indicated Australia, with secondary probing showing that the reason for the UK as a final destination was often influenced by family.

Choosing a study destination

All 1,023 Asian university students were asked to award a score to indicate the importance of various factors when choosing a study destination[3].

Table 2: Importance of factors in determining the choice of country as a study destination

Importance of factor in determining choice of country as a study destination	TOT	AUS	UK
Ease of obtaining work after graduating	**8.2**	8.2	8.1
Want to study in a specific city	**8.2**	8.5	7.9
Quality of education based around measures (e.g. rankings)	**7.9**	7.8	8.1
Content viewed via digital media (e.g. YouTube)	**7.7**	7.7	7.7
Lifestyle	**7.6**	8.1	6.9
Ease of obtaining work while studying	**7.5**	7.8	7.1
Opportunity to reside in destination after graduating	**7.5**	7.8	7.1
Established pathways	**7.4**	7.5	7.3
Previously visited the country	**7.3**	7.6	6.8
Friends living / studying in country	**7.3**	7.5	7
The living and studying environment	**7.3**	7.8	6.8
Feedback from friends/family (e.g. social media)	**7.3**	7.6	6.8
Cost of undertaking study in country	**7.2**	7.1	7.3
Ease of obtaining a student visa	**7.1**	7.2	6.9
Strong sense of community	**7.1**	7.3	6.9
Family live in country	**7.0**	7.3	6.6
Comparative affordability (living, accommodation, studying, total package)	**6.8**	6.9	6.6
Ease of obtaining travel and other student concessions	**5.5**	5.5	5.4
Sample size	**1023**	**515**	**508**

The importance of pre-disposition to city was highlighted by the highest score among the Asian university students in Australia being awarded to 'want to study in a specific city', at 8.5. From the verbatim responses, this was for a variety of reasons including access to residing networks, the reputation and profile of specific Higher Education providers in these cities, employment opportunities, previous exposure, third party advocacy, entertainment choices and the convergence of people and places.

[2] Compared with 45% in 1999

[33] The higher the mean score the greater the importance

However, the results showed that there are other factors which can be leveraged within the regional Australian context, including 'ease of obtaining work after graduating' (8.2), 'lifestyle' (8.1) and 'opportunity to reside in destination' (8.1).

Given the importance of extended regional post study work rights and the growing desire for community integration, as well as skills gaps, these results are a strong endorsement of the recent regional agenda.

Other factors worth noting are that some measures, such as 'rankings' (7.8), reinforced the strength of the Australian proposition; as well as 'the living and studying environment' (7.8).

Since 1999, the differential in terms of the 'standard of education' between Australia, the UK and the US narrowed significantly. In 2019, both Australia and the US were rated at 7.7 by Asian university students in Australia, with the UK marginally ahead at 7.8. Even those Asian university students in the UK awarded a mean score for Australia of 7.4 – a substantial increase since the 1999 research for the Asian student of 2000 paper.

Deciding upon a study destination

The 1,023 Asian university students were asked to indicate their top six reasons for finally choosing to study in their destination country.

Table 3: The top six reasons for finally choosing to study in destination country

Top six reasons for finally choosing to study in country	TOT	AUS	UK
Good career/employment prospects overall	**77**	81	73
High quality of education	**55**	52	59
Desire to study in a specific city/location	**53**	74	32
Strong migration residency opportunities	**47**	54	39
Employment prospects /opportunities in destination country	**42**	45	39
International recognition of the qualification	**42**	33	52
Institution where I wanted to study was there	**31**	31	31
Access to a highly ranked university	**28**	28	27
Strong advocacy via social media	**27**	25	29
Family wanted me to study here	**22**	22	21
Qualification more highly respected/high reputation of country	**21**	17	26
Established pathway into institution of choice	**15**	15	14
Offered particular course I wanted	**14**	11	18
Offered scholarship in country	**13**	14	11
Relatives/friends live in country/city	**13**	15	10
Friends study there	**13**	13	14
Strong advocacy from family and friends in country	**10**	10	9
Speed of offer	**8**	11	5
Agent recommendation	**6**	5	8
Only/first place from which I received an offer	**6**	6	5
Previously studied in country	**5**	2	8
Only/first country for which I received a visa	**5**	6	3
Safe country	**4**	6	2
Lifestyle choices	**4**	5	3
Tuition fees and/or living expenses cheaper than many other countries	**3**	4	1
Close to home/convenient location/easily accessible	**3**	3	2
Climate/weather	**3**	5	1
Affordable destination in which to live	**3**	3	2
I wanted a country different from my home country	**2**	2	3
Sample size	**1023**	**515**	**508**

For the 515 Asian university students in Australia, there was a distinct pattern around future employment and migration outcomes, city predisposition, third-party advocacy / presence, education quality and, institutional standing. Overall, 81% of the Asian university students in Australia indicated 'good career / employment prospects overall', followed by 'desire to study in a specific city / location' (64%), 'strong migration opportunities' (54%) and 'employment prospects / opportunities in destination country'.

The differential between Australia and the UK has narrowed considerably over the past 20 years, with Australia being awarded a higher figure against four of the top five variables.

For Asian university students in Australia, there was a strong correlation between choice of institution and the selection of country, with 73% choosing institution within 11 months of determining country.

Selecting a university

All 1,023 Asian university students were asked to indicate up to six reasons when selecting a university – as opposed to their specific university.

Table 4: The top six reasons considered when selecting a university

Top six reasons considered when selecting a university	TOT	AUS	UK
Reputation of the university	**60**	57	62
Part-time / future employment opportunities in the area	**52**	63	41
Good career/employment prospects based upon university name	**50**	49	51
Most preferred location	**44**	51	36
Ranking of the university	**43**	41	45
Pathway into the university	**34**	36	32
Speed of offer	**28**	29	26
Offering the course (qualification) I want/content of course	**28**	26	31
Cost of tuition fees/living expenses	**25**	26	23
Campus environment/aesthetics	**25**	21	30
Quality of facilities/infrastructure	**23**	31	15
Having institution recommended (in general)	**23**	24	22
On-campus/accommodation facilities	**18**	12	24
University having endorsement of family	**17**	16	19
Location of university/accessibility within preferred city	**17**	22	11
Being offered a scholarship	**15**	17	12
Images on digital/social media	**14**	13	16
Responsiveness during application process	**14**	16	11
Friends studying there	**12**	13	10
Having relatives/friends living nearby	**11**	13	9
Agent advocacy/endorsement	**8**	6	10
Previously visited university	**7**	8	6
Number of international students there	**2**	3	1
Sample size	**1023**	**515**	**508**

The results signalled the importance of quality, employment, pathways and the application process. For the 515 Asian university students in Australia, 'part-time and future employment opportunities in the area' was rated first, at 63%. This reason was evenly distributed between students at both metropolitan and regional universities.

Other important factors were 'reputation of university', (57%), 'most preferred location[4]' (51%) and 'good career / employment prospects based upon the university name' (49%).

[4] I.e. the actual city or town.

The strength and diversity of the Australian proposition was captured in many of the second tier of responses, including 'ranking' (41%), 'pathways' (36%), 'speed of offer' (34%), 'quality of facilities / infrastructure' (31%), 'recommendation' (24%) and 'location of university / accessibility within preferred city' (22%).

Determining the university of choice

As a follow-up, the 1,023 Asian university students were then asked for the top four reasons as to why they chose their 'specific university'[5].

Table 5: The top four reasons for choice of specific university (i.e. where currently enrolled)

Top four reasons for choice of specific university	TOT	AUS	UK
Reputation of the university/quality of education	**51**	48	54
Good career/employment prospects based on university name	**42**	32	51
Most preferred location	**37**	46	28
Ranking of the university	**36**	38	34
Pathway into the university	**31**	35	26
Offering the course I want/content of course	**25**	24	26
Campus environment/aesthetics	**24**	25	23
Location of university/accessibility	**16**	19	13
Having institution recommended (in general)	**15**	13	17
Friends studying there/affirmation	**14**	15	12
University having endorsement of family	**14**	13	16
Offering qualification I want	**12**	11	13
Being offered a scholarship	**12**	17	6
First university to make an offer	**12**	14	9
Cost of tuition fees	**10**	10	9
Quality of facilities/infrastructure	**9**	10	8
On-campus/accommodation facilities	**7**	5	10
Part-time employment opportunities in the area	**6**	5	7
Affordable accommodation in area	**5**	3	8
Having relatives/friends living nearby	**4**	4	3
Speed of offer	**4**	6	2
Images on digital/social media	**4**	4	5
Agent advocacy/endorsement	**3**	3	4
Responsiveness during application process	**2**	2	1
Sample size	**1023**	**515**	**508**

The two stand-out variables among the Asian university students in Australia were 'reputation of the university / quality of education' and 'most preferred location', at 48% and 46% respectively. Significantly, these results were consistent across all locations – metropolitan and regional.

A second tier of responses was based around 'ranking' (38%), 'pathways' (35%) and 'good career / employment prospects based upon the university name' (32%).

The results highlighted that some perceptual drivers can also influence attitudes and perceptions, including 'campus environment / aesthetics' (25%), the 'location of the university / accessibility' (19%) and 'being offered a scholarship' (17%).

Sources of information

All 1,023 Asian university students were asked to indicate their top four sources of information on overseas universities in general.

For Asian university students in Australia, the 'internet (in general)' and 'Google' were dominant, at 88% and 44% respectively. Other forms of digital and social media also played a profound role, including 'Facebook' (29%), 'WeChat / Weibo' (23%) and 'other social media / blogs' (22%).

The influence of other networks was also important, with 27% of the Australia sample indicating 'word-of-mouth friends' and 15% indicating 'word-of-mouth family'. And whereas agents were dominant in the 1999 study, the importance of embedded in-country university representatives was illustrated by 13% of the Asian university students in Australia choosing this as one of their top four sources of information.

Across the entire sample of 1,023 students, 81% of Asian university students indicated that the internet was accessed 'a great deal' in the process of selecting an overseas university.

Sources of influence

All 1,023 Asian university students were asked to nominate the one source who most influenced their decision to study at a particular university. Of the 515 Asian university students in Australia, 38% indicated 'no-one', followed by 'parents' (22%), 'friend / peer' (13%) and significantly, 'university representative' (11%). By comparison, only 5% indicated 'agent'.

Despite the comparative lack of influence of agents, 79.3% of the Asian university students in Australia indicated that an agent was involved in their 'original point of access into Australia' (e.g. university, pathways provider, secondary school).

The roles of agents

The 408 Australian university students who had used an agent were asked to indicate the type of assistance provided by their agent. Their responses were as follows:

- Submitted my application to university / universities (82%)
- Provided visa advice (63%)
- Provided advice on which universities to apply to (62%)
- Tracked the progress of my application (59%)
- Provided information relating to universities in general (43%)
- Arranged counselling session(s) with university representative(s) (23%)
- Provided accommodation advice (22%)

Application to offer

The impact of digital media, combined with changing expectations around immediacy and acceptance, is reflected by the length of time in which Asian university students in Australia received an offer after submitting their application. Overall, 81% indicated a period of 'three weeks or less', with 51% indicating 'two weeks or less'.

In total, 69% of the entire sample considered 'less than two weeks' as an acceptable timeframe between submitting an application and receiving an offer. This applied to 73% of the Asian university students in Australia. A further 21% of the sample in Australia indicated 'two to three weeks'.

Additional insights

Since the original 1999 study, there have been numerous other factors which have impacted market dynamics. Many of these revolve around the substantial number of alumni who now live and work in Australia, easier access to travel, the impact of social media and, changing workplace conditions and dynamics. Therefore, the 2019 study incorporated some additional lines of enquiry which could potentially be used in any future longitudinal exercise.

Personal networks

Of the 515 Asian university students in Australia, 41% had 'friend(s) (only)' in Australia prior to commencing their studies. A further 22% had 'relative(s) (only)'; whilst 26% had 'both friends and relatives'.

Sources of funding

The primary source of funding for Asian university students in Australia was 'parents', at 77%. A further 6% of this sample indicated 'parents and scholarship'. 9% of this sample indicated 'self only', which mostly applied to postgraduate students (notably those aged 27 plus). The remaining 6% offered a combination of scholarship, sponsorship and grant payments.

Prior exposure

Of the 1,023 Asian university students, 39% of those in Australia had previously visited Australia, compared with 24% in the UK. However, the aggregate for students from Singapore, Malaysia and Hong Kong was 76% compared with India (11%) and Nepal (5%).

As an extension of the aforementioned point, 41% of the Asian university students in Australia had previously studied in Australia (a combination of secondary school, pathways and prior undergraduate studies), compared with 27% of the UK sample who had previously studied in the UK.

The 1999 study was primarily focused around choice of destination and university. However, many empirical studies have since identified that the choice of course is playing an increasingly influential role in the overall purchase decision.

The choice of 'course'

The 1,023 Asian university students were asked to indicate three factors in choosing their current course.

Table 6: The top three factors in choosing current course

Top three factors in choosing current course	TOT	AUS	UK
Strongly intend working in the field	**59**	62	56
Personal interest in the field	**41**	37	45
Course ranking	**32**	34	30
Reputation of my preferred university in my field	**27**	26	29
Good employment prospects in destination country	**25**	31	18
Good employment prospects back home	**22**	22	23
Good employment prospects internationally	**19**	16	23
Parental influence	**14**	11	17
Attracted by the course title	**13**	11	15
Attracted by the course structure	**13**	12	14
Recommendation of friends	**11**	12	9
Recommendation of university representative	**11**	14	7
Recommendation of agent	**5**	6	3
Attracted by the entry criteria	**5**	6	3
Sample size	**1023**	**515**	**508**

Of the 515 Asian university students in Australia, 62% indicated that they 'strongly intend working in the field', which continues to reinforce the importance of employment outcomes when determining the purchase decision. A further 41% indicated 'personal interest in my field', followed by 'course ranking' at 34%, 'good employment prospects in destination country' (i.e. Australia) (31%), 'reputation of my preferred university in my field' (26%) and 'good employment prospects back home' (22%).

Part-time employment

Of the 515 Asian university students in Australia, 61% indicated that they work or that they are employed part-time. In overall terms, one third of students work between '11 and 20 hours per week' and 12% are 'employed casually'. Of the remaining 39%, just over half 'do not work' and the balance are 'currently looking for work'.

Indian students recorded the highest rate of part-time employment at 83%, with an average of 16.15 hours per week. This was followed by students from Nepal (77% - 16.4 hours) and Vietnam (73% - 14.9 hours). Only 26% of students from China worked part-time.

Journey times

Several recent studies have examined average journey times between home and university, based upon nationality, age and level of study.

Of the 515 Asian university students in Australia, 59% reported a travelling time of 'up to 20 minutes' between home and university. This almost entirely comprised of students from China, Hong Kong, Singapore, Malaysia and Indonesia. Conversely, 14% reported that their travelling time was '31 to 45 minutes' and a further 9% indicated '45 minutes plus'. These longer journey times were consistently reported by students from the Indian Sub-Continent and Vietnam.

Community integration

All of the Australian destination agencies (e.g. Study Adelaide, Study Perth) seek avenues to promote and enhance community engagement. As this study and various empirical studies have shown, the sense of integration and community immersion are key drivers when conveying the sense of belonging, identity and security which international students seek and subsequently communicated through social media and third-party advocacy.

The 515 Asian university students in Australia were asked to indicate a score to indicate their community engagement experience, with higher numbers referring to higher levels of engagement.

Table 7: Level of community engagement experience

Community Engagement Experience	Australia
Preferred retail / entertainment options	**8.3**
Pre-departure engagement support	**8.1**
Festivals and events	**8**
Overall sense of welcome	**7.8**
Sense of safety / security	**7.7**
Access around location	**7.4**
Support from points of reference (e.g. banks)	**7.3**
Accommodation ease	**7.2**
Employment support	**7.1**
Post-graduation opportunities	**7.1**
Making Australian / British friends	**6.5**
Sample	**515**

The 515 Asian university students in Australia were particularly strong advocates of 'preferred retail / entertainment options' at 8.3. The students in Melbourne awarded a mean of 8.8, closely followed by Sydney (8.5). This was followed by 'pre-departure engagement / support' at 8.1, 'festivals and events' (8.0) and 'overall sense of welcome' (7.8).

Overall satisfaction

The 515 Asian university students in Australia were asked to indicate a score to indicate their overall satisfaction rating, with higher numbers referring to higher levels of satisfaction.

Table 8: Overall satisfaction

Satisfaction ratings	Australia
Living environment	8.3
Studying environment	8.1
Quality of education	7.9
Application process	7.8
International support services	7.8
Building employability skills	7.7
Securing part-time employment	7.5
Access to facilities	7.5
Academic feedback	7.4
Wider community integration	7.3
Value for money	7.3
Co- and extra-curricular options	7.2
Sample	515

Overall, the highest ratings were for 'living environment' at 8.3, followed by 'studying environment' (8.1), 'quality of education' (7.9) 'application process' (7.8), and 'international student support services' (7.8).

Against all criteria, Australia rated above 7.1. These included areas where many empirical studies have previously highlighted gaps, including 'co and extra-curricular options', 'community integration', 'international support services' and 'access to facilities'.

Return on Investment

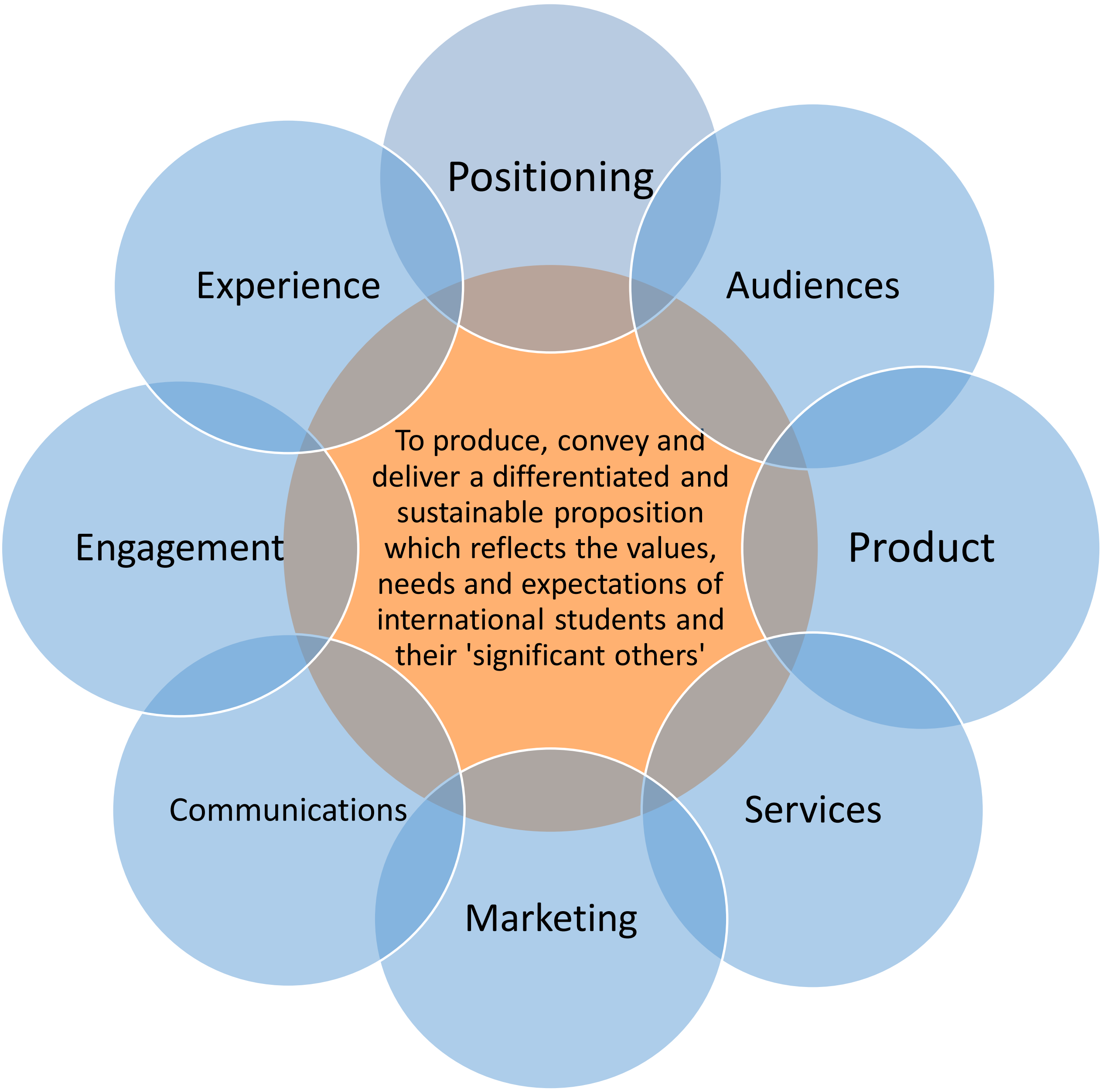
All 515 Asian university students in Australia were asked to select the one word which they viewed as representing the single most important return on investment. Overall, the highest response was 'future employment opportunities', at 44%; followed by 'post study work rights / residency outcomes' (19%), 'recognition of the qualification' (16%), 'high ranked university' (7%), 'life experiences' (6%), and 'future networks' (3%).

Part Two

Articulating and Integrating the Australian Proposition – towards 2025

The purpose of informed market research is to provide a platform for implementing new initiatives designed to grow market share. Ultimately, with so many universities competing in the same space, it is essential to have a clearly differentiated and sustainable market position whilst leveraging the assets of location – whether environmental, social, topographical, economic, metropolitan, regional etc.

Part two focuses upon the implications for Australian providers, based upon the changes that have occurred over the past twenty years and the likelihood of changes that will occur in the future. Such changes are reflected in the following diagram which should feature as a core measure of any future marketing, communications and engagement strategy.



All international students require a Return on Investment (ROI). Over the past three decades, this has consistently been aligned with future employment, career and income aspirations – as well as the opportunity to gain residency within the destination country.

In Australia, the market is highly diverse. Many students, particularly those from South East Asia, are often the second and even third generation of their family to study overseas – often in the country where their parents may have also studied. Conversely, many international university students hail from more price-sensitive markets and therefore, they are generally the first generation of their family to study abroad.

Whereas many students view international education as a 'rite of passage', others are reliant upon loans through which they can offset their tuition fees and living expenses through repatriated funds. Those reliant upon loans are invariably dependent upon securing part-time employment.

Australian providers across all levels of education need to adapt their proposition in response to the diverse indicators associated with these markets. These include different social and cultural values, economic circumstances, conditioning factors, past experiences and future aspirations.

The purpose of Part two is to provide a contextual overview to show how the international education market has evolved and to provide some empirical insights designed to support future performance and growth.

Positioning

In 1999, there were approximately 1,100 universities around the world who were actively engaged in international education – determined by those universities with a stand-alone international marketing and recruitment function. In 1999, there were approximately 1,800 Australian university partnerships, many of which were loose relationships based upon a MoU between various departments and academic groups.

In 2019, there were approximately 4,300 universities from around the world actively competing for a share of the international student market. And in Australia, there were approximately 1,150 formal university to university partnerships, as well as those associated with pathways and other forms of feeder. And in 2019, the 'typical' size of an Australian international marketing and recruitment operation is around eight times that of 1999, embracing many such specialisations as digital media engagement and social networking.

All Australian universities need to establish a clearly differentiated and sustainable market position, based around such considerations as location, specialisation, performance measures and the overall student experience. Consequently, Australian universities have striven to achieve differentiation through employability, professional placements, co- and extra-curricular options, accommodation, student hubs and unique co-badged programmes (e.g. Joint and Dual Degrees).

The challenge is conveying such differentiation within a market place which is highly attuned to the competitive nature of international education – a market where prospective students increasingly recognise their purchasing power as consumers, expect immediacy and, constantly seek additional benefits and enticements such as scholarships, residency outcomes (e.g. post study work rights) and guaranteed employment.

The one factor which has had a profound impact on buyer behaviour is the incredibly strong predisposition to place, where place is associated with a particular city or enhanced opportunities, such as those associated with the regional proposition. And underpinning buyer behaviour are the core attributes associated with Australia, including lifestyle, multiculturalism, environment, climate, consumer choices, the sense of welcome and now more than ever, the quality of education.

Audiences

Australia's initial foray into international education was primarily based around specific regions. For example, the promotion of Higher Education was largely concentrated in the more accessible South East Asian countries – hence the early evolution of partnerships. English language provision was strongly concentrated around such countries as Japan and South Korea; and, North America was mostly dominated by the US Study Abroad market.

There were of course exceptions with smaller cohorts of students from markets which have since escalated into major source markets for Australia, including China, India, Western Europe and South America. And, there were some sponsored audiences whose exposure to Australia centred around a particular course proposition (e.g. Scandinavia for Nursing).

In 2019, increased global affluence coupled with access to information has resulted in a far more diversified market. There are no corners of the world which are yet to be exposed to the opportunities of an international education. And even more remote outposts such as Northern Central Asia and West Africa now provide pipelines of students into Australia.

In 1999, international university students were largely concentrated around undergraduate demand. In 2019, pathways represented a major articulation pipeline. Access to post study work rights had a profound influence upon the growth in demand for postgraduate studies especially, a pattern which will undoubtedly positively impact future demand into regional locations given extended post study work rights.

In 1999, many students from Asia had networks in Australia but these could be largely interpreted as 'loose'. Today, most international students from Asia have large established networks who provide a strong sense of history, identity, security and place.

Access to digital media has vastly impacted the attitudes and perceptions of Asian university students in Australia. These students are becoming increasingly aware of alternative industries and career pathways, the importance of employability assets and, access to the types of opportunities which will enable individual differentiation and performance within increasingly competitive workplaces.

Aligned with all this is the growing importance of vocational skills and capabilities which represent the next 'big picture' opportunity for graduates (both tertiary and VET) as key source markets build their skills assets portfolio in response to largescale demand in such fields as advanced manufacturing and technologies.

Product

In 1999, very few Asian students had access to careers advisors in their home country. Consequently, the actual choice of course was often based around the influence of significant others, in response to intended outcomes. For example, a career in business was often associated with a degree in Business, a pattern which is still evident today.

Demand patterns in 1999 have since escalated as various industries have become associated with different source markets. For example, a large number of Indian students study IT and Computer Sciences, a pattern which reflects the dominance of, and the opportunities available in the IT industry both in India and globally.

By 2019, many Asian students have now enjoyed greater access to careers advice, both formally via schools and counsellors and, informally through word-of-mouth advocacy. Such advocacy has often been based around evolving opportunities in next generation industries and increasing recognition that to prosper in a highly competitive world, graduates need individual differentiation in terms of their career and employment portfolio.

Consequently, whilst students may continue to study such fields as Business and Commerce, they are more inclined to seek expertise in specialist domains such as Marketing, International Business, Human Resources, Data Analytics, Finance and Logistics. This includes those seeking subject matter expertise which is captured either in the full degree programme or as micro and badged credentials.

Equally, many students still choose their specialisation based around potential access to post study work rights. And this specialisation often counters traditional patterns of demand as international Higher Education students seek access to qualifications in areas where there are recognised skills shortages in Australia.

There is now a clear shift towards next generation applications. A growing number of Asian students are aware of the opportunities associated with changing economic and social conditions, ranging from Medicine and Allied Health through to Science, Security and Technology. Consequently, over the next few years, demand in such fields as Cyber Security, Forensic Accounting, AI, Medical Devices, Renewables, Augmented Reality, 3D Immersive Technologies, Food Production, Robotics and Automation will all escalate.

Another pattern will be the evolution of industries which cater for heightened community demand and affluence. For example, Tourism and Entertainment will continue to grow and within these domains, other specialist applications will expand in response to the pace of changing technologies. This will trigger demand for such fields as Creative Industries which in itself, has multiple applications from Gaming Technologies and App Development through to Special Effects, Digital Media, Major Events and Film Production.

Australian universities are highly adept at creating products which respond to next generation demand through both the development of content and the types of channels through which the delivery of such content occurs. Australian universities are also well placed to leverage assets which are associated with Australia per se, from Aquaculture and Viticulture to Smart Technologies and Advanced Pharmaceuticals – opportunities which owe much to Australia's focus upon applied research outcomes, innovation and relevance.

Services

In 1999, the general delivery of services was through the support mechanisms needed around academic studies, technology, accommodation, English language and careers. However, due to the types of patterns which impacted student behaviours, quite often these services were rarely accessed or in the case of careers especially, only accessed following the culmination of studies.

Further, in 1999, there were various empirical studies that identified that international students were often averse to 'calling for help' in case this impacted their overall experience and potential outcomes.

Over the past twenty years, the Asian student mindset has changed dramatically, largely influenced by consumer behaviour, social media, support mechanisms and a general recognition of the importance of well-being. In 2020, universities now have vastly different student service networks which are equally accessible to both international and domestic students. The range of co- and extra-curricular options has expanded and most universities now have recognised 'meeting places' where all students can merge.

Many of the services now available to international students include those which reflect and therefore respond to changing workplace dynamics. These include systems designed to build a recognised portfolio of skills and competencies, vehicles through which students and graduates can engage in the start-up space; and, opportunities which enable access to mentors, opinion and industry leaders, customers and, networks.

In 2020, access to services is no longer based around exposure to a touchpoint. Rather, in response to generational and social change, access to services is widely measured as an ongoing continuum, available 24/7 – online and direct.

The next three sections around Marketing, Communications and Engagement are inextricably linked. They are three stages of a journey which in the world of international education, need to be viewed as distinct streams.

Marketing

In 1999, the marketing of international education was heavily dependent upon face-to-face engagement through events, exhibitions, seminars and agents. Only a handful of universities had an in-country presence, mostly through embedded staff co-located within the premises of an education partner. A significant proportion of budgets was expended in advertising, including newspaper advertising campaigns and billboards. And as the primary interface into Australia, IDP was largely considered Australia's 'unofficial agency at large'.

Many universities adopted a system of regional managers, although many of these were loose amalgams with managers often servicing widely distributed source markets.

The foundation for Australia's success as an international education destination was based around the concept of concurrently building 'wholesale' and 'retail' channels.

The wholesale channels mostly consisted of partner institutions, particularly across South East Asia, with students enrolled into Australia through various combinations of twinning arrangements. Some of these ultimately evolved into offshore campuses, such as Monash University in Malaysia.

The retail channels were more based around individual decision-making, supported by the input of agents. At that time, agents were often 'family concerns' located within a specific city, unlike the large and widely distributed networks of the same agency brand evident today. These agents were often considered the primary interface between prospective students and universities and consequently, acted as both the sales representative and the application facilitator.

In 1999, applications were mostly manually produced. Applications were often submitted via facsimile machines, whilst the use of email was often secondary to the telephone and written communications. Application turnaround times were therefore reliant upon successful completion of often laborious templates and there was far less emphasis upon constantly tracking progress through automated technologies and CRM systems.

In 2019, the application process is highly sophisticated and often involves access to embedded university admissions and representatives in country. Applications are invariably distributed and processed electronically and digital media now provides a conduit between third-parties and university admissions staff.

Marketing has also taken a different direction. Whilst in many countries agents still promote universities, courses and events in print media, many Australian universities now focus their marketing efforts through digital platforms supported by embedded marketing, recruitment and admissions staff.

Today, internet sites are far more sophisticated and adapted to where prospective students are situated in the decision-making cycle. And automation enables universities to monitor the level, type and frequency of engagement and if necessary, adapt their messaging accordingly.

The use of algorithms, 'Chatbot' and data analytics can provide universities with an immediate insight into where target audiences are best responding and the key considerations which need to feature in future dialogue - considerations such as next generation demand patterns, communication preferences, needs and expectations, individual values and, conditioning factors.

Communications

In 1999, universities were beginning to leverage the power of the internet through the creation of websites and access to the early iterations of online directories. Search engine optimisation was well established through the likes of AltaVista and Yahoo, with Google becoming a more prominent vehicle from 2000 onwards.

Whilst acknowledging the potential afforded by the internet, in 1999 there remained a heavy reliance upon printed marketing collateral, including brochures, posters, course flyers and directories, generally distributed through agents. The language of communications was often formal and many images showed groups of international students all grouped together in 'posed' settings.

In 2019, provider-led communications still had an element of formality such as content which ensured appropriate accreditation and compliance. There remained a need for course lists and transparently communicated information to allow prospective international students to make informed decisions. But in 2019, there was also a much greater degree of informality since the bulk of marketing communications was distributed online.

Most prospective students today are prolific users of social media utilising platforms which are commonplace and accepted within their home country (e.g. WeChat in China). These students constantly seek access to destination through visual images, online networks, chat groups and various information sites (e.g. 'Street View', YouTube).

Consequently, many universities have dedicated resources for managing and distributing information through digital media and, for constantly updating content - given the underlying target audience need for relevant and new information based around diverse needs and expectations and, cultural and environmental idiosyncrasies / behaviours.

Immediacy has now become the catchword for most communication and engagement strategies targeted at international students – because without immediacy, they now have options. They are independent purchasers who express their own needs and values throughout their decision-makers and ultimately, they are consumers.

In 1999, the success measures for communications campaigns were measured against such criteria as the number of enquiries, attendance at events and even, reply-paid coupons. By 2020, universities now rely upon sophisticated measuring and intercept technologies to determine frequency, duration and touchpoints based around initial and supplementary sources of communications. This allows for highly sophisticated, targeted and personalised campaigns to occur, designed to maximise impact and build 'consumer' relationships.

Engagement

In 1999, engagement was mostly 'top down'. Universities would make presentations and generally, agents would act as the conduit between prospect and institution. The underlying sentiment was often built around securing a place being a 'privilege'. Words such as 'prestigious', 'high quality', 'traditional' and 'reputable' often dominated conversations – language which rapidly changed from the mid-2000s when 'recognition', 'rankings', 'pathways' and 'opportunities' became more prominent in day-to-day dialogue.

In 1999, the size of admissions teams appeared inconsequential to the largescale operations evident today. However, in 1999, applications were often very specific with each application requiring significant 'manual' input. Many agencies limited the number of applications to different universities and most follow-up from agents occurred through fax, telephone conversations and feedback to visiting representatives. Plus, in 1999, a large proportion of communications were received from markets which today would be viewed as highly compliant (e.g. Singapore, Malaysia).

In 2019, universities often wrestled with substantial volumes of applications based around the opportunities provided through digital media and, the fact that the doors have since been opened to such global and aspirational populaces as China and India.

Today, applications are received from every corner of the world, and the nature of these applications challenges the most experienced of admissions teams, given the diversity of different source country systems and compliance measures. Further, there are now multiple access points into universities, including partnerships and pathways, often calling for individual applications to be assessed and responded to accordingly.

Online access provides an avenue to constantly engage with prospects and opinion leaders, including agents. However, in the world of 2020 online access has also perpetuated the expectation of immediacy and, whereas prospective students were more willing to be patient in 1999, this pattern is far less evident today when prospective students now have the option to distribute multiple applications.

In some major source markets, prospective students are fully aware that if one agent will not submit an application on the basis of non-compliance, they can simply turn to another agent. And whilst many Asian parents still view a printed brochure as a formal contract, thereby distrusting online information as changeable 'at the click of a mouse', their children will often view online communications and social media endorsement as the only viable and credible means of engagement.

All told, there are many cultural and behavioural nuances to also factor into the communications equation. These include the expectation of personalised communications which respect individual needs and circumstances, incumbent pressures upon agents to initially submit, the ongoing influence of parental and peer networks and, the ability to be in constant communication with individuals and the world (which includes the damaging reputational risk associated with negative advocacy).

The final consideration is based around the importance of 'advocacy'. The decision to study in another country can be all consuming for the student, their family and networks.

Experience

In 1999, universities were all committed to the student experience but their definition and application of the student experience was quite different to that witnessed today. In 1999 many international students arriving in Australia had to 'find their own way' – alone, without networks and a home. There was only limited 'meet and greet' at the airport and even on-campus. Outside of residential colleges and home-stay, longer-term accommodation was rarely secured in advance. And at a macro-level, there was no Study Adelaide, Study Perth or Study Melbourne to help enable community engagement.

In 1999, newly arriving students were often disconnected from their homes and families given the challenges associated with securing mobile connections and internet access. They were often confronted with accommodating the demands of securing accommodation, bank accounts and transport access; and, the initial arrival period on campus was often viewed as an isolating and lonely experience, particularly for students who were directly enrolled as opposed to those enrolled through a partnership.

In 1999, the backgrounds of many students made it seemingly impossible to adapt to an entirely different education environment where the learning platform was often based around individual research, instead of rote learning and supplied materials. Further, the type and level of interaction with academic staff was unprecedented for many students who were unused to the interactive and more open means of engagement associated with Australia. Consequently, the focus was often built around academic 'survival' with little recourse to an enhanced student experience based around co- and extra-curricular options.

In 1999, the student experience largely revolved around touchpoints, such as responses to enquiries, feedback regarding applications and pre-departure booklets. There were support services for international students but these were often difficult to source and largely centred around the teaching and learning platform.

Compared with 2020, far fewer international students in 1999 were engaged in social and recreational activities, compared with their domestic counterparts and, their greatest participation was often in areas relevant to their background, home interests and cultures.

By 2020, the international student experience is front and central of all Australian universities' dialogue and interactions. The entire decision-making cycle is viewed as a continuum and automated systems ensure regular and relevant engagement. Universities are heavily invested in pre-departure information, given that the six weeks leading into arrival and the ensuing six weeks post-arrival are recognised as representing the critical period when attitudes and perceptions are forged. These impressions clearly determine how the international student experience is conveyed through social media and via third-party networks.

In 2020 the various destination agencies play a key role in enabling international students to become immersed within the community, via festivals, events and targeted initiatives. The universities are now far better positioned to enable international students to adjust into an alternative living and studying environment, through dedicated services, case managers and easily accessible points of reference – in person and online. Plus, the arrival mechanisms and protocols now positively contribute to effective meet and greet, university engagement, information provision and community immersion.

Ensuring a satisfactory student experience today is now a far more complex and sophisticated enterprise, consisting of multiple layers of interaction – from interaction with systems needed to maximise the teaching and learning experience through to initiatives which will enable adjustment into an entirely different study environment. This includes experiences designed to augment the curriculum through employability attributes, opportunities and competencies.

Universities are committed to providing avenues to build networks, identify mentors, create opportunities and building a profile around lifetime engagement. Universities are also aware that lifelong learning provides a vehicle to constantly work with and alongside students as they progress through their careers and, constantly readjust their 'individual profiles' through upskilling and reskilling to remain relevant.

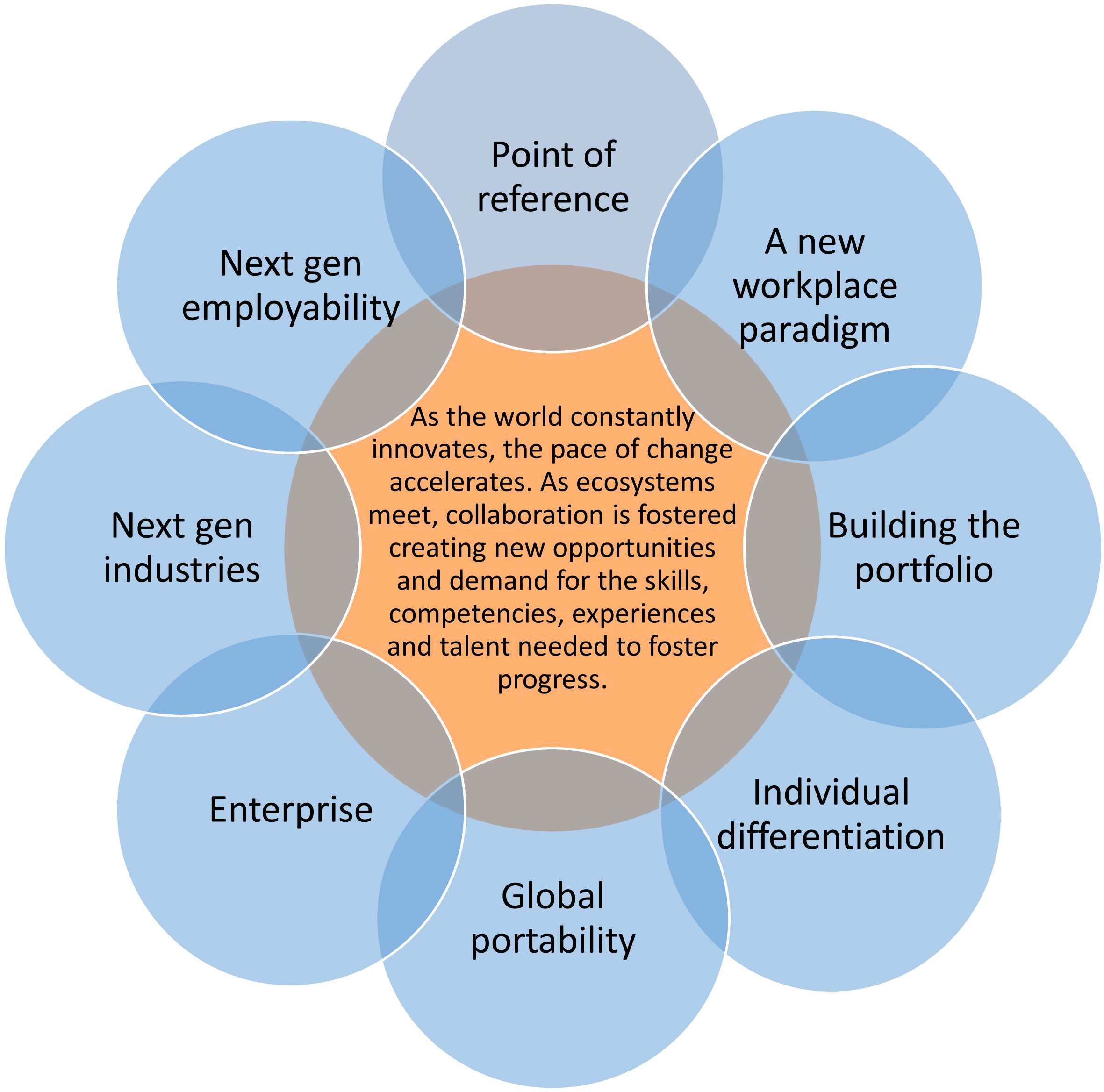
Part Three

A Future Cast

The previous provided an overview as to how universities, when engaging with future students, should manage future differentiation and sustainability around eight key internal perspectives that will ultimately drive future positioning.

The diagram below provides an overview as to how change will impact education purchase behaviour based upon the delivery and fulfilment of the outcomes needed to ensure that graduates are adequately prepared for the future – and that through this preparation, they are equipped with the knowledge and skillsets needed to remain relevant.

This diagram illustrates how universities need to accommodate future international market needs and expectations in order to remain relevant in response to evolving dynamics. The eight principles need to be viewed concurrently, since the pace of change today signals the need to constantly refocus and rebuild to remain both relevant and responsive to demand.



Point of reference

Today's generation of graduates will live and work in a turbulent world, where change will be omnipresent. Reliance and trust will reside in limited forms since so much engagement will be transactional and virtual. Any sense of job security and tenure will become increasingly diluted as new alternatives expose graduates to workplace dynamics that revolve around fluctuation and change. And education will become lifelong - an essential vehicle for remaining relevant, in touch and in demand, through constant upskilling and reskilling; and the need for subject matter expertise to enable specialisation.

This will change the entire way in which universities will engage in future, as they become a point of reference and catalyst for students and graduates as they progress through their working lives. It calls for a complete rethink via strategies which will enable loyalty, recognition and belonging; a membership model of sorts where the University becomes a constant and importantly, trusted point of reference for new learnings, skills, opportunities and experiences.

24/7 delivery will be across multiple platforms and collaborative public private partnerships – online, on site and multi-site, at education 'pop-ups', virtual workshops etc.. And the consumer trend towards 'click and collect' will extend to education as purchasers seek specific content and knowledge, including those applied VET capabilities which are integral to such fields as advanced manufacturing technologies and robotics.

Over the next few decades at least, there will be an ongoing demand for a formal longer-term education. But all of the indicators suggest that short-term and narrow content provision will increase in terms of the relative proportion of demand-led delivery.

A new workplace paradigm

Every graduate can expect to experience a career 'watershed'. In Australia, this is already evident in the 30 to 40-year age category where many people need to reskill and upskill in response to changing workplace dynamics.

Most new graduates can expect to work almost their entire career in the gig economy – whether as freelancers, contractors, business owners etc., irrespective of whether they are professionally or vocationally qualified.

Such patterns will extend to Asia. Already, many graduates may return to the family business which in itself, is a mainstay of the gig economy. And those seeking employment in the major multinationals and corporations may equally be employed for their skills at the time of employment and not on the basis of tenure.

To survive in the workplace of 2025, graduates will not only require core and applied skills and competencies such as communications, problem solving and teamwork; but they will need to be flexible, resilient, creative, enterprising and innovative. And their knowledge, capabilities and experiences will need to extend to such territories as 'design and critical thinking', 'negotiation and resolution', ' cross cultural communications', 'analytics and interpretation' and, 'listening, understanding, responding and delivering'.

Building the portfolio

The degree may be the ticket into employment, but it may not be sufficient to reach the destination. The employment journey, in all its forms, will involve the constant acquisition of new knowledge – the experiences, skills, learnings and networks required to remain relevant, informed and in-touch.

A diverse and recognised portfolio will enable students and graduates to transition between different industries, environments, roles and locations. Many graduates can expect to work in multiple careers, often through a combination of self-driven projects and employment in different places at the same time.

The portfolio is the 'kit bag', one which enables graduates to determine which strengths and attributes need to be called upon for each role.

Adopting a membership model enables universities to become one of several valuable touchpoints through the delivery of alternative knowledge via diverse learning platforms. Further, a membership model enables universities to access other membership driven education entities in fields which are complimentarily aligned.

Individual differentiation

Relative to the number of graduates, the proportion of graduate entry positions around the world continues to diminish. Consequently, the majority of graduates can now expect to create their own opportunities and steer their own course. Graduates will therefore need to be differentiated, based around their own brand assets and attributes which convey a unique proposition.

Future employers will be SMEs, business owners, contract organisations and individuals. They may recruit based around specific specialisations or the ability to work in unique environments and fields.

Graduates will need to possess a raft of capabilities and competencies which will enable immediate immersion – from design thinking and cross-cultural communications; to risk, innovation, business and financial applications.

The portfolio becomes a measurable way of judging specific qualifications and proven capabilities, but ultimately it all comes down to the 'individual'. That cannot just be taught – it also needs to be embedded and instilled.

Global portability

Today's generation of graduates will increasingly work in a world without borders. Technology, business, trade and communications will become global.

Graduates can expect to become immersed in different countries and societies, whether actual or virtual. They will need to possess global perspectives and an understanding of the various nuances and behaviours which influence different cultures and, dictate the sense of history and future identity. Graduates need to be engaged locally but aware globally – qualities which require different forms of experience and exposure.

Enterprise

Every organisation across every industry and location needs to constantly adapt. Product and service innovation is front and central for securing future success and sustainability. And with the pace of global change occurring so rapidly, the decision-makers and opinion leaders who influence and determine the future direction of organisations need to be informed about the future.

The ability to identify and create opportunities, to innovate and speculate, to promote and support and, to work collaboratively, are all qualities which graduates now need to possess.

The concept of enterprise is not just around entrepreneurship but rather constant creativity, innovation and engagement - a 24/7 cycle built around an ongoing evaluation of market trends, behaviours and dynamics. Enterprise involves sales but the world of sales today is quite different to that of twenty years ago – media provides options and advocacy drives trends. The question is knowing where to source these options and trends; and how to then leverage the market potential they afford.

Next gen industries

Most of the devices, technologies, applications and products which drive consumer sentiment and demand, did not even exist a decade ago – a time when Blackberry and Apple were close competitors in the mobile space.

Today, smart applications link different technologies. Concepts such as 3D immersive technologies, special effects and animation are now used throughout every industry. And research innovation continually drives a new wave of applications from robotics and AI through to health treatment and food production.

Today's pool of graduates can expect to see next generation industries continuously unfolding in response to new technologies, markets and tools. And working in these next generation industries will require entire skillsets in fields which are yet to be invented.

For universities, the challenge is in equipping students with the ability to foresee change and constantly acquire the knowledge needed to move into entirely new domains.

Next gen employability

Just as driverless vehicles, whether on the ground or in the air, will be a feature of tomorrow's global landscape, so too will the types of places and roles where graduates will be employed. Creative zones and shared work spaces and, the use of augmented reality, automation and AI, will all require people who can work in diverse environments and fields.

This will call for entirely new skillsets and capabilities including the ability to work in multiple domains, across multiple locations and within diverse environments.

Some employability assets will be taken as given, such as communications, technology, problem-solving and teamwork. Others will require unique augmentation and development, through new experiences and access to employability service functions such as start-up incubators and zones.

Soon, every university will have some form of innovation hub to act as a stimulus for the creation of new ideas and the fulfilment of the attributes needed to deliver next generation employability demands. And these innovation hubs will provide a basis and potentially long-term framework for creating new networks, inspiring ideas and opportunities, building confidence and acumen, fostering potential and ultimately, generating the outcomes.

Innovation hubs provide real-world exposure to the realities of the world of today … and tomorrow.

Conclusions

The Asian student of 2020 still has much in common with the Asian student of 2000. There remains a high demand for quality and a priority focus built around employment prospects as a primary ROI – and employability attributes as a selection KPI.

In the 1999 research, many students had family and friendship networks in Australia. Many were also reliant upon part-time employment and for students from South East Asia, a large proportion of the research participants had previously visited Australia.

In 1999, the primary drivers were based around affordability, proximity, safety and access to a course of choice. Many students were compelled by home country limitations to access a place in Australia and consequently, growth from the major source markets was largely based around twinning and pipeline partnerships.

In 1999, Australia was recognised as a credible and reputable destination but not necessarily the destination of choice. Today, that perception has changed. The Australian university brand proposition occupies a very narrow window where the rankings and performance gap between all universities is far tighter than other competing destinations. Underlying this, is a regulatory environment which ensures that all Australian providers afford a high quality proposition. This has been consistently reflected by rankings performance which has clearly elevated the profile of Australia's Higher Education reputation and proposition.

In the 2019 research, most students were found to have established networks and importantly, these networks are much larger than evident in 1999. The major metropolitan centres have become vibrant and dynamic centres with international students representing a substantial component of the population landscape. And, the regional proposition is now buoyed by the fact that a regional experience can lead to enhanced post study work rights and outcomes.

In 2020, the Australian proposition is distinguished by the wide diversity of assets which contribute to the overall proposition. This is supported by a dramatic expansion over recent years in the breadth and depth of channels which service education providers, from agents and partners through to offshore campuses and embedded recruitment and admissions staff.

The question is whether the market over the next few years will represent the same shape and composition of that experienced today. The pace of technological change for example is making some education programmes redundant before the first influx of students even graduate.

Many employers around the world are now seeking the equivalent of graduate talent in ways outside of traditional recruitment mechanisms – talent which is selected based upon such qualities as innovation and creativity.

At the same time, the employment dynamics are now shifting in favour of the gig economy. Access into a start-up enterprise is now a very realistic proposition for any future graduate and many universities are helping to facilitate the opportunities and knowledge needed to secure access in this space.

The next generation of graduates will need to be individually differentiated based around a unique portfolio built around different experiences, capabilities, skills and competencies. Graduates will need to know how best to identify and create their own opportunities and in so doing, establish their own networks and importantly, their own individual brand.

There will continue to be demand into Australia from Asia, based around the potential afforded by a foreign university qualification and the experiences, lifestyle and opportunities which studying in Australia and other key destinations afford. But the Asian prospect pool, in keeping with the rest of the world, will continue to grow and with this growth, demand will become more layered. Micro and badged credentials, professional development, vocational skillsets and accreditation will all feature in a demand landscape where the choice and influencing factors may not only be driven by the students themselves, but by their significant others.

Universities will need to leverage the consumer service and delivery patterns adopted by many global brands across different industries. Loyalty and membership models will become key in terms of future engagement and alongside these models, access into and recognition of, alternative education options should be aligned with the importance now associated with relevance and recognition.

Word of mouth will continue to dominate referral and advocacy – because reliance and trust will continue to reside in known and established networks. Family purchase patterns and affirmation will continue to impact decisions. And measures will continue to influence attitudes and perceptions.

But the Asian Student of 2020 is now so much more aware, resilient and knowledgeable than the Asian Student of 2000. They appreciate that they have a choice. And in 2020, an international education experience is less that of a transactional interlude but rather a deliberate platform for enabling growth.

The decision still remains subjective but today the decision is so much more informed.

Author: Rob Lawrence

Rob Lawrence is a marketing strategist who possesses extensive market research credentials – initially honed in industry prior to specialising in education across all levels.

Rob's understanding of education market dynamics, demand and drivers is without equal. Each year, he interviews many thousands of students, academics, employers and opinion leaders, on behalf of universities, government agencies, institutions and cooperative organisations around the world.

Rob describes his role as projecting future market demand, testing market potential and assessing market performance. Much of the work which Rob undertakes is in entirely new space. This calls for thorough project mapping and planning, applied creativity, extensive stakeholder consultation, outstanding communication and interpersonal skills, enormous flexibility and, the very highest standards of integrity and quality control.

Rob has worked in 38 countries on projects for the Australian Federal Government and all State Governments, various international agencies, numerous peak bodies, over 120 universities and countless colleges, schools and institutions.

Rob has constantly stated that no project is ever the same. And, that every project needs an entirely new methodology and approach.

At the 2014 AIEC Conference in Brisbane, Rob was presented with the highly prestigious Award for *Distinguished Contribution to the Field of International Education*. This Award was in recognition of 25 years at the forefront of the industry, undertaking research and developing strategies which have helped to shape the face of Australia's education industry worldwide.

Rob was a contributor to *Making a Difference: Celebrating 25 years of Australia's international education industry*. Rob is a renowned expert facilitator and accomplished presenter. Rob makes, on average, twenty keynote addresses at conferences and events each year.

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