Executive summary

The Australian international education (IE) sector sources international students from nearly every country in the world. These students have disparate backgrounds, come to Australia for a variety of reasons, and have their own unique experiences once they are here. However, one thing they have in common – with each other and with the rest of the world – is that they are increasingly connected to information, to their networks of friends and family, to services, and to each other via digital channels.

Digital engagement by international students across their study journey – wherever they study – is ubiquitous. Through digital channels students learn about the study choices they have, seek opinions from friends and others about study experiences, manage applications, enrolments and immigration processes, engage with agents, connect with services, and build support networks. The digital engagement experience for international students is therefore a crucial part of their overall experience. Understanding how students engage digitally, and the underlying needs served by digital engagement, is therefore critical for those in the IE sector seeking to attract students and improve the experience of students.

This study sought to better understand how international students engage with the IE sector and government departments and agencies that have a role to play in enabling the IE experience in Australia via digital channels.

This study was conducted through in-depth analysis of the end-to-end experiences of international students (from awareness through to alumni), providers (from market entry to engaging past students), and governments (encompassing their policy, regulatory and market development roles).

The scope of the study included schools, English Language Intensive Courses for Overseas Students (ELICOS), Vocational Education and Training (VET), and Higher Education (HE). It engaged students, providers, agents and governments – in Australia and overseas – through interviews, focus groups and research that included case studies and online reviews.

The study found that there are many examples in Australia of good practice in digital engagement across all sectors, as well as instructive examples from overseas that Australia’s IE sector can learn from. More generally, it found that the scale of change brought about by digital ubiquity – and its disruptive nature – is both a source of challenge and opportunity for the sector.

Key findings, overleaf, are arranged according to themes that relate to how providers interact with international students via digital engagement (digital marketing), the digital experience of students across their journey (digital journey), and the quality of data and digital content (digital quality).
Executive summary (2/3)

Across Australia there are examples of digital excellence among providers, across sub-sectors, and along the student journey. There are also areas for improvement. Findings focus on opportunities available to education providers, governments and other services to deliver a consistent, high-quality digital experience for students.

KEY FINDINGS

1.0 Digital Marketing

1. **Clear and consistent branding.** National education branding could better explain the nuances of Australian education across sectors and jurisdictions, rather than to present a one-dimensional national view. Branding could also be more realistic about the benefits of studying in Australia, to help establish realistic expectations among students about the study experience.

2. **Authoritative digital information.** Students and parents report that it can be hard to find authoritative, unbiased and up-to-date digital information on providers and studying abroad. They seek a consolidated ‘single source of truth’ to compare and test provider quality, education pathways and job outcomes, and tuition and living costs.

3. **Marketing support for providers.** Providers seek digital access to higher quality data, research and analytics on international competitors, entry barriers and student preferences in international markets to assist with better targeting the needs of students from international markets.

2.0 Digital Journey

4. **Seamless digital experience.** Students, parents and agents expect to receive a seamless and responsive digital experience across all points of digital interaction, similar to their interaction with everyday businesses and applications.

5. **In-country digital engagement focus.** The in-country experience of students (covering service orientation, learning pathways, employment prospects, and migration) and engagement of alumni are critical to whether students recommend study in Australia in the future. Yet digital engagement around these ‘critical moments’ is lighter compared to pre-departure awareness and marketing engagement.

6. **Improved digital processes.** Students report that online processes around visa and provider application processes, and complaints handling and escalation pathways, can be confusing and difficult to navigate, and untimely. Students are often referred from one website or government department to another, and there are limited online support services.

3.0 Digital Quality

7. **Tailored digital content.** Students want access to digital content that is more tailored to their language needs, levels of digital literacy or channel preferences.

8. **Authentic digital content.** Students want digital content that is authentic and unfiltered (i.e. user-generated). Students are more trusting of first-hand experiences and testimonials from current students and alumni shared via social channels.

9. **Coherence across government.** There are many agencies involved in international education, which can lead to instances where students and providers are confused about the appropriate point of contact and channel. Providers and agents report that digital information provided by government can be out of date, hard to find or reconcile across a myriad of sources, or not specific to sub-sector needs.

10. **Digital capability among providers.** Better digital literacy, stronger digital research and analysis capabilities, and increased access to digital specialists and training would assist some sector stakeholders – especially those with fewer resources – to better engage with, and provide a superior customer experience to international students.
Executive summary (3/4)

Perhaps the most important finding of this study is that the end-to-end digital experience of students is actually made up of thousands of digital interactions with education providers, agents, governments and other service providers over extended periods of time. These stakeholders have different roles, responsibilities, and underlying motivations. Indeed, they may be competing against each other. Yet, from the perspective of international students, the digital activities of stakeholders are inter-dependent.

A good digital experience – where content is high quality and engaging, data is accurate and up-to-date, and providers and governments are responsive to students needs – can advance the interests of stakeholders individually and collectively. The converse is also true for a less satisfactory digital experience.

The challenge is therefore to strive for a more consistent and high-quality digital experience for students.

This is a shared challenge for stakeholders and the IE sector broadly – to improve the end-to-end digital experience of international students as a means to ensure Australia’s IE sector is well-positioned in a competitive and disrupted IE market, where digital use is ubiquitous among international students.

This challenge invites consideration of opportunities for cooperation and collaboration among stakeholders to enhance the digital experience of students. This encompasses a range of areas, including those in aforementioned findings: national, regional and sector-based digital branding; providing unbiased and authoritative digital content; assisting students to navigate their learning journey using digital channels; improving digital processes and digital ‘hand-offs’ between stakeholders; and lifting sector-wide digital literacy and capability.

Accordingly, a more collaborative approach among stakeholders, focussing on shared opportunities to enhance digital engagement, has the potential to improve the end-to-end experiences of students, to achieve this more consistently, and to advance the interests of all stakeholders individually and collectively.

This involves developing a better collective understanding of the part that each stakeholder plays and where interests intersect, then co-designing solutions around these shared interests.
Drawing on research findings, this study has identified three main areas of shared opportunity, summarised below. To focus the collaborative efforts of sector stakeholders, this study describes a number of initiatives aligned with these shared interests, which were informed by good practice in Australia and overseas. They are selective, and in some cases ambitious.

However, the hope is that, as relatively stand-alone projects, they can provide a *call to action for a more joined-up approach across government and the sector to improving the digital experiences of international students.*

The IE sector one-stop shop is potentially a game changer, which could underpin a seamless, authentic, rich and consistent experience for all IE stakeholders, especially students.
Part I.
Introduction
The International Education Digital Engagement Scoping Study

This study aims to build an evidence-base that supports the Australian IE sector to use its online platforms to present cohesive, consistent and fit-for-purpose information about Australia’s international education offering.

PROJECT OBJECTIVES

The National Strategy for International Education (NSIE) and the AIE2025 Roadmap highlight the scale of opportunities for the ongoing growth and development of the Australian international education market and the pivotal role that digital engagement will need to play if these opportunities are to be fully realised.

Austrade and DET engaged Deloitte and EduWorld to answer two key questions:

- How might the Australian International Education (IE) Sector improve the use of digital to better meet the needs of students at every stage of the student lifecycle?
- How might Australian Government agencies better support and enable the IE sector to grow and develop via digital engagement?

SCOPE

For the purposes of this project, digital engagement refers to how online channels are used to disseminate information, facilitate communication and conversation, or deliver services and support to students in the international education sector. The scope of the project includes digital engagement that spans the end-to-end experiences of students, providers and governments, impacted by other stakeholders including agents and parents. The delivery of courses through digital channels is outside the scope of this study.

The IE sector scope includes the international student markets for school education, English Language Intensive Courses for Overseas Students (ELICOS), Vocational Education and Training (VET), and Higher Education (HE).
INTRODUCTION

A broad-based approach was used to understand digital use, needs and opportunities in the International Education market

The project involved engagement with students, providers, peak bodies and government agencies, with the objective to better understand how digital engagement impacts the experiences of each stakeholder, and how it could be improved. Opportunities identified through this project will require further testing with IE stakeholder groups.

LOOK OUT RESEARCH

Understanding what is happening in the local and global markets as well as the adjacent industry spaces via desktop research. This included:

- 18 local case studies
- 10 competitor case studies
- 10 online reviews

GENERATIVE RESEARCH*

Understanding and envisioning the IE experience through primary research with students, providers, agents, peak bodies and government agencies. This included:

- 10 student focus groups
- 4 provider focus groups
- 5 stakeholder focus groups
- 15 agent interviews
- 26 government interviews

*detail on research population is provided in the appendix.

STUDENT JOURNEY BLUEPRINT

A chronological map of the student digital experience shows the interactions between students, providers, governments and others, and the challenges and opportunities that stem from this engagement.

SHARED OPPORTUNITIES

Research surfaced many examples of good practice, in Australia and elsewhere. These may prove instructive for providers of education and other services as they scan this report. However, the study emphasises in particular challenges around consistency as the basis for shared action.

1. DIGITAL MARKETING
   An approach to branding, coupled with digital market development tools, that supports the needs of each sector and demands of each source market.

2. DIGITAL JOURNEY
   A better end-to-end digital experience for students.

3. DIGITAL QUALITY
   Digital engagement to promote quality, transparency and trust.
The impact of digital disruption on education is significant

A study by Deloitte classifies Education as a ‘Long Fuse, Big Bang’ sector, which means the sector will be subject to profound digital transformation over a medium to longer-term timeframe.

The adjacent chart describes the exposure among a range of sectors to digital disruption from two perspectives: the size of the impact and the immediacy of change. Organisations that stand to experience significant digital disruption quickly are said to be on a ‘short fuse’ with a ‘big bang’. Those that can expect major change in four to ten years are on a ‘long fuse’ with a ‘big bang’.

In 2012, Deloitte characterised education as one of the ‘long fuse, big bang’ sectors. Seven years on, as predicted, education is experiencing major transformation, being “disrupted” by the emergence of digital technologies that are fundamentally changing how students and education providers interact with government and with each other.

Opportunities presented by digital technology are being realised by education providers and government departments and agencies throughout the international student lifecycle. This extends from the time students start seeking out study opportunities, through assessing study options, enrolling, studying, assessment, graduating, through to being an alumnus.

The challenge for the sector is how to leverage digital to improve the student and provider experience consistently, and across every aspect of the education lifecycle in Australia.

Sources: 1. Digital Disruption Short Fuse, Big Bang, 2012, Deloitte
More providers are using innovative digital strategies to engage students more effectively

Across IE internationally there are a large number of providers undertaking a broad range of innovative digital engagement activities. Below are some of the larger-scale digital trends emerging across IE globally.

**Digital Engagement Trends**

1. **Self-service student support and learning**
   - Providers are launching easy-to-use digital platforms to provide students with intuitive options for finding information, as well as an accessible repository of relevant information made available to international students to guide the discovery and application process.

2. **Strategic use of social platforms and channels**
   - Students are increasingly using channels and platforms for different purposes. For example, some will scroll past videos and articles on Twitter, but readily access them on Facebook. Providers are actively cross-posting content and campaigns to a wide range of social media platforms, web channels, and blogs in multiple languages.
   - Development of detailed information pages and instructional guides are increasingly available online across a wide range of languages, customisable depending on the audience (e.g. by country, degree etc.). This generally incorporates the use of rich media that includes advanced features like downloaded applets, infographics or videos that encourage users to engage with content.

3. **Personalised learning delivery and support**
   - Providers are designing and developing mobile applications specifically for international students in response to increased mobile usage. Providers are also developing applications that provide access to a wide suite of information such as pre-departure content and interactive media guides. Some applications also enable students to perform a number of tasks personalised to their academic needs.

4. **Increased uptake of mobile**
   - Providers are increasingly recognising the need to establish an online support network to help international students adjust to life and study in Australia. Providers are administering secure online platforms for students to network, find study groups, facilitate peer-to-peer mentoring, sell second-hand books and access a wide range of support services across the student lifecycle.
   - 84% of consumers’ outbound sharing from publishers’ and marketers’ websites now takes place via private, Dark Social channels such as email and instant messaging. Providers need to be increasingly aware of the value dark social traffic delivers as a new form of ‘word of mouth’ marketing.

5. **Growing demand for community support**
   - The adoption of AI and chatbots enables institutions to rapidly answer routine questions from students across a vast range of topics, facilitating a responsive and smoother student experience. Providers have launched text-message-based chatbots to help new university students successfully transition into their new environment.

6. **Rise of ‘Dark’ Social**
   - Providers are collecting data on user behaviour to understand how students access information, time spent on tasks, how often online materials are used and other student behaviour patterns, in order to provide more relevant and personalised content throughout the decision-making process.

7. **Interactivity, AI and the rise of the chatbots**
   - Providers are increasingly recognising the need to establish an online support network to help international students adjust to life and study in Australia. Providers are administering secure online platforms for students to network, find study groups, facilitate peer-to-peer mentoring, sell second-hand books and access a wide range of support services across the student lifecycle.
   - The adoption of AI and chatbots enables institutions to rapidly answer routine questions from students across a vast range of topics, facilitating a responsive and smoother student experience. Providers have launched text-message-based chatbots to help new university students successfully transition into their new environment.

8. **Data analytics and marketing automation**
   - Providers are collecting data on user behaviour to understand how students access information, time spent on tasks, how often online materials are used and other student behaviour patterns, in order to provide more relevant and personalised content throughout the decision-making process.

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1 Radium One, “The Dark Side of Mobile Sharing”, https://radiumone.com/darksocial/#YbA02oJ0WJMz7Bdg.99
### The study surfaced principles of good digital practice

**Transparency and Trust**
- Provide clear, accurate, and comprehensive data on tuition and living costs, education pathways, the study experience and job outcomes.
- Provide easy-to-use digital platforms with intuitive options for finding information.
- Provide a centralised platform for students to search courses, review application requirements, and calculate fees.

**Personalising the student experience**
- Provide content tailored to students’ language needs and channel preferences, and aligned to the different stages of the student journey.
- Provide detailed information pages and instructional guides online, with tailored content and design for the target audience (e.g., prospective students, parents, etc.).
- Design personalised content based on different customer journey types and customer segmentation groups (e.g., by country, degree, etc.).
- Enable students to create personalised guides based on stated interests and preferences.
- Provide the student website in multiple languages, and/or with dedicated pages for different offerings and target audiences.
- Strategically use channels and platforms for various types of content. For example, some students scroll past videos and articles on Twitter but readily access them on Facebook; the same concept applies with mobile apps and devices in the enrolment process.

**Clarity**
- Collect and analyse user behaviour data to continually improve and tailor digital offerings to meet student needs throughout the student lifecycle.
- Utilise marketing automation to uplift and improve digital marketing with prospective international students. For example, with the platform, providers can analyse social events which attract more students; or personalise content throughout to increase student engagement.
- Collect data from users to understand how students access information. For example, clicks can measure the time spent on tasks, or how frequently online materials are used.

**Tailored content**
- Provide a seamless, omni-channel experience that is easy-to-use and allows students to self-service (such as for applications).
- Provide an interactive website with ‘step-by-step’ information that directs students along the journey, including: timelines, lists of activities and required documentation with links to be trusted and authoritative sources.
- Supplement detailed information pages and instructional guides with online chat functionality that enables immediate engagement.
- Enable prospective students to apply and enrol via self-service tools and includes the ability to track status and raise/respond to queries.

**Accessibility**
- Provide accessible support (digital and people) for students to get assistance or lodge complaints, and deliver high-level of customer service to students with timely responses.
- Assign international students to dedicated provider staff who can then advise and support them from onboarding (including airport pickup) through to on-campus support.
- Provide a pre-departure ‘companion’ mobile app specifically for international students, that guides students from the early stages of the student lifecycle, such as accepting an offer, to being on-campus, to student advice videos.
- Provide students with convenient 24/7 online support and an option to book appointments with student advisors on campus if further assistance is required.

**Voice of student**
- Encourage prospective students to connect with current students and providers via online forums to provide direct insight into student life.
- Use student testimonials to showcase the student experience – content can be curated to ensure quality; however it must retain the voice of the student and be honest to the student’s experience.

**Unbiased information**
- Work with government to provide information and/or co-design a shared platform that enables prospective students to learn about the programs available in Australia, costs, and application processes and requirements.
- Collaborate with government on additional areas of support (e.g., market/sector data and analysis) to differentiate Australia’s offering.

**Continuous improvement**
- Enable alumni to connect with each other, to institutions and to Australian governments.
- Promote job vacancy information and continuing education opportunities in Australia.
- Maximise the impact of alumni referrals and advocacy via video links and targeted content.
- Strengthen connections with alumni by engaging with international students at the pre-graduation stage of the student lifecycle, and increase support for alumni to achieve their post-study career or migration goals.

**Responsiveness**
- Build an online network to enable students to remain connected to the provider, fellow alumni and prospective students, and to learn about education and employment opportunities.
- Engage proactively with students throughout the student lifecycle, not just in times of need. Use digital channels to better enable students to connect and engage with a wider community outside of the curriculum and education and institution.
- Provide a secure platform for students to network, find study groups or student mentors, and career support.
- Provide a peer-mentoring program that connects new students (international, rural/regional and interstate) with current students to assist with settling in to their new location.
- Collate and analyse economic/industry trends to provide students with a better understanding of employment prospects. Use this information to create tailored support strategies to help alumni as they begin searching for employment.

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**Common principles and examples that emerged from research of good practice**

- Provide transparent, unbiased information to facilitate market comparisons by students.
- Promote creation of voice of the student content via social media channels and public forums that provide insight into current student life and experiences.
- Develop user-friendly websites that attract more students; or personalise content and design for the target audience (e.g., prospective students, parents, etc.).
- Design personal content based on different customer journey types and customer segmentation groups (e.g., by country, degree, etc.).
- Enable students to create personal content based on stated interests and preferences.
- Provide the student website in multiple languages, and/or with dedicated pages for different offerings and target audiences.
- Strategically use channels and platforms for various types of content. For example, some students scroll past videos and articles on Twitter but readily access them on Facebook; the same concept applies with mobile apps and devices in the enrolment process.

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**Introduction**

The study surfaced principles of good digital practice...
Part II.
The student journey and digital engagement
Understanding the student journey and key pain points in the process

Findings are presented according to a six stage student journey. Given IE is a large sector, and this study therefore has a broad scope, findings represent general thematic conclusions, and do not necessarily apply to all providers and sub-sectors equally. The study has focussed on digital engagement to the extent that it does, or could, enhance the student journey, with less emphasis on how students engage or communicate through other channels.

The Student Journey

**Awareness**
The student develops an awareness of, and interest in overseas study primarily through word of mouth.

**Research & Engage**
The student conducts high level research on study options often supported by agents and family members.

**Apply & Enrol**
Student applies to study overseas, potentially involving multiple education providers.

**Prepare**
Visa applications and pre-departure activities are completed such as finding lodging and setting up bank accounts, often with the help of an agent.

**Study**
The student experience while studying includes both education and wider experiences, including with local services and social groups.

**Alumni**
The student experience post graduation can include finding a job, applying for visas and staying connected with other alumni and potential applicants.

Moments to Master

Our research identified points in the student and provider journeys that represent proportionately more opportunity to improve the student experience. They are called ‘Moments to Master’.
1. Awareness

The student first must develop an awareness of, and interest in, overseas study.

Consultation feedback from students on digital experiences

**Awareness through word of mouth**
Awareness of Australia among students in general is derived primarily from previous travel experiences or word of mouth from friends, family, agents, or from national marketing, including from Tourism Australia. This is further supplemented by research on digital channels such as websites and social media platforms.

Research suggested that word of mouth is the single most persuasive influencer at this stage of an international student’s journey, which can be amplified by digital channels.

No one we interviewed chose Australia based on desktop research alone.

Given the persuasiveness of word of mouth, more consideration could be given to how word of mouth can be replicated or enhanced via digital channels.

![Leveraging popular social media platforms. Agents report that social media platforms are the most effective mode of digital engagement to raise awareness, by far.](Image)

**Mainstream digital modes are more effective than bespoke approaches.** Some agents have sought to create their own digital platforms or utilised digital counselling/webinar services with limited success, while others report much more success experimenting with Facebook live, WeChat, Facebook ads and web pop-ups.

“Over 90% of lead generation for all our destinations come from referrals – they talk to their friends, family”

*Agent*

“Over 90% of lead generation for all our destinations come from referrals – they talk to their friends, family”

*Agent*
2. Research and Engage

Student conducts high level research on study options often supported by agents and family members.

Consultation feedback from students on digital experiences

Multiple sources of information
The ‘Research and Engage’ process for students and agents can be a complex, frustrating process of exploration across digital platforms and physical sources. Students, parents and agents use multiple channels in their search for trustworthy information. Given this, the mean quality across Australian sites influences perceptions of the Australian brand. As a result, students often turn to agents to aggregate information.

User generated content
Some students’ and parents’ perceptions are also shaped by the opinion of others, with social media, blogs and online forums providing popular sources of information. To get a sense of what it is like to study in Australia, some students will look to social media and user generated content to get ‘insider information’.

Agents are critical
Agents continue to play a crucial role in providing original digital content and curating provider content. As a consequence, Australian providers and the government often default to using or liaising with agents to amplify their digital messaging.

A single source of truth. Students will benefit from a single consolidated digital source where students, parents and agents can find accurate, trustworthy and unbiased information. The opportunity is to provide students better, more direct access to authoritative information in an easy-to-navigate way that meets their individual needs.

Uneven experience. Some students find it hard to locate information on living costs, local Australian conditions, scholarships, eligibility criteria, applications processes and deadlines. Some provider websites are perceived as too general, complicated or outdated.

Reliance on social media for advice. Students and parents rely heavily on popular social media channels for much of their research (as compared to virtual fairs, public Q&A sessions and webinars) as a more efficient and direct way to obtain information.

Agents as gatekeepers. Agents can be the gatekeeper of information for many students in countries where Google is not the standard search platform, where ranking highly in search queries is intensely competitive, and where English is not a first language.

Social platforms more trustworthy than websites. Some students prefer the use of social media and forums to source first hand experiences and testimonials from current students and alumni, trusting these channels because the large communities of users act as a quality control on content.

Tailored digital content. Most of the agents engaged reported spending a lot of time translating provider supplied materials into content tailored to local markets (tone, visual style, language).
3. Apply and Enrol

Student applies to study overseas, receives enrolment confirmation, and enrols.

Consultation feedback from students on digital experiences

- **Applying to study at a provider**
  Most students inquire or apply to multiple education providers. The process of applying to study in Australia can be impacted by how fast providers respond to queries, and the speed of the application and visa processes.

- A large proportion of students consulted elect to attend the education provider that responds to them the fastest.

- **Smother application processes.** Online application processes from providers can be more intuitive, smoother and be more responsive.

- **Competitive applications.** Most students inquire or apply to multiple education providers. Consistent online application channels to facilitate this process proves invaluable to students due to the time and efficiencies gained.

- **Receiving important updates via digital channels.** Many agents sign up to newsletters with providers and government agencies to keep informed of changes. They appreciate regular updates on social media networks on provider activities and government policy.

- **Speed is key.** A large proportion of students elect to attend the education provider that responds the fastest. Consistent institution response times to queries and outcomes through digital platforms will greatly enhance the student experience.

  **Opportunity to improve response times.** Late responses from providers can impact accommodation and visa applications, dissuading students. Improvements in turnaround times for digital services and document requests can alleviate unnecessary stresses.

“I had a bad experience with the [provider] website and enrolment process. It just asked me to upload so much information. They wanted so much compared to similarly ranked universities. I just gave up”

Student
4. Prepare

Student completes visa applications and pre-departure activities, such as finding lodging and setting up bank and telephone accounts, often with the help of an agent.

- **Consultation feedback from students on digital experiences**
  - **Applying online for student visa**
    Students and parents can find the online visa application process complex. As a consequence, many students rely on agents for assistance navigating the visa process.
  - **Preparing to move overseas**
    Students tend to rely on agents for assistance with pre-departure activities, including but not limited to, finding accommodation, setting up bank accounts, buying sim cards, and organising airport transfers. Students typically search for options online, but report that information can be limited.

- **Complex online visa application processes.** Students report that requirements around information and document certification could be better supported through online guidance and tools.

- **Finding suitable accommodation.** Students often need to review accommodation options across multiple websites, rely on word of mouth recommendations or engage an agent. Consolidated information about accommodation options would benefit students.

- **Perceived lack of transparency across the visa application process.** Students and agents have limited visibility of visa applications once submitted, partly due to slow communication and response processes. There is an opportunity to improve responsiveness of communications through digital channels.

- **It was good to compare all the different types of accommodation, but when applying I had to fill in a separate form for each of the options, and pay them ($50) with no money back if I didn’t get a place. It was terrible and took so long. They wanted references, bills paid, etc. They ask for documentation that you obviously just don’t have**

  *Student*
5. Study

The student's studying experience includes both their education and engagement with services and the wider community.

Consultation feedback from students on digital experiences

**Difficulty navigating international requirements**
Students need support when in-country with respect to issues such as visas, work rights, accommodation, transport and other day-to-day living needs.

There is also confusion regarding who to contact and the right course of action when raising concerns or complaints via digital channels.

There is an opportunity to better enable students to access support services and to tailor digital information and engagement to students' needs at each stage in the student lifecycle.

**Payment Method.** Many parents struggle with payment methods required by some providers such as bank deposits. This is particularly an issue in markets where instant digital payments are considered the norm (e.g. Alipay in China).

**Online course materials.** Many students reported that the ability to access lecture notes, course content and presentations online was helpful, particularly for students with lower English language proficiency as this enables them to review content at their own pace.

**Lack of student support from providers during study.** There is a reported lack of support from providers when students experience issues during study. This can include, but is not limited to, switching courses, accommodation disputes, translating and understanding government notices, and making payments. As a result, students often turn to agents for help.

**Internet performance.** There is a perception that internet speeds and access are significantly slower and more expensive in Australian than in students' home countries (e.g., China, India, Europe).

"Honestly speaking, the cost we are paying here in Australia (for the internet) is not so good really. The speed of the internet in China is faster than here – considering the Chinese students come from Beijing, Shanghai, Guangzhou – the internet is very good compared to here; faster and cheaper"

**Student**
6. Alumni

A student’s experience post-graduation can include finding a job, applying for visas and staying connected with other alumni and potential applicants.

Consultation feedback from students on digital experiences

Connecting with alumni and inspiring future students
Students report that recommendations from alumni carry significant weight in the decision making process, supporting research that word of mouth is a very influential marketing channel.

Providing alumni with support to achieve their post-study education, career or migration goals will help create a positive feedback loop from alumni to prospective students and complementing the sector’s ongoing market activities.

There is an opportunity to further boost engagement between prospective students, providers and alumni through appropriate digital channels.

Job support is a major benefit. Students have expressed satisfaction with the level of job search/application support provided by some institutions. Some of these services are increasingly scheduled and conducted via online channels such as provider websites.

“My provider helped me with my resume, with everything. It was really great. I have a job now. Yes – I would recommend to study here”

Student

Disengagement post study. Many students that participated in interviews and focus groups felt that providers do not actively engage with them after the completion of study. Students are less likely to recommend a study destination if they experience minimal interaction post study and/or no personalised support to achieve their post-study ambitions (career or migration).

There is an opportunity to further tailor digital tools and services (beyond, for example, DFAT’s “Australia Global Alumni” activities) to support different student types in achieving their post study goals.
Part III.
Key findings
Key findings (1/3)

1.0 DIGITAL MARKETING

1. **Clear and consistent branding.** National education branding could better explain the nuances of Australian education across sectors and jurisdictions, rather than to present a one dimensional national view. Australia has a very strong national tourism brand, which is more dominant than education branding. Branding could also be more realistic about the benefits of studying in Australia, to help establish expectations among students about the study experience.

2. **Authoritative digital information.** Students and parents report that it can be hard to find authoritative, unbiased and up-to-date digital information on providers and studying abroad. Students, parents and agents use multiple digital channels to gather information because they claim there is no single, accurate and trustworthy source. They cross-validate information between agents and what they find online.

   Students seek a consolidated ‘single source of truth’ to compare and test digital content provided by providers and governments in relation to visas, courses, provider quality, education pathways and job outcomes, and tuition and living costs. In addition, providers reported that they would like to see more accountability for the information that is provided online.

3. **Marketing support for providers.** Providers seek digital access to higher quality data, research and analytics on competitors, entry barriers and student preferences in international markets to assist with better targeting overseas student markets.

   A lack of access to up-to-date market data, research and analysis at a system level can result in less mature and less well-resourced providers following ‘leaders’ into markets, rather than making strategic choices.
Key findings (2/3)

2.0 DIGITAL JOURNEY

4. Seamless digital experience. Students, parents and agents expect to receive a seamless and responsive digital experience across all points of digital interaction, similar to their interaction with everyday businesses and applications. Expectations are influenced especially by the retail and financial sectors, both of which have experienced substantial digital disruption and have reshaped how they engage with customers as a result.

5. In-country digital engagement focus. The in-country experience of students and engagement of alumni are critical to whether students recommend study in Australia in the future. Students require support when in-country with respect to issues such as local services, learning pathways, employment prospects, visas, work rights, accommodation, safety, transport and other day-to-day living needs.

Yet digital engagement around these ‘critical moments’ is lighter compared to pre-departure awareness and marketing engagement. The ‘next step’ (e.g., transition back home, migration) is important to students, as it is often the last experience students have with the Australian education system.

6. Improved digital processes. Students report that online processes around visa and provider application processes, and complaints handling and escalation pathways, can be confusing and difficult to navigate, and untimely. Students are often referred from one website or government department to another, and there are limited online support services.

Many students apply to multiple institutions. Their decision is influenced by the speed of the transfer of critical information (i.e., student visa, enrolment, etc.), with students most often choosing to elect to attend the institution that responds the fastest.
Key findings (3/3)

3.0 DIGITAL QUALITY

7. **Tailored digital content.** Students want access to digital content that is more tailored to their channel preferences, level of English proficiency or digital literacy. Where this is not supplied, providers and students rely on agents and local sources of information, who tailor information to their target market.

8. **Authentic digital content.** Students want digital content that is authentic and unfiltered (i.e. user-generated). Students are more trusting of first hand experiences and testimonials from current students and alumni shared via social channels.

9. **Coherence across government.** There are many agencies involved in international education, which can lead to instances where students and providers are confused about the appropriate point of contact. There are instances where agencies may duplicate functions or processes, pursue different priorities, or set conflicting policies or initiatives.

   Providers and agents report that digital information provided by government can be out of date, hard to find or reconcile across myriad sources, or not specific to sub-sector needs. In addition, government’s dual role of marketing and regulating the Australian international education sector can cause confusion for students.

10. **Digital capability among providers.** Better digital literacy, stronger digital research and analysis capabilities, and increased access to digital specialists and training would assist some sector stakeholders – especially those with fewer resources – to better engage with, and provide a superior customer experience to international students.

   Digital capabilities across the IE sector are varied. Certain sub-sectors, some providers (public and private) and some functions within government departments and agencies have limited capabilities and resources targeted to education strategy and marketing activities. Institutions and agencies with lower digital capability often rely on leveraging research, analysis and campaigns from better resourced counter-parts, which can impact their ability to compete in the market.
Part IV. Opportunities for success
Six goals for the future

We sought views among students, providers and government about their ambitions for the international student sector and how digital engagement can support better outcomes for students and the market. Based on this engagement and other research (including the preparation of journey maps and ‘Moments to Master’) six goals emerged. These goals helped to shape the search for opportunities that align with key findings.

THE SECTOR AIMS TO:

G1: Facilitate the provision of trusted, accurate and comprehensive content in a timely manner to support informed decision-making.

G2: Support digital engagement that is personalised to meet the unique and diverse needs of current and prospective international students.

G3: Ensure that information and advice about the sector, providers and agents is accurate, and includes an unbiased neutral perspective.

G4: Ensure that digital engagement between Government and providers is simple, effective and tailored to educational sub-sector needs.

G5: Leverage digital engagement as an instrument of market design, lifting compliance, facilitating collaboration and enhancing the competitiveness of Australia’s IE sector.

G6: Digital engagement should complement, enhance and not compromise existing strengths.
A co-produced outcome

Research related to the student experience and leading practice case studies surfaced three sets of opportunities that align with future state goals.

All along their learning journey, international students have a need to obtain information, navigate processes, access services, resolve problems and share experiences.

In doing so, they engage via digital channels with a range of IE sector stakeholders and others including education providers, agents, governments (federal, state and local), other service providers, and friends, family and social networks.

As a consequence, the end-to-end digital experience of students is co-produced by the digital activities of many actors performing different roles and responsibilities, for different outcomes. This means that the activities of stakeholders are interdependent when viewed from the student's perspective.

Accordingly, a more collaborative approach among stakeholders, focussing on shared opportunities to enhance digital engagement, has significant potential to provide more consistent and high-quality end-to-end experiences for students.

By developing a better collective understanding of the part that each stakeholder plays, then co-designing solutions around shared interests, significant potential exists to improve the digital experience of students and advance the interests of all stakeholders individually and collectively.

There are three areas of shared opportunity, summarised below. Most notably, the idea of a digital ‘one-stop-shop’ stands out as a potential ‘game changing’ opportunity that will enable a dramatic shift to the current way of doing things.

The one-stop-shop idea received support during consultation with stakeholders given its potential to underpin a seamless, authentic and consistent experience for IE stakeholders. A number of other initiatives aligned with the shared interests of sector stakeholders are further detailed in this section.

This review is silent on the precise allocation of roles and responsibilities in delivering each opportunity. Suffice to say, in most cases effective delivery will require the co-ordinated, joined-up efforts of education providers, their peak bodies, governments at all levels, and other service providers.

The hope is that each stakeholder will see value in each opportunity, providing the catalyst for a conversation, then joint action, on shared opportunities to improve the digital engagement experience for international students.

1.0 DIGITAL MARKETING
An approach to branding, coupled with digital market development tools, that supports the needs of each sector and demands of each source market.
1.1 National, differentiated brand proposition
1.2 Provider ‘market maker’ tools

2.0 DIGITAL JOURNEY
A better end-to-end digital experience for students and IE stakeholders
2.1 IE sector one-stop-shop
2.2 Student journey information aggregator

3.0 DIGITAL QUALITY
Digital engagement to promote quality, transparency and trust
3.1 Agreed, shared digital standards
3.2 Skills Lab to uplift digital skills and literacy
3.3 Clearer digital connections across Government
1.0 Digital marketing

**OPPORTUNITIES**

1.1 National differentiated brand proposition
An approach to branding that is both consistent, yet flexible to accommodate sector and sub-national needs. It should also be tailorable to diverse audiences.

1.2 Provider ‘market maker’ tools
A broad set of digital tools for providers to enable targeting and granular segmentation of international markets.

**HOW COULD THIS BE DELIVERED?**

Materials to communicate a national value proposition, including the benefits of studying in-country and to tell a unified ‘our story’, that also draw out the distinct experiences in different regions and sub-sectors. This should also assist with coordinating messaging across the IE sector and ensuring that key information is not duplicated or contradicted across state and federal departments.

This would include a library of brand assets such as logos, videos and student testimonials (‘brand lab’), delivered via a central Digital Asset Management store, which can be accessed from all platforms and includes information on current marketing campaigns across all sectors; collection of brochures, logos, images, posters, presentations and videos that reflect the brand and national messaging; a library of student stories, case studies and testimonials with translations for different source markets.

In addition, government and institutions could use a hybrid structure of centralised and program, sector or geography-specific brands and digital profiles to tailor messaging to specific audiences. This could help to ensure that branding sets appropriate expectations for students across the various sectors and geographies.

Typically a central platform where education providers can access information and tools, including:

- Student focused information, including visa dashboards and trends, student dashboards, annual snapshots, and self-service tools to explore data.
  - Sector specific information applicable to both public and private institutions regarding student preferences and ‘barometers’, ‘fact sheets’, strategies and information on funding programs.
  - Market focused information such as source market fact sheets and country profiles (economic analysis).
  - Other research, including, but not limited to, economic impact reports (on the local economy), brand and campaign reviews, competitor analysis, student experience and satisfaction reports.
  - Information for providers about the needs, wants and pain points for students along the journey.

The Market Information Package provides a range of these services and tools, but could be improved with free access and more consistent, user-friendly and up-to-date information and data that is presented in modular content formats to suit various audience preferences.
2.0 Digital journey

OPPORTUNITIES

2.1
IE Sector ‘one-stop-shop’
A comprehensive, singular, digital point of reference for the IE sector.

2.2
Student journey information ‘aggregator’
A single digital resource to assist students to self-navigate their student journey, as an alternative to a full-service one-stop-shop.

HOW COULD THIS BE DELIVERED?

A consolidated and comprehensive platform of information and support services to students, providers, agencies and government departments. In its most ambitious form, it would be accessible through all digital channels, tailored to language preferences, and curated to ensure information and support is up-to-date and responsive to stakeholder needs.

It could potentially incorporate broad-ranging functionality including guidance on applications and enrolment processes, assistance with the visa process, provision of pre and post-arrival support services, assistance with navigating across government, facilitation of networking and peer mentoring opportunities, a central administration and communication about escalations and complaints, a central knowledge hub for providers, a central repository for alumni details, and support for institutions and governments to mobilise engagement with alumni.

A curated site that provides guidance for students on how to self-navigate their journey end-to-end, including journey ‘check lists’, links to information on admission requirements and enrolment processes, visa and immigration processes and requirements, rights and obligations under Australian law, roles and responsibilities of departments and agencies, education quality and standards, scholarships, cities and services, education outcomes, and complaints and issues management. It would also be important for all providers to have complementary information and services for their students at a more specific and tailored level.
3.0 Digital quality

**OPPORTUNITIES**

### 3.1

**Agreed and shared digital engagement standards**

A common industry standard for digital engagement.

### 3.2

**Skills Lab**

Access to capability-lifting digital tools.

### 3.3

**Clearer connections between department and agency websites**

Digital engagement that assists departments and agencies to carry out their roles, while creating an experience for students where ‘any door is the right door.’

**HOW COULD THIS BE DELIVERED?**

### 3.1

A code of practice agreed by the Government and the sector to provide a high quality and responsive digital experience with respect to digital service quality, digital ethics, and the integrity of digital engagement.

Data could be made available with respect to performance against these standards, including support and services amenity, and frequency and nature of complaints. Success stories could also be shared on how these standards are being upheld. This data could be self-reported by the sector with oversight by government.

### 3.2

Typically a central website or portal where government departments, agencies and education providers can access information and tools to improve international student recruitment skills. This could be complemented by:

- funding, support and training for literacy and skills development provided by government and peak agencies.
- embedding digital learning as a priority for relevant public sector employees.
- using Government and peak body channels to communicate a ‘baseline’ level of skills and literacy required for engaging with students and the sector.
- elevating digital learning and engagement among funded vocational education programs.
- national and international conferences on digital needs of students and sector digital capability up-lift.

### 3.3

A central website that explains the roles and functions performed by each government department/agency with respect to engagement of international education students. This is especially relevant in relation to roles that span both promotional and regulatory activities.

Create clearer connections between existing departmental and agency websites, assisted by retraceable pathways, and ensuring that for users there are no ‘dead ends’ when navigating between websites.

This could be achieved as part of 2.1 – IE sector ‘one-stop-shop’. However, in the absence of a one-stop-shop, a more joined up approach across government stands out as a high value digital opportunity.
Appendix
Engagement for this study

This study was informed by views of students and agents across a number of countries, providers, government departments and agencies, and other service providers and stakeholders.
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