



The global student experience

2024 insights and analysis from the world's largest survey of enrolled students.

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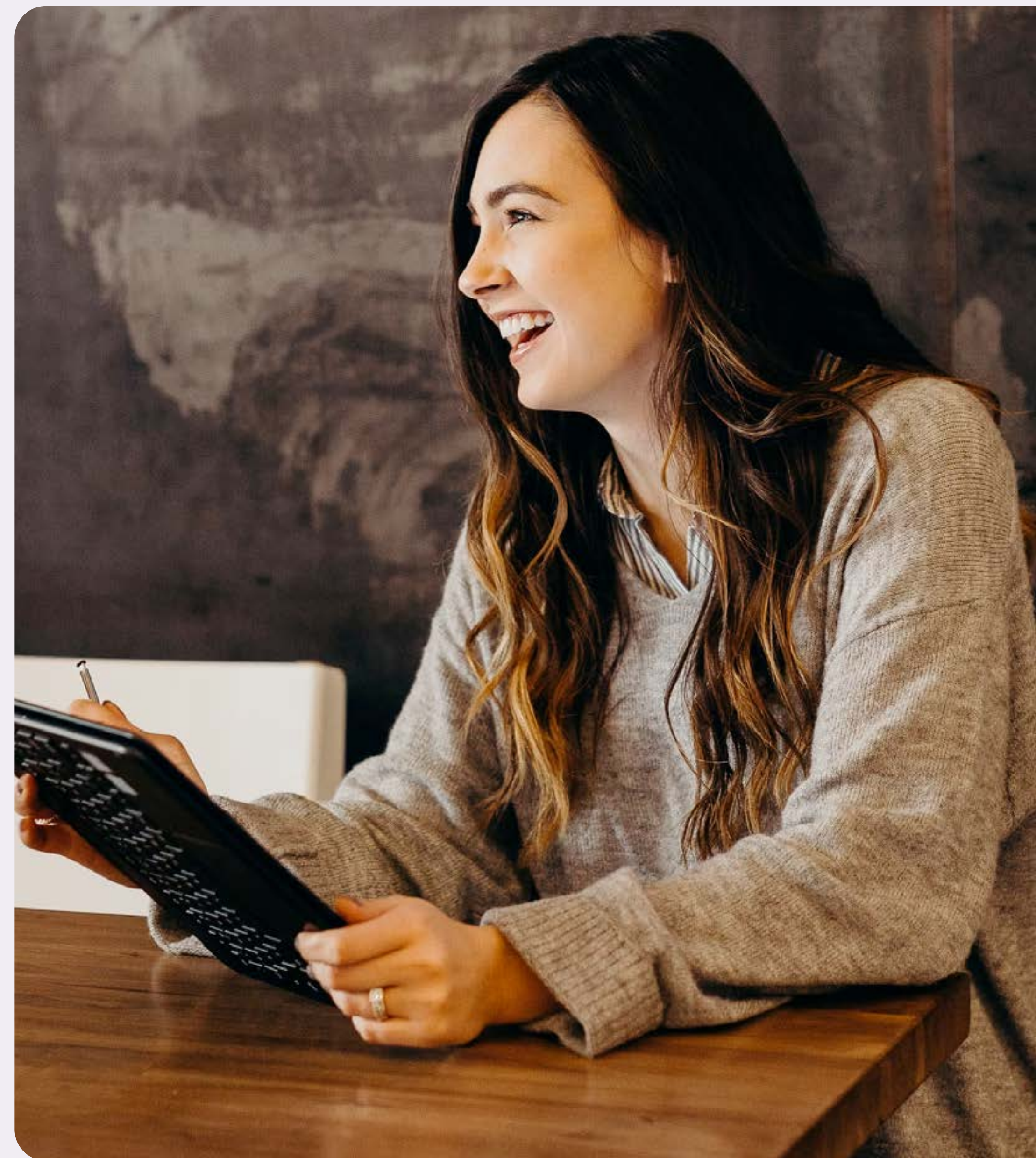
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Foreword

Robin Hallows, Head of Surveys - Performance Benchmarking



Welcome to the 2024 Global Student Experience report brought to you by Etio. As in previous years, the 2024 report benefits from an unrivalled sample of 192,581 student responses, including 122,975 international students, studying at 155 institutions in 24 countries.

As Tribal i-graduate we have supported Higher Education institutions and national bodies around the world since 2005, tracking and benchmarking student and stakeholder opinion across the entire student journey. As Etio, we continue this mission, bringing you granular benchmarked analysis and actionable insights into today's student experience.

Etio's International Student Barometer and Student Barometer benefit from all the same robust data collection and validation processes, as well as the support of our expert consultants and Client Services team. We look forward to bringing you an enhanced customer experience and extended dataset through our continued investment in these highly valued tools.

We are proud to support our client institutions' endeavours to respond to the evolving challenges presented by the Higher Education landscape and provide the best possible experience for current and future students.

Feature article

Sustainability – what do students think?

Nick Pidgeon, Business Director - Performance Benchmarking



Introduction

With climate change showing worrying signs of acceleration, sustainability goals are becoming an increasingly dominant topic of conversation within the international education community. For students and staff alike, the importance of behaving mindfully with respect to the environment is growing. But there is an undoubted conflict between the air travel associated with international education and sustainability.

Technology allows us to behave more responsibly. In recent months, by delivering ISB presentations remotely instead of in person, our own Nannette Ripmeester saved 6,832kg of CO2 emissions!

From the ISB, we can gain valuable insights into how students are approaching the issue of sustainability. For environmentally conscious students, environmental issues are becoming a more dominant decision factor when deciding where to study.

Importance of environmental issues is increasing

We ask students responding to the ISB: “How important were the following factors when deciding where to study?” Respondents work through a prescribed list of twenty “decision factors” that they might have considered when deciding which institutions to apply to. The list of decision factors is wide-ranging, including factors such as “cost of living”, “opportunities for further study”, “reputation of the institution”, and “impact of the qualification on my future career”. One of the factors respondents are required to give an importance rating is “the institution’s position on environmental issues”. Students choose one of five options when stating the importance of each decision factor: very unimportant, unimportant, important, very important, not applicable/don’t know. The responses allow us to give each decision factor a percentage importance score. For example, a score of 85% for “cost of living” means that 85% of survey respondents consider cost of living “important” or “very important” when deciding where to study. So, what are the importance scores for “the institution’s position on environmental issues”?

Between 2021 and 2023, the importance of the institution’s position on environmental issues has increased. For students at UK universities it has increased from 79% to 84%, and for students at non-UK universities it has increased from 76% to 78%.

The increasing importance of environmental issues is an expected result for two possible reasons. Firstly, the amount of media coverage of climate change continues to increase, due to the increasing frequency of climate change events (e.g. flooding) taking place, and due to greater appetite from many media outlets to report more visibly on climate change. Secondly, students are becoming more environmentally aware, and therefore more likely to attribute increasingly high importance to environmental issues.

Treating the international student body as a single group does not yield the intelligence required to make the most impactful decisions. For this reason, ISB data covering the full student experience can be broken down/scrutinised at multiple levels. In the case of sustainability, a deeper dive into nationality and age, provides some interesting results.

Environmental issues are more important to students from countries which have been directly impacted by climate change

Looking at the importance data by nationality reveals a likely link between student nationality and the importance of the institution’s position on environmental issues. Broadly, we see that students from countries that are more likely to have been directly



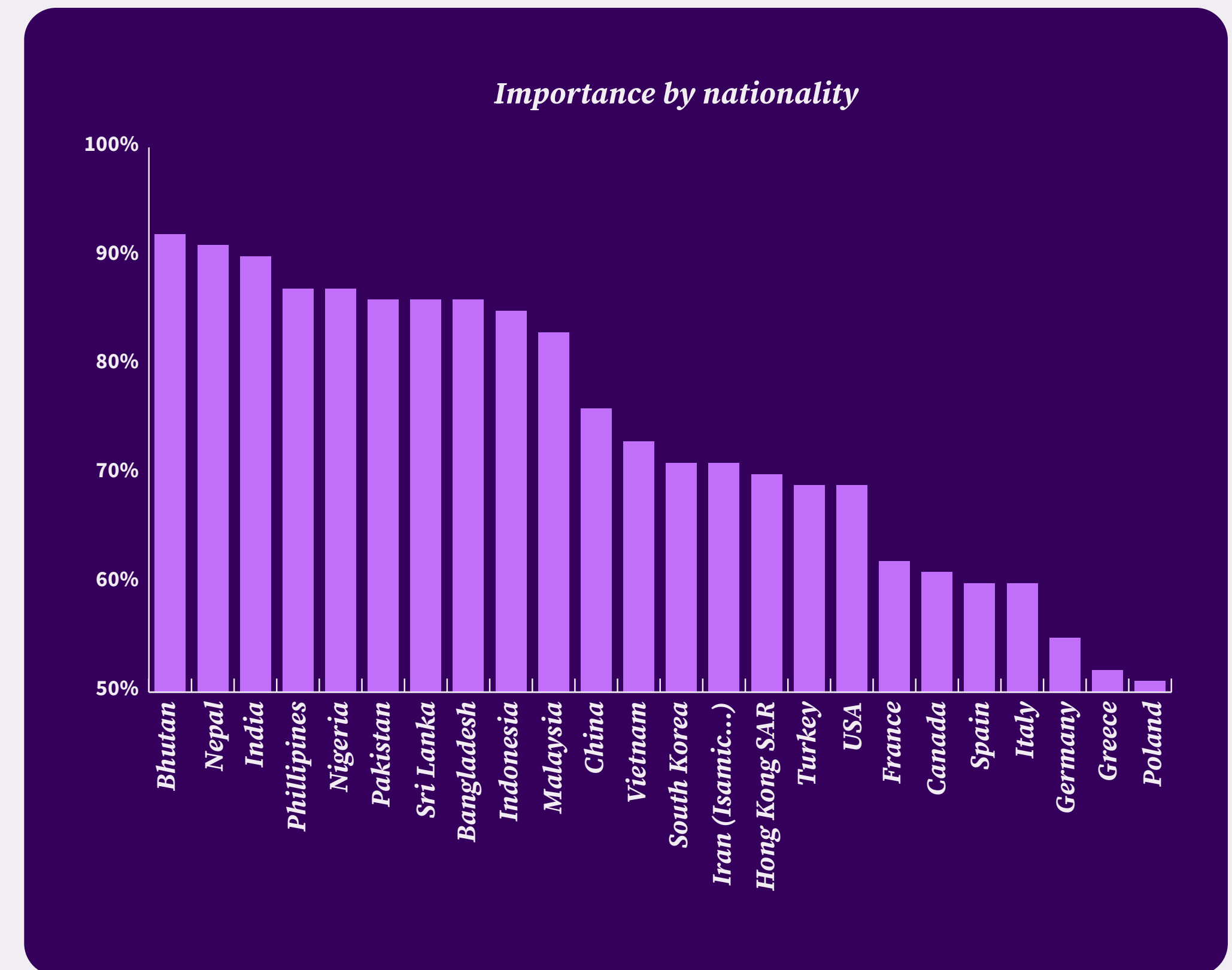
impacted by climate change think that environmental issues are more important than students from other countries.

The chart on the right shows student nationality and importance, ranked from left to right in order of decreasing importance of the institution’s position on environmental issues. Towards the left of the chart are several countries (e.g. Pakistan, India) which have been directly impacted by climate change, for example with severe flooding. Towards the right of the chart are countries where the impact of climate change has not been felt so severely.

Age of students shows surprising results with respect to the importance of environmental issues

Looking at the importance data by age gives very interesting – and surprising - results. One might reasonably expect environmental awareness to be keenest in younger age groups, and for this awareness to feed through into the results i.e. younger students attributing greater importance to environmental issues. The following chart does not support this hypothesis.

70% of 18-20 year olds considered environmental issues important or very important with respect to their choice of institution. This was the lowest percentage of all age groups. What are the possible reasons behind the results for different age groups? Are 30-39 and 40-49 year olds the most environmentally concerned out of worry for their children’s future? Do those in the 50+ age group fit the stereotype that “climate change

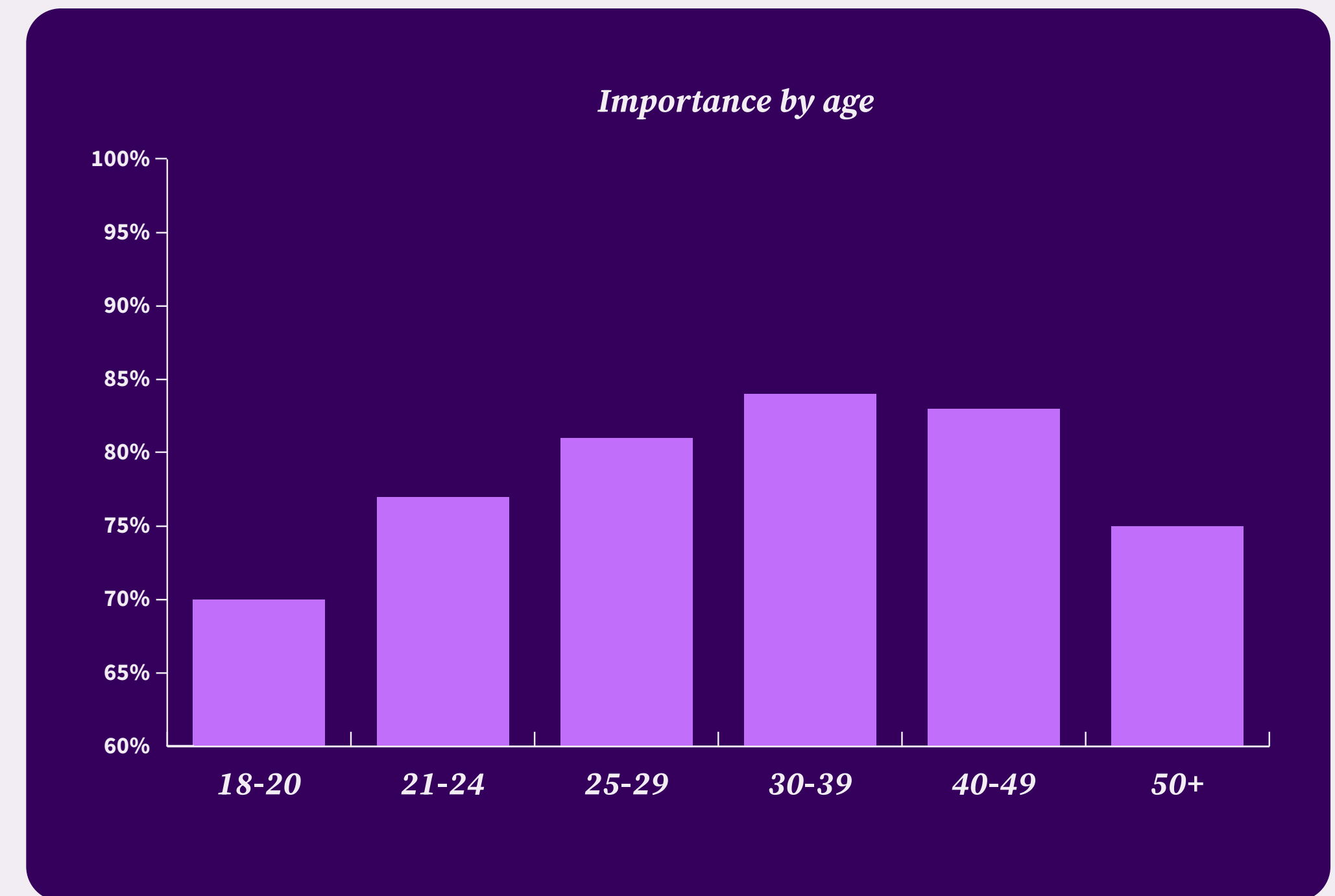


won't affect them, because they'll be long gone?" Are 18-20 and 21-24 year olds so convinced of their own invincibility, that the impact of climate change seems too far away? Or is it that younger students simply prioritise other decision factors, such as the impact of their studies on their career prospects? Whatever the reasons behind the data, the data itself is surprising.

Satisfaction has increased 2020-2023

We've talked about the importance students attach to environmental issues when choosing their institution. What about student satisfaction with institutions' environmental sustainability efforts?

We ask students "say how satisfied you are at this stage in the year with the following: the institution's eco-friendly attitude to the environment (e.g. recycling/energy etc.)". Between 2020 and 2023 the percentage of students who were satisfied or very satisfied in response to this question increased from 89% to 95% for students in UK universities, and from 90% to 92% for students in non-UK universities. This is a pleasing increase in satisfaction scores, showing that, in the eyes of students, universities are improving their eco-credentials.



Satisfaction is high in all “main” countries, but there is variation between countries

Looking at satisfaction scores by university/institution region, we see high satisfaction scores in all regions, although Europe is notably some 5 percentage points adrift of the other regions, albeit with a satisfaction score of 88%.

Breaking this down by country (including only those “main” countries with over 1,000 survey responses), we see a similar pattern. Overall, scores are high, but some European countries are towards the lower end of the range. The chart shows high satisfaction rates (all in excess of approximately 85%), but the scores do vary between countries.

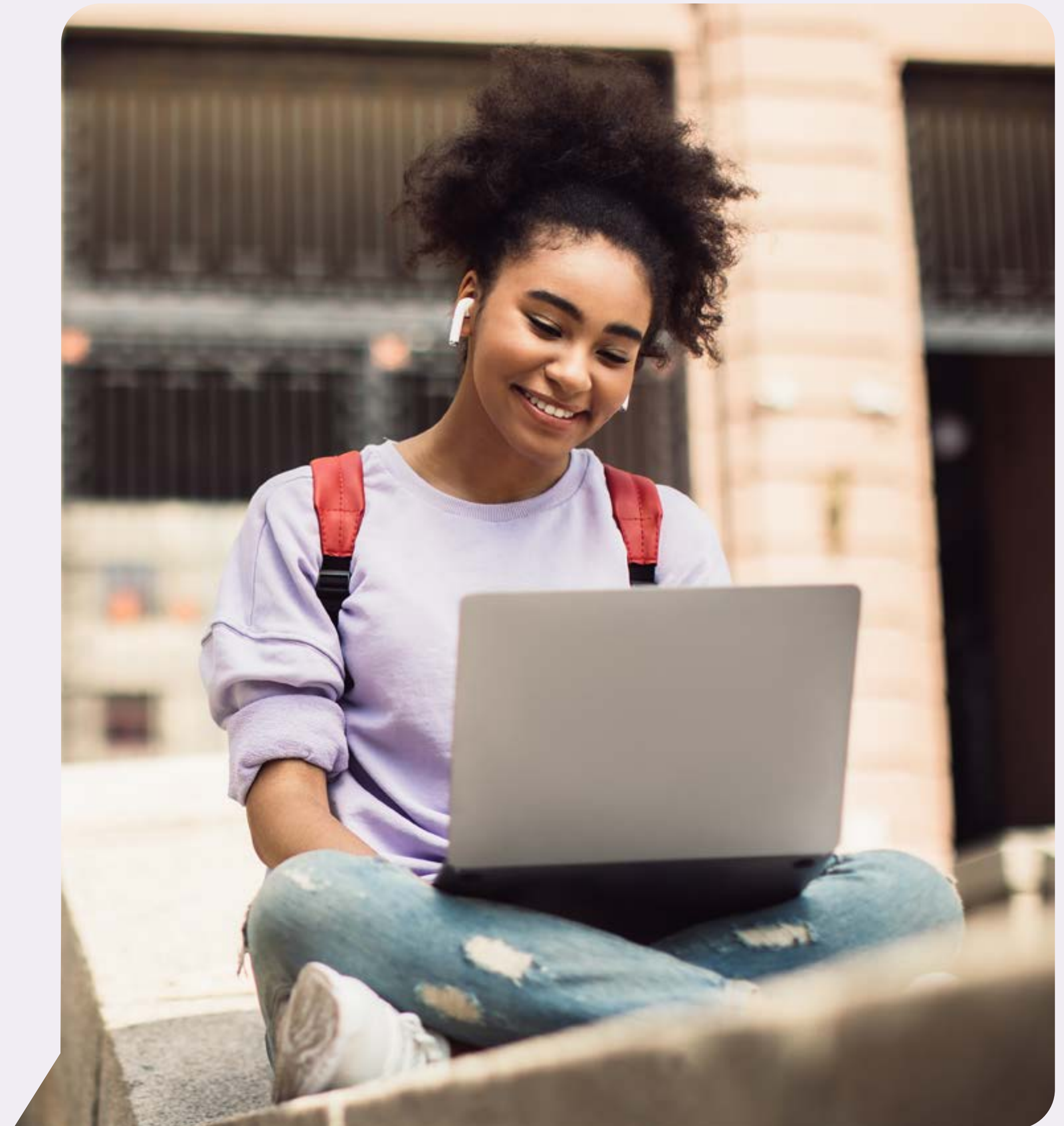
Overall, the satisfaction results give a very positive picture for the global HE sector’s commitment to sustainability goals; overall, a high proportion of students are satisfied or very satisfied with their institution’s eco-friendly efforts.

Where next for international education and the environment?

The topic of environmental sustainability in international education will continue to gain greater prominence. The work of organisations like CANIE, and the International Education Sustainability Group, alongside our own data from the ISB, will ensure that there is appetite and data to keep the conversation at the forefront of the international education debate. Solving the climate crisis may be beyond universities, but the importance students place upon sustainability issues is clearly on an upwards



trajectory. Universities should seek to understand just how important it has become for their specific/diverse populations so they can develop policies that speak to the demands of their prospective students. In doing so, those universities will position themselves as leaders in the climate change debate.



Feature article

Inclusivity and sense of belonging – the UK view

Sam Camden, Client Consultant - Performance Benchmarking



With the UK Higher Education sector increasingly reliant on the contribution of international students, the need to evaluate the effectiveness of inclusivity policy in a way that centres the student voice has never been so important. Since the Autumn 2021 survey, the International Student Barometer (ISB) has expanded its contribution to the topic of inclusivity through a specific question set designed to gauge student's experiences of discrimination at their institution. With a focus on the race, ethnicity and nationality elements of this question (the other elements warrant their own discussion), some key themes have begun to emerge from the data. International students studying at UK institutions over the past three survey waves experience levels of discrimination in-line with that of the Global ISB average, and when drawing upon pre-existing ISB metrics, feel as welcome and have a greater sense of belonging. When breaking this data down by different nationality cohorts, however, we see a clear variation in the frequency of discrimination experienced by international students in the UK, with students from East and Southeast Asian (ESEA) backgrounds the most affected. This demonstrates the need to utilise the granularity of tools like

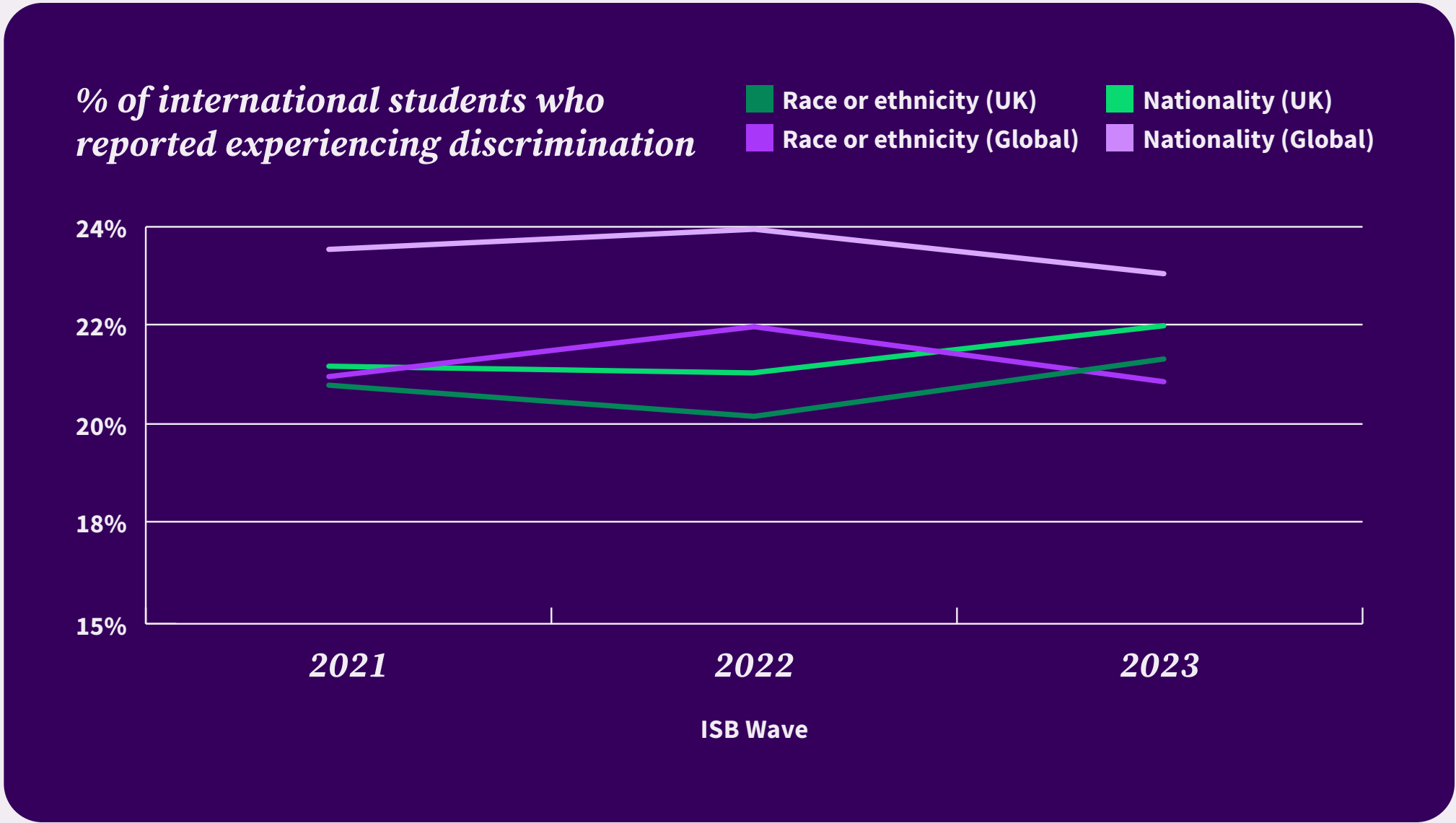
[There is] a clear variation in the frequency of discrimination experienced by international students in the UK

the ISB when using them to inform on inclusivity policy and internationalisation strategies, ensuring that the full range of student experiences are considered.

Looking at the most recent ISB data in more detail, firstly in terms of race and ethnicity, discrimination was experienced by a similar proportion of international students at UK institutions when compared with the global average. 22% of international students in the UK ISB benchmark reported having experienced discrimination on this basis (either occasionally, quite often or always) versus 21% in the Global ISB benchmark. There was no major shift in these scores on the previous year, with the proportion of those experiencing some level of discrimination remaining reasonably consistent with both the 2022 and 2021 survey results. When looking at discrimination based on a student’s nationality, 22% of international students in the UK reporting having experienced some frequency of discrimination versus 23% in the Global benchmark. In the 2022 survey results we saw a slightly bigger difference between the UK and Global benchmark in this measure, with the scores 21% and 25% respectively.

Discrimination faced by different nationality cohorts

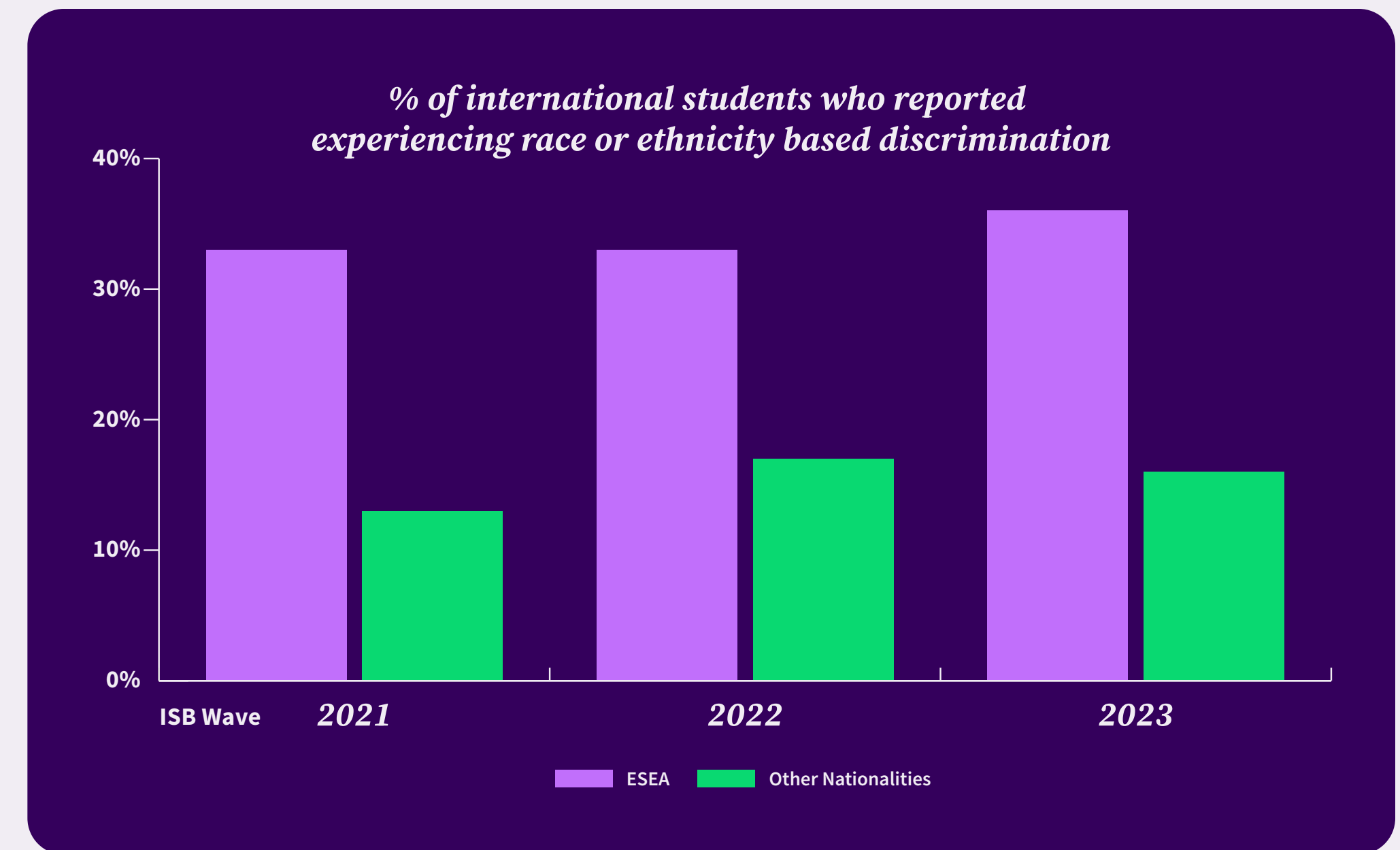
What stood out when analysing the results from the 2022 survey was the stark variations in the frequency of discrimination faced by different nationality cohorts – particularly the higher rate experienced by students from ESEA backgrounds at UK institutions. Unfortunately, this is trend which continues to pervade the inclusivity data in 2023. Of the five largest nationality cohorts at UK universities, students from



China were again by some margin the most frequently discriminated against in terms of both race or ethnicity, and nationality, with 41% reporting having faced discrimination on these bases (up from 35% and 37% respectively in the 2022 study). This compares with 20% and 21% for Indian students, 18% and 16% for Nigerian students, 23% and 26% for Pakistani students, and 12% and 31% for US students, respectively. Although drawing upon smaller sample sizes, we almost exclusively see similar levels of discrimination to that faced by Chinese students in the UK when we view the results for other ESEA nationality cohorts. This is particularly true in terms of race and ethnicity-based discrimination, where an average of 36% of students across ESEA nationalities with a significant response count reported experiencing discrimination – an increase from 33% the previous year. Similarly high levels were reported by Chinese and other ESEA nationality cohorts in the 2021 survey.

One hypothesis which could have been suggested whilst taking an initial glance at the data last year, was that the relatively high prevalence of discrimination against ESEA students in the UK was a potential hangover from the COVID-19 pandemic (during which reported hate crimes against ESEA communities in the UK rose due to the popular apportioning of blame for the virus’ origination on China), and that such attitudes will soften the further the pandemic recedes from our immediate memory. The fact that discrimination reported by ESEA students from the 2022 intake (students in their first year of study, and therefore most removed from the pandemic experience on-campus) remained high, however, suggested something more pervasive.

Looking at the inclusivity data from the Autumn 2023 intake, there is still little sign

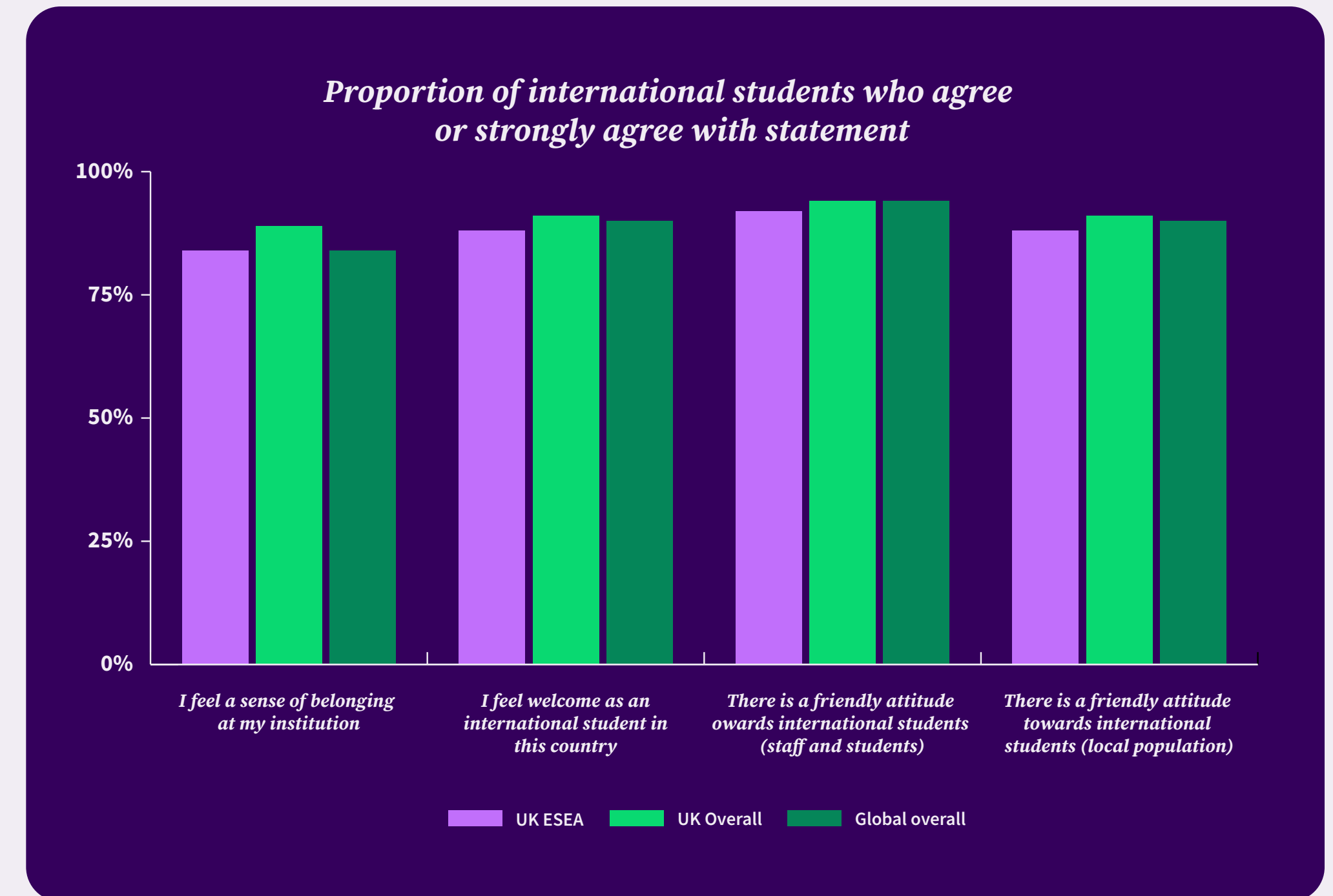


of the abatement of this trend. First-year students from ESEA backgrounds appear just as likely as students in other study years to have experienced discrimination on the basis of their nationality (26% for both), and only marginally less when looking at race & ethnicity (33% vs 36%). Of the ESEA cohorts with a significant sample size, only first year students from South Korea reported experiencing fewer instances of discrimination around their race or ethnicity than students in other study years (30% vs 47%).

Discrimination and a sense of belonging

The better news for UK institutions is that the frequency of discrimination faced does not appear to correlate with a significantly lesser sense of belonging, or feeling welcome, amongst students from ESEA backgrounds, with the scores for international students in the UK more widely slightly outperforming the Global ISB benchmark in these metrics. In response to the statement “I feel a sense of belonging at my institution”, an average of 84% of ESEA nationals studying in the UK either agreed or strongly agreed. This is below the 89% average for all international students in the UK surveyed, but unlike the ESEA results in the discrimination data, does not represent an outlier when compared with the averages of other nationalities. The ESEA average here is in-line with the same metric when reported from Spanish students (83%), for example, and is higher than those from US, Canadian, and Italian students (81%, 80% and 76% respectively). The sense of belonging for ESEA students is also in-line with the 84% of all international students within the Global ISB benchmark.

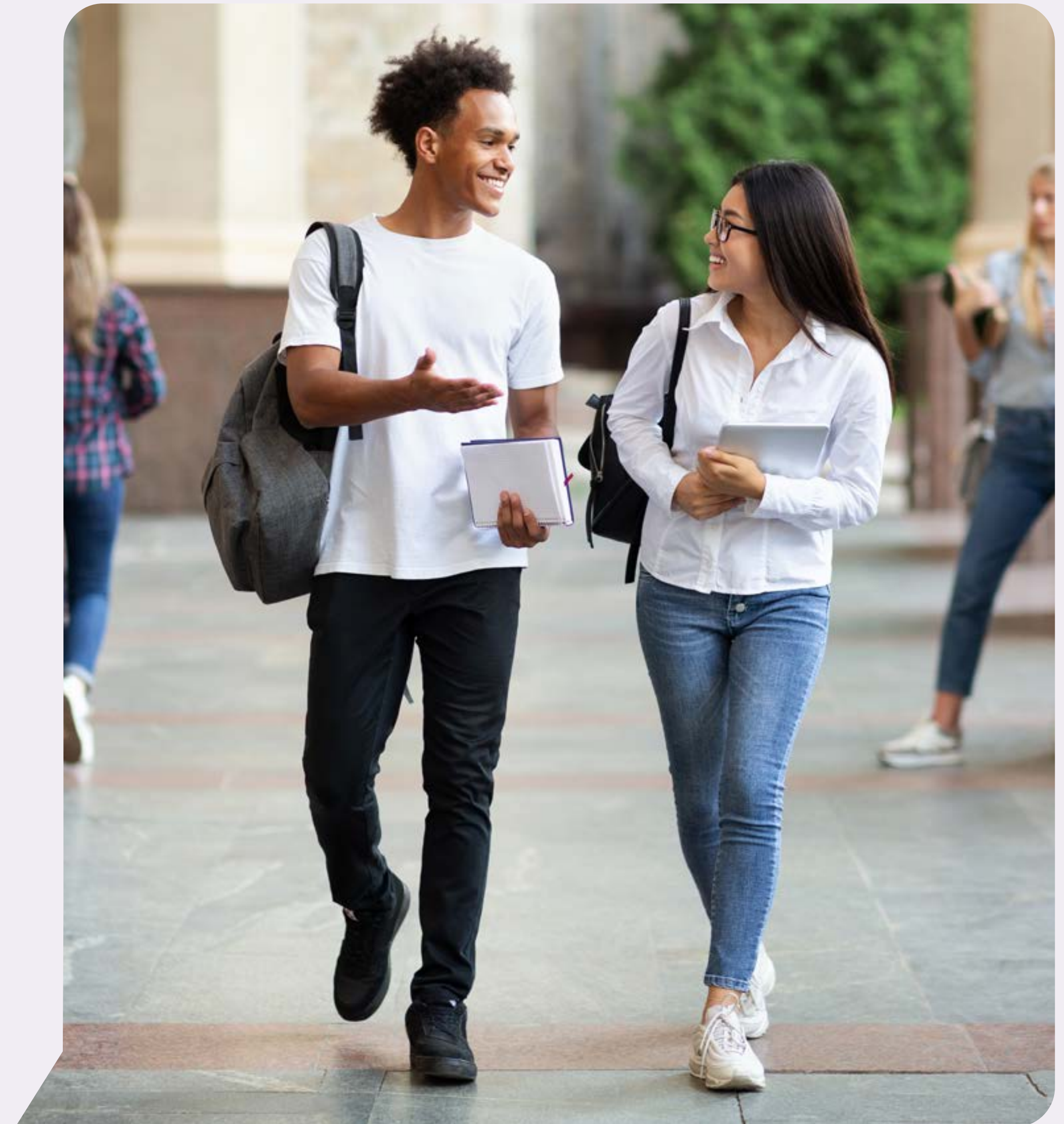
When presented with the statement “There is a friendly attitude towards international students at my Institution amongst staff and students”, an average 92% of UK-based ESEA students agreed or strongly agreed, compared with 94% of all UK international students and the Global benchmark. In response to the same statement, but this time relating the attitudes of the local population as opposed to staff and students, an average of 88% across ESEA nationalities studying in the UK agreed or strongly agreed, just below the 91% of all UK-based internationals surveyed and 90% of



international students in the Global benchmark. Finally, when asked whether they feel welcome as an international student in the UK, an average of 88% across ESEA nationalities agreed or strongly agreed, versus 91% of UK internationals more widely, and 90% of international students in the Global benchmark. These figures have seen no major shifts since the last survey iteration.

Closing thoughts

The first three years of inclusivity data from the International Student Barometer suggest that UK universities are overall performing as well as the global average when it comes to providing an inclusive environment for international students of various racial, ethnic and nationality backgrounds. International students in the UK are likely to have experienced discrimination on these bases, and to feel welcome in their host country, at similar levels to the Global ISB benchmark, but are more likely to feel a sense of belonging. In this sense the figures could be seen as somewhat encouraging for the UK sector, but with still over a fifth of international students in the UK having experienced discrimination due to their race, ethnicity or nationality during their studies, there is clearly more work to be done. The experience of ESEA students in the UK as reported through the ISB data also highlights the disparities which can exist across different nationality cohorts. The frequency of discrimination faced by this group of students was significantly higher than the UK average, and consistent across all years of study, meaning this cannot simply be dismissed as a pandemic-related aberration. This is not to create a hierarchy of discrimination when discussing inclusivity policy, but to highlight the fact that the experience of international students cannot be homogenised. The specific challenges, concerns and needs of different groups must be understood – through tools like the ISB – and effectively responded to.



Feature article

The overriding importance of employability

Nannette Ripmeester, Director - Performance Benchmarking (Europe and North America)



Since 2018, “Future career impact” has consistently topped the list at 96% as the primary reason why globally international students choose a Higher Education Institution (HEI). While it is often assumed that students choose where to study based on the country (#7), the reputation of the university (#3), or the specific course or programme (#2), we should not underestimate the importance of careers regarding study choice as the number 1 driver, backed up by ‘Earning potential’ on the 5th place (out of 20 answer options).

Hence institutions cannot disregard the importance of connecting knowledge to the professional field in which people will be using that knowledge. However, that does not mean a higher education degree is ‘just’ about the job afterwards. It is about preparing people for the world of work that awaits them and the skills (and confidence!) they need to manoeuvre in this constantly changing global job market.

Study choice: How students decide on their institution

Decision making	Global ISB - % satisfied
<i>Future career impact</i>	96%
<i>Specific course/program title</i>	94%
<i>University reputation</i>	94%
<i>Research quality**</i>	93%
<i>Earning potential</i>	93%

As Wendy Curtis, Dean of International Strategy, Partnerships and Market Development at Fanshawe College, explains:

“Capturing the student voice is important as it brings a transparency to what is a very fluid audience. When you think about what’s important to students, ultimately, students are looking to gain the skills for employment. It’s a huge priority for them.”¹

Connection to the world of work

According to research, such as the Erasmus Careers² project, it’s evident that skills gained by students through international mobility experiences align closely with what employers desire in candidates. Additionally, the World Economic Forum (WEF) Job Report 2023³ highlights the rising significance of international mobility-related skills coupled to more globally-spread teams, a trend in contemporary workplaces driven by the surge in remote work practices. This, combined with employability being a top factor for international students when selecting an international study opportunity, is critical for Higher Education Institutions (HEIs) to boost their focus on ensuring employability for their (international) students. Ideally this leads to a more seamless transition - from graduation to workforce - for students, transforming future alumni into the brand ambassadors of the institution. Careers advice coming from academics (faculty) on long-term career opportunities matters to students (placed 7th in derived importance at 40%; 77% satisfaction in the Global ISB).

“All study programs are relevant to the German job market. This is reflected in our teaching and learning where theoretical knowledge is applied to actual problems in cooperation with business and industry partners. All professors have worked outside academia and therefore, can give career advice from their experience.”

And this pays off in the recommendation of the institution explains Kerstin Frodl, Director Center for International Students at Osnabrück University of Applied Sciences⁴.

Making good contacts for the future

‘Making good contacts for the future’ is globally the highest ranking (37%), derived importance element in the living section of the ISB, meaning that out of the 25 questions asked this answer shows the highest correlation with recommendation. Making those contacts apparently is key to students. Indonesian and Canadian students seem to find making contacts for the future most important, followed by students from the Philippines, Jamaica, Australia, and the UK. Understanding what drives decision-making for different groups can help institutions to better align their marketing and their support services to these groups – one-size-fits-all does not work for the new generations, whether it is how to attract them to institutions, or what support is offered while they are studying at the institution.

¹ https://info.i-graduate.org/case_study/optimising-international-student-employability-to-increase-competitive-edge

² <https://project.erasmuscareers.org>

³ https://www3.weforum.org/docs/WEF_Future_of_Jobs_2023.pdf

⁴ <https://www.gate-germany.de/fileadmin/dokumente/Publikationen/Schriftenreihe-Hochschulmarketing/Band-22-ISB-barrierefrei.pdf>

Career goals defined

Regarding teaching and learning, international students find something as pragmatic as ‘Course organisation’ most important to recommend the institution; secondly the actual ‘Quality of lectures’ plays a role; and third comes ‘Employability’ (i.e. learning that will help me to get a good job) with 43% (40% in 2022). Hence employability-related elements play a role in study choice (number one reason) and recommendation (number three), but how well-prepared do students feel when it comes to careers?

Globally, 80% of final-year students indicate they feel prepared for their career goals. Whether or not parents have a degree does not have a major impact on the career goal preparedness of final-year students (just 1% difference; 85% for parents with a degree vs 84% for parents without a degree). 80% is a high number but one can argue: after completing their degree, 20% of students do not feel prepared for the next step in their career. Whether your take is, the glass is half full or half empty, is personal, but I would advise institutions to think about how best to prepare their students for the step after graduation.

“The ISB showed us our international students are interested in employability and career guidance. EUR has since recruited a career advisor with a special focus on international students. Starting this summer the international office and the new career advisor will work together to enhance the engagement of our internationals in career development activities, such as workshops and alumni panel discussions.”

Impact on recommendation	
Learning Elements	Global ISB - Derived Importance
Course organisation	46%
Quality of lectures	45%
Employability	43%
Course content	43%
Good teachers	42%

mentions Karen de Man, Senior International Relations Officer, at the Dutch Erasmus University Rotterdam (EUR). She continues:

“Thanks to the ISB EUR was able to improve our orientation programme which resulted in better scores and evaluation for our arrival programme, and a better start for our students.”

Personally, I'm keen to see how this new career advisor role plays out at this institution – I believe it will work well as international students prioritise 'Advice' (64%) as the main career support element they expect from their institution. But as careers advisors may not always know how job-hunting works in other countries, and not all students will stay in their host country, I would add a tool such as CareerProfessor.works⁵ to provide information on job hunting practices in over 40 countries and support students global employability.

The Global ISB shows there is room for improvement when it comes to career service satisfaction, where the top 3 are 'Information' (75%), 'Support' (73%), and 'Advice' (72%) – relatively low satisfaction scores if we can compare it to other elements. Hence, employability remains an area that requires attention from higher education institutions as it is a key element for international students regarding the selection and recommendation of the study experience.

About the author:

Nannette Ripmeester is also Director at Expertise in Labour Mobility, and the founder of CareerProfessor.works, a gamified global careers app providing employability and career information to students via their institution.



*Careers support:
what students expect and how happy they are with service provided*

Careers support elements	Global ISB - % expected	Global ISB - % satisfied
Advice	64%	72%
Placement	62%	61%
Training	60%	70%
Opportunities to meet employers	60%	71%
Support	58%	73%
Information	53%	75%
Network with Alumni	49%	65%
Employment	47%	55%
Representation	32%	58%

⁵ <https://careerprofessor.works>

Feature article

TNE provision: How the student experience differs

Guy Perring, Director - Performance Benchmarking (Asia)



In the first two quarters of the of 2024, it is noticeable how many of the conversations and conferences in the Higher Education arena revolve around transnational education. This may be driven by new initiatives in Indonesia and India whose governments have become more open to the setting up of such enterprises within their countries. It also might be due to the shifts in policy in the traditional receiving destinations of USA, Canada, the UK, and Australia in the process of getting visas or post-study work rights for graduates.

Student Barometer

The student barometer has been in existence since 2006, and since then has collated data on over 4 million students. As the largest survey that globally captures data on the student experience for enrolled students, it is inevitable that it is also able to capture data on transnational education (TNE) globally. For 2023, we had responses from 14,670 transnational education (TNE) students. The majority were from campuses in Malaysia, China, Singapore, Mauritius and Dubai, but we also captured those students who were studying at local institutions who had partner programmes with UK, Australian or U.S. institutions.

The data gives unprecedented insight into the decision-making behind why students would choose to study at a particular institution. Looking at the data comparing TNE students with more ‘traditionally’ mobile students, we can see some similarities and differences.

Decision making

‘Future career impact’ is the key decision-making factor with 98% of TNE students selecting it, which is 2% above the global benchmark. This combined with ‘earning potential’ which sits at 96% compared to the global benchmark of 92% reveals the centrality of future employment to the decision-making process. This appears to be even more crucial for transnational education students. The slightly higher score in these areas is probably due to the fact that the courses offered by transnational education globally still tend to be more in business, computer science and engineering, rather than poetry or French philosophy, for example.

Note that ‘opportunities for further study’ is only selected by 70% of TNE students compared to 80% in the global benchmark. Most TNE provision is at undergraduate level and if students do look for ‘opportunities for further study’ it would probably be at the home campus or they may more widely see a TNE qualification as an initial stepping-stone to study overseas.

Cost

It should also be noted that ‘the cost of living’ at 89%, and ‘the cost of study’ at 91%, are slightly more significant factors for transnational education students than others. Clearly, the global cost of living crisis has contributed, and generally the cost of study at TNE provision is considerably less than in the home campuses and for local

Decision making		
Decision making elements	Global ISB/SB* - % Important	Global TNE - % important
Future career impact	96%	98%
Institution reputation	94%	97%
Personal safety	92%	96%
Earning potential	92%	96%
Cost of living	87%	89%
Cost of study	86%	91%
Entry requirements	84%	91%
Visa process	81%	85%
Opportunities for further study	80%	70%
Work opportunities	77%	69%
Permanent residence	66%	55%

*Combined International Student Barometer (international students only) and Student Barometer (international and domestic students)

students. In particular the cost of living is significantly lower with the opportunity to live at home and maintain part-time jobs.

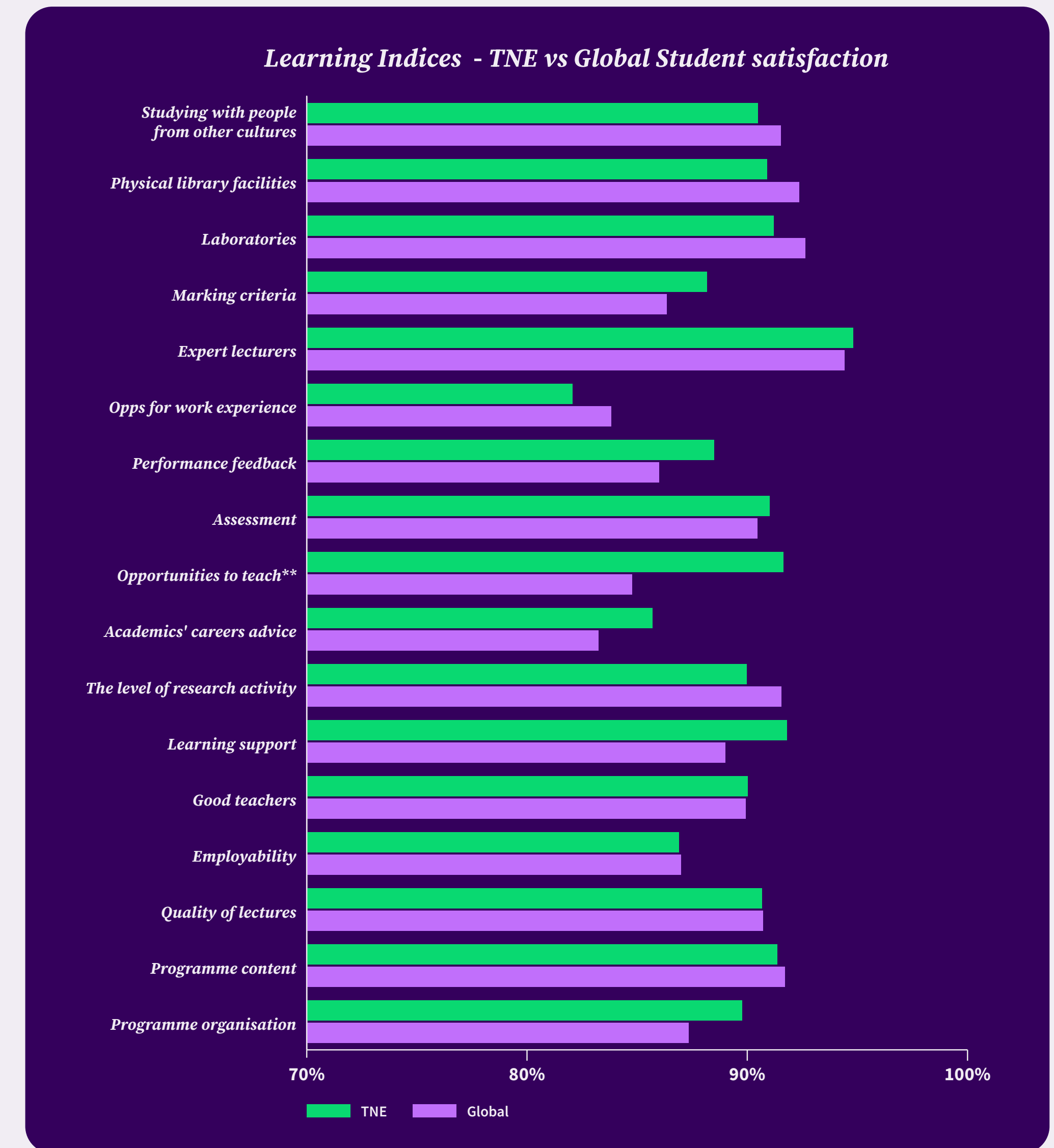
Overall satisfaction and learning indices

In terms of overall satisfaction, 90% of TNE students are either ‘satisfied or very satisfied’ which is exactly the same as the global benchmark. This is also true when we ask students about their overall satisfaction with just the learning which is also at 90%.

As can be seen from the table below, satisfaction across learning in TNE provision remains high and this puts paid to the idea that education offered in TNE provision and overseas campuses is somehow inferior to the offer at the awarding institution.

Key aspects such as ‘programme organisation’, ‘quality of lectures’, ‘employability’, and ‘good teachers’ are equivalent to or ahead of the global benchmark. ‘Programme organisation’ at 90% compared to 87% in the global benchmark has a high correlation with recommendation. It is essentially about effective timetabling and ensuring students can study the modules they want. Not radically exciting, but students regard it as very important!

‘Academics’ careers advice’ at 86% is ahead of the global benchmark by 3% and reflects the fact that many of the academics within TNE provision often have extensive industrial experience.



Living

In the range of living indices that we ask, as can be seen there are very small differences in satisfaction between the vast majority of items.

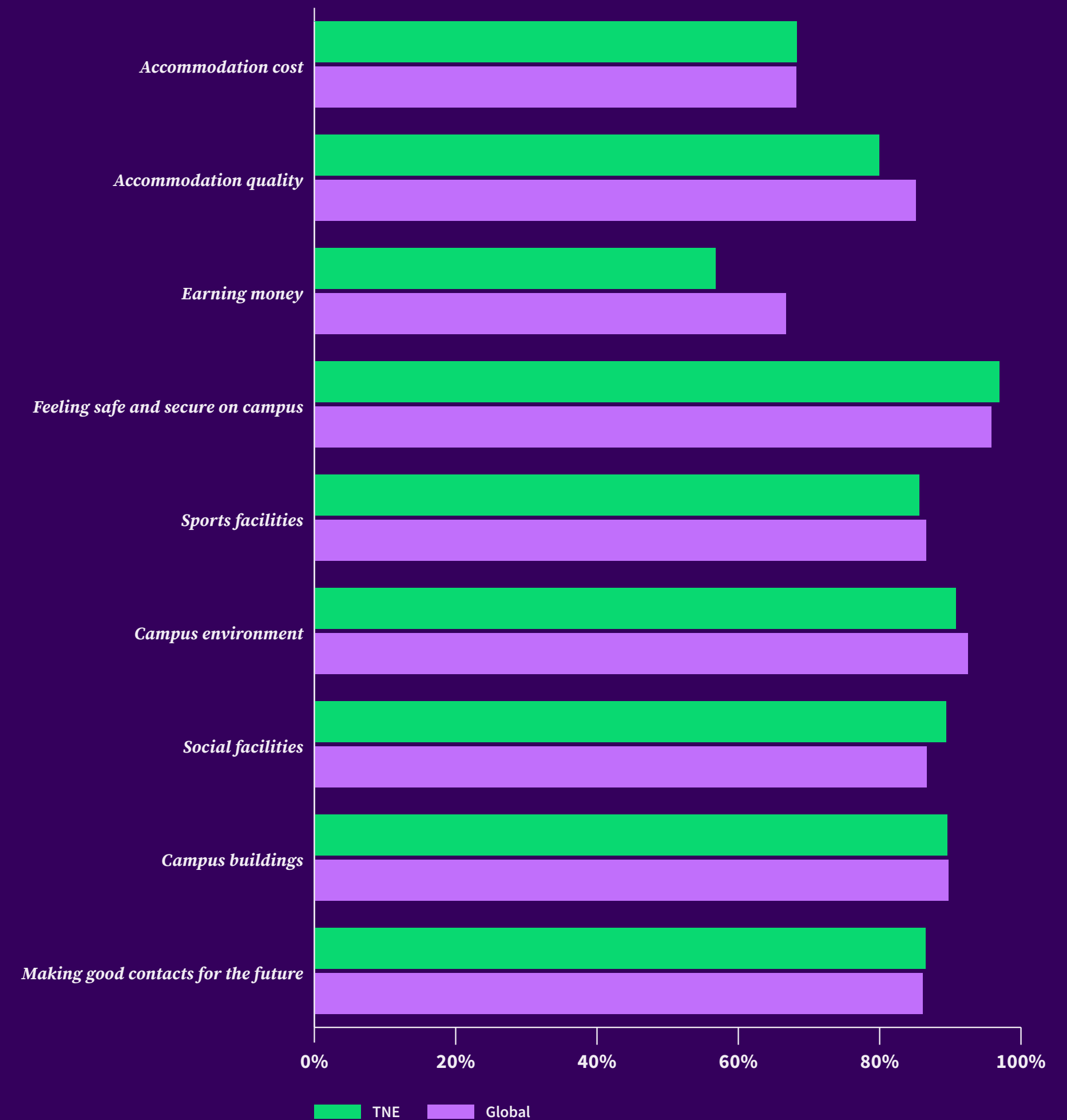
Although ‘accommodation cost’ is comparable with the global average, some attention needs to be paid to the quality of accommodation in TNE provision, which is 5% below the global benchmark.

‘Earning money’ whilst studying is problematic for many international students who choose transnational education provision. The current laws in China, Malaysia and Singapore severely limit the ability of international students to work whilst studying.

Personal safety

As we noted earlier ‘safety and security’ is a key factor in the decision-making process of students. It’s good to see that TNE institutions deliver on this with 97% of students saying that they were either satisfied or very satisfied with ‘feeling safe and secure on campus’.

Learning Indices - TNE vs Global Student satisfaction

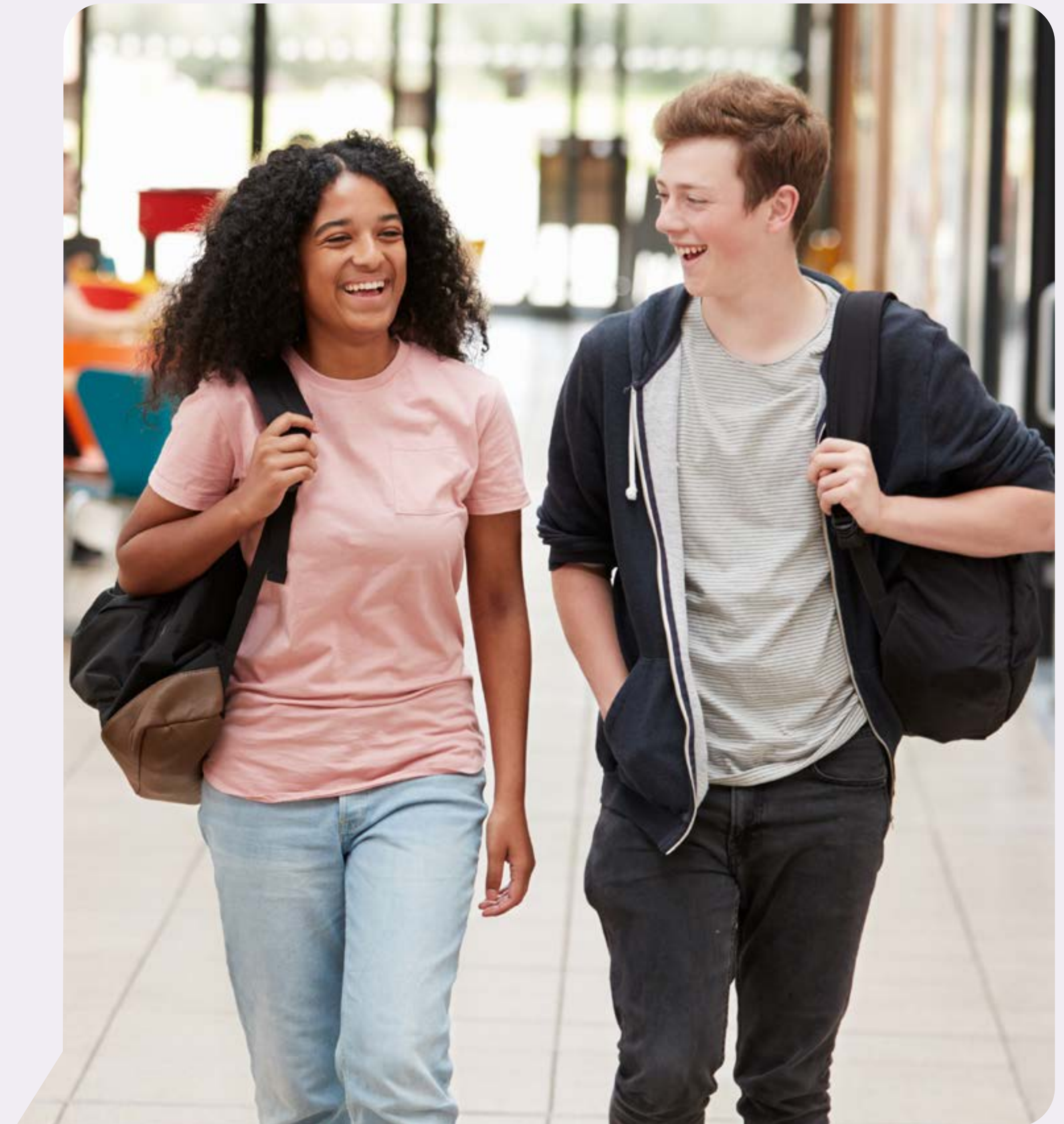


Future development and analysis

Having been involved in TNE for the last 15 years, there's perhaps too much attention paid to international branch campuses due to their high profile and the significance of the investment. The reality is that the vast majority of TNE students are not studying at branch campuses. Instead, they are in partnership arrangements where the delivery of the qualification is by a local partner. In the future, we want to disaggregate this data more effectively and give an insight not just into TNE vs global, but also the full range of TNE provision.

Recommendations

With more institutions having a range of TNE partnerships globally, it is important that the home institution has a way of evaluating the student experience across all its locations. Of course, the contexts will be different, but this shouldn't prevent ensuring an excellent student experience for all students wherever they are located. Our experience is that by using the barometer as a benchmarking tool across multiple locations, an institution can really capture the full range of the student voice globally and ensure a culture of continual improvement in the learning, living and support services that it offers its students.



Feature article

Understanding challenges around mental health

Guy Perring, Director - Performance Benchmarking (Asia) & Samantha Oakley, Client Support Officer



There's been growing recognition of mental health issues amongst university students in recent years and, inevitably, the global pandemic contributed to both highlighting said issues and intensifying them. Even before the pandemic, there was an increasing awareness of the mental health challenges students are facing during their time at university, including but not limited to; academic pressures, financial stress, social isolation, and the transition to adulthood. These stressors can have a detrimental effect on not only students' academic performance, but their overall quality of life.

The Student Barometer has recognised the need to include a number of questions that can help understand, measure and lead to enhancements in these areas. These include the following:

- *To what extent would you feel comfortable asking for mental health support from your university?*
- *Overall, how happy are you with life at this institution at this stage in the year?*
- *How satisfied are you with the counselling service?
(also questions on awareness)*
- *Do you feel particularly stressed or anxious with your life at this institution?*

Comfortable asking

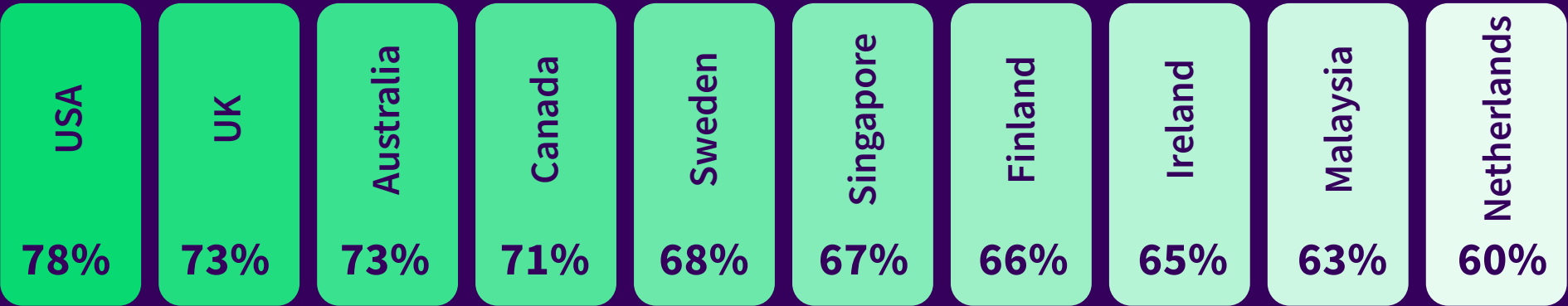
The question “to what extent do you feel comfortable asking for mental health support from your university” inevitably varies across both nationalities and locations. However, even with this variance, what we have observed since 2022 is a small but clear increase in the number of students who feel comfortable asking for mental health support. In 2022, 67% of students reported feeling comfortable, which then saw an increase to 70% in 2023.

As can be seen from the table below, this increase is also apparent when we look at the data from a regional perspective, with increases of between 1 to 5% from 2022 to 2023. When we drill down into country level data, we see far more significant variations, with 78% of international students in the US feeling more comfortable, compared with 63% in Malaysia. Remember, this data is for international students, so may reflect a nationality makeup of international students within the particular destination. It is noteworthy that students in the US not only express greater comfort in asking for mental health support, but are experiencing greater overall happiness, with 94% saying they are happy with their life at this institution at this stage in the year.

To what extent would you feel comfortable asking for mental health support from your university? (by students’ region of study)

	Global ISB	Asia ISB	Canada ISB	Europe ISB	UK ISB	USA ISB
2022	67%	64%	70%	62%	71%	73%
2023	70%	67%	71%	64%	73%	78%

To what extent would you feel comfortable asking for mental health support from your university? (2023) - Top 10 countries ranked



Knowledge of counselling service

With the shifts in societal attitudes towards mental health and a greater understanding and acceptance of mental health issues, this has prompted universities to prioritise their wellbeing services and resources as part of broader student support initiatives. Both the usage and awareness of available counselling services are a key factor in this, and the barometer seeks to understand students' use and / or knowledge of these services.

Highlighting Malaysia as an example, the data indicates that only 15% of students have used their institution's counselling service, and 64% of students are aware of this service, but haven't used it. Taking those who have used the service, we see that 93% have reported being either satisfied or very satisfied. Certain destinations/institutions report much lower figures of counselling awareness. For example, in Finland, only 31% of students are aware of how to access their counselling services. It is incumbent upon institutions globally to not only have appropriate counselling services available, but also to make sure all students are informed about how to access them. In the UK, 15% of students stated that they have used the counselling service, which is interesting to consider in parallel with a report by the Policy Institute at King's College London and the Centre for Transforming access and Student Outcomes in Higher Education, which showed that between 2016/2017 and 2022/3 academic years, the share of undergraduate students who had experienced mental health difficulties rose from 6% to 16%, so in other words one in six.

Please indicate your use / knowledge of the counselling service (2023)

I have used this service	I am aware of this service, but I haven't used it	May be useful to me but I don't know where to find it
25% USA	46% Sweden	11% Malaysia
21% Australia	47% Finland	11% USA
19% Canada	48% Netherlands	16% Canada
15% Sweden	49% Singapore	18% Australia
15% Malaysia	53% Ireland	19% UK
15% UK	56% Australia	20% Singapore
14% Singapore	57% USA	22% Ireland
12% Ireland	59% UK	24% Sweden
12% Netherlands	60% Canada	27% Netherlands
8% Finland	64% Malaysia	31% Finland

Stress and anxiety

The Barometer asks whether students ever feel particularly stressed or anxious with their life at their institution. Of course, this will also vary considerably across institutions and, perhaps, more importantly, across different study levels as well as subjects. There is much work to be done on analysing the stress and anxiety of students within different age groups, different subject levels, and different disciplines, which is an ongoing endeavor for the Barometer data and its participating institutions.

Broad generalisations should always be treated with caution; however looking at three major study destinations in the world; 27% of students in the UK stated they feel particularly stressed or anxious either quite often or always, with 22% in the US, and 31% of students in Australia.

Open comments

As well as the quantitative data, the Barometer collects a wealth of qualitative data in terms of open comments from the students. Institutions are able to filter this data across different subject areas, nationalities and study levels as well as concentrate on areas of particular concern.

From the table across you can see a few open comments from students related to these areas of mental health.

Do you ever feel particularly stressed or anxious with your life at this institution? (2023)							
	UK	USA	Canada	Finland	Ireland	Australia	Malaysia
Never	22%	20%	16%	15%	13%	13%	9%
Occasionally	51%	57%	53%	61%	57%	55%	55%
Quite often	20%	16%	22%	19%	21%	23%	26%
Always	7%	6%	9%	5%	8%	8%	10%

“Mental health is still a taboo among some staff members and is looked upon”

Malaysian student studying in Malaysia

“Not enough mental health support or understanding within my department”

Polish student studying in Ireland

These comments reveal that there are still some lingering cultural taboos surrounding mental health and having an open dialogue, particularly in certain cultures. In addition, it is clear that there is a real challenge to meet the increasing demand from students for such support.

Advice for institutions

As the Barometer has incorporated more data on student welfare, stress and anxiety, as well as usage and awareness of the counselling services available within institutions, the question remains, as with a lot of our data, what can you do now? This article has of course focused solely on aggregated data which can often lead to the broad generalisations that might not assist individual institutions. However, the individual institutional data in this area is incredibly rich and we always advise institutions to mine their data to look for any patterns and analyse it across all the demographic details from nationality, age, gender, subject, study level etc.

So, the questions you should ask from our data are the following:

- Are particular groups feeling high levels of stress and anxiety?
- Are particular groups unaware of the counselling services we offer?
- If 20% of students are either dissatisfied or very dissatisfied with the counseling services offered, are they coming from a particular group?

“Special attention to the student mental health should be taken in account”

Pakistani student studying in the UK

“Sometimes waiting times for counselors and psychologists are too long”

Romanian student studying in the Netherlands

“Some people will expect you to overcome your mental issue. They would claim that if you try hard enough, you should be able to keep the mental problem from affecting your work. This expectation cause me some pressure. (Only few people would do this, most are nice)”

Taiwanese student studying in Taiwan

Best Practice in mental health

There are plenty of examples of best practice in mental health provision across campuses globally and many of these are already our partners. Once you have unlocked the data, the question becomes, what next?

There's little doubt that there has been a surge in demand for services, as evidenced by our own data, and this highlights the need for additional resources to be introduced, which can be trained staff, suitable technologies or facilities devoted to Wellness support.

The key point is to still work daily on ensuring students know how to access these services. One poster is not enough; there must be multiple access points for information about counselling and also numerous ways to engage with the support itself, including face-to-face, virtual, telephone, chatbots etc. Using various platforms to offer wellbeing services not only ensures there's adequate support available for students, but also helps your institution tailor the support to meet the diverse needs of your students, given one size does not fit all and accessibility needs to be taken into account.

Closing thoughts

The Barometer data provides abundant material in the area of mental health and can hopefully provide an insight into some of the challenges students are faced with and the areas that require institutional response. The data is already presenting us with evidence of progress, with a gradual increase in comfort amongst students, whilst highlighting where further growth is required. We know that mental wellbeing irrefutably affects student success and therefore appropriate strategies should be in place throughout the university, with an understanding that a multifaceted approach that fosters a nurturing environment for a diverse range of students is required.

Feature article

Empowering Saudi international students

Examining the international student experience and the role of international education in increasing Saudi students' employability

Annamarie Lawrence, Lead Advisor – Skills



It is widely acknowledged that studying abroad as an international student offers substantial opportunities for personal growth, extending far beyond the realm of academics. The immersion in a foreign culture and the interaction with other international students can foster enduring connections with individuals and places worldwide. Though personal and academic advancement are evident benefits of being an international student, mounting evidence suggests that those who return from their international student experience bring back to their home countries exposure to innovation, research, management practices, different systems of

government and business⁶. Consequently, international students who study in host institutions with robust ties to industry and innovation can gain an even broader understanding of the potential opportunities within their home countries and, in some cases, become leaders of national transformation⁷.

Since the 1950s, Saudi Arabia has been encouraging its young population to pursue their studies overseas. Given that a significant 60% of the country's populace is under the age of 30⁸, the youth is considered Saudi Arabia's most valuable asset. As these young individuals progress from formal education into the workforce, they

⁶ Zhe Wang, Z; Hanley, N; Kwak, J; Lavoisier, I; Al Hussein, M; Tyson, L; Akkad, A; Chankseliani, M. (2024). How do international student returnees contribute to the development of their home countries? A systematic mapping and thematic synthesis. International Journal of Educational Research. Volume 125, <https://doi.org/10.1016/j.ijer.2024.102330>.

⁷ Campbell, A. C. (2016). International scholarship graduates influencing social and economic development at home: The role of alumni networks in Georgia and Moldova. Current Issues in Comparative Education, 19(1), 76–91.
Knight, Jane. "Knowledge Diplomacy: A Conceptual Analysis." The Palgrave Handbook of Diplomatic Reform and Innovation. Cham: Springer International Publishing, 2023. 59-80.

⁸ <https://www.reuters.com/world/middle-east/saudi-population-322-mln-median-age-29-years-old-general-authority-statistics-2023-05-31/>

will undeniably transform the country’s labour market and work environment. Saudi Arabia’s economic development goals necessitate the availability of a highly educated workforce to realize its ambitious national vision. In light of this, the Saudi Arabian government has detailed its strategy to enhance education and competencies in their national Human Capability Development Plans. These plans, which cover a variety of focus areas, aim to “empower citizens and elevate their global competitiveness”⁹.

A key part of Saudi’s national Human Capability Development Plan strategy is encouraging Saudi youth to study abroad. The Saudi government has been instrumental in this strategy through its generous scholarship programs. The King Abdullah Scholarship Program, covers full tuition, monthly stipends, medical and dental coverage, and annual round-trip airfare for students studying abroad. Since its launch, approximately 130,000 young Saudis a year have taken up the scholarships¹⁰. This initiative has significantly reduced the financial burden on students and make studying abroad an attractive option. While the volumes of students studying abroad have decreased from the early days of the scholarship, studying abroad is still a popular option for young Saudis with a rise in self-funded students¹¹.

The positive benefits to Saudi Arabian society of returnees from an international student experience can be seen in their rapid transformation . According to some studies, Saudi’s who study abroad can have enhanced intercultural understanding,

critical thinking, and personal development¹², all of which are the key areas of development outlined in the Saudi National Human Capability Development Plan.

This article examines data from the International Student Barometer survey, focusing on Saudi students’ responses and their educational experiences in relation to employability and career progression in their host countries. This analysis offers insight into international Saudi student experiences in areas important to Saudi national transformation.

The International Student Barometer (ISB)

Each year, Etio (formerly Tribal i-graduate) conducts the world’s largest survey of enrolled students, tracking and benchmarking student and stakeholder opinion of the higher education experience. The 2023/2024 survey saw a total of 122,975 global responses. Of these responses, 556 were students from Saudi Arabia studying in a higher education institution globally. 30% of Saudi students who responded were studying in UK, another 30% in Europe, 25% in Australia/New Zealand, 10% in North America and 5% in Asia¹³.

These responses provide interesting insights into how Saudi Arabia students view their international student experience and offer both Saudi policymakers and global higher education institutions unique data on the international education experience of Saudi students.

⁹ <https://www.vision2030.gov.sa/en/vision-2030/vrp/human-capacity-development-program/>

¹⁰ <https://sacm.org.au/education/>

¹¹ <https://monitor.icef.com/2022/02/the-new-shape-of-saudi-demand-for-study-abroad/>

¹² Alhazmi, A., & Nyland, B. (2013). The Saudi Arabian international student experience: From a gender-segregated society to studying in a mixed-gender environment. *Compare: A Journal of Comparative and International Education*, 43(3), 346-365.

¹³ <https://www.i-graduate.org/>

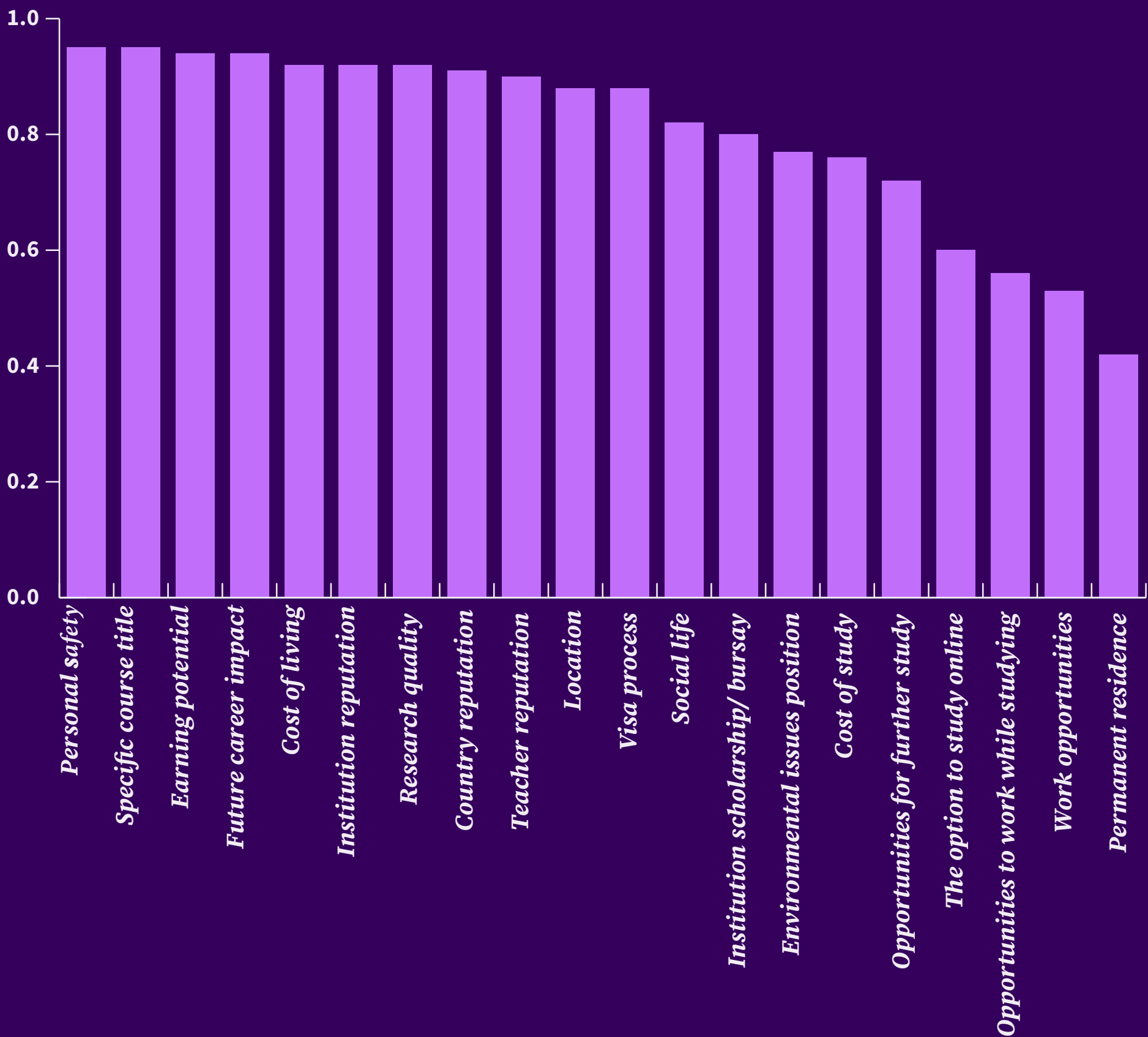
What Saudi students told us

The focus on employability among Saudi students abroad aligns well with the objectives of Saudi Vision 2030, which aims to enhance job opportunities for Saudi nationals and reduce reliance on foreign labour. According to survey findings, a significant majority of Saudi students’ responses suggest that studying abroad has advanced these national goals, with 83% stating that their international studies have supported their career ambitions, and 84% feeling that their overseas education will aid in securing a good job¹⁴. These figures are marginally higher than the global average. This strong belief in the value of international education underscores the positive impact of the Saudi government’s substantial investment in scholarship programs, as well as its strategy to increase the number of Saudis employed in the private sector.

Reasons for choosing their institution

In previous years, the International Student Barometer (ISB) found that employability was the primary factor in first-year students’ decisions on where to study¹⁵. The ISB gives students 21 options, including considerations like employment outcomes, institutional reputation, research quality, social life, and cost. Globally, the priority for students when selecting an educational institution is employability, but we are

Saudi Arabian student responses by reason for choosing institution



¹⁴ ISB responses to the question: “Learning that will help me get a good job.”; How well has your experience prepared you for your career goals?

¹⁵ Download the 2023 report here <https://info.i-graduate.org/the-global-student-experience-2023>

seeing ever-greater importance being placed on personal safety. This trend is even more prominent among Saudi students, where personal safety, alongside the ‘specific course title’, have become the predominant factors in their decision-making process. Indeed, 95% of Saudi students cite these two reasons as the main factors influencing their choice of institution for their studies abroad. Since the 1950s, Saudi Arabia has been sending students to the US for study, but safety concerns have led to a decrease in this number¹⁶. This change in priority could explain why fewer Saudi students are choosing to study in the USA. As a result, alternative study destinations perceived as safer, like Germany or Japan, are growing in popularity among Saudi students.

Employability factors were cited as the second equal most popular reason for Saudi students to choose their international institutions - the belief their education would lead to higher earnings and improve their future career prospects¹⁷. This is well aligned to the intentions of the King Abdullah Scholarship Program and the Saudi Vision 2030 where international education is a key part of modernising the Kingdom. Literature on employability outlines the potential for better employment prospects for international graduates which may be attributed to the fact that international education exposes students to a diverse learning environment, equips them with global skills and enhances their employability¹⁸.

The choice of institution as a part of the intention to obtain ‘permanent residence’ received the lowest response from Saudi students, with only 42% of them expressing

Responses to ‘permanent residency’ as a reason for choice of institution	
Country	‘Permanent Residency’ as a Reason for Choosing your Institution
Nigeria	88%
India	79%
Pakistan	79%
China	74%
Saudi	42%

this sentiment. This suggests Saudi students are intending to return to Saudi rather than stay in their host country. A recent survey by LinkedIn found that 82% of Saudis and Emiratis prefer to work in the GCC than in Europe or Asia¹⁹. This is in contrast to other nationalities who are more likely to seek permanent residency in their host country. This may indicate a strong sense of responsibility by young Saudis abroad to return to Saudi Arabia and contribute to the national transformation and Vision 2030.

¹⁶ <https://gulfnews.com/opinion/op-eds/why-the-united-states-is-no-longer-attractive-to-saudi-students-1.95411089>
¹⁷ ISB Questions on ‘earning potential’ and ‘future career impact’.

¹⁸ Altbach, P. G., & Knight, J. (2007). The internationalization of higher education: Motivations and realities. *Journal of studies in international education*, 11(3-4), 290-305.
¹⁹ <https://www.thenationalnews.com/business/money/2024/01/17/uae-and-saudi-employees-prefer-working-in-gcc-linkedin-says/>

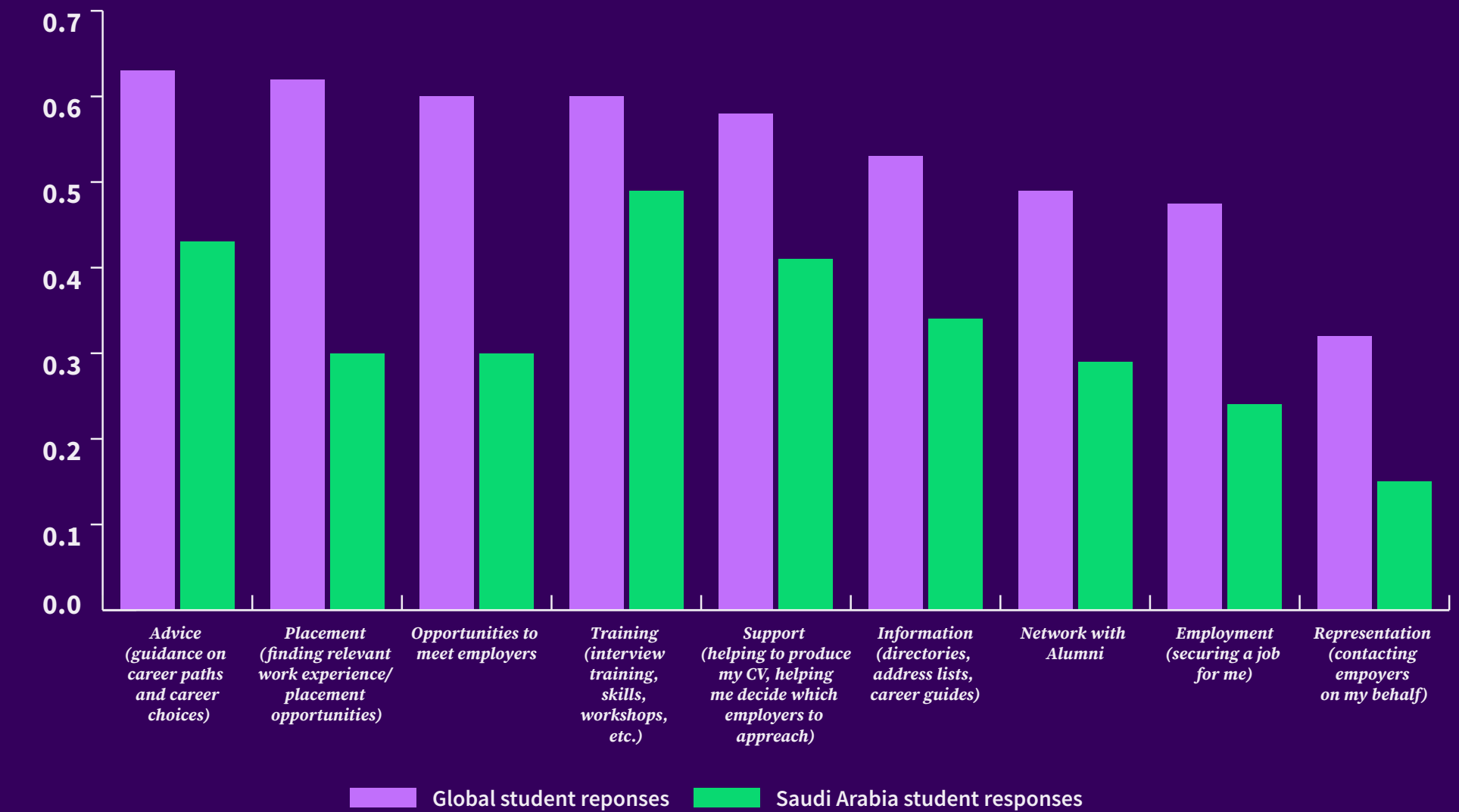
Exceeding expectations – connecting to the world of work

The ISB results indicate Saudi students studying abroad are impressed by their institutions’ services that offer access to the workplace and build employability. In all areas Saudi students score lower than the global average and, in some areas, significantly lower, to the ISB question ‘What employment/career support do you expect from your institution’. The difference in responses is particularly notable in areas relating to gaining employment. In particular, the institutions’ role in finding work placement, securing a job and representing students to employers. Unlike their peers, Saudi students do not see this as the role of their institutions. This may be due to a number of potential reasons, such as Saudi students’ understanding of the role of higher education from their own perspective and experience in Saudi. Alternatively, it may also be because it was not as important to Saudi students to build employment relationships in their host country due to the intentions to return to Saudi for their career.

Career advice

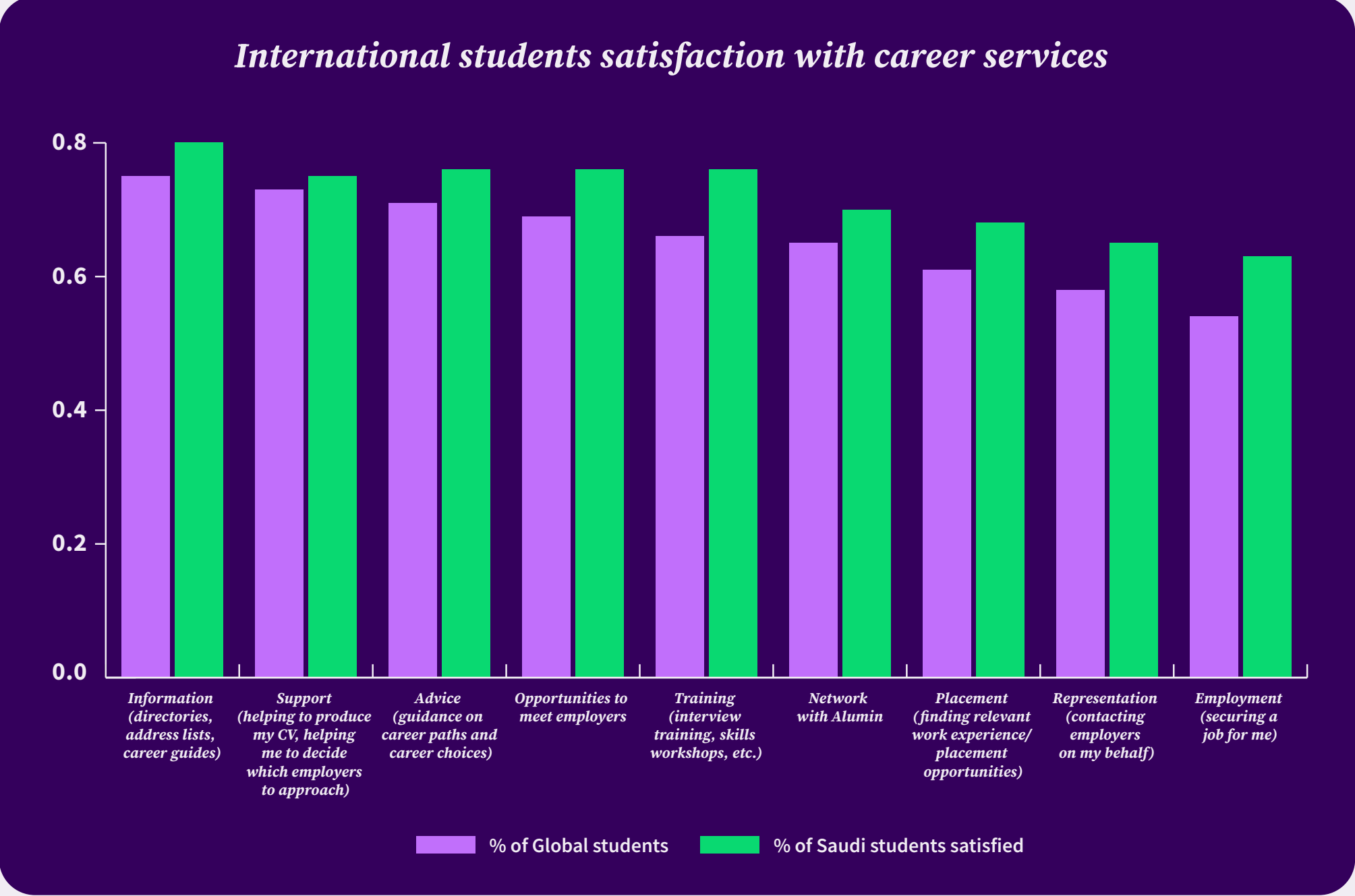
Saudi students are clearly satisfied the career service of their host institutions. In all areas of career support services, Saudi students were more satisfied than the global average. Saudi students were particularly satisfied with the levels of career guidance information, advice, opportunities to meet employers and support with interviewing and job-related skills. Saudis also valued the advice (on jobs and

What employment/careers support do you expect from your institution



their career) from faculty, with 78% saying they were very satisfied when asked about ‘advice and guidance on long-term job opportunities and careers from academic staff’. Expectations on the role of faculty to support students with career advice vary globally with some institutions placing a high level of importance on this through formal mentoring systems²⁰. Internationally, universities recognise the benefit of encouraging faculty engagement with the labour market to ensure that faculty members stay abreast of the latest developments, research, and practices in their fields. In some universities it is compulsory for faculty to periodically spend time working in industry as part of their performance management systems²¹. It could be assumed that in universities with closer relationships with industry could mean faculty are able to offer high quality career advice to students.

The data indicates that UK universities excel in providing support to Saudi students, with 82% expressing satisfaction with opportunities to meet employers, compared to 74% of Saudi students worldwide and a global average of 71% for all students. Additionally, Saudi students in the UK report a high level of satisfaction with the training opportunities offered by their universities, surpassing the global average. This positive feedback is a strong endorsement for UK higher education institutions, suggesting that Saudi students feel well-prepared for future employment through their international study experiences.



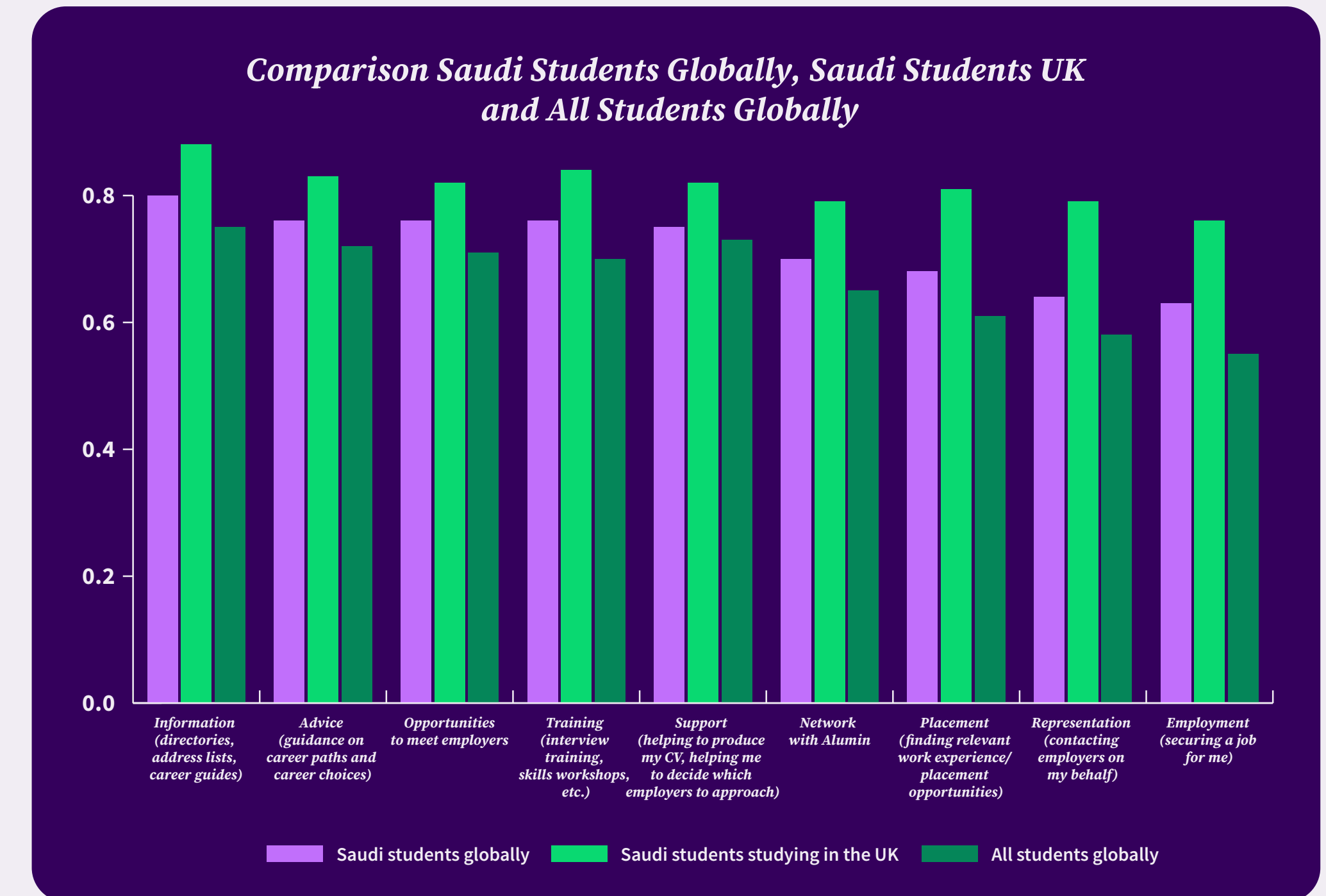
²⁰ <https://www.insidehighered.com/news/student-success/2024/05/14/faculty-are-key-resource-student-career-exploration>

²¹ Wilson, T (2012). A review of university business collaboration. Dept. Skills and Innovation, UK Government

The international students experience - employability and Saudi Vision 2030

The ISB findings highlight the perceptions and anticipations of Saudi students regarding employability services in their international higher education institutions. The findings reveal that students have come across unexpected yet highly advantageous services for their career progression. These experiences may have transformed their self-perception and career prospects once they returned to Saudi Arabia. It is clear that Saudi students consider their foreign education a robust foundation for their forthcoming careers and their part in Saudi Arabia's national transformation.

Global trends in higher education policies have highlighted the importance of university-business collaborations in supporting research & development, innovation, and equipping students for the workplace. To enhance employer engagement, higher education institutions worldwide have adopted various strategies such as collaborative research, incubators and innovation centres, internships, work-integrated learning, professional training, and employer participation in academic development. Saudi Arabia's Human Capability Development Plan is a roadmap of how Saudi intends to build better university business collaboration, outlining a clear national ambition for innovation and technological development, as well as recognition that closer alignment between education and the labour market will improve graduate outcomes. Significant



achievements are already in place to support the implementation of these strategies, including the establishment of Sector Skills Councils to ensure formal mechanisms for employers to engage with government and education institutions²².

The Saudi government is also providing substantial support to domestic higher education institutions through significant investments in university transformation initiatives and the establishment of international partnerships. Vision 2030 sets goals for the evolution of Higher Education, including the ambition to have six Saudi universities ranked among the global top 200 by 2025. Another key area of focus for domestic institutions is the improvement of career services to align Saudi university with international best practices in career guidance²³.

The ISB results would suggest this would be very well received by Saudi students and support graduates with their choice of job to contribute to the national vision.

There is some evidence to suggest that Saudi students who graduate from foreign universities tend to have better career prospects²⁴. This is often due to the perceived high quality of education, better language skills, and broader exposure that foreign graduates bring. Thus, Saudi students graduating from foreign universities seem to have a competitive edge in the job market.

‘It is prestigious if you get your Master’s degree from abroad and I assumed that it would give me better employment opportunities.’

Post Graduate student from Saudi Arabia
(quote from the Universities UK International Report 2021)

Saudi Arabia’s relationship with international education was further enhanced in March 2024, when the Ministry of Education announced the launch of a new ‘Study in Saudi Arabia’ platform. This platform supports and simplifies a new visa process and access to foreign students who wish to study in Saudi Arabia²⁵. This marks one of many national initiatives to develop Saudi Arabia as an international student destination for higher education.

²² <https://www.hrsd.gov.sa/en/media-center/news/071120232>

²³ <https://www.arabnews.com/node/2275871/saudi-arabia>

²⁴ Alsulami, N. (2020). Characteristics of the Re-Entry Experiences of Returning Saudi International Students after Studying Abroad. International Journal of Higher Education. Vol. 9, No. 3;

²⁵ <https://saudigazette.com.sa/article/640826>

Closing thoughts

The ISB survey sheds light on the aspirations of Saudi students studying abroad to return to their homeland, equipped with new skills and knowledge to contribute to Saudi Arabia's development. Although these students initially had low expectations regarding the support for employability from their institutions, they were positively surprised by the effectiveness of the services once they engaged with them. Considering that employability is the second most crucial factor (after personal safety) in choosing an international university, this information could be invaluable for Saudi policymakers. They could use these insights to enhance the support systems in domestic universities in the country's own international student strategy. Additionally, if similar data were available regarding international students in Saudi Arabia, it could help refine student support systems, bolstering Saudi Arabia's reputation as a prime destination for international studies.

The findings from the ISB, along with research on best practices in employability, validate the substantial investments made by the Saudi Arabian government in international scholarships and the emphasis on collaboration between businesses and domestic universities as part of transforming educational institutions.

Regional focus

UK

Robin Hallows, Head of Surveys - Performance Benchmarking



Overall satisfaction

90%

Overall satisfaction

1% above global benchmark

80%

would recommend
their institution

1% above global benchmark

20

Net Promoter
Score (NPS)

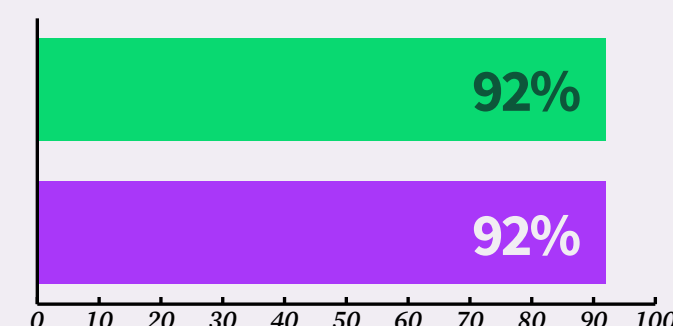
Global benchmark = 19

84%

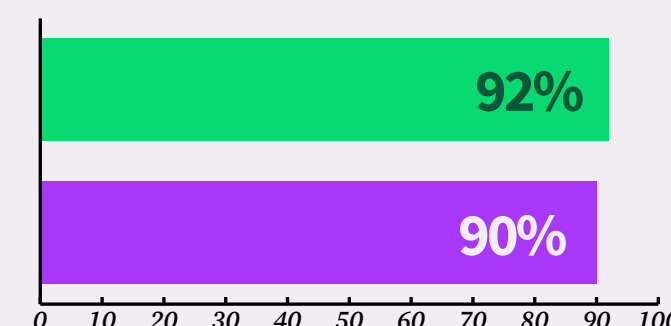
agree their current programme
is good value for money

2% above global benchmark

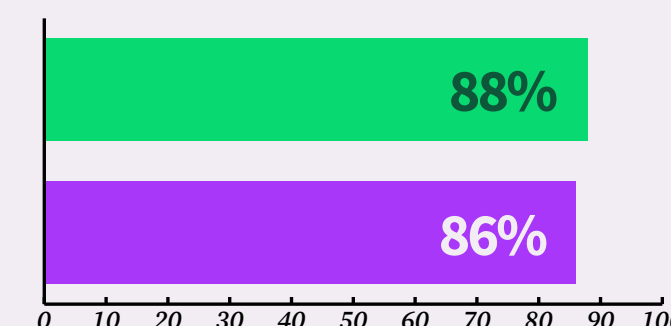
Arrival



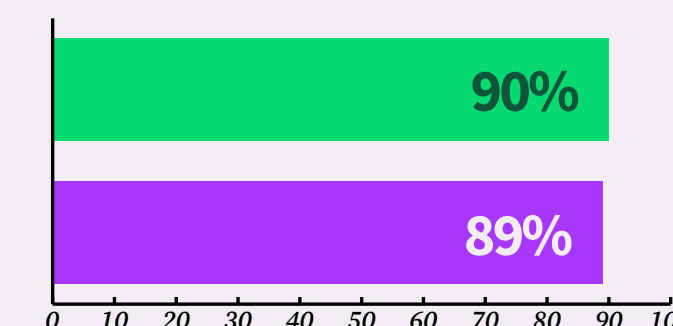
Learning



Living



Support



UK ISB

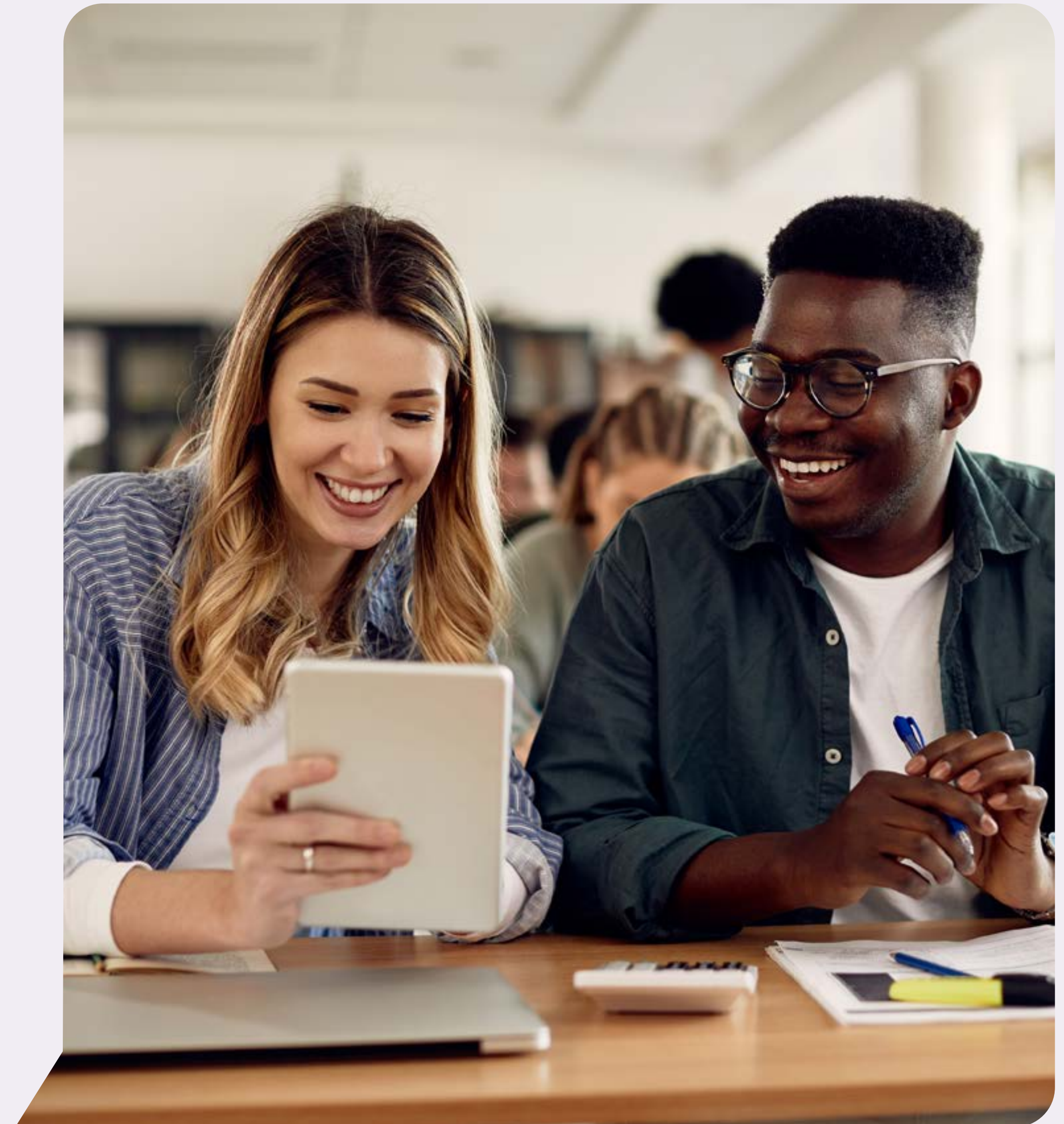
Global ISB

The views of nearly 40,000 International students from a wide selection of universities were included in our UK ISB data set. To add further context to the commentary below the 5 most represented nationalities were India 26%, Nigeria 16%, China 14%, Pakistan 7% and USA 4%. 65% of students were on postgraduate taught programmes, with business and management being the most popular field of study, 56% identified as Female, and nearly 60% were living in privately rented accommodation.

Yet again, our UK universities appear to be performing well on the global stage. Ultimately, International students studying at UK universities are more likely to recommend their university to family or friend reflected in a Net Promoter Score (NPS) of 20 vs 19. It was particularly pleasing to see several of our clients achieving scores over 30.

UK universities continue to deliver on employability factors

The ISB covers most aspects of the international student life-cycle and the UK's satisfaction scores across each of our four key themes (arrival, learning, living and support) exceeds that of the global benchmark. However, what is likely contributing greatly our positive recommendation score is our relative performance in the employability space. As has been the case for many years, the number 1 decision factor for international students studying in the UK remains “the impact the qualification has on their future career” (future career impact). And satisfaction at our UK universities in employability aspects such as learning that will me get a good job, advice and guidance on long-term job opportunities and careers from academic staff, opportunities for work



experience / work placements as a part of my studies all score notably above that of our global comparison. Similarly, satisfaction with the careers/employability support service is often higher at UK universities than elsewhere.

Should UK universities be satisfied with careers support provision?

Expectations around careers support will undoubtedly play a part in the satisfaction scores we see, and those expectations appear to be similar for students studying in the UK as overseas. For example, 60% of international students studying in the UK expect their university to provide relevant work experience or placements, a similar proportion to elsewhere. As you may expect however, we do see some quite interesting variances when we look at the data by our most represented nationalities. 71% of Nigerian students expect placements whereas its 52% for students from Pakistan. In the case of employment (securing a job for the student) 57% of students from Pakistan expect this, whereas it is only expected from 18% of students from the USA.

However, satisfaction with the various aspects of careers support surveyed is typically much higher in the UK, as shown in the table across the page.

In addition, our careers services appear to be used more, with 28% of international students studying in the UK said they used the careers service compared to just 21% on average globally. Now whether that’s a question of additional investment in the UK is an interesting consideration. From the work of colleagues in Performance

Careers support elements	Global ISB	UK ISB
Information	75%	81%
Support	73%	80%
Advice	72%	79%
Opportunities to meet employers	71%	77%
Training	70%	76%
Network with Alumni	65%	70%
Placement	61%	70%
Representation	58%	66%
Employment	55%	63%

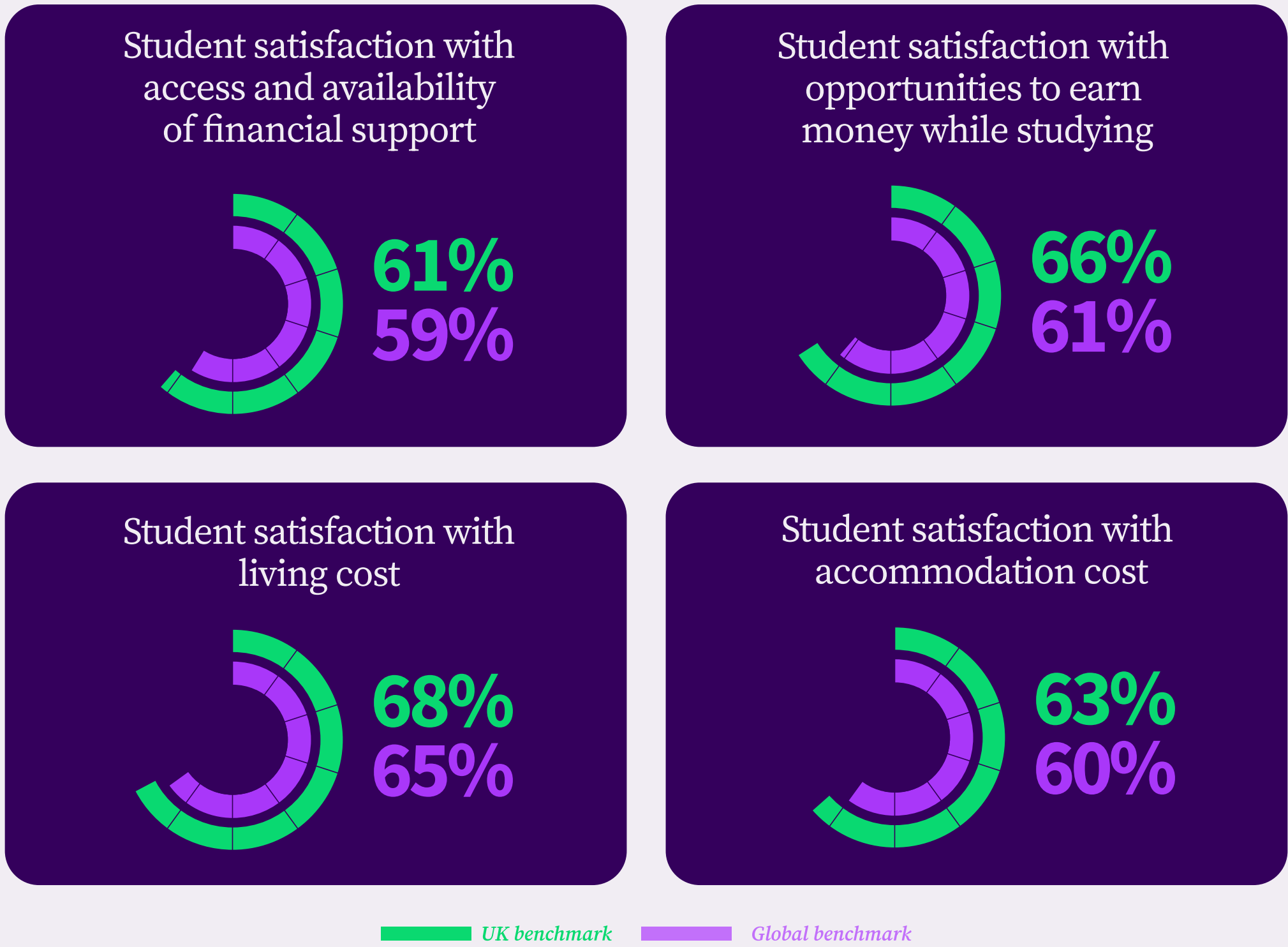
Benchmarking – Finance, who analyse the costs of numerous university activities, we see that universities spend around £59 per equivalent full-time student on careers pay; as a point of comparison it is circa £73 for university accounts. Irrespective of the investment, ultimately 81% of final year international students felt prepared to meet their career goals. So, the question becomes are we satisfied, given the resources and technology available, that nearly one fifth of students don’t feel prepared?

Students in the UK feel the finance strain


As highlighted in the 2023 Global Experience whitepaper, challenges remain around many financial aspects. Whilst satisfaction in the UK may be a little higher than elsewhere, there are clear challenges around four areas, as seen below.

There has been plenty of press around the financial strain the UK university sector is under, and a number of institutions have had to cut back on financial support and/or change fee payment structures. Invariably linked to the country’s currency issues, students from Nigeria, the 2nd largest cohort in our sample, appear to be feeling the pressure the most. Their satisfaction with financial support was only 43%, opportunities to earn money 55% and accommodation cost 52%.

Lastly, whilst visa restrictions continue to be the most frequently selected reason for students leaving the UK after graduation, cost of living has been steadily climbing year on year and is now a close second. Whatever the reason it’s an awful lot of talent, and money, leaving the UK.



What would make you leave the UK after graduating?			
	2021	2022	2023
Cost of living	30%	35%	40%
Visa resrtictions	44%	44%	43%

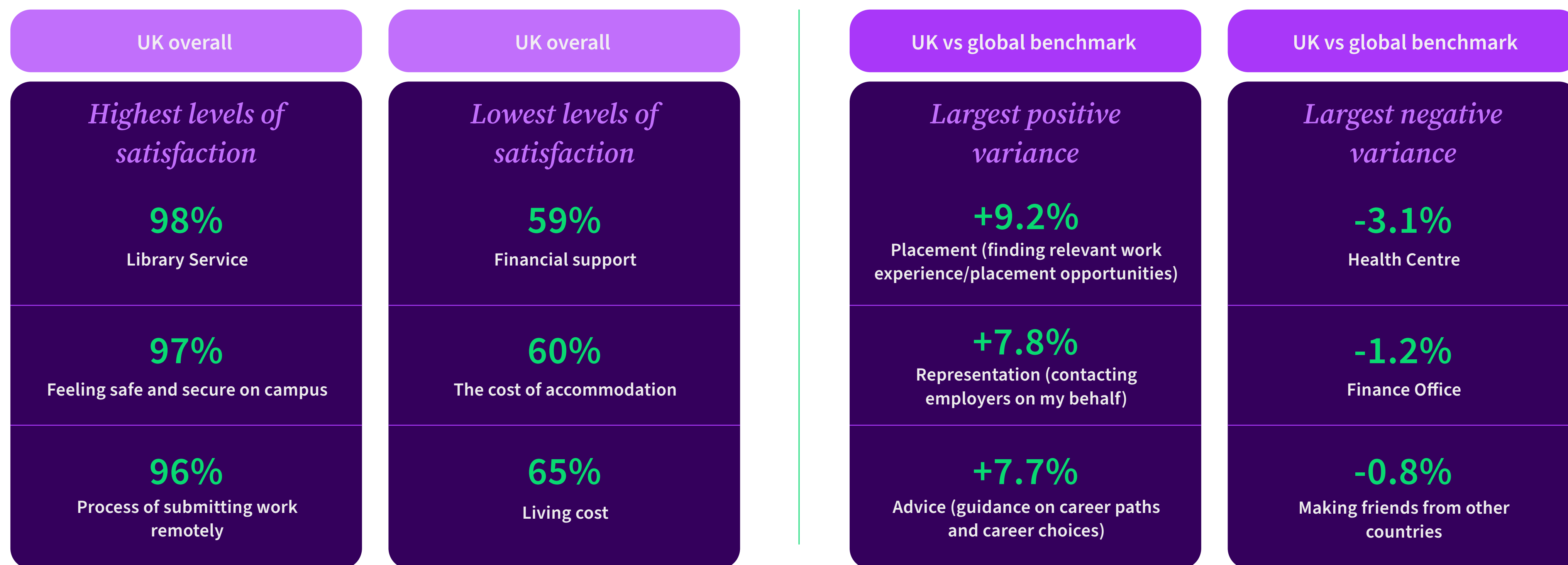


ISB results

UK - at a glance

“We need to listen to our international students, their voice, how they’re feeling. The ISB will absolutely provide us with those KPIs that we want to incorporate into our strategy. Moving forwards, the ISB really underpins our student experience – it will help shape it – it will be a litmus test to get a sense of what students are feeling as they go along that journey with us. In five years’ time we will be a different institution altogether.”

Christopher Sharpe, Director of International and Partnerships, University College Birmingham



Regional focus

Europe

Nannette Ripmeester, Director - Performance Benchmarking (Europe and North America)



Overall satisfaction

89%

Overall satisfaction

In line with global benchmark

80%

would recommend
their institution

1% above global benchmark

19

Net Promoter
Score (NPS)

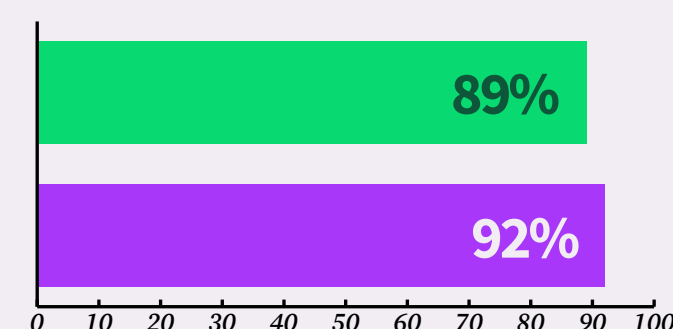
Global benchmark = 19

84%

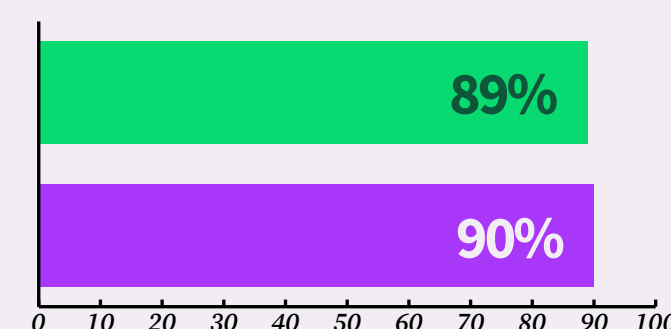
agree their current programme
is good value for money

2% above global benchmark

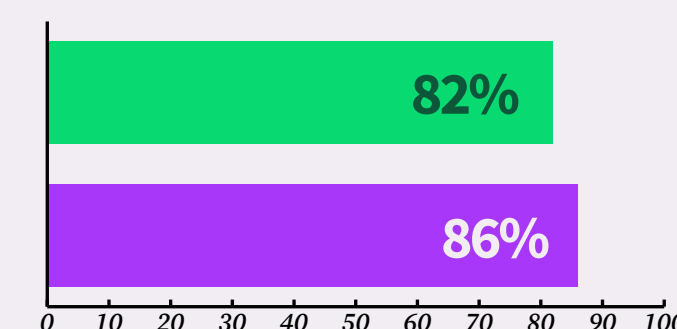
Arrival



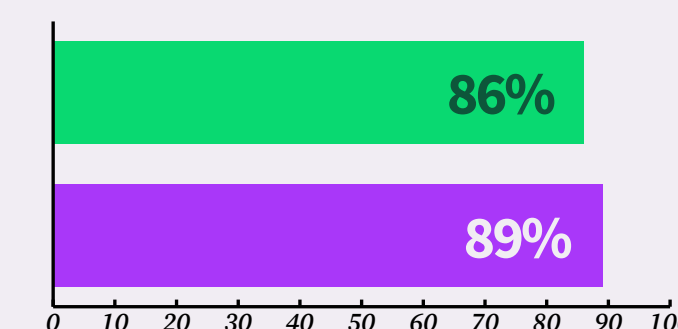
Learning



Living



Support



Europe ISB Global ISB

What do international students in Europe value most?

Consistent with the previous year, the 2023-24 European ISB benchmark shows an increase in overall satisfaction, now reaching 89%, in line with the Global ISB benchmark. Similarly, the proportion of students in Europe endorsing their Higher Education Institution (HEI) has risen to 80%, surpassing the Global ISB slightly, which stands at 79%. Also, the Net Promoter Score²⁶ in Europe witnessed a notable increase, going from 15 in the last year to 19 now in 2023-24, equalling the Global ISB. While the number of students who believe their current programme is ‘Good value for money’ has stayed the same at 84%, it is important to note that this is a significant 2% higher than the global benchmark. What makes international students studying in Europe feel their programme provides better value for money than the global comparison? In this regional feature, we will try and dive deeper to understand that difference.

Good value for money

When looking at the aggregate data for Europe and comparing it to the global benchmark, there is something that stands out: the European benchmark scores lower in all main areas than the global average. Comparable to last year’s numbers, the overall satisfaction with the main categories ‘Arrival’, ‘Learning’, ‘Living’ and ‘Support’ are all below that of the Global ISB. Even ‘Overall happiness’ scores lower than the



²⁶ The Net Promoter Score (NPS) looks at score an institution received from their students. Students that give a score of 6 or below are classified as Detractors, those that give a 7 or 8 are classified as Passives, and those that give a 9 or 10 are Promoters. To calculate the Net Promoter Score, we subtract the percentage of Detractors from the percentage of Promoters providing a number as NPS.

global comparison. However, the European aggregated data for ‘Good value for money’ scores a remarkable 2% higher than the Global ISB (84% vs 82%). Apparently, European Higher Education Institutions provide programmes that are valued by their students. Just pointing at (differences in) tuition fees would be a simplification of the reality as European institutions also score higher for ‘Recommendation’ than their global peers.

The social setting

While the Global ISB benchmark outperforms the aggregated European dataset for most areas, international students at European institutions seem to have less concerns about completing their studies and seem to experience a more inclusive environment - two areas that, together with a high mark for ‘Feeling safe and secure on campus’ (96%) may explain the better European score for ‘Good value for money’. If we look at inclusivity, we see the European ISB outperforming the Global ISB for almost all discrimination categories measured in the survey: ‘Sexual orientation’, ‘Mental or physical disability’, ‘Religious beliefs’, ‘Gender or gender identity’, and ‘Race or ethnicity’. Only for ‘Nationality’ does the Global ISB score slightly better with 77% (compared to 76% in the European ISB) of students reporting they have never experienced discrimination based on their nationality. Either way, that leaves over 20% of students globally that have experienced some form of discrimination based on their nationality – an area of concern that institutions will need to address.

Happy students

If we look at ‘Overall happiness’, we see a wide variety of scores between the participating European institutions, ranging from 96% to 78%. Nonetheless, with most European institutions scoring in the upper 80, lower 90 percentages, we can surmise that most international students studying in Europe seem rather happy. Scrutinising data for the different study types, exchange and Erasmus students indicate they feel most happy at 95%, compared against full-time students who score noticeably lower at 89%. Maybe the fact that it is easy to ‘make friends from other countries’ at the European institutions plays a role here, with Erasmus students being keen to build a wide network of international friends. Interestingly, there is a 13% difference between Europe (58%) and the Global (71%) ISB benchmark around ‘making friends from this country’, showing how difficult it is in most European countries to connect with the domestic students.

Linking internationals

Making the connection between host and home students is a true area of concern for most European institutions where often welcome activities and housing options are separated between international and domestic students. Maybe separating the two groups from the start and next expecting - by magic - that both groups merge into an international classroom is not the best option, hence some institutions do it differently:

“The integration among our students is a crucial part of the university’s internationalisation efforts and offers considerable value to the students themselves. We hope and believe that many of them will forge lifelong friendships and that their time at SLU will enrich them in numerous ways in the future.”

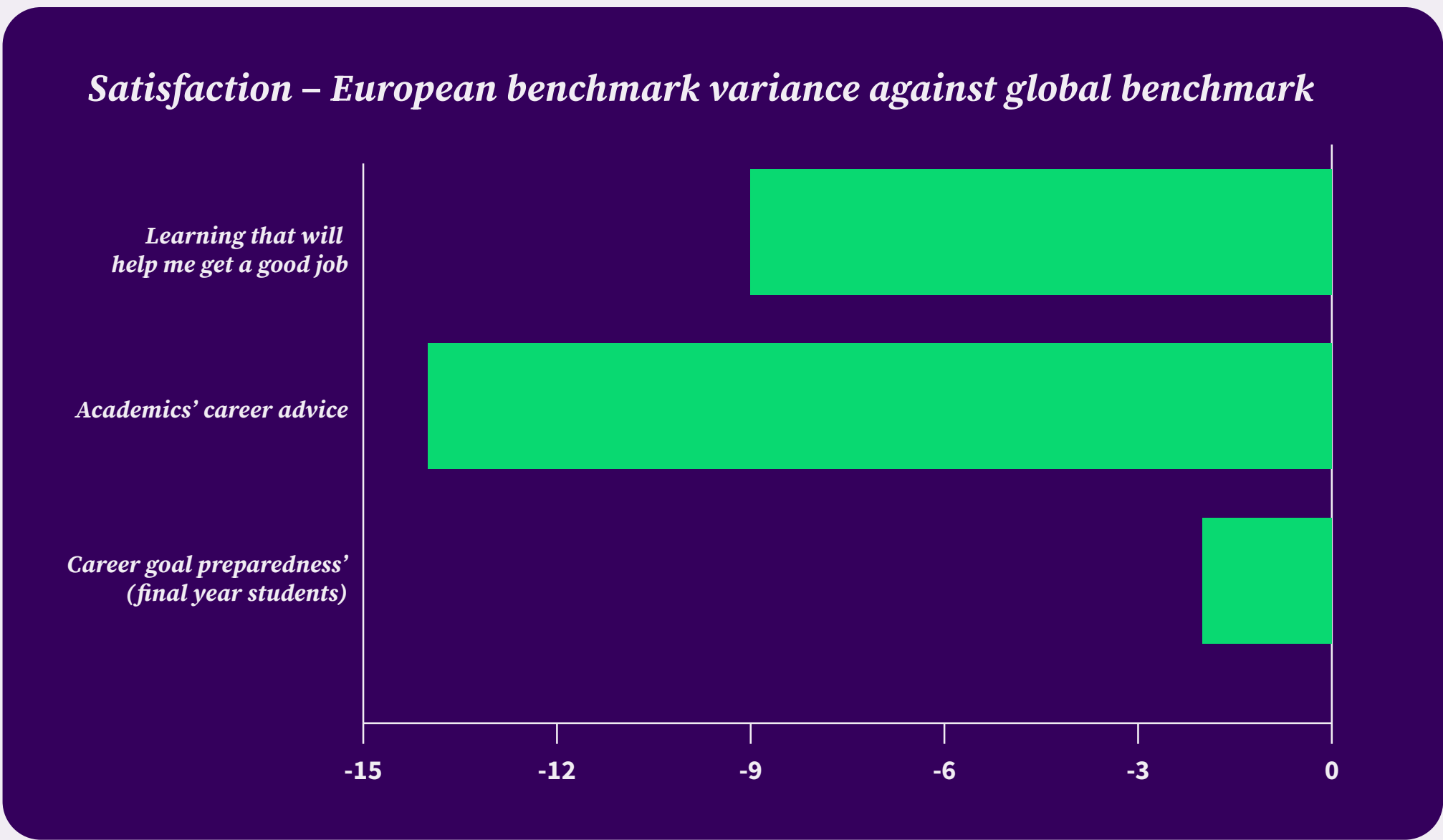
Elin Helgsten, Marketing Officer of the Swedish University of Agricultural Sciences.

Also noteworthy is the wide variety between the European institutions in this area, from a soaring 100% (!) to 81%, with most scores being around the mid 90 percentages for ‘Studying with people from other cultures’. The European ISB average is 91%, 1% below the Global benchmark. The key here seems to be the domestic students as they are already outside of their comfort zone and willing to make the effort. Tying the experience of an international study experience to the world of work seems a smart way to go, as the comment from Dr. Arnim Heinemann, Director of the International Office at the German University of Bayreuth illustrates:

“Our interdisciplinary campus with short distances, both in terms of distances and communication, fosters the development of a future professional network we support with social events designed to bring national and international students together early in their studies.”²⁷

Connection to the world of work

The connection to the world of work is a key area of concern for all students across the globe - those studying in Europe are no exception here - with ‘Future career impact’



being the number one reason to decide upon an institution. However, when it comes to ‘Employability’ (aka ‘learning that will help me get a good job’), the European ISB scores 9% lower than the Global ISB. Similarly, ‘Academics’ career advice’ (i.e. advice and guidance on long-term job opportunities and careers from academic staff) in Europe, scores 14% lower than the Global ISB. When we look at ‘Career goal preparedness’ amongst final year students the European ISB is only 2% lower than the Global ISB, with Engineering and Education & Teaching students feeling best prepared for their careers. In short, the area around employability offers room for improvement for European higher education institutions.

²⁷ <https://www.gate-germany.de/fileadmin/dokumente/Publikationen/Schriftenreihe-Hochschulmarketing/Band-22-ISBN-barrierefrei.pdf>

Information about GATE-Germany’s deployment of the ISB to evaluate and improve the effectiveness of recruitment channels, and national marketing initiatives, can be viewed [here](#).

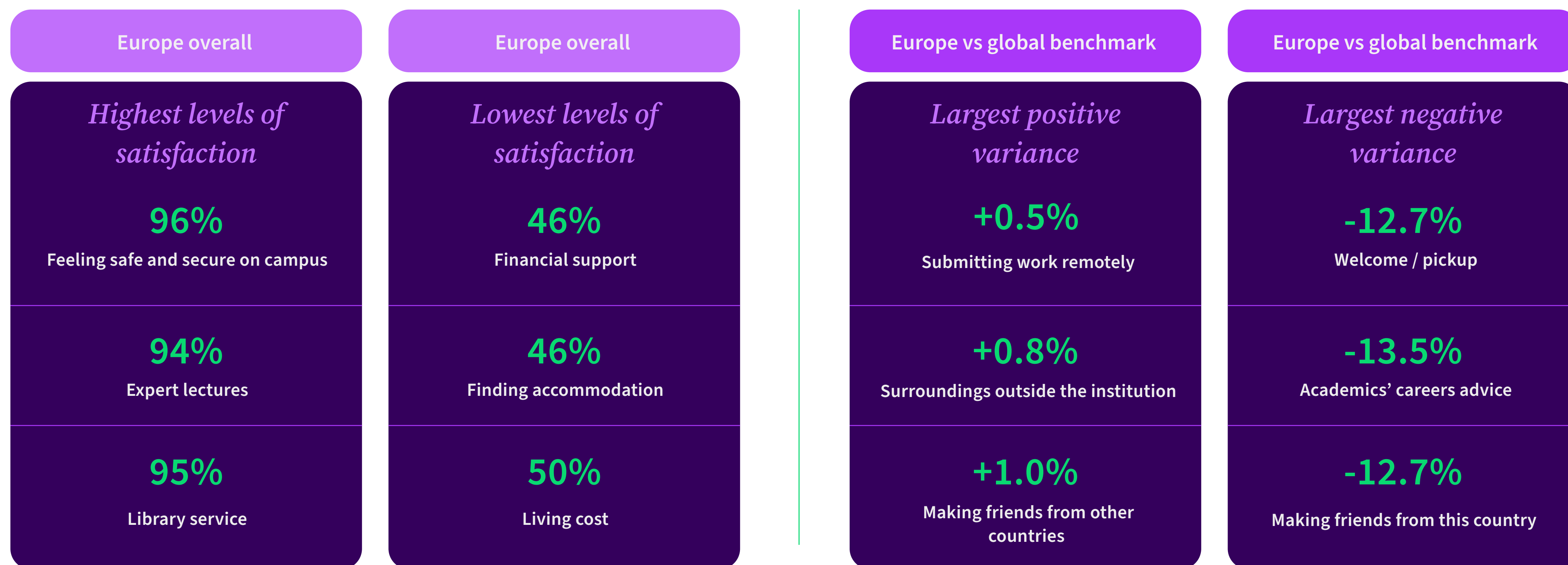


ISB results

Europe - at a glance

“We’ve consistently seen across our student services that international students experience university differently – they have different issues and place a different emphasis on different aspects of the university experience, so it’s very important to tease that information out, to hear their voice separately. You don’t get that from many other surveys; the ISB is the exception. The benchmark data really puts it into perspective, and you don’t really get that from anywhere else. It’s one of the main reasons we participate in the ISB.”

Toni Kaila, Specialist for International Affairs, Aalto University (Finland)



Regional focus

Singapore

Guy Perring, Director - Performance Benchmarking (Asia)



Overall satisfaction

(International and domestic students combined)

88%

Overall satisfaction

1% below global benchmark

67%

would recommend
their institution

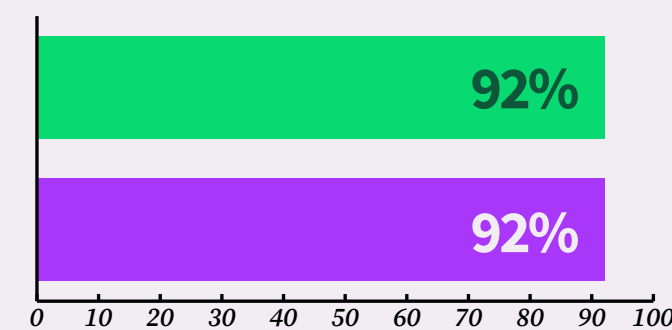
4% below global benchmark

81%

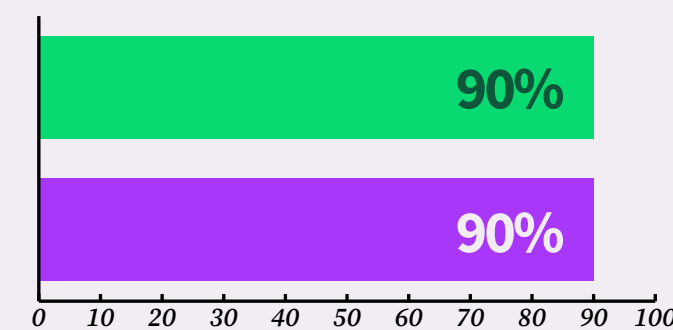
agree their current programme
is good value for money

2% above global benchmark

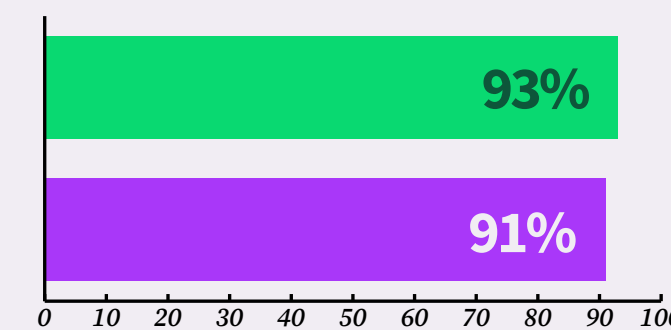
Arrival



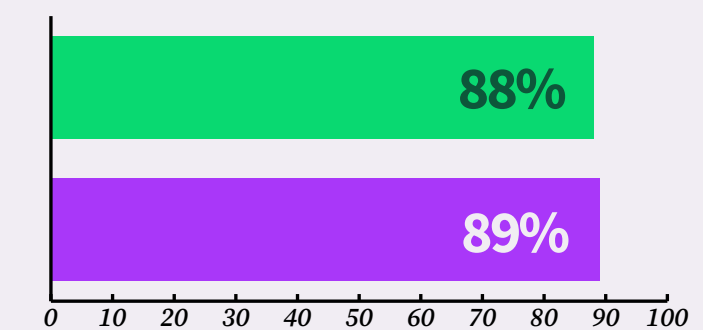
Learning



Living



Support



Singapore ISB Global ISB

Singapore is an outlier in the ASEAN region with a number of its public institutions such as National University of Singapore (NUS) and Nanyang Technology University (NTU) figuring at the top range of global institutions as determined by the various ranking bodies such as QS and Times Higher Education (THE).

Our work in Singapore in improving the student experience has mainly focused on the range of high-quality private institutions which have developed in parallel with the public institutions.

The private institutions in Singapore such as PSB Academy, SIM Global Education, James Cook University Singapore and Curtin Singapore offer a range of courses that are heavy tailored to the employment needs of Singapore. In the case of PSB Academy and SIM GE, they also offer a range of programs from their partner institutions in the UK and Australia such as Nottingham, Coventry, La Trobe and RMIT.

It is unsurprising, therefore, that the latest Student Barometer data for 2023 shows that the number one factor when deciding where to study is ‘future career impact’. Indeed, 97% of students studying in Singapore institutions stated it was the most important factor compared with 95% of students globally.

Employability support

When we look at correlation between the individual items in the Student Barometer and the Net Promoter Score (NPS) this gives us a sense of what is important to

Satisfaction: Employability support

	Singapore	Global
Making good contacts for the future	87%	86%
Learning that will help me get a good job	90%	87%
Academics’ Careers Advice	86%	83%

(International and domestic students combined)

students. Having already mentioned that future career impact is the key decision-making factor it is unsurprising that those items which relate to employability have a strong correlation with recommendation. In other words, if students are satisfied with these items, then students are more likely to recommend their institution to others.

The Barometer has a number of items that look at areas of employability in the living, learning and support services. These include ‘Learning that will help me get a good job’, ‘academics’ careers advice’, and ‘opportunities for work experience’ in our Teaching/Learning section. In the Living and Support sections, we have ‘making good contacts for the future’ and ‘Careers’ Advisory Service’.

The table above highlights some of the areas where Singapore does especially well.

I want to highlight ‘Making good contacts for the future’ which has a global correlation rate of 36% with the Net Promoter Score²⁸. This is considered relatively high and shows how important this item is to students. ‘Making good contacts’ is all about building a network for the future, and institutions who do well in this area are often strongly partnered with industry and offer students a range of opportunities to meet potential employers, network with other like-minded individuals, and create chances to visit industrial partners.

Another item that always has a strong correlation with recommendation is ‘employability’; the actual phrasing of the question is ‘learning that will help me get a good job.’ This is the sense for the students that the curriculum they are learning has a connection with their chosen future career and an institution should provide explicit signposting in the curriculum showing that the learning is connected to employability in the future. It’s pleasing to see that 90% of students in Singaporean institutions are either ‘satisfied’ or ‘very satisfied’ with ‘learning that will help me get a good job’, against the global benchmark of 87%.

Value for money and living in Singapore

Singapore is a relatively expensive country to live and work in, but it is notable that 81% of students agree that ‘their program is good value for money’, which is 2% above the global benchmark. This is an excellent result, since the institutions in the

²⁸ The Net Promoter Score(NPS) looks at score an institution received from their students. Students that give a score of 6 or below are classified as Detractors, those that give a 7 or 8 are classified as Passives, and those that give a 9 or 10 are Promoters. To calculate the Net Promoter Score, we subtract the percentage of Detractors from the percentage of Promoters, providing a number as NPS.

Satisfaction: Living aspects		
	Singapore	Global
Surroundings outside the institution	93%	91%
Transport links to other places	92%	84%
Accommodation Quality	87%	85%
Internet Access at my accommodation	91%	78%
(International and domestic students combined)		

Singapore benchmark are all from the private sector and, consequently, are charging relatively high tuition fees.

The infrastructure across Singapore is excellent and Singaporean institutions benefit from this fact. Our living indices cover some of the external factors that affect students and, as can be seen, Singapore exceeds the global benchmark for satisfaction in these areas.

It should be noted that ‘internet access at accommodation’ is often an issue for students across ASEAN, particularly when the campus provision in this area can be so strong. In the case of Singapore, internet connections across the island state are especially strong and often rated number 1 or 2 in the world²⁹. The size of the island

²⁹ <https://www.ookla.com/articles/worldwide-connectivity-mobile-fixed-networks-digital-divide-2023>

state combined with the investments in transport infrastructure also mean that ‘transport links to other places’ score well above the global benchmark.

Overall satisfaction and happiness

The Barometer has questions about overall satisfaction and also happiness, the two of course are related, but not necessarily the same. Indeed, whilst 88% of students in Singapore are either ‘satisfied or very satisfied with their institution’ which is 1% below the global benchmark, 92% say they are ‘happy or very happy’ which is 1% above the global benchmark. That happiness may be down to relatively low levels of stress and anxiety with only 7% saying they always have feelings of particular stress and anxiety compared to 9% in the global benchmark.

Cultural factors may influence the relatively low score of 61% of students in Singapore who felt ‘comfortable or very comfortable asking about mental health support from their university’. However, those who did use counselling services within their institution were highly satisfied with a rate of 95%, 3% above the global benchmark.

Closing thoughts

Institutions in Singapore ultimately use the Student Barometer for two simple reasons. The first is operational - there is a benchmarking requirement from the regulatory body, the Committee for Private Education, as part of the institution’s certification.



The second is however, far more strategic, and this was explained clearly by our long-term partner, SIM GE, below.

“We use the Barometer because the survey has been providing comprehensive analysis on the motivations, aspirations, expectations, and experiences of our international and domestic students. It uncovers areas for improvement, as well as areas we can celebrate. It also shows existing and emerging trends in student satisfaction and decision-making criteria.”

ISB results Singapore - at a glance

Singapore overall

Highest levels of satisfaction

98%

Feeling safe and secure on campus

96%

Submitting work remotely

96%

Disability Support

Singapore overall

Lowest levels of satisfaction

70%

Accommodation cost

68%

Earning money

67%

Campus eating places

Singapore vs global benchmark

Largest positive variance

+12.6%

Internet access at my accommodation

+7.3%

Transport links to other places

+7.0%

Visa advice

Singapore vs global benchmark

Largest negative variance

-18.9%

Campus eating places

-5.8%

Clubs / Societies

-5.6%

Student Advisory Service

Regional focus

Malaysia

Guy Perring, Director - Performance Benchmarking (Asia)



Overall satisfaction

(International and domestic students combined)

91%

Overall satisfaction

1% above global benchmark

70%

would recommend
their institution

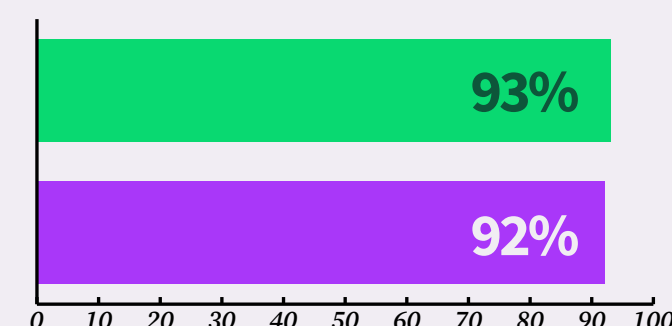
1% below global benchmark

82%

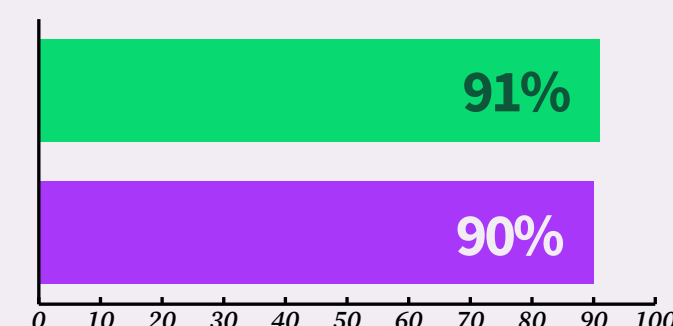
agree their current programme
is good value for money

3% above global benchmark

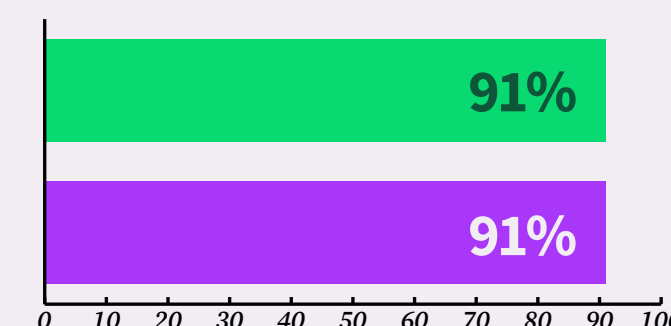
Arrival



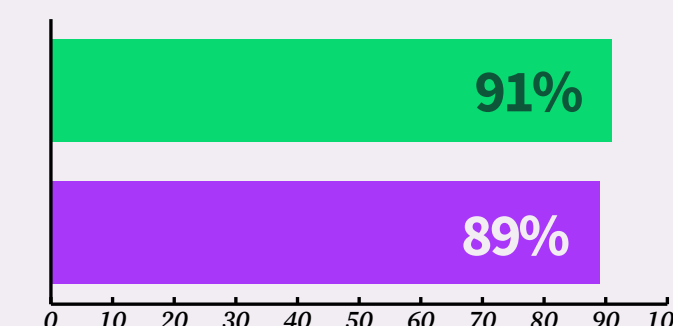
Learning



Living



Support



Malaysia ISB Global ISB

Etio (formerly Tribal i-graduate) has run the Student Barometer for over 15 years in the Malaysian market and over that time we have seen some extraordinary developments. In particular, the growth of the private sector serving over 50% of students, and which hosts the vast majority of international undergraduate students. The role of the Student Barometer is to capture the student voice, and, working with our partners in the Malaysian Higher Education sector, we firmly believe that student input has really led to an improvement in teaching & learning, facilities, and the quality of the support services offered to both local and international students.

The centrality of employability in student choice

I write this article whilst attending the THE Asia Universities Summit hosted by one of our longstanding clients in the region - Sunway University. I moderated a panel of students who reflected on their own views of employability, and whether educators were addressing some of the concerns they have.

Our own data from 2023 clearly shows that future career impact remains the key factor in choosing an institution. Indeed, 98% of students in Malaysia choose it as a factor, compared to 95% in the Global Benchmark. In addition, 95% of students selected ‘Earning Potential’ as another significant factor.

Student satisfaction rates with elements of learning

Learning elements	Malaysia	Global
Academics’ Careers Advice	88%	83%
Opportunities for Work Experience	89%	84%
Learning that will help me get a good job	87%	91%

(International and domestic students combined)

Getting the learning focused on future careers

This means that all institutions really have to have a laser focus on the aspects of employability that matter to students. It’s good to see in our latest data that Malaysian institutions are particularly strong in the student experience where it comes to those crucial aspects of employability. In our learning section there are really three key measures that relate to future careers. These can be seen in the table above.

I want to emphasize how important ‘careers’ advice from academics’ is. Of course, every institution will have their own careers department or service, but the day-to-day contact that students have with academics and the guidance they can offer for a future career is absolutely crucial. Malaysian institutions, particularly the private sector, have academics who tend to have a range of industrial experience and have not solely dwelt in the realms of academia.

In addition, we see ‘Learning that will help me get a good job’ scores similarly well at 91%, which is 4% above the Global Benchmark. This really is about ensuring that students can see the link between the curricula and what is learnt in the classroom with a future career. Here it is vital institutions not only ensure their curricula is up-to-date with industry needs, but also offer clear signposting in the learning on its relation to future employment.

Issues for international students

When we look at the data for international students only, there are a few key issues that Malaysia needs to address.

We ask international students ‘What would make you leave Malaysia after graduation?’. 53% said ‘visa restrictions’, 49% said ‘work permit restrictions’ and 48% said ‘Employers are not interested in foreign candidates’. As can be seen from the table across this exceeds the global benchmark significantly.

What would make you leave your host country after graduation

Learning elements	Malaysia	Global
Visa Restrictions	53%	38%
Work Permit Restrictions	49%	31%
Employers are not interested in foreign candidates	48%	31%

(International and domestic students combined)

These items are all interconnected, since employers may not be interested in foreign candidates due to the visa and work permit requirements. But Institutions should be proactive in showing industry the value that foreign candidates can bring to the workforce and also lobby the government to ease the path to employment for their international students.

Effective integration

Those who have spent any time in Malaysia will not be surprised to hear that Malaysian institutions, and indeed Malaysian students, are enormously welcoming to international students and we have a number of items in the barometer that cover this area. This includes ‘Making friends from Malaysia’, ‘Making friends from your own country’ and ‘Making friends from other countries’. It represents a proxy for integration - an area of growing concern for international students who wish to feel part of a community, especially post-COVID.

The table across shows how well Malaysia performs in this area.

Overall satisfaction and cost of living

Overall satisfaction of students remains high at 91%, 1% above the global benchmark. The global cost of living crisis is of concern to students worldwide and both students and parents are right in evaluating programs and institutions in terms of value for money. It’s good to see that 82% of Malaysian students agree that ‘their current program is good value for money’ which is 1% above the global benchmark. This is especially striking since the majority of institutions in the Malaysian benchmark are in the private sector and therefore have relatively high tuition fees compared to the public institutions.

Integration: Satisfaction with making friends		
	Malaysia	Global
Making friends from Malaysia	94%	91%
Making friends from other countries	88%	85%
Making friends from my own country	83%	85%
(International and domestic students combined)		

Support services

We look at the full range of support services in the Barometer which makes it fairly distinctive from other surveys. These support services include Finance, Catering, Library services, the International office, the Careers’ office, IT support and Students’ Union/Council.

In 2023 Malaysian Support services have a satisfaction rate of 91% which is 2% above the global average. Again over the 15 years that we’ve been working in the Malaysian market we have seen an increased professionalism in the support offered by universities and we believe strongly that the student input via the Barometer has led to significant changes and improvements in these services.

Mental health

In another article in this whitepaper, we will look at the area of mental health in more depth. The stress and anxiety of students and their concerns about completing studies are of increasing concern to institutions and the Barometer measures those factors. There are of course many cultural dimensions to this, but Malaysian students when asked ‘if they feel particularly stressed or anxious’, 26% say quite often or always which compares favorably with the global average of 31%. However, only 61% of students in Malaysia felt comfortable or very comfortable ‘asking about mental health support from the university.’

Issues of mental health of students across Asia are perhaps only now being fully recognized and support services are beginning to be put in place to cater for these concerns. That said, those who do seek counseling have a high level of satisfaction with the services offered by Malaysian institutions, with 93% saying they are either satisfied or very satisfied which is 1% above the global benchmark.

An emerging hub for international education

As Malaysia has emerged as a hub for international education, the Barometer has provided feedback and guidance ensuring the student voice is heard and incorporated in enhancing provision.



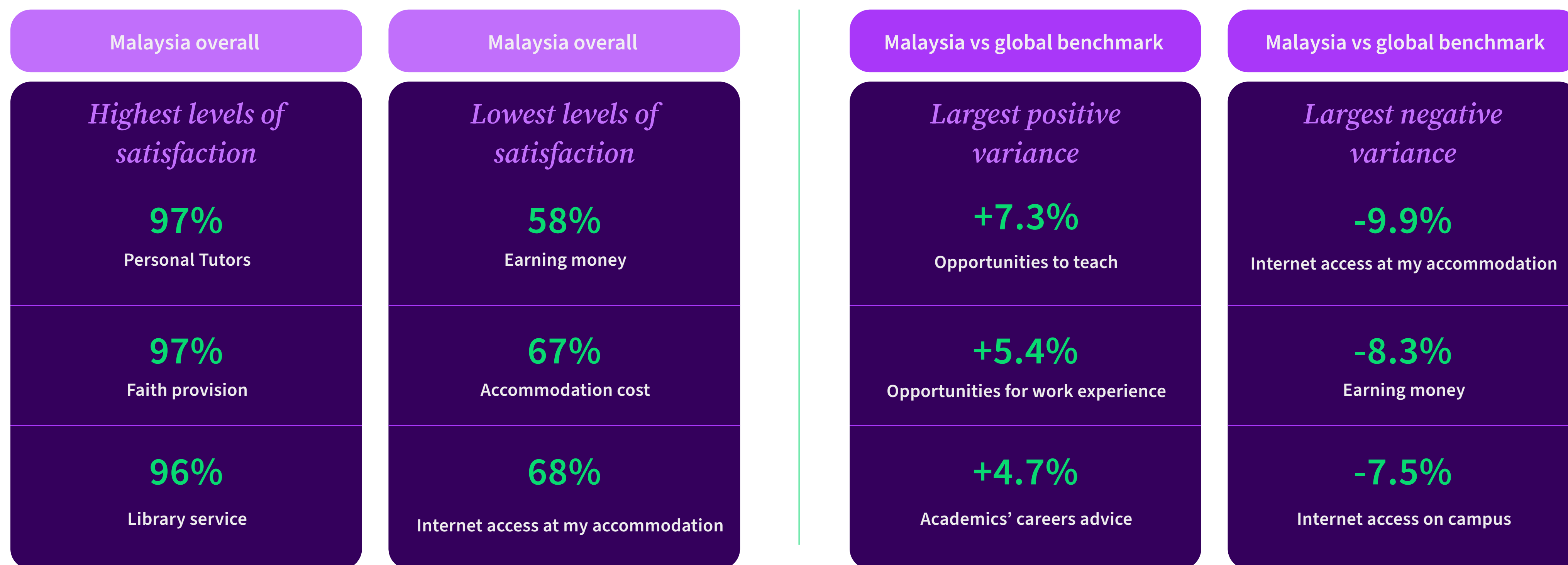


ISB results

Malaysia - at a glance

“The survey provides valuable insights for us to benchmark with our counterpart universities in UK and Malaysia as well as with other universities in Asia and globally. As we aim to be a borderless university, it’s important for us to capture the students’ voice, especially at a time with changing international context and emerging technologies that disrupt traditional teaching and learning.”

Ivy Sun, Deputy Director for Strategy and Performance, University of Nottingham Ningbo China



Regional focus

Australia

Thomas Eastwood, Senior Consultant (Edified)



Overall satisfaction

90%

overall satisfaction

1% above global benchmark

79%

would recommend their institution

1% below global benchmark

18

Net Promoter Score

Global benchmark = 17

74%

agree their current programme is good value for money

7% below global benchmark

In the wake of the COVID-19 pandemic, Australia’s education sector faced some challenges. Pleasingly, the sector is seeing a V-shaped recovery in terms of student demand, with increasing demand for students wanting to choose Australia as their destination of choice. The latest findings from Australia’s International Student Barometer (ISB)³⁰ reflect this recovery³¹. It reveals that despite the hardships faced, the sector has managed to surpass previous benchmarks and achieve notable success in enhancing overall satisfaction levels.

Bouncing back from COVID

Largely due to the impacts of COVID-19, the satisfaction of international students studying in Australia were notably impacted. In the last study, a moderate 67% of students expressed their inclination to recommend their respective universities. However, this sentiment has undergone a dramatic positive return in the latest study. Presently, 79% of students express their willingness to recommend their universities, marking a significant improvement and bringing recommendation levels into closer alignment with global benchmarks.

Students in Australia are career focused

International students weigh up various factors when choosing their study destination. The students deciding to go to Australia often prioritise practical factors

such as job opportunities, career prospects, and work experiences. The Australian sector has a reputation not only in its academic offerings but also in its potential to provide real-world opportunities for professional growth and development.

These practicalities are reflected in the scores for Australia in this year’s ISB.

The availability of work opportunities is a priority for 89% of Australian students, significantly more than the global average of 82%. The lure of Australia’s job market offers students more than just classroom learning as it’s a chance to gain valuable work experience and financial stability during their studies.

Similarly, the opportunities to work while studying and pursue further study are key considerations, with 89% and 88% of international students in Australia prioritising these aspects, 8% and 6% higher than the global averages, respectively.

With these heightened decision-making factors, the students in Australia have higher expectation levels in areas such as placements and employment opportunities and are higher than global benchmarks. Satisfaction levels regarding career advice from academic staff and opportunities for work experience are also notably higher compared to benchmarks. These findings suggest that institutions are aware of the importance of meeting the needs of students who base their decision-making on such factors.

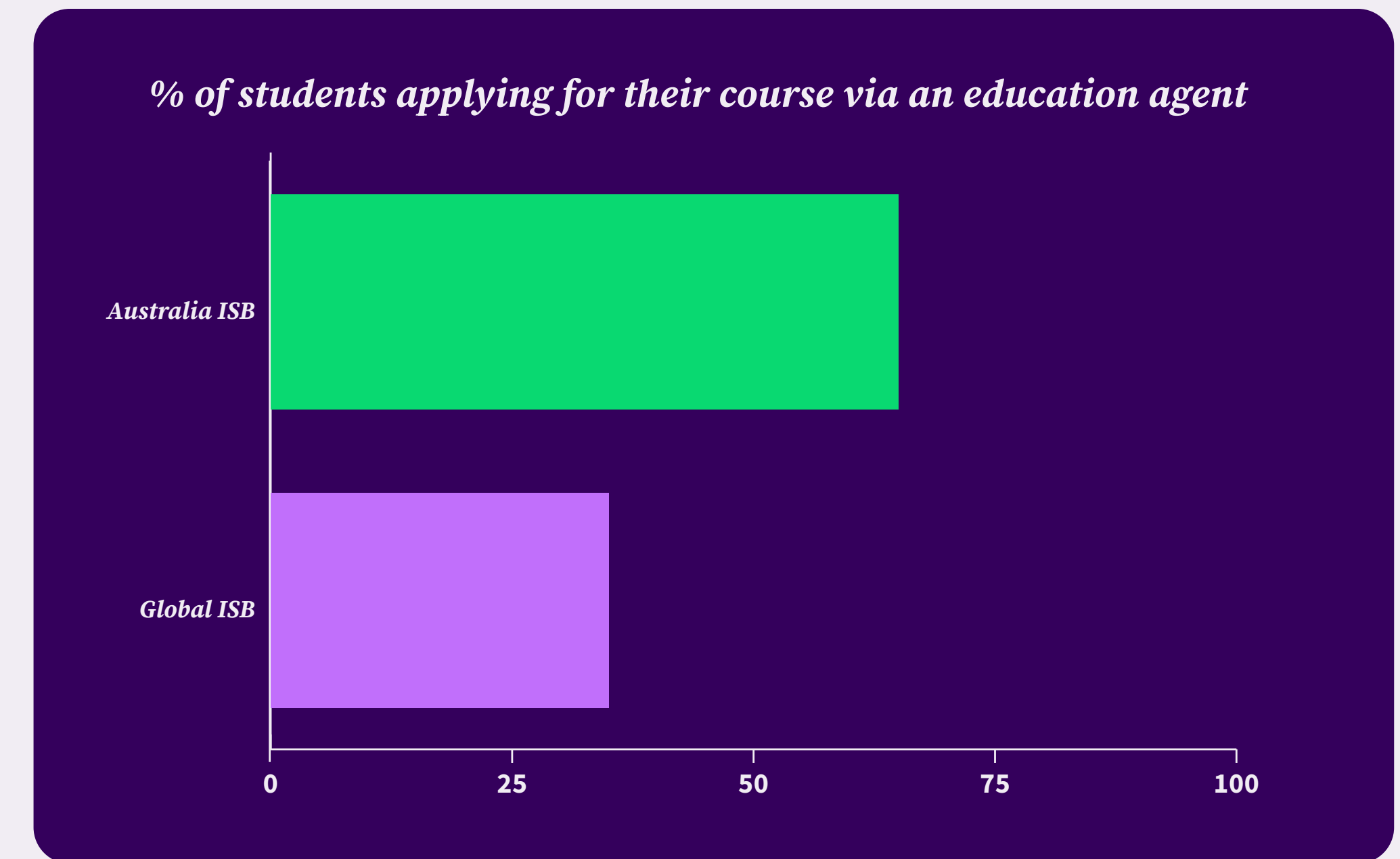
³⁰ The 2023 Australian International Student Barometer data comprises 24,812 responses from international students studying at 28 Australian universities. Survey data collected between March and June 2023.

³¹ In line with NZ article.

The importance of a good agent

Education agents are highly esteemed by international students in Australia, with a remarkable 92% being positive about the services provided. This high level is not unique to students in Australia as this is the same level as the global benchmark. This outstanding rating underscores the invaluable support and guidance that education agents offer in navigating the complexities of studying abroad. Their pivotal role is further evidenced by the fact that over half of students, specifically 51%, credit their agents with helping them choose a university. With a substantial 69% of students applying via education agents, surpassing the global benchmark by an impressive 34%, it's clear that these agents play a crucial role in facilitating the journey of international students to Australia.

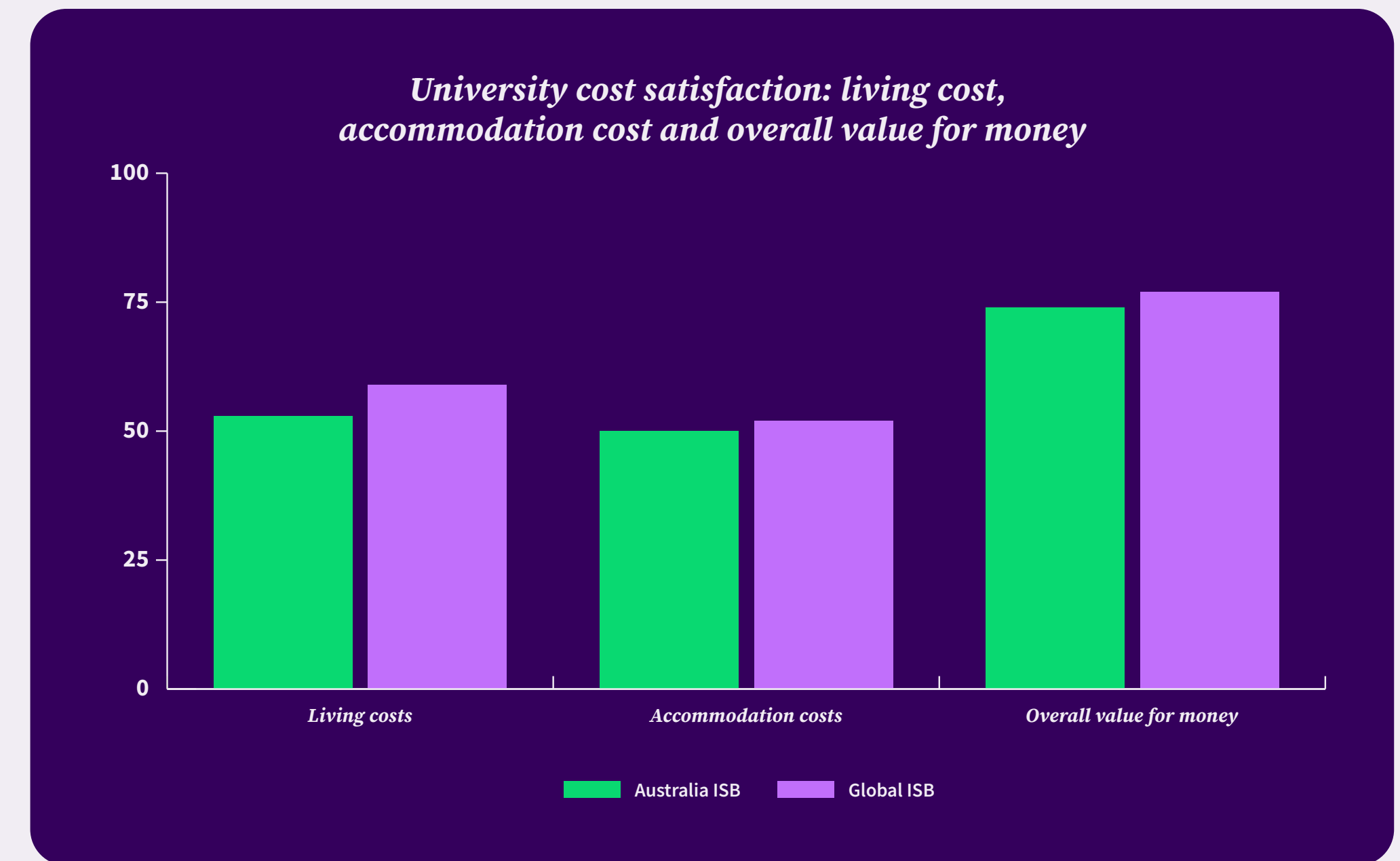
The findings from the ISB underscore the importance of equipping agents with the necessary tools to effectively advise students in their decision-making process. In light of the substantial number of students relying on agents to choose their university, investing in this partnership becomes essential for universities to remain competitive in attracting and assisting international students.



Value for money: Meeting Challenges Head-On

While Australia boasts excellence in various aspects, challenges arise concerning accommodation and living costs. With the ongoing cost of living crisis, relatively high interest rates, and escalating rent levels in major cities, it's understandable that satisfaction scores regarding living costs and accommodation expenses are lower among students. Nonetheless, it's imperative for the Australian education sector to ensure that the overall value proposition remains financially competitive and offers value for money.

Specifically, 58% of students expressed satisfaction with their living costs, and 51% were satisfied with their accommodation expenses, making this a lower 3% and 4% score from the global average, respectively. These factors may significantly influence the 74% of students in Australia who reported satisfaction with the perceived overall value for money, a figure that stands 7% below the global benchmark.



Etio is represented in Australia by Edified. Edified is a specialist research, consulting and delivery company focused exclusively on the education industry consultancy. Edified is dedicated to assisting education providers and promoters globally, to significantly improve their ability to build their brand and reputation, acquire and retain students, and deliver outstanding student/graduate success.



www.edified.com.au

Regional focus

New Zealand

Kyla Steenhart, Director - Performance Benchmarking (New Zealand)



Overall satisfaction

89%

overall satisfaction

In line with global benchmark

76%

would recommend their institution

4% below global benchmark

11

Net Promoter Score

Global benchmark = 17

77%

agree their current programme is good value for money

4% below global benchmark

Throughout the COVID period, unlike many countries where there were notable falls in international student satisfaction, satisfaction with the New Zealand university experience remained high. New Zealand’s International Student Barometer (ISB) results compared well against the global benchmark and generally remained similar to pre-COVID satisfaction levels, a reflection of much hard work undertaken by institutions.

As indicated in i-graduate’s 2023 Global Student Experience report, international student satisfaction globally has rebounded significantly as normality has returned (or in some cases a new normality has been established) post-COVID. With a very strict COVID response, New Zealand’s borders opened later than most other countries. 2023 – the first full academic year that international students were able to re-enter the country – was the first time since mid-COVID that New Zealand universities ran the ISB, so it is particularly interesting to see how New Zealand’s results compare.

At a sector level, overall, satisfaction amongst international students at New Zealand universities remains high and relatively steady. With the recovery in satisfaction globally, however, high-level results are now generally in line with the global benchmark or, in some cases, slightly below.

Some key points of interest from the 2023 New Zealand ISB are set out across.

	2023 New Zealand ISB	Global ISB
Overall satisfaction	89%	89%
Overall arrival satisfaction	89%	91%
Overall learning satisfaction	89%	89%
Overall living satisfaction	87%	86%
Overall support satisfaction	86%	88%

Important factors when choosing where to study

For new international students at New Zealand universities, the same things are most likely to be important when deciding where to study as in previous years: the impact of their qualification on their future career (95% of students said this was important or very important), the quality of research (important or very important to 95% of postgraduate students), personal safety and security (94%), and the reputation of a qualification from their university (93%). In 2023 for the first time, however, cost of living has made it into the top five most important factors (93%).

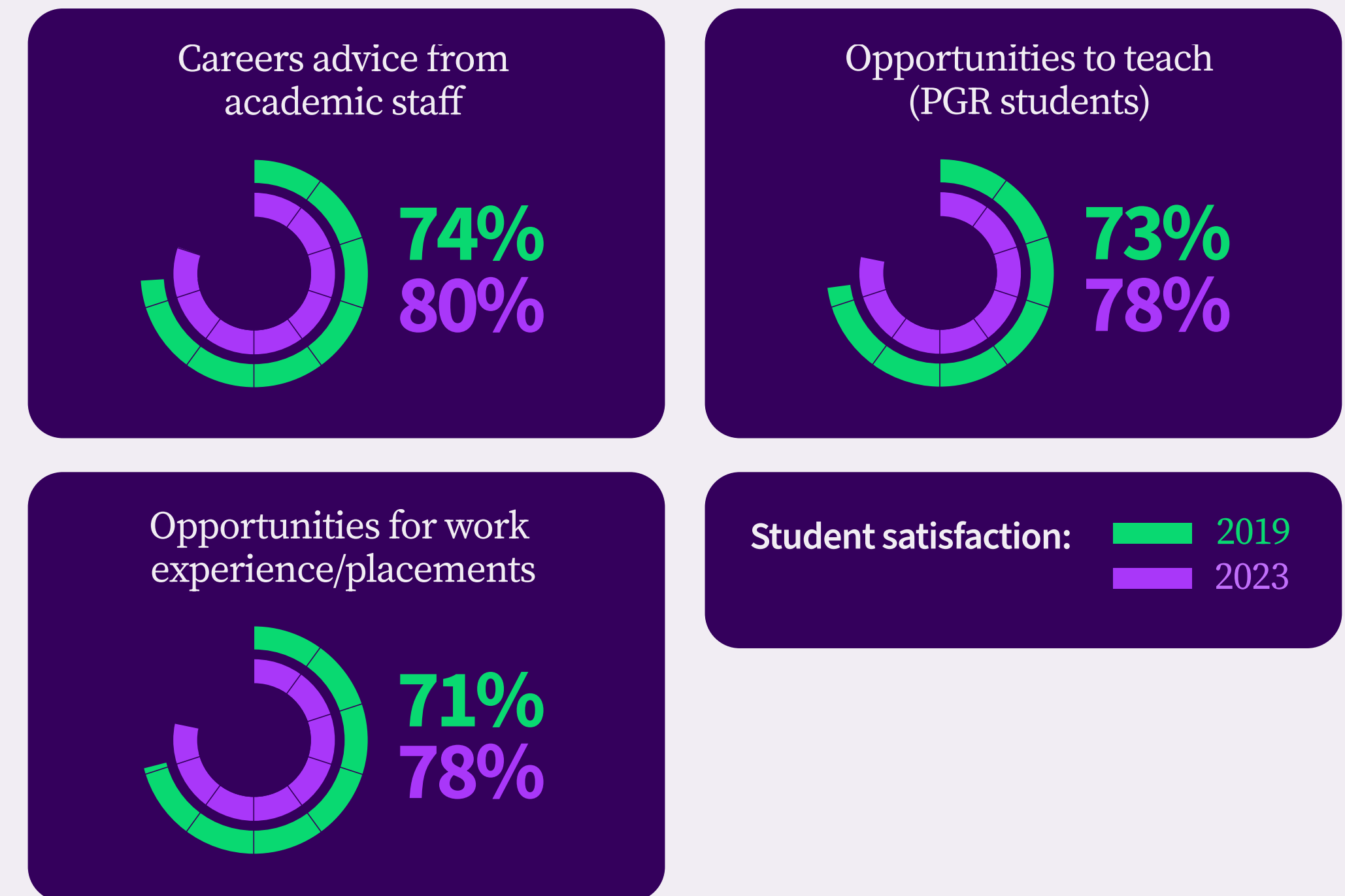
While maybe linked to New Zealand’s relatively recently opened borders, interestingly, ease of getting a visa had increased considerably in importance for international

students in New Zealand (88%, up from 79% in 2019³²). Likely connected at least in part to sample composition, the visa process is notably more important for international students in New Zealand than international students globally, although similar to Australia. The importance of opportunities for permanent residence has also increased since 2019 (80%, up from 70% in 2019) and is of more importance to international students in New Zealand (and Australia) than globally. The relative importance of both of these factors may be of interest in light of the new New Zealand government's proposed plan to revive New Zealand's international education sector.

Employability

Positively, considering the importance of employability and future career plans, satisfaction amongst international students at New Zealand universities has increased notably since 2019 with careers advice from academic staff (80% satisfied or very satisfied, up from 74% in 2019), opportunities for work experience/work placements as a part of their studies (78%, up from 71%), and, amongst postgraduate research students, opportunities to teach (78%, up from 73%).

New Zealand universities perform strongly on a number of elements of employment/careers support, with international students in New Zealand more likely than international students globally to be satisfied with support from their university on helping to produce their CV and helping with job applications (80% satisfied



³² 2019 is used as a comparison due to the unusual circumstances in 2021 due to COVID.

or very satisfied) and with advice (guidance on career paths and career choices) (77%). Overall, international students in New Zealand are slightly more likely than international students globally to feel that their university experience has made them feel prepared or very prepared for their career goals (82% v 79%).

Access to suitable accommodation

Against a global background of challenges in this area, access to suitable accommodation for international students is currently a key strength for New Zealand universities: 83% of students in New Zealand satisfied or very satisfied compared to 76% globally. Of course, this may well be related to the relatively low number of international students in New Zealand (although in 2019 New Zealand was also 5% above the global benchmark) so it will be interesting to see if this changes over coming years as the market rebounds.

Making local friends and feeling welcome and safe

Another area of strength for New Zealand is international student satisfaction with making local friends. While slightly lower than in 2021 when lower onshore international student numbers and a COVID-inspired sense of solidarity may have contributed to the environment, 77% of international students at New Zealand universities were satisfied or very satisfied with making friends from New Zealand, 5%

above the global score and a positive result for New Zealand against the ‘international students are welcome and safe’ aspect of Goal 1 of the country’s International Education Strategy.

In addition, the vast majority of international students at New Zealand universities are satisfied with feeling safe and secure on campus (95%), feel there is a friendly attitude towards international students at their institution (94%), feel there is a friendly attitude towards international students at the city/location where their institution is based (91%) and feel welcome as an international student in New Zealand (90%).

Cost of living

ISB results show that satisfaction with cost of living has fallen globally amongst international students in recent years. However, in 2023, just 50% of international students at New Zealand universities were satisfied or very satisfied with the cost of living (food, drink, transport and social), 11% below the global satisfaction score.

Satisfaction with the cost of accommodation (55%) is in line with the global score, and international students in New Zealand are actually slightly more satisfied than international students globally with the availability of financial support (59%, although down from 64% in 2019) and the opportunity to earn money while studying (66%).

However, with lower feelings of value for money from their programme amongst

international students at New Zealand universities (77%) than globally (82%), and cost of living now amongst the most important factors when choosing where to study, cost of living is clearly a challenge – and a difficult one at that – for New Zealand.

Satisfaction with visas and education agents

As noted above, ease of getting a visa is more likely to be important for international students in New Zealand than students globally and was notably more important in 2023 than in previous waves.

Satisfaction with the visa process, however, was comparatively low in 2023, with international students less satisfied than international students globally – and international students in Australia – with time taken to process their visa (9% below global), service levels from visa office staff in their home country (7% below global), and support from their institution with their visa application process (6% below global). While satisfaction will undoubtedly be impacted in some cases by lingering COVID disruptions, this is an important area to keep an eye on.

Satisfaction with education agents was also below the global and Australian benchmarks for international students in New Zealand, particularly in terms of feeling that the agent reduced their overall costs (9% below), provided helpful pre-departure orientation services (6% below), and was well informed about higher education in this country (6% below)

Recommendation

Another area for New Zealand to monitor is students' likelihood to recommend their university. Recommendation scores for New Zealand in terms of international students encouraging others to apply here (76%) and the Net Promoter Score (NPS)³³ (11) have stayed steady since 2021 but remain down slightly from pre-COVID levels. And, importantly, they are below global benchmarks (80% and 17 respectively).

Of course, like all ISB results, there is variation between institutions and by different groups of students. Indian students, for example, have higher propensity to recommend – 82% would encourage people to apply there and their NPS is 32; this strong NPS amongst Indian students is a pattern also seen at a global level. First year students too, are more likely than those in subsequent years to recommend their institution. This is also seen in global results and is worth understanding further.

Verbatim comments are extremely valuable for understanding students' scores. Analysis of these shows that reasons for lower likelihood of recommending their university in New Zealand tend to be institution-specific rather than overarching sector-wide reasons.

³³ The NPS is a market research metric based here on a question that asks students to score on a scale from 0 (Not at all likely) to 10 (Extremely likely), 'How likely is it that you would recommend this university to family or a friend?' The NPS is calculated by subtracting the proportion of Detractors (those scoring 0-6) from the proportion of Promoters (those scoring 9 or 10).

Closing thoughts

This article provides a brief summary of a selection of key points from the 2023 ISB in New Zealand, taken from our comprehensive data set which looks at every aspect of the student journey. Once again, overall, the survey provides a generally positive set of results for New Zealand, although with satisfaction globally having recovered from COVID times, New Zealand is no longer in the standout position it was in 2021 with global ISB scores now back in line with New Zealand on most elements. While data highlights some challenges for New Zealand at a sector level, the detailed insight provided by the ISB continues to help institutions address these to ensure an optimal international student experience and to assist with the recovery of the international education sector in New Zealand.



ISB results New Zealand - at a glance

New Zealand overall

Highest levels of satisfaction

97%

Library service

96%

Submitting work remotely

95%

Faith provision

New Zealand overall

Lowest levels of satisfaction

50%

Living cost

55%

The cost of accommodation

59%

Financial support

New Zealand vs global benchmark

Largest positive variance

+8%

Access to suitable accommodation

+5%

Making friends from this country

+5%

Introduction to clubs and societies

New Zealand vs global benchmark

Largest negative variance

-11%

Living cost

-9%

Time taken to process visa

-9%

Agent reduced overall costs

Regional focus

North America

Nannette Ripmeester, Director - Performance Benchmarking (North America and Europe)



US

Overall
satisfaction

92%

3% above the
global benchmark

(NPS) NET
Promotor
Score

39

Benchmark = 19

Value for
money

87%

5% above the
global benchmark

Canada

Overall
satisfaction

88%

1% below the
global benchmark

(NPS) NET
promotor
score

19

Benchmark = 19

Value for
money

78%

4% below the
global benchmark

Looking at ISB’s results in North America, the participating institutions once again score above the Global ISB benchmark in most categories. This is particularly evident regarding the Net Promoter Score (NPS³⁴) for American universities, which has not only increased from 32 to 39 but also exceeds the Global ISB by an incredible 20 points. Similarly, Canadian Universities have an NPS of 24, scoring three points higher than the previous year. Furthermore, the overall satisfaction of international students studying in the US has remained steady at 92% since last year, scoring above the global benchmark of 89%, as well as above the Canadian benchmark where international students rated their overall satisfaction at 88%. These satisfaction levels are mirrored in the category of ‘Value for money’, where US institutions score 87% compared to the Global ISB of 82%, while Canadian institutions rate at 78%.

What impacts study choice?

When it comes to students choosing their institutions, the US ISB benchmark shows three main reasons, all tying at 96%: ‘Future career impact’, ‘Specific program title’ and ‘University reputation’, followed by ‘Earning potential’ (95%) and ‘Country reputation’ (94%). The Canadian ISB similarly shows ‘Future career impact’ (95%) as the highest-scoring reason, showing once again, that employability continues to be a pivotal consideration for most students, underscoring the significance of the

Top influencing factors on institution choice			
US		Canada	
Future career impact	96%	Future career impact	95%
Specific course/program title	96%	Specific course/program title	94%
University reputation	96%	Cost of living	94%
Earning potential	95%	Earning potential	94%
Country reputation	94%	Country reputation	94%

institution’s role in shaping future careers. International students in Canada next mentioned ‘Specific program title’, ‘Cost of living’, ‘Earning potential’ and ‘Country reputation’ all at 94%, showing that the factors influencing international students’ study choice varies somewhat between the US and Canada. Institution reputation seems to be more important for international students opting for the US market, but the country’s reputation meaningfully matters for both markets.

³⁴ The Net Promoter Score(NPS) looks at score an institution received from their students. Students that give a score of 6 or below are classified as Detractors, those that give a 7 or 8 are classified as Passives, and those that give a 9 or 10 are Promoters. To calculate the Net Promoter Score, we subtract the percentage of Detractors from the percentage of Promoters, providing a number as NPS.

Managing expectations

The North American ISB outperforms the Global ISB benchmark when it comes to satisfaction regarding career support and services with 84% against 80%. However, an interesting observation can be made since international students in North America seem to have different expectations towards the offered career services. For instance, while the Global ISB shows ‘Advice’ at 60% as the highest-ranking expectation, international students based in the US prefer ‘Training’ (69%), while the Canadian benchmark stands highest at 68% for ‘Placement’. These differences in expectations in North America may be due to the nationality groups represented in that benchmark with a strong presence of Indian students. Managing expectations seems key advice here to ensure students know upfront what type of career support they can expect. At the Canadian Nova Scotia Community College, it is “employability front and centre”, says International Director Katie Orr:

“The top goal of NSCC is to ensure that students have the skills, expertise, and the preparation to enter the labour market, which is tight in Canada, despite there being a national skills shortage. Nova Scotia is a relatively small province, and arguably not as internationalised as big city areas like Toronto, Montreal and Vancouver - international students still have challenges landing jobs in their chosen profession, so helping and mentoring them to successfully enter the labour market is particularly key for the college.”³⁵

Mental health matters

Overtime we have seen the importance attached to mental health grow. Younger generations seem more aware of the importance of mental health and (dare to) ask for support here. The US benchmark did well in the ‘Mental health support’ category compared to the Global ISB. While Canada also achieved a higher score with 71%, compared to the Global ISB of 70%, the American HEIs managed to reach a high 78% of students who feel comfortable asking for mental health support. A good sign, also as North American institutions have some catching up to do when it comes to inclusivity. For all 6 measurements around the experience of discrimination, the North American benchmark underperformed in a global comparison.

³⁵ https://info.i-graduate.org/case_study/informing-resourcing-decisions-with-the-isb-at-nova-scotia-community-college

Connecting post-pandemic

Connecting with others seems even more a struggle for young people post-pandemic. More students feel either isolated or struggle to make connections with other students, either from their country, or with domestic students.

“It’s something we take very seriously - we have taken some very concrete, specific steps to develop new forms of connection among students and specifically innovative forms of connection through social media. So, rather than trying to get people to sit in rooms and eat pizza together, we are successfully implementing new ways of using social media and communication tools to facilitate students connecting with each other, and to reduce feelings of isolation. We hope to see student feedback in the next ISB survey reflect our efforts in this area.”

Chad Hoseth, Assistant Vice Provost of International Affairs at Colorado State University.³⁶



³⁶ https://info.i-graduate.org/case_study/the-benefits-of-meaningful-analysis-of-the-student-experience-at-colorado-state-university



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