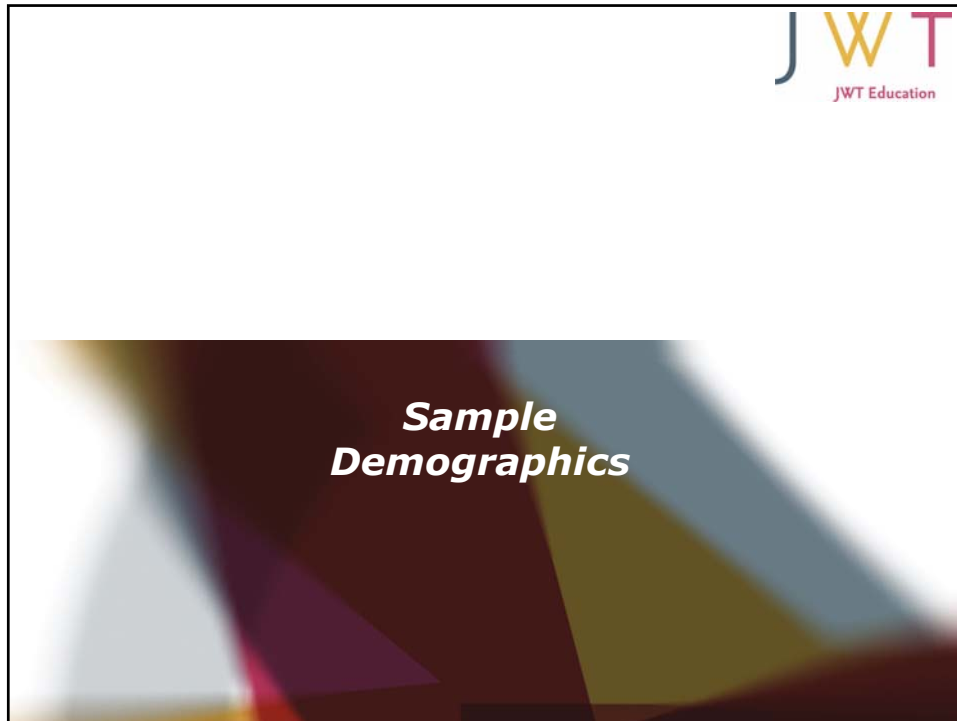


The image shows a slide titled "Introduction" with a red underline. The slide contains a list of five bullet points. In the top right corner, the JWT Education logo is displayed, consisting of the letters "J", "W", and "T" in a stylized font, with "JWT Education" written below them.

Introduction

- The Asian Student of 2005 examines the attitudes and perceptions of Asian undergraduate students from the 10 major source countries.
- This is a follow-up to similar studies conducted in 2000 and 1997.
- The study explores issues including when decisions are made, how information is sourced, key selection criteria, standards of education and influencing factors.
- Research was conducted with Asian first and second year undergraduate students studying in Australia and the UK.
- Students were studying across a wide range of universities from the traditional to the new, metropolitan and regional.



The image shows the JWT Education logo in the top right corner. On the left side, the text 'Nationality of Students' is written in a bold, dark blue font, with a red horizontal line underneath. To the right of this text is a table titled 'Country of permanent residence'. The table has four columns: 'Country of permanent residence', 'Overall', 'UK', and 'Aust'. The rows list various countries and a 'Sample size' row at the bottom.

	Overall	UK	Aust
China	17%	19%	16%
Malaysia	15%	19%	14%
India	12%	19%	9%
Hong Kong	11%	16%	9%
Singapore	8%	6%	9%
Thailand	7%	5%	9%
South Korea	7%	4%	9%
Japan	7%	5%	9%
Taiwan	7%	5%	8%
Indonesia	7%	3%	8%
Sample size	519	155	364

**Australian
International HE
Market**



**International Enrolments by
Leading Source Countries**

	2002	2003	2004	2005	% Growth	
					02-05	04-05
China	16,269	22,549	30,203	40,055	146.2%	32.6%
India	8,867	12,291	17,850	22,263	151.1%	24.7%
Malaysia	13,575	15,436	15,894	15,374	13.3%	-3.3%
Hong Kong	8,374	10,164	10,970	10,707	27.9%	-2.4%
Indonesia	11,437	11,379	10,541	9,540	-16.6%	-9.5%
Singapore	10,430	10,182	9,226	8,348	-20.0%	-9.5%
South Korea	3,673	4,478	4,974	5,375	46.3%	8.1%
Thailand	4,955	5,666	5,719	5,248	5.9%	-8.2%
Taiwan	3,881	4,104	4,166	3,966	2.2%	-4.8%
Bangladesh	2,043	2,769	3,371	3,655	78.9%	8.4%
Japan	2,643	2,944	3,265	3,472	31.4%	6.3%
Total Australia	116,232	135,676	151,285	163,911	41.0%	8.3%

**Age and Gender
of Students**



Age

	Overall	UK	Aust
Under 18	1%	1%	1%
18 - 21	60%	69%	57%
22 - 25	32%	21%	37%
26 - 29	4%	5%	4%
30 - 33	2%	3%	1%
Over 33	1%	1%	1%
Sample size	519	155	364

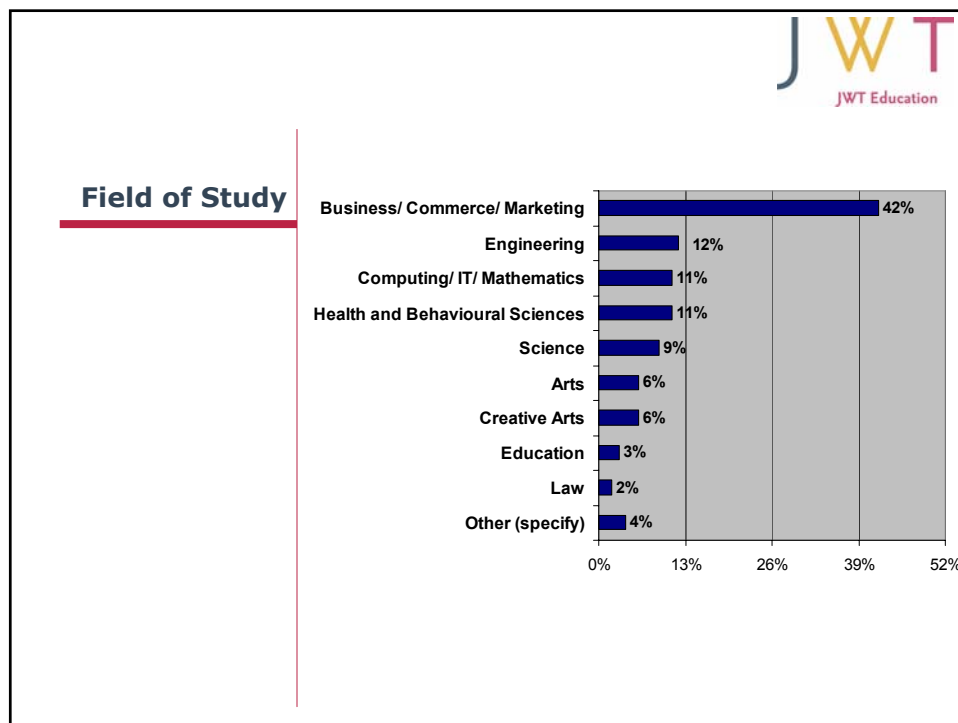
Gender

	Overall	UK	Aust
Female	51%	51%	51%
Male	49%	48%	49%
Sample size	519	155	364

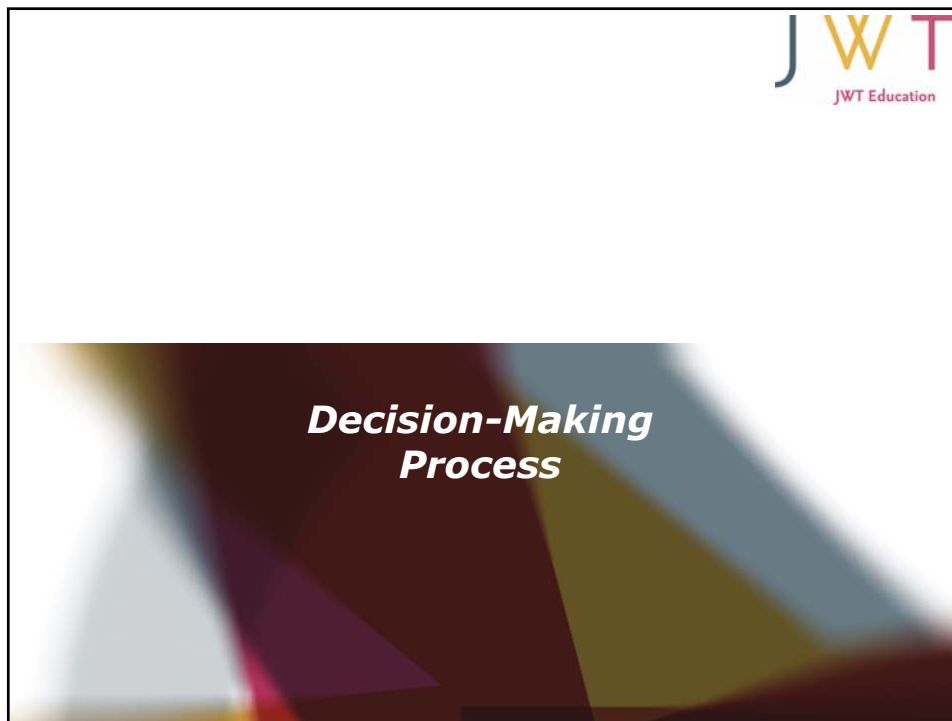
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Field of Study

	Overall	UK	Aust
Business/Commerce/Marketing	39%	31%	42%
Computing/IT/Mathematics	12%	8%	13%
Engineering	11%	8%	13%
Science	10%	14%	8%
Health and Behavioural Sciences	8%	3%	11%
Arts	6%	5%	6%
Creative Arts	5%	3%	6%
Education	4%	2%	5%
Law	3%	6%	1%
Other	10%	23%	4%
Sample size	519	155	364



International Enrolments by Field of Study					JWT JWT Education	
	2002	2003	2004	2005	% Growth	
					02-05	04-05
Business Administration, Management	43,120	51,105	58,251	66,305	53.8%	13.8%
Computer Science, Information Systems	22,729	23,960	24,761	23,631	4.0%	-4.6%
Engineering, Surveying	9,971	12,068	13,675	14,085	41.3%	3.0%
Arts, Humanities and Social Sciences	10,371	11,755	12,341	12,533	20.8%	1.6%
Economics	4,151	5,697	6,440	7,075	70.4%	9.9%
Science	3,798	4,649	5,006	5,360	41.1%	7.1%
Visual and Performing Arts	2,997	3,558	3,964	4,112	37.2%	3.7%
Education	2,072	2,710	3,273	3,818	84.3%	16.7%
Medical Science, Medicine	2,075	2,693	3,217	3,651	76.0%	13.5%
Services, Hospitality, Transport	1,902	2,421	3,016	3,608	89.7%	19.6%
Architecture, Building	2,678	2,981	3,163	3,311	23.6%	4.7%
Nursing	1,222	1,510	2,080	2,886	136.2%	38.8%
Health, Community Services	1,449	1,692	2,049	2,536	75.0%	23.8%
Physical Sciences	2,093	2,291	2,347	2,362	12.9%	0.6%
Law, Legal Studies	1,607	1,896	1,983	2,080	29.4%	4.9%
Multi-Field Education	705	851	1,067	1,310	85.8%	22.8%
Life Sciences	986	943	1,131	1,234	25.2%	9.1%
Language Studies	504	724	966	1,132	124.6%	17.2%
Pharmacy	487	639	786	907	86.2%	15.4%
Land and Marine Resources, Animal Hus	514	600	740	812	58.0%	9.7%
Veterinary Science	302	376	421	518	71.5%	23.0%
Mathematics	302	301	317	325	7.6%	2.5%
Dental Services	197	256	291	320	62.4%	10.0%
Total	116,232	135,676	151,285	163,911	41.0%	8.3%



Reasons for Choosing to Study Overseas Rather than Undertaking a Local Degree



Up from 28%

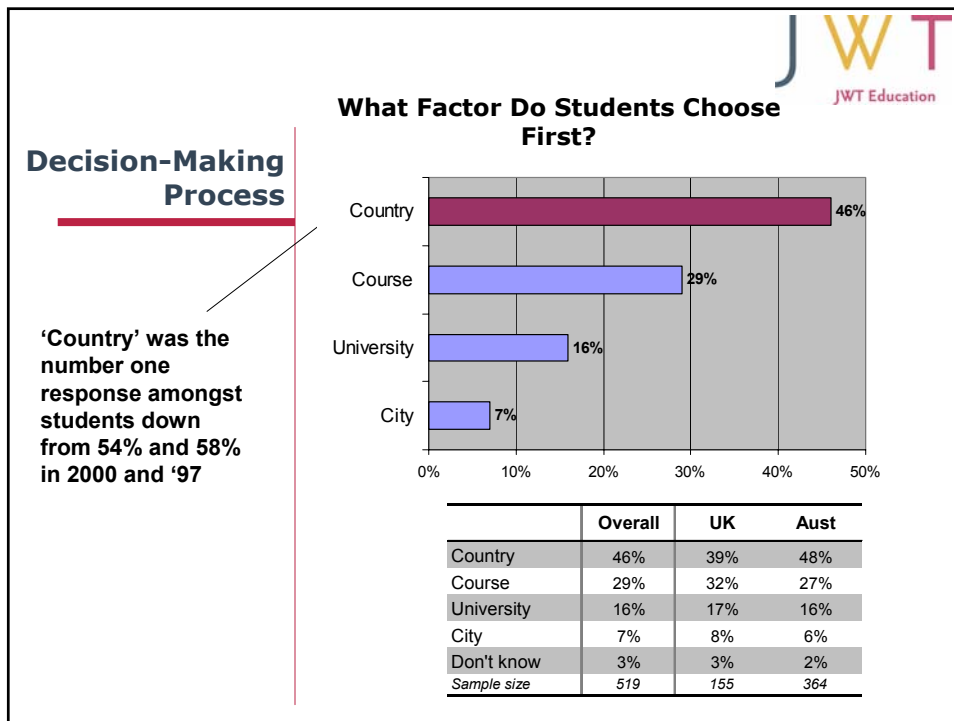
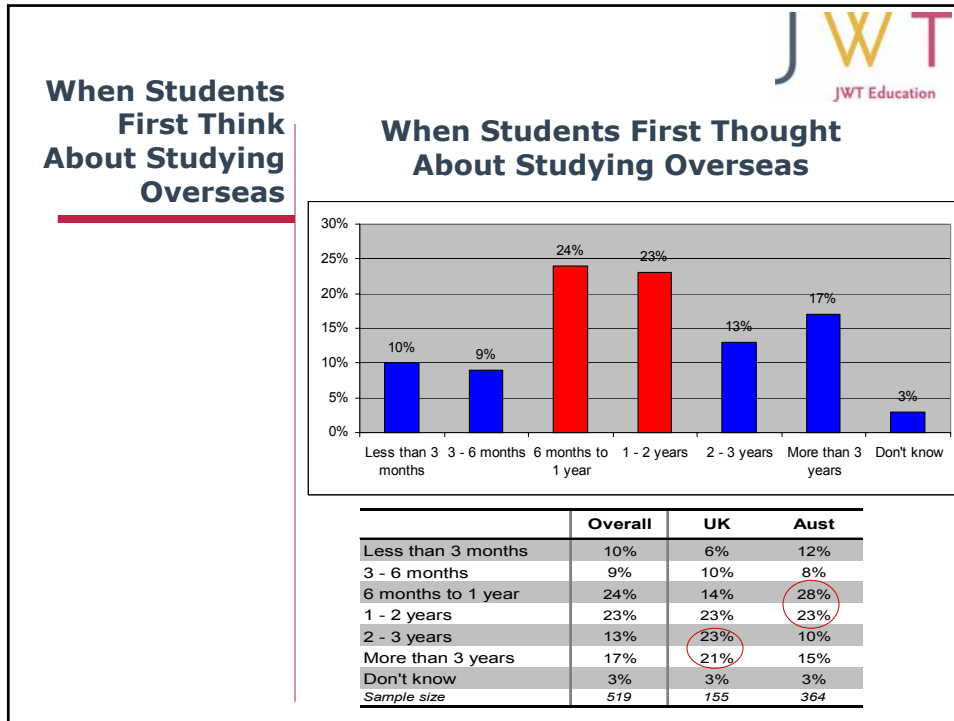
	Overall	UK	Aust
Better quality of education overseas	40%	46%	37%
Wished to broaden experience	27%	30%	26%
Wanted the experience of living overseas/cultural experience	27%	23%	28%
To improve career prospects	14%	16%	14%
Family wanted me to study overseas	14%	15%	13%
Overseas qualifications are more highly respected/ have a better reputation	14%	17%	12%
Particular course wanted to study not offered in own country	11%	12%	10%
Improve English/language environment	10%	8%	10%
Previously studied overseas	6%	12%	4%
Unable to obtain a university place in own country	5%	1%	6%
Intend to become permanent overseas resident	5%	5%	5%
Obtained scholarship overseas	4%	8%	2%
Other	10%	4%	12%
Sample size	519	155	364

When Students First Think About Studying Overseas



Did Students First Think About Studying Overseas while They were Still in School?

	Overall	UK	Aust
Yes	87%	90%	86%
No	11%	7%	13%
Don't know	2%	3%	1%
Sample size	519	155	364





How Long it Took to Determine which Country to Study in, from the Time They First Started to Consider Overseas Study

	Overall	UK	Aust
I immediately knew the country in which I wanted to study	26%	31%	24%
Within a month of considering overseas study	14%	16%	13%
1 - 3 months from the time I began considering overseas study	23%	21%	24%
3 - 6 months from the time I began considering overseas study	20%	11%	24%
6 - 12 months from the time I began considering overseas study	8%	9%	8%
More than a year from the time I began considering overseas study	6%	10%	5%
Sample size	519	155	364



Time it Took to Choose a University

From the Time Students Selected a Destination Country, the Length of Time it Took to Choose a University

	Overall	UK	Aust
I knew the institution where I wanted to study	16%	12%	18%
Less than a month	27%	26%	27%
1 - 3 months	31%	29%	32%
3 - 6 months	14%	13%	15%
6 months to 1 year	7%	12%	4%
More than 1 year	4%	5%	4%
Sample size	519	155	364

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Decision-Making Process

Most Important Factors when Considering a Country for Overseas Study

	Overall	UK	Aust
Quality of education/ university	58%	77%	50%
Cost of undertaking study/ value for money	43%	19%	54%
Safe place to study	17%	14%	18%
Presence of relatives/ friends	12%	13%	11%
Courses offered there	11%	17%	8%
Location of destination country	9%	9%	9%
Close to home country/ convenient to travel to from home country	8%	4%	10%
Environment	7%	2%	9%
Weather/ Climate	6%	2%	7%
People	4%	4%	5%
Ease of obtaining a student visa	4%	8%	2%
Improve English/ Language environment	4%	5%	4%
Ease of obtaining work in country after graduating	3%	4%	3%
Ease of obtaining work in country while studying	1%	1%	1%
Other	6%	6%	6%
Don't know	1%	1%	1%
Sample size	519	155	364

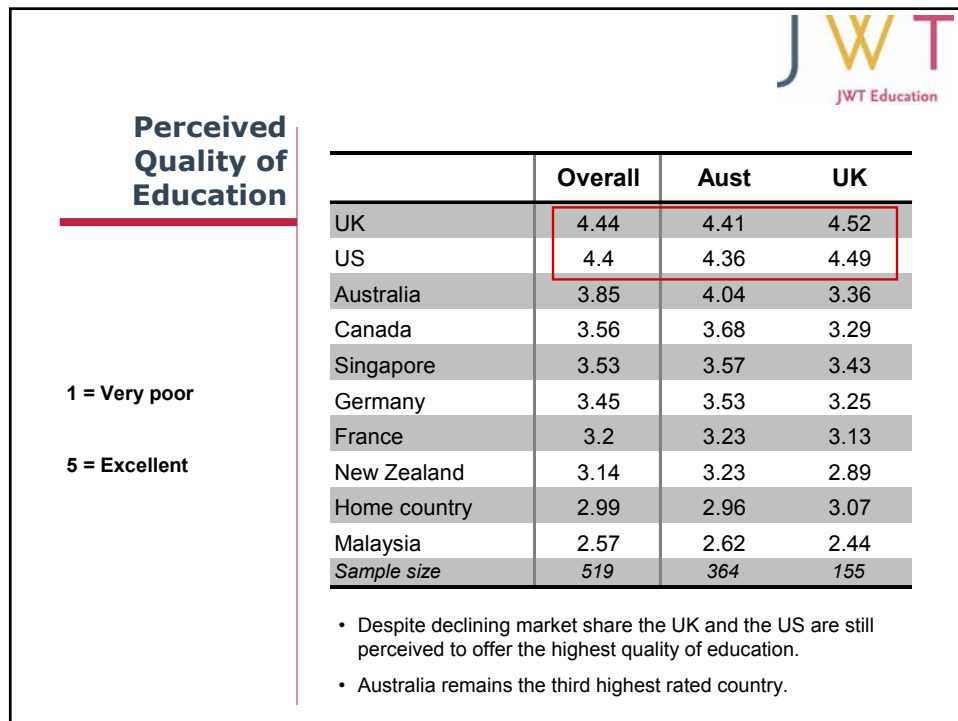
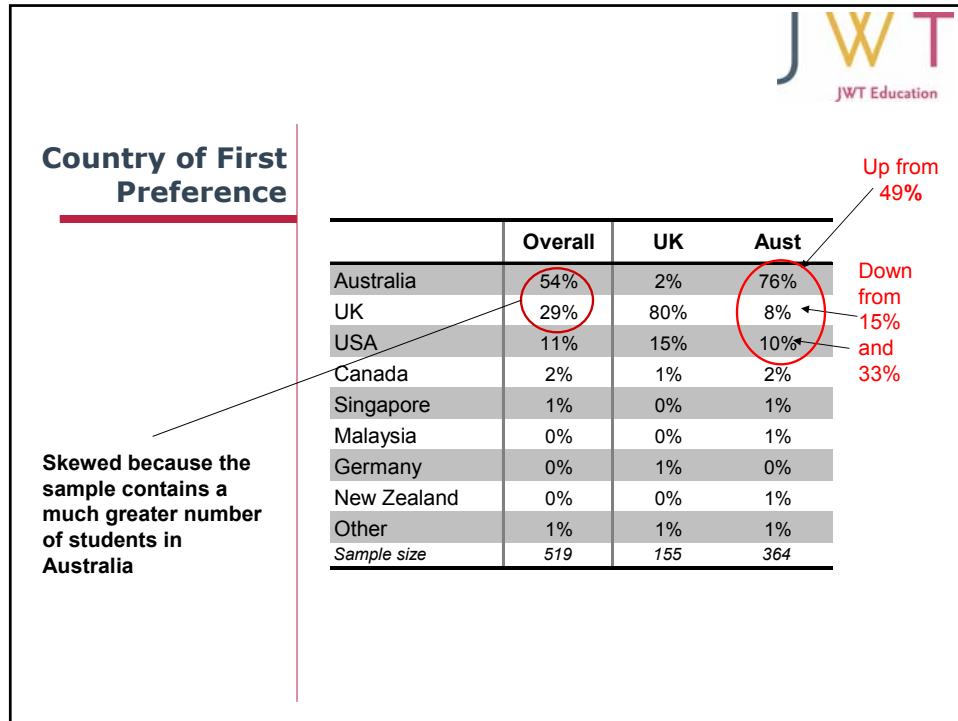
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Countries Considered for Overseas Study

More students considered Australia (20%)

More students considered the UK (26%), less the US (50%)

	Overall	UK	Aust
Australia	80%	34%	100%
UK	55%	100%	36%
USA	37%	65%	25%
Canada	14%	12%	14%
New Zealand	8%	3%	10%
Singapore	5%	3%	6%
Germany	2%	5%	1%
Malaysia	1%	0%	2%
France	1%	1%	1%
Other	5%	4%	5%
Sample size	519	155	364



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Reasons Students Said They Finally Chose to Study in a Particular Destination

	Overall	UK	Aust
Better quality of education	29%	40%	24%
Living expenses cheaper than many other countries	24%	4%	32%
Offered particular course I wanted	21%	23%	20%
Tuition fees cheaper than many other countries	16%	5%	21%
Relatives/ Friends live in this country/city	15%	14%	16%
Qualification more highly respected/high reputation of country	12%	28%	5%
Family wanted me to study here	12%	16%	10%
Relatives/ Friends study/studied there	11%	9%	12%
I wanted a country different from my home country	9%	10%	9%
Close to home country/convenient to travel to from home country	9%	3%	11%
Safe country	8%	8%	9%
It was recommended to me	7%	6%	8%
Good career prospects	6%	8%	5%
Institution where I wanted to study was here	5%	8%	4%
Offered scholarship in	5%	11%	2%
Only/first place I received an offer	4%	3%	4%
Sample size	519	155	364

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Reasons Students Ultimately Decided to Study at Their Current University

	Overall	UK	Aust
Offered particular course/qualification I wanted	40%	41%	39%
Reputation of institution as a whole	36%	47%	32%
Course/qualification highly respected in my field	18%	21%	16%
Living expenses cheaper than many other institutions	12%	6%	15%
It was recommended to me	9%	6%	11%
Good career prospects	9%	14%	7%
Convenient location/easily accessible	8%	7%	8%
Only/first place I received an offer	8%	5%	9%
Relatives/friends studying there	8%	2%	10%
Family wanted me to study here	8%	12%	6%
Relatives/friends living near	7%	6%	7%
Tuition fees cheaper than many other institutions	6%	5%	6%
Good on-campus/accommodation facilities	4%	3%	4%
Offered a scholarship here	3%	7%	1%
Number of international/Asian students	2%	5%	1%
Other	11%	8%	13%
No response	1%	2%	0%
Sample size	519	155	364



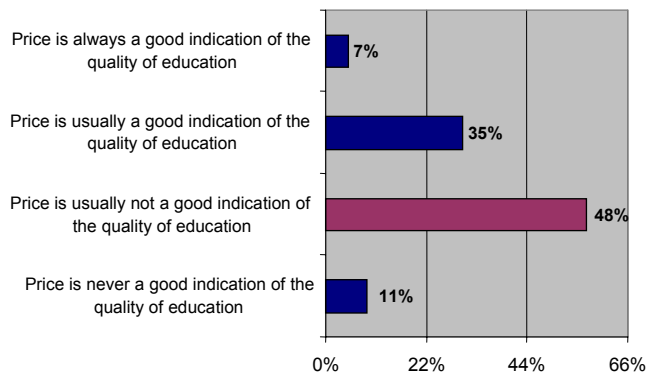
What it Means to Students for a University to have a Good Reputation...

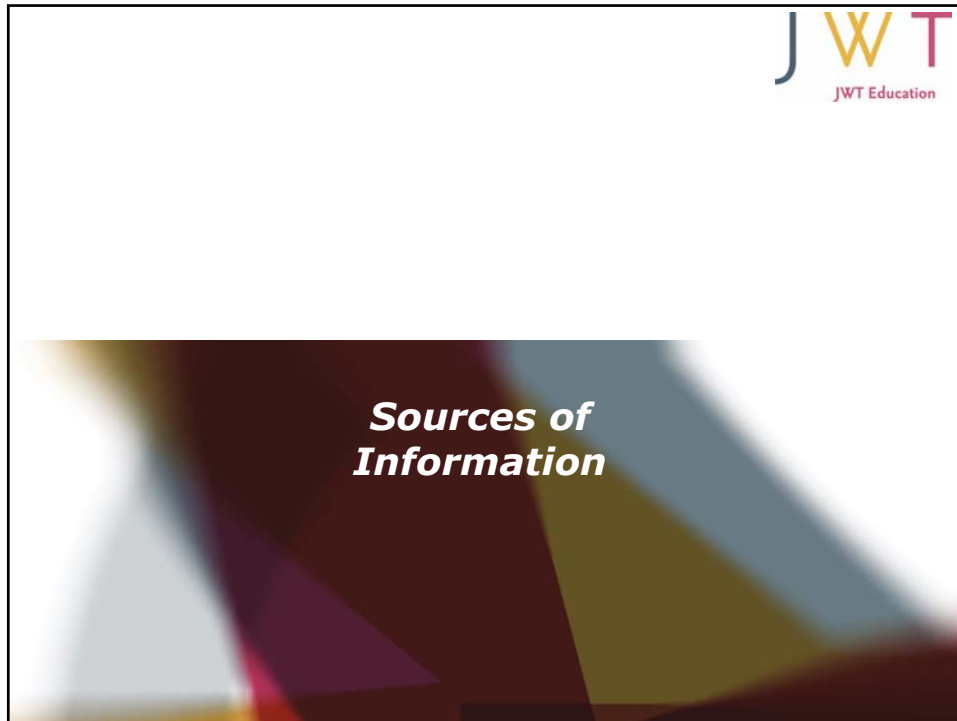
	Overall	UK	Aust
Perceived standard/quality of education	31%	37%	28%
Internationally recognised	26%	28%	25%
Its graduates find work easily	23%	22%	24%
Its name is well recognized amongst employers, peers etc.	23%	27%	21%
It has high quality lecturers	20%	22%	19%
The university is respected amongst employers, peers etc.	17%	22%	15%
Industry rankings	11%	11%	11%
Its graduates are prepared well for the working world	10%	16%	7%
It has excellent facilities	8%	14%	5%
It treats students well	6%	13%	3%
Places at the university are sought after	5%	9%	3%
It has a good research profile	4%	10%	2%
It represents value for money	3%	2%	3%
High entry requirements	2%	3%	2%
Large number of international students	2%	3%	1%
Other	5%	13%	2%
Don't know/ No response	3%	3%	3%
<i>Sample size</i>	519	155	364



Decision-Making Process

Correlation of Price and the Quality of Education



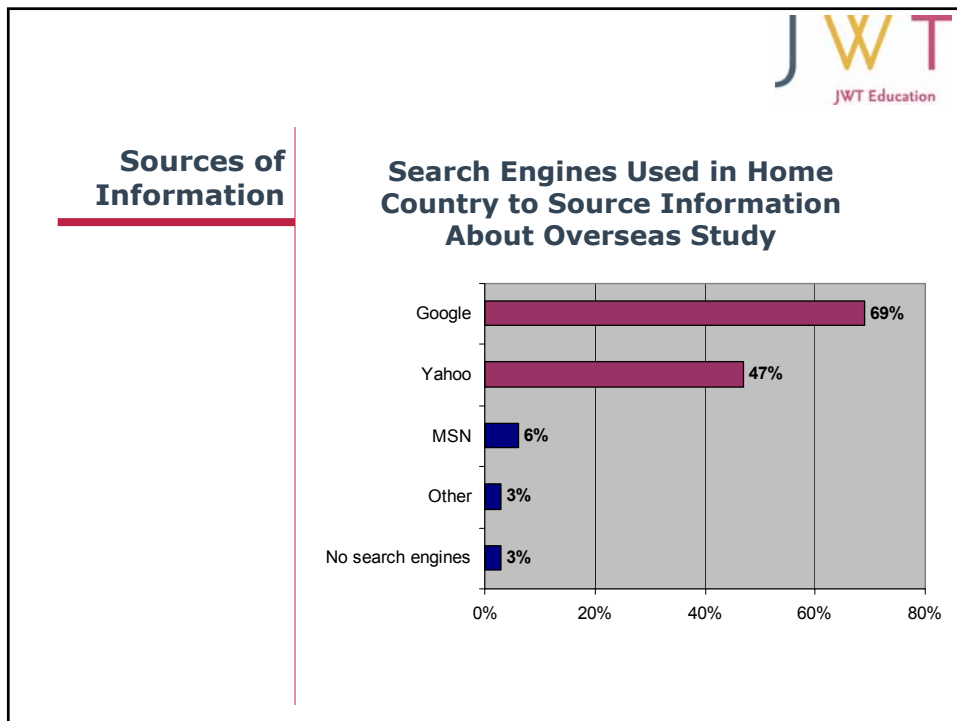
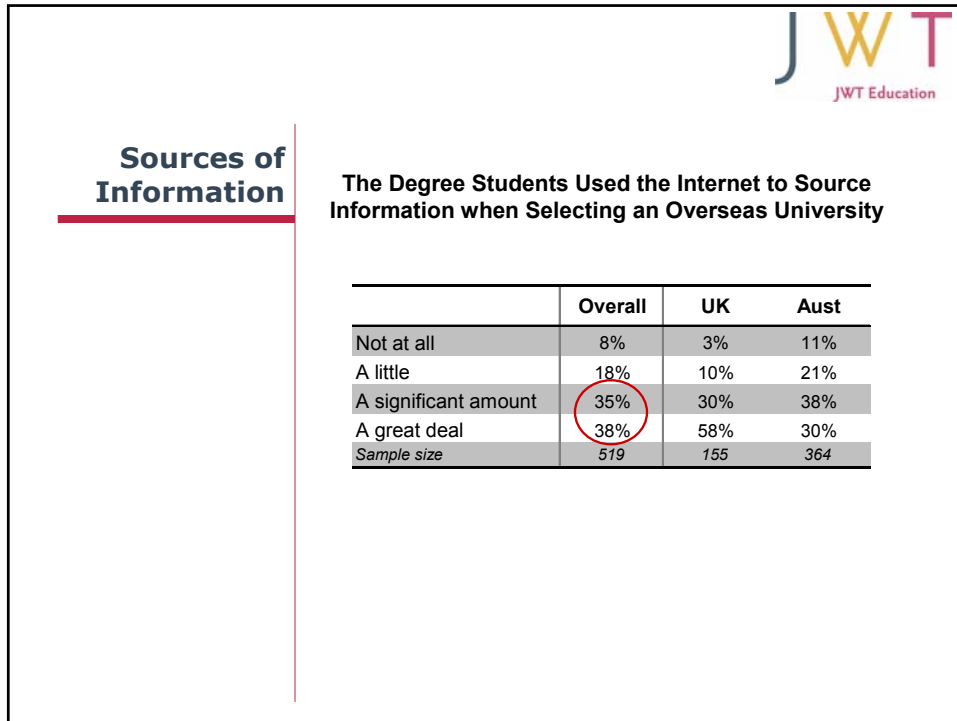


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Sources of Information

Up from 10% in 97 and 30% in 2000

	Overall	UK	Aust
Internet	69%	72%	67%
Education Agent	39%	15%	49%
Word of mouth - friends (peer group)	24%	17%	27%
Word of mouth - family	15%	14%	16%
IDP	14%	0%	20%
British Council	9%	26%	2%
School/college	9%	19%	5%
Course guide from university	7%	10%	6%
Word of mouth - teacher/careers adviser	6%	8%	5%
Exhibition/ Fair	6%	5%	6%
Publication/ Directories	5%	10%	3%
Word of mouth - alumni/former student	5%	7%	4%
Sample size	519	155	364





Sources of Funding

Main Source of Funding for Students' Current Studies

	Overall	UK	Aust
Parents	86%	76%	90%
Self	5%	5%	5%
Student/bank loan	3%	3%	3%
Scholarship - government	2%	6%	0%
Scholarship - university	2%	5%	0%
Scholarship - other	1%	3%	1%
Other family	1%	0%	1%
Scholarship - industry	0%	1%	0%
Other	0%	1%	0%
Sample size	519	155	364



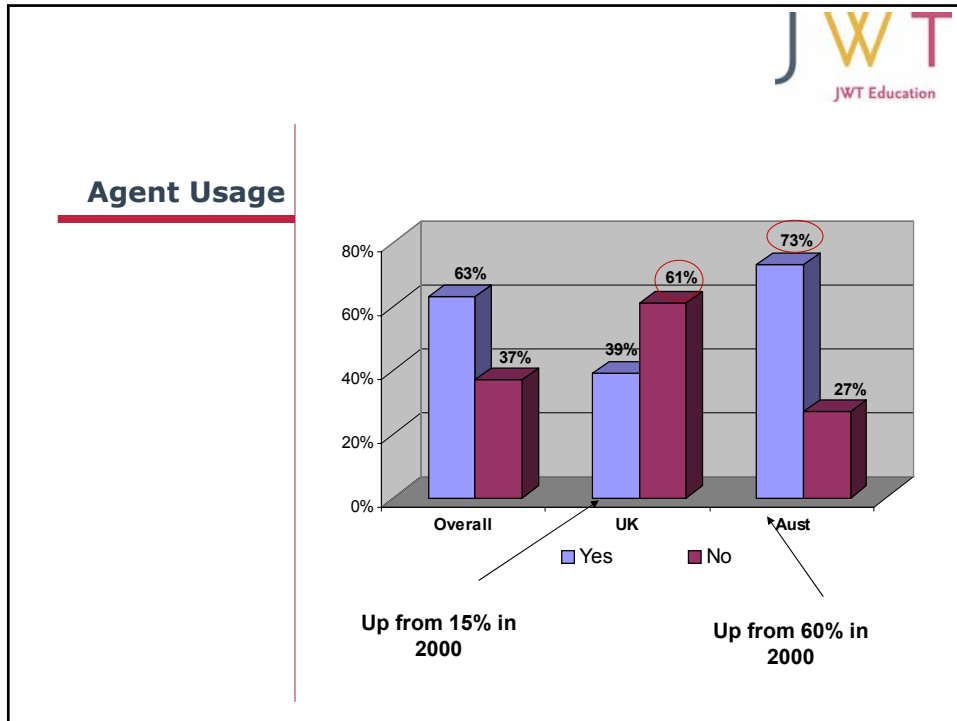
Influencers

Level of Influence Persons had on Students' Study Decisions

1 = No influence

5 = Great deal of influence

	Overall	Aust	UK
Parents	3.97	4.02	3.86
Teachers/career advisors	2.86	2.64	3.38
Friends/peers	2.77	2.73	2.88
Alumni/former students	2.5	2.43	2.65
Relatives other than parents	2.25	2.25	2.27
Agents	2.21	2.36	1.86
University representative	2.07	1.85	2.57
AEC/IDP		1.8	
British Council			2.14
Sample size	519	364	155

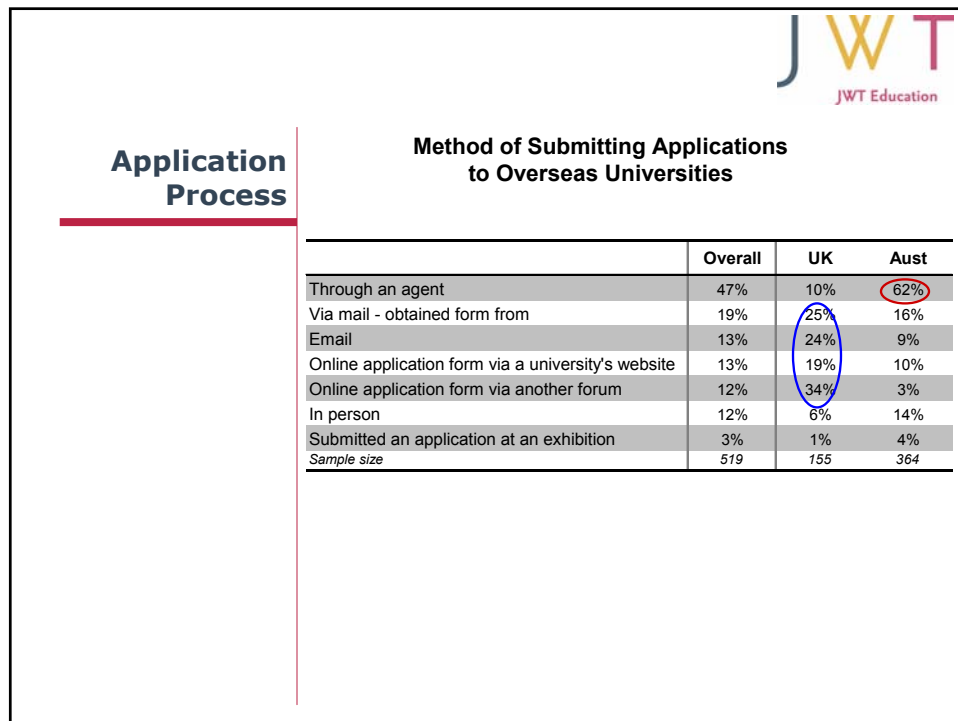
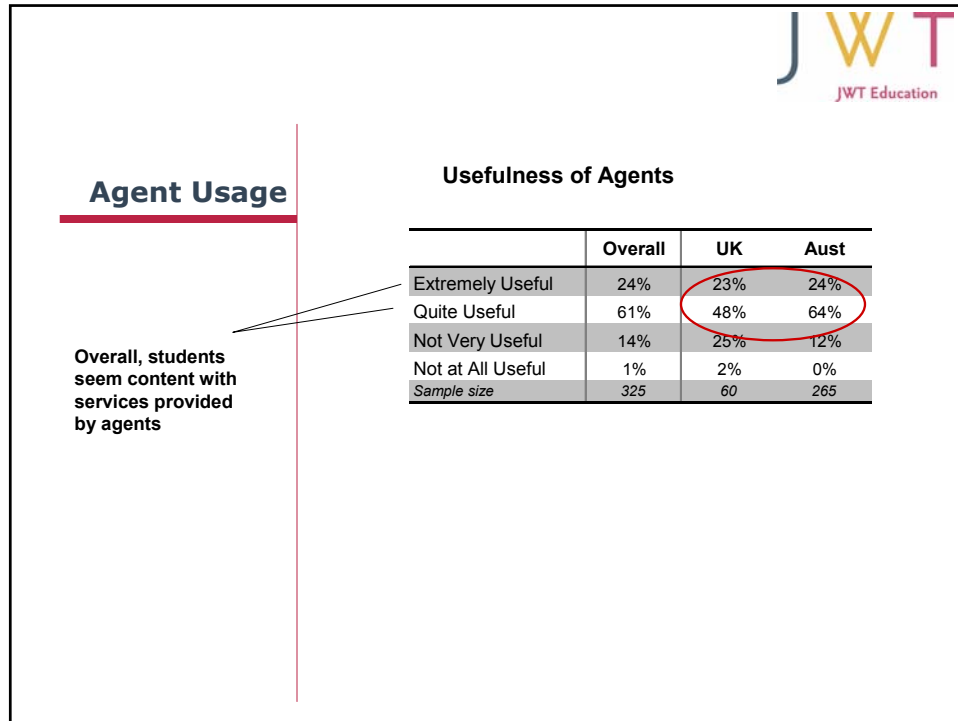


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Services Sought from Agents

Up from 51%

	Overall	UK	Aust
Submitted my application to universities	77%	48%	83%
Gave visa, accommodation advice	53%	20%	61%
Gave me information and brochures relating to universities	51%	65%	48%
Gave me advice on which universities to apply to	46%	37%	48%
Received an offer directly from an agent	26%	7%	31%
Sample size	325	60	265





Application Process

Acceptable Length of Time to Receive a Response After Applying

	Overall	UK	Aust
Less than 2 weeks	13%	14%	12%
2 weeks to 1 month	39%	36%	40%
1 - 2 months	29%	26%	30%
2 - 3 months	13%	17%	12%
3 - 4 months	2%	3%	2%
More than 4 months	3%	1%	3%
Don't know	1%	1%	1%
Sample size	519	155	364

Connection to Destination Country


Presence of Family and Friends

	Overall	UK	Aust
Friend(s) only	27%	26%	28%
Relative(s) only	20%	17%	21%
Both friends and relatives	19%	34%	13%
Neither friends or relatives	33%	21%	38%
Sample size	519	155	364

Have Previously Visited Destination

	Overall	UK	Aust
No	62%	50%	67%
Yes	37%	48%	33%
Sample size	519	155	364

Have student expectations been met?




The extent universities have met students' expectations for study

	Overall	UK	Aust
Better than expected	40%	38%	41%
Same as expected	47%	48%	46%
Worse than expected	12%	14%	12%
No comment	1%	1%	1%
<i>Sample size</i>	519	155	364

The extent destinations has met students' expectations for student life

	Overall	UK	Aust
Better than expected	47%	50%	46%
Same as expected	39%	36%	40%
Worse than expected	13%	12%	14%
No comment	1%	2%	0%
<i>Sample size</i>	519	155	364



**Consideration
of TNE**



Background

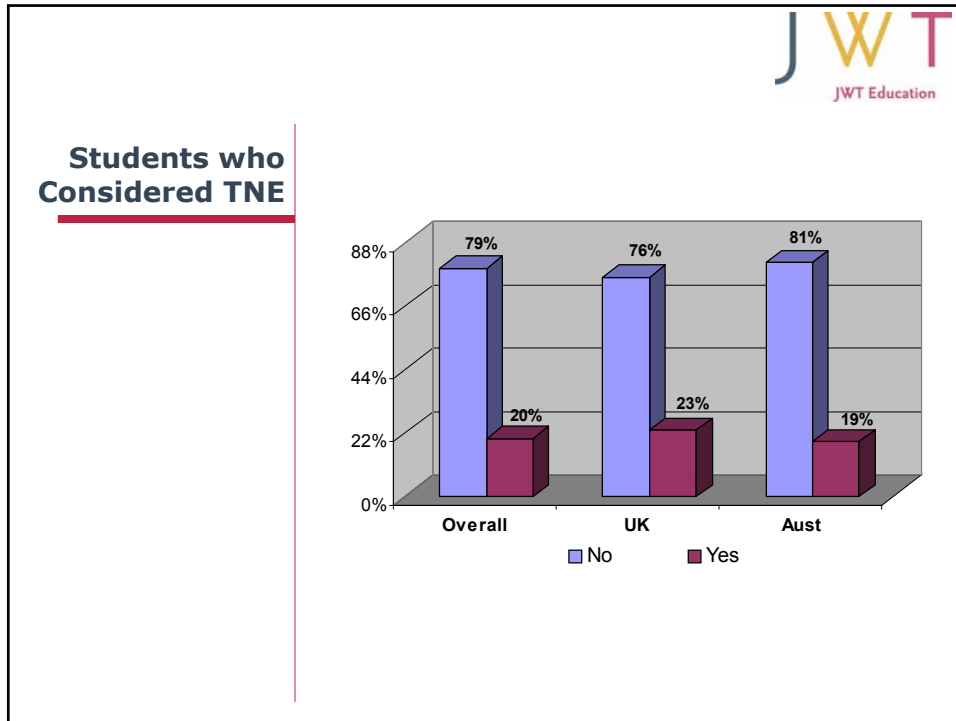
What is TNE?

- TNE refers to education provision in one country offered in another
- It does not include the traditional student recruitment market where students travel to another country for their studies.
- TNE includes a wide variety of delivery modes:
 - distance and e-learning
 - validation and franchising
 - other collaborative provision



Background

- Demand for TNE is predicted to increase significantly. By 2010, it's likely that demand will exceed that for international students seeking an overseas campus-based experience.
- One of the key reasons is the large unsatisfied demand for higher education places in Asia (China, India, Malaysia).
- Overseas governments encourage entry from foreign providers as a partial solution to this. However there are concerns with regard to quality. Many countries have set up regulatory systems for foreign/private providers and some governments do not recognise qualifications that are delivered through "distance learning" or "e-learning".
- The main providers of Anglophone TNE programmes are the UK, the US and Australia.
- Considerable discussion that increasing TNE provision is eroding the traditional market.



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Reasons Students did Not Consider TNE

	Overall	UK	Aust
Wanted to study overseas	57%	47%	61%
Not as reputable as completing a degree/education overseas	11%	12%	11%
I was not aware of any such programs	10%	8%	11%
Quality of education is superior overseas	7%	13%	5%
There are no opportunities to do so in my home country	7%	10%	5%
Other	5%	8%	3%
Don't know	3%	3%	3%
Sample size	412	118	294



Type of TNE Programme Considered

	Overall	UK	Aust
Twinning programs/Co-ops - where a local college or university offers courses from overseas universities	68%	56%	74%
At a stand alone campus - where an overseas university opens a campus in your home country	23%	28%	20%
On-line courses	8%	11%	6%
Other	7%	14%	3%
Sample size	106	36	70



Conclusions

- *There are some significant changes between the 2000 and this study*
- *While country remains the first choice for most students it is not as prominent as it has been*
- *Students continue to choose to study overseas for a variety of reasons including perceptions regarding superior quality and the desire to broaden their experience*
- *Students are still ranking the US and UK as offering the best quality education, with Australia a close third*
- *Australia has increased its profile among students choosing the destination with the majority of students stating this was where they wanted to study*
- *More students studying in the UK had considered Australia*
- *Students are increasingly using the Internet as a key information source and application channel, however they do use other channels including agents whose useage continues to increase*