The International Education Digital Engagement Scoping Study

PROJECT OBJECTIVES
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 engagement to develop the market by better meeting the needs of students at every stage of the student lifecycle?

• How might Australian Government agencies better support and enable the sector to grow and develop via digital engagement?

SCOPE
For the purposes of this project, digital engagement refers to online channels 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 experiences of students, providers and governments, stakeholders including agents and parents. Delivery of channels is out of scope.
Executive summary: Key Findings

1. Clear and consistent branding.
3. Marketing support for providers.
5. In-country digital engagement focus.
6. Improved digital processes.
7. Tailored digital content.
8. Authentic digital content.
10. Digital capability among providers.
Executive summary: Areas of Shared Opportunity

THREE AREAS OF SHARED OPPORTUNITY

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.
   1.1 National, differentiated brand proposition
   1.2 Provider ‘market maker’ tools

2. 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. 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

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

1. Self-service student support and learning
2. Strategic use of social platforms and channels
3. Personalised learning delivery and support
4. Increased uptake of mobile
5. Growing demand for community support
6. Rise of ‘Dark’ Social
7. Interactivity, AI and the rise of the chatbots
8. Data analytics and marketing automation
Examples of good digital practice yield useful insight

COMMON PRINCIPLES THAT EMERGED FROM RESEARCH OF GOOD PRACTICE

- Transparency and Trust
- Personalising the student experience
- Student support
- Alumni support
- Clarity
- Accessibility
- Unbiased information
- Responsiveness
- Tailored content
- Word of mouth
- Continuous improvement
- Community building
Part II.
The student journey and digital engagement
Understanding the students journey and key pain points in the process

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.

**Digital experiences**

- Awareness through word of mouth

---

**What works well and what could be improved**

- ✓ Leveraging popular social media platforms.
- ✓ Mainstream digital modes are more effective than bespoke approaches.
- ✗ Availability of safety information online.
- ✗ Australia’s relative digital presence.
2. Research and Engage

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

Digital experiences
- Multiple sources of information
- User generated content
- Agents are critical

What works well and what could be improved

- A single source of truth.
- Reliance on social media for advice.
- Social platforms more trustworthy than websites.
- Uneven experience.
- Agents as gatekeepers.
- Tailored digital content.
3. Apply and Enrol

Student applies to study overseas, receives enrolment confirmation, and enrolls

Digital experiences

Applying to study at a University

What works well and what could be improved

- Smoother application processes.
- Competitive applications.
- Receiving important updates via digital channels.
- Speed is key.
- Opportunity to improve response times.
4. Prepare

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

Digital experiences

Applying for student visa
Preparing to move overseas

What works well and what could be improved

- Difficult visa application process.
- Finding suitable accommodation.
- Improvements to communication of visa application and policies.
- Provider accommodation is considered a plus.
5. Study

The student's experience while studying includes both their education and the wider community experience, such as public transport and social groups.

**Digital experiences**

Difficulty navigating international requirements

**What works well and what could be improved**

- Payment Method.
- Online course content.
- Utilisation of Technology.
- Internet performance
- Student portals are a major benefit
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.

---

**The Student Journey**

**Digital experiences**

- Connecting with alumni and inspiring future students

---

**What works well and what could be improved**

- ! Disengagement post study.
- ✓ Job support is a major benefit.
- ! Students are less likely to recommend a study destination if they experience minimal interaction post study.

---

**Diagram Overview**

- Student completes study and graduates
- Travel
- Return home
- Apply to migrate
- Begin career
- Student tells friends and family about their experience overseas
Part III.
Key findings
Key Findings (1/3)

1.0 DIGITAL MARKETING

1. Clear and consistent branding.


3. Marketing support for providers.
Key Findings (2/3)

2.0 DIGITAL JOURNEY

4 Seamless digital experience.

5 In-country digital engagement focus.

6 Improved digital processes.
Key Findings (3/3)

3.0 DIGITAL QUALITY

7 Tailored digital content.

8 Authentic digital content.

9 Coherence across government.

10 Digital capability among providers.
Part IV.
Opportunities for success
Six goals for the future

THE SECTOR AIMS TO:

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

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

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

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

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

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

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

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

2.1 Student journey information ‘aggregator’
2.2 Student ‘one-stop-shop’

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 tailor able 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.

**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.

**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.

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?**

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.

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.

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.
We will develop a stronger nation brand that reinforces our reputation as

- an internationally competitive investment destination
- a great place to visit
- a quality provider of education
- a trusted exporter of premium quality goods and services.
Austrade’s Future Digital Focus

Updating Study in Australia
The Study in Australia website refresh will be launched at the end of July 2019

Evolving and replacing Study in Australia
Austrade, working closely with Whole of Australian Government and Australian states and territories, is developing a new international education ‘discovery portal’ to replace Study in Australia

What does great digital engagement for Australia’s international education sector look like?
We want to hear from you, please send insights to
Natasha.monks@Austrade.gov.au
THANK YOU
&
QUESTION TIME

CONTACT:
fraser.cargill@eduworld.net.au
0437 141 002