



cisaustralia

Study | Intern | Volunteer Abroad

Outbound Mobility Industry Intelligence Results 5.0

July 2022



Introduction

As part of CISAustralia's industry engagement strategy, we have set out to learn more about the impact of COVID-19 on outbound mobility at Australian Universities and to further advance shared knowledge across Australian institutions and the Learning Abroad sector as a whole.

An initial survey was sent in April 2020 to determine the immediate impacts of COVID-19 on international mobility across the Australian University sector. Versions 2.0 (November 2020), 3.0 (May 2021), 4.0 (November 2021), and now 5.0 (July 2022) were designed to build on those results, analyse what has changed, and to benchmark institutional feedback. The aim is to assist universities in knowing what other institutions across Australia are doing or considering in the mobility space when it comes to navigating COVID-19.

CISAustralia developed a set of indicators for Australian Universities to provide data that has been collated to be presented and shared anonymously and confidentially in a summarised format. This 5.0 survey was sent to all 40 Australian Universities and in most cases was completed by the University's Learning Abroad Manager / Coordinator or similar.

The results of this initiative will enable CISAustralia to better support Australian Universities and students moving forward. A summary of survey results will also be presented at the Learning Abroad Forum in August 2022. **Thank you all for your participation and strong interest. Please contact CISAustralia with any questions.**



Results

The following slides contain summarised data from the Outbound Mobility Industry Intelligence survey sent 28th June 2022. The survey was sent to all 40 Australian Universities with 36 providing responses.

Results in this report are compared to the results from the [first survey](#) (sent to our 30 partner Australian Universities in April 2020 with 29 responses), the [second survey](#) (sent to 31 partner Australian Universities in November 2020 with 27 responses), the [third survey](#) (sent to 31 partner Australian Universities in May 2021 with 29 responses), and the [fourth survey](#) (sent to 32 partner Australian Universities in November 2021 with 31 responses).

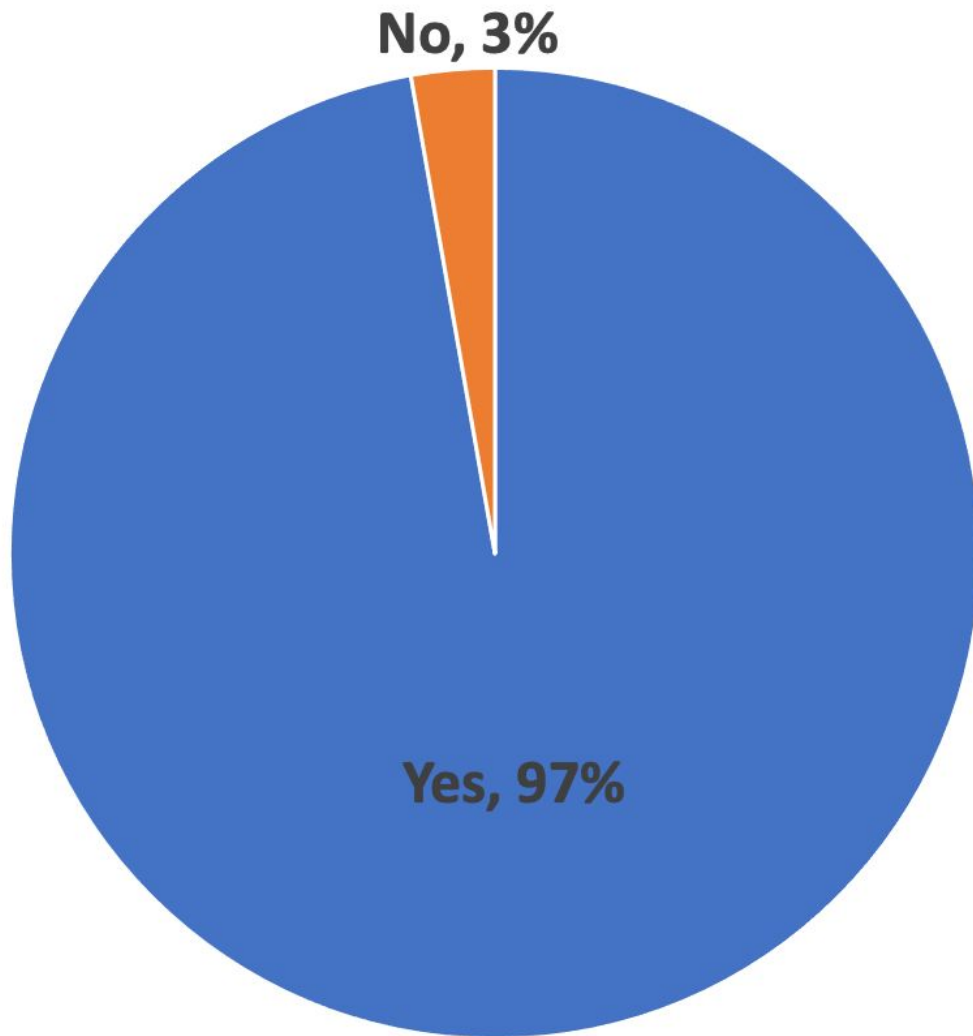
Please contact CISAustralia directly if you would like to discuss these results.

Response Rate

90%



Has your University approved outbound travel for 2022?



of Responses: 36 | Response Rate: 100%

If yes, are there any caveats or restrictions on students going abroad that did not exist pre-COVID?

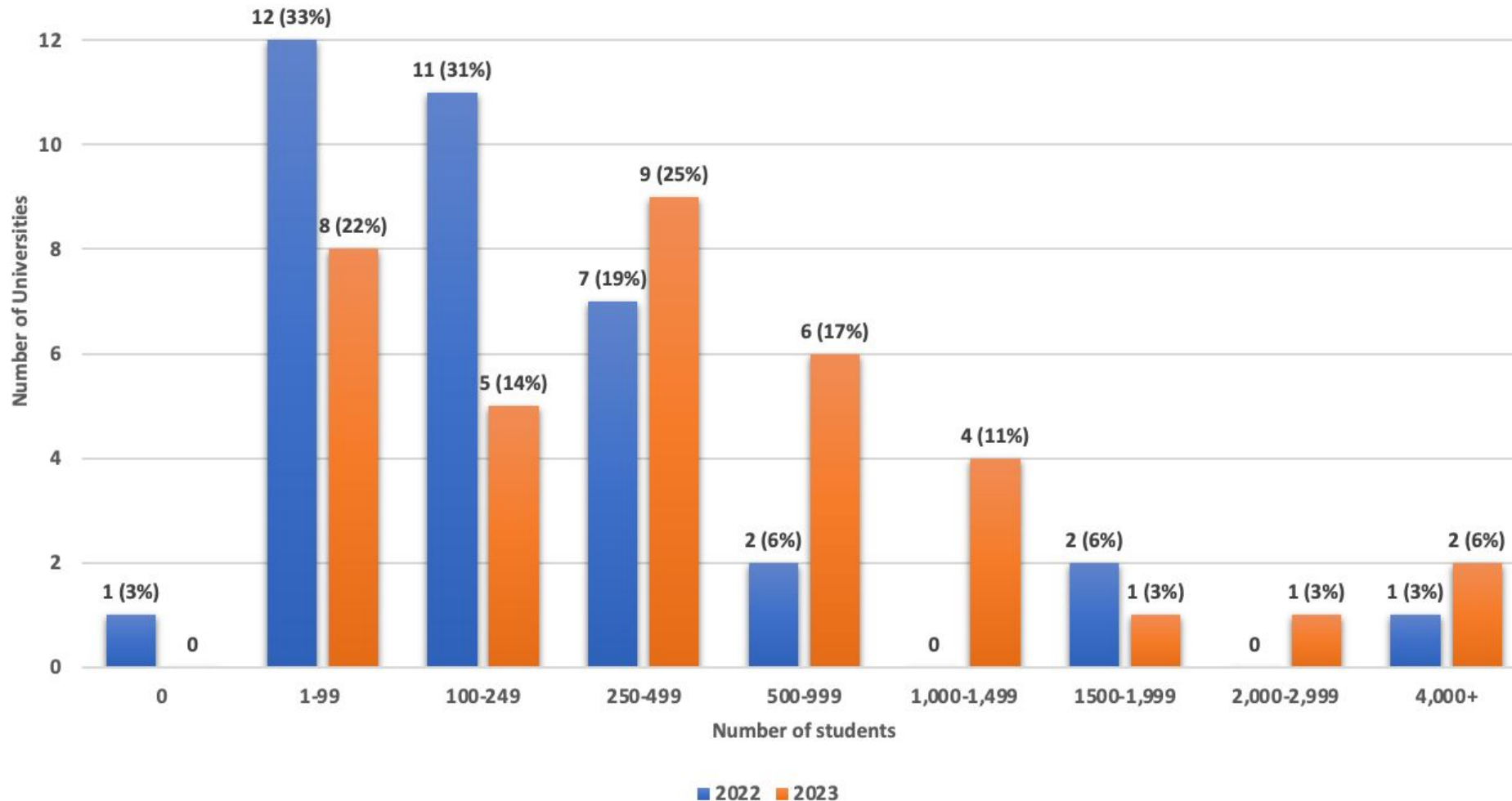
- Students must complete an individual risk assessment and emergency funds for unexpected expenses
- Border restrictions and quarantine requirements are making some destinations unfeasible
- New risk management compliance - risk assessment, PSEAH and Child Protection
- Must book through university travel agent
- We cannot provide financial support for COVID-related travel disruptions, including mandatory quarantine and testing. Our university provided this support during and in the first tranche of return to travel for students.
- Restrictions for countries for DFAT Levels 3 or 4
- Enhanced approval for high risk destinations (DFAT 3-4)
- All programs / study tours are required to seek approval from risk management before proceeding
- Each student is required to undertake an individual risk assessment and travel approval
- Carefully planning for locations and approving them considering Smartraveller and International SOS
- More checks in place, student risk assessments

- Extra risk module to complete
- Travel to some destinations is not allowed
- Return flights are required
- No private travel days are covered by University travel insurance
- Risk Assessments / Critical Incident Plans – greater level of scrutiny and monitoring
- Destinations must be approved by the Deputy Vice Chancellor of Education
- Vaccination requirement is in place
- Double COVID Immunisation mandatory
- Students required to meet our risk matrix
- Level 2 countries need a risk assessment
- Students must register with ISOS and can only go to countries classified as DFAT rating 1 or 2
- Additional forms relating to COVID and risk management
- We now require all students to have their own travel insurance - policy docs must be provided before travel will be approved
- Detailed risk assessment and travel bookings to be made via university travel team
- Mobility team is required to complete a risk assessment (incl. COVID risks) for each country students travel to

If no, when are you expecting outbound student mobility to be approved at your University?:

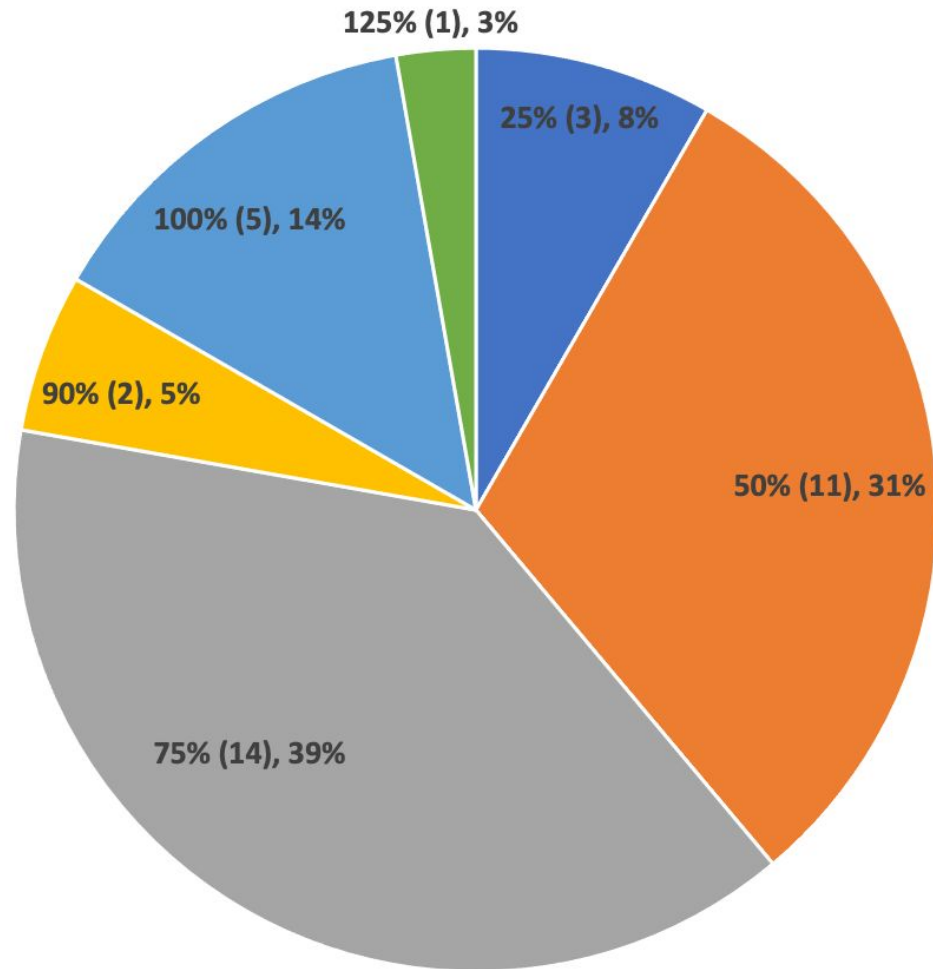
- Mid-late 2023

In 2022 and 2023, how many students do you expect to place overseas from your University on an approved (for credit) study, intern, volunteer, exchange or other Learning Abroad program?



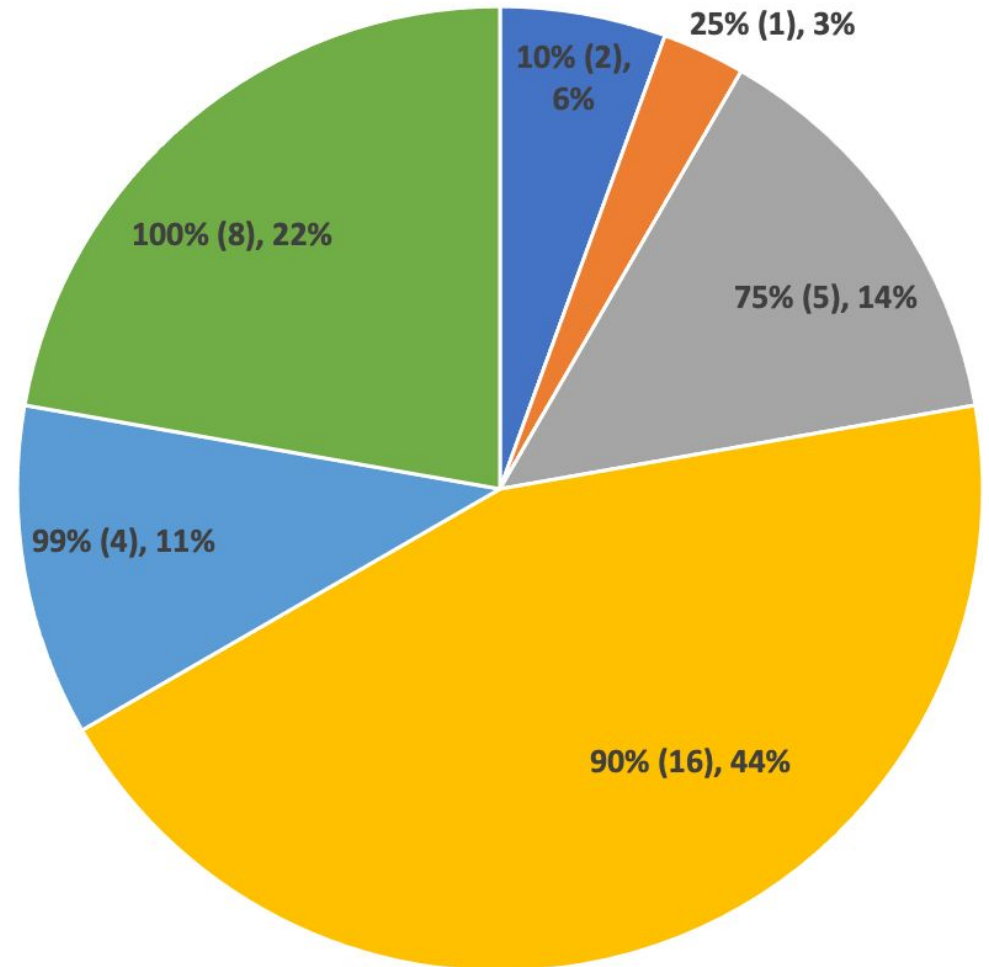
of Responses: 36 | Response Rate: 100%

What (approx.) percentage will your 2023 projected enrolments represent compared to your normal pre-COVID Learning Abroad levels, i.e. 2019?



of Responses: 36 | Response Rate: 100%

What (approx.) percentage of your outbound student cohort in 2023 do you expect to go abroad on approved programs FOR ACADEMIC CREDIT?



of Responses: 36 | Response Rate: 100%

What factors will limit your institution's Learning Abroad enrolment levels indicated for 2023?

	1 – Least important	2	3	4	5 – Very important
Limited HR support	43%	14%	26%	9%	9%
Limited support from senior management	17%	31%	22%	17%	14%
Limited interest, availability or engagement from academic staff	3%	8%	33%	33%	22%
Limited communication and marketing to students	3%	14%	28%	28%	28%
Lack of funding / scholarships for students	8%	19%	14%	33%	25%
High demand from students but limited ability to service demand	8%	19%	25%	28%	19%
Impact of new technology introduced or being introduced	29%	37%	26%	3%	6%
Lack of interest / awareness to the benefits of Learning Abroad across your institution more broadly	3%	22%	31%	31%	14%
Student concerns about the impact of travel on the environment	25%	31%	25%	17%	3%

Are there other important limiting factors to student enrolments you are aware of?

- Ability to get academic credit
- Without academic credit there is no OS-HELP
- Reduced support and professionalism to facilitate learning abroad experiences
- Visa issues - particularly for the US
- Some partners having limited class availability or housing
- Increase in cost of travel
- Delay in getting passports and visas
- Curriculum - lack of space in the curriculum to accommodate abundant opportunities
- Continued concerns about COVID-19 and international travel
- Some uncertainty to global events
- Lack of funding
- Not an attractive experience for some demographics of our student cohort - mature age, remote/rural, external, first in family and low socio-economic status
- Students are actually earning good incomes at the moment and don't want to give this up
- Staffing levels - capacity, antiquated systems
- Inflexible degree structure that prevents some majors from participating in overseas programs
- Third-party providers folding which support some specific discipline areas
- Reduced international student numbers
- Language capability
- Course mapping and inflexibility of program structure
- Students are concerned about accommodation options for when they return
- Finding faculty members to lead programs can be challenging
- Lack of electives in courses makes this very hard, if not impossible for many students
- 2023 academic restructure and unknown implications (if any) on mobility programs

of Responses: 36 | Response Rate: 100%

What do you believe will be your students' least popular to most popular type of Learning Abroad programming at your institution in 2023?

	1 – Least important/popular	2	3	4	5 – Very important/popular
Short-term study abroad programs in January and/or July	3%	6%	20%	31%	40%
Study tours (short-term faculty-led customised programs)	3%	0%	11%	37%	49%
Professional Internships abroad (WIL)	9%	14%	23%	34%	20%
Virtual programs	46%	31%	14%	6%	3%
Volunteering / Experiential Service Learning	40%	40%	11%	6%	3%
Traditional semester exchange	3%	8%	33%	31%	25%
Conferences	46%	43%	9%	3%	0%
Other non-traditional forms of programming abroad	50%	41%	9%	0%	0%

Other important/popular forms of programming not listed?

- Hybrid programs
- Program for first-year students
- Offshore campus/centre based programs - "very popular"
- Research activities
- On-campus and virtual global leadership programs
- Clinical placements, i.e. nursing, medicine or teaching placements
- Collaborative Online International Learning (COIL)

of Responses: 35 | Response Rate: 97%

What do you believe will be your students' most popular Learning Abroad destinations for your institution in 2023?

	1 – Least popular	2	3	4	5 – Very popular
Africa	74%	20%	6%	0%	0%
Asia	0%	3%	20%	37%	40%
Europe	0%	0%	11%	39%	50%
North America	0%	0%	22%	39%	39%
South America	39%	47%	14%	0%	0%
Pacific / Oceania	3%	29%	31%	26%	11%

of Responses: 35 |
Response Rate: 97%

Comments around your ranking selections (why, specific countries, etc.)?

- English speaking countries remain the most popular for longer term experiences and internships
- The popularity for Asia is driven by NCP and faculty led study tours
- Limited partnerships in Africa
- South America struggles with availability of classes in English
- The lack of opportunity for learning abroad programming in Africa would likely be the main reason for its low popularity
- Pacific / Oceania is growing in demand but on a smaller scale through bespoke programs
- Europe and North America continue to be the most popular for both short term and semester programs
- Students are wanting safe experiences and so we are seeing a trend (similar to when mobility first started) that the most popular destinations are UK, USA & Canada
- USA does not have as much interest as it used to
- Students are being more selective with where they want to go based on COVID restrictions and economic & social climates - this may be influenced more so by their parents
- Traditional exchange destinations will remain popular and the Indo Pacific due to funding support
- No exchange agreements in Africa heavily impacts on the awareness of the country as an overseas study destination
- Short term programs to Oceania are gaining in popularity
- Europe has surpassed North American in student numbers
- Europe popular but not necessarily attainable due to cost
- North America and Europe continue to be top 2 choices although the European situation may change this in 2023

With challenges associated with travel to China and Japan in the short to mid-term, what alternate locations are you considering for associated Learning Abroad programs, i.e. NCP-funded study tours?

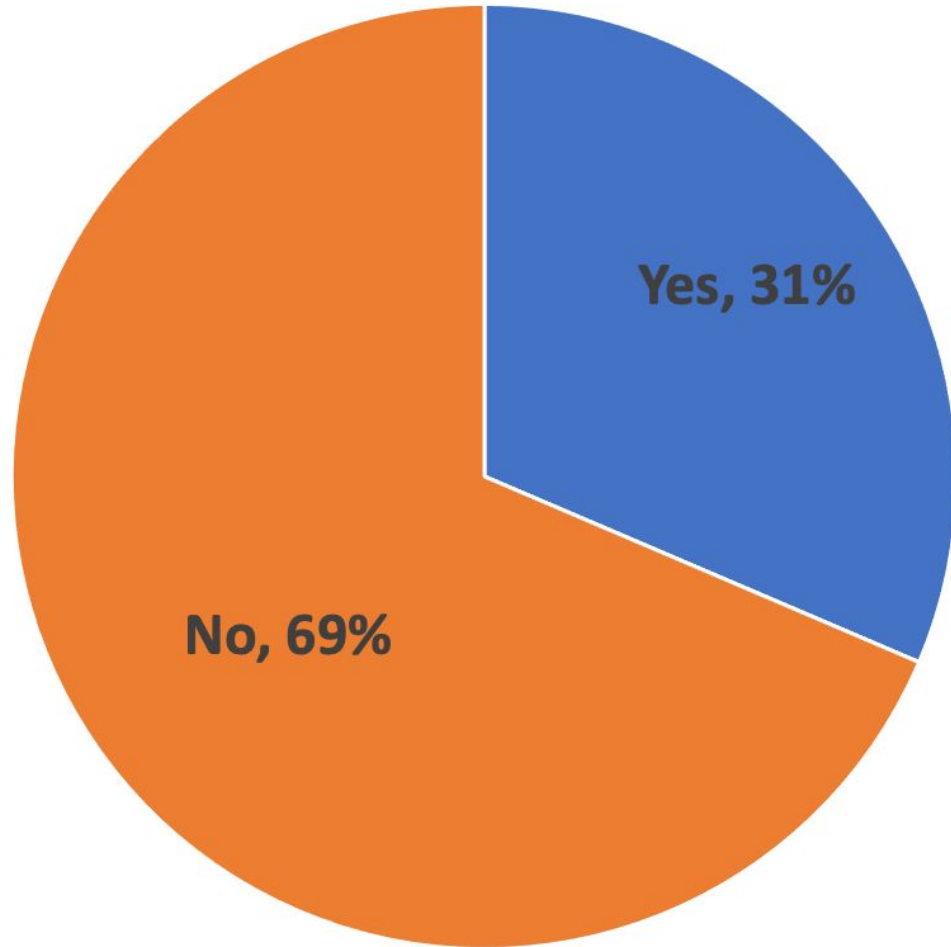
Country	% of respondents
Cambodia	24%
India	41%
Indonesia	65%
Singapore	65%
South Korea	74%
Thailand	47%
Vietnam	56%
Other	29%

If other:

- Fiji
- French Polynesia
- Malaysia
- Taiwan
- Timor Leste
- Vanuatu

of Responses: 34 | Response Rate: 94%

Will your institution be able to allocate all NCP-funded places in 2023, including variations from 2022 and prior?

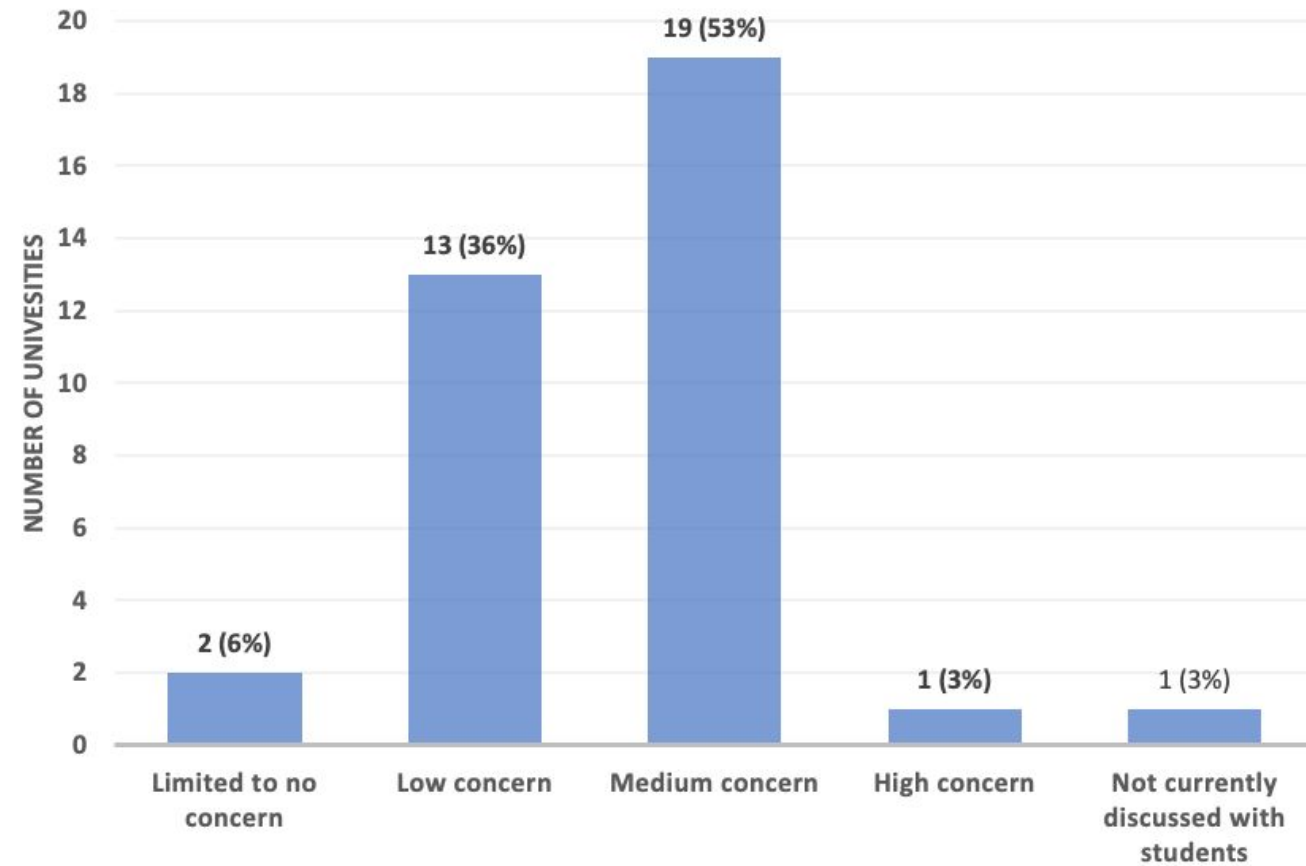


of Responses: 35 | Response Rate: 97%

If no, what are the primary obstacles?

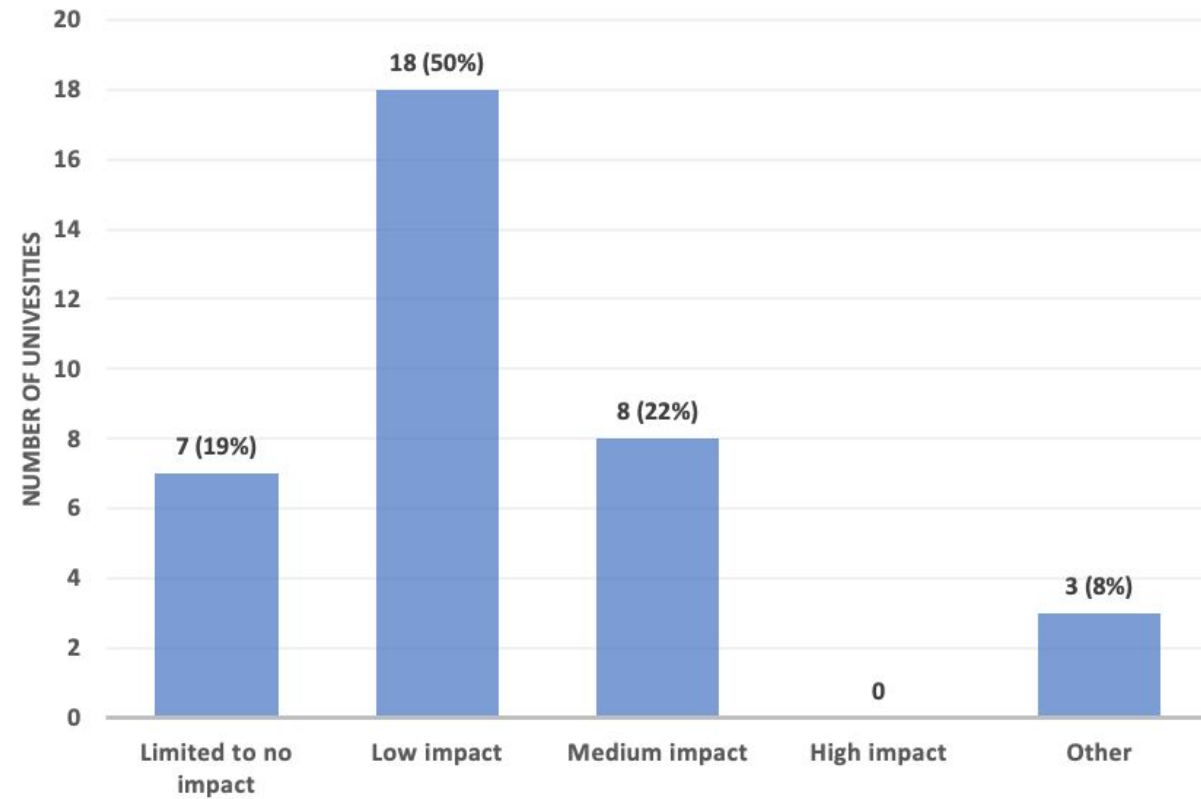
- Volume and resourcing
- University school staff not at adequate levels to run all programs
- Academic staffing limitations and continued COVID impacts on in-country operations of key project partners
- Staff workload when they have multiple programs to run due to Covid delays
- Backlog of projects/degree saturation, academic staff availability, senior level endorsement of travel
- Some from specific faculties may have difficulty due to the amount of the projects that they have and not enough student interest
- We still have a backlog of funds but do not have the resources/student numbers to run all the trips in 2023
- We have many projects that require variations and re-planning
- Project Leads have left the university and other project partners are no longer viable
- Student numbers lower than anticipated
- Academic no longer available
- Minimal interest from eligible students
- Academics are struggling with existing workload let alone NCP programs on top
- Lack of staff
- Sheer amount of funding backlog from the last 3 years, which will make using all of the funding in one year difficult
- Staff resourcing in faculty and mobility offices - all schools have lost the admin staff who coordinated faculty programs
- Expecting to have to return many grants to NCP unspent in June 2023 as unable to offer virtual programming in certain subjects (e.g. nursing, education, health) and still not safe to travel to locations for clinical experiences

In 2023, what level of concern do you think your students have in relation to the impact of travel on the environment, if any?



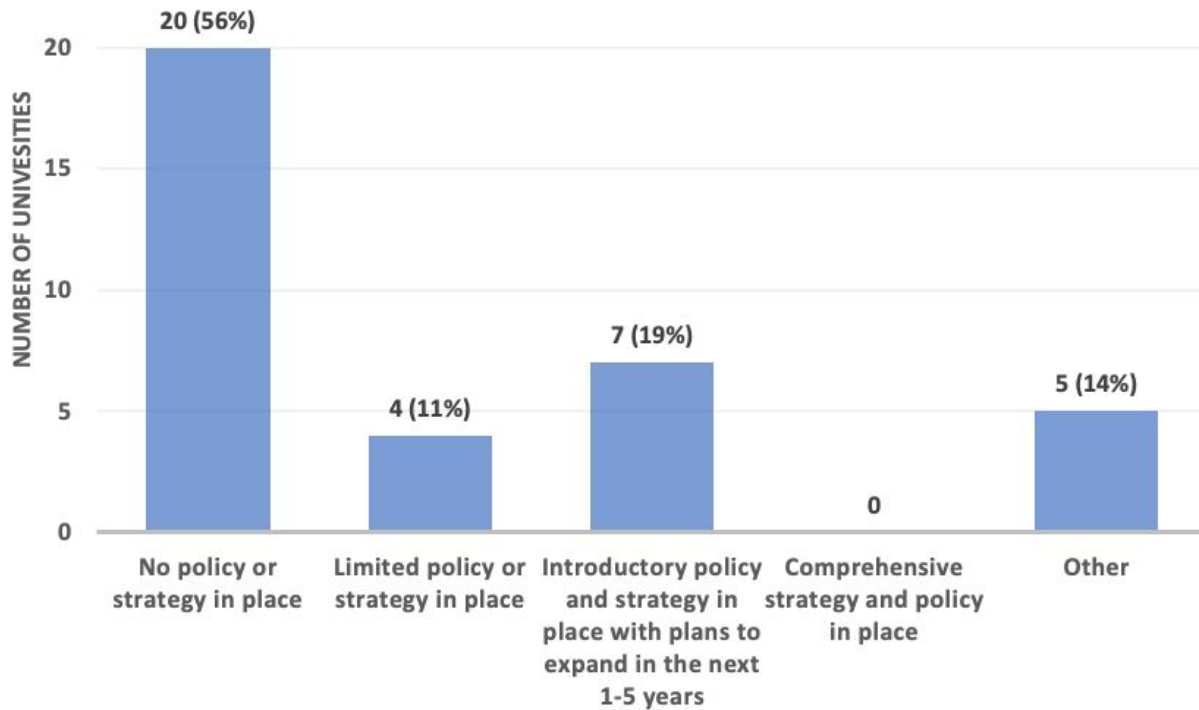
of Responses: 36 | Response Rate: 100%

Will environmental concerns impact your students' choice of destination for their Learning Abroad experience in 2023?



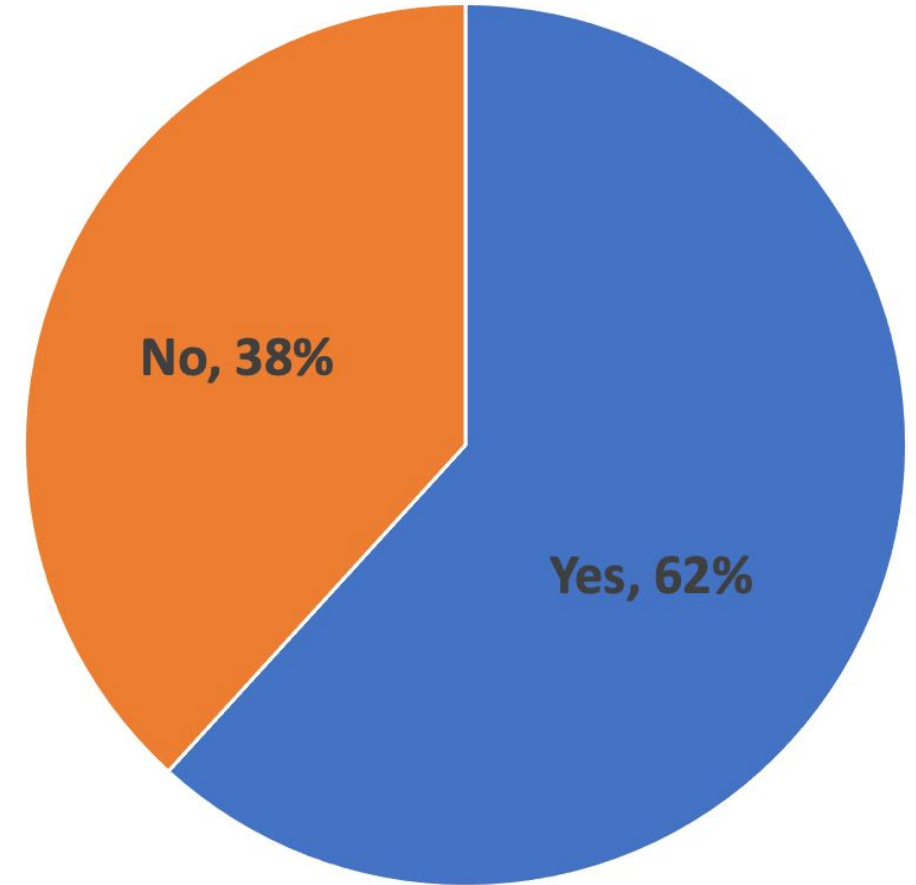
of Responses: 36 | Response Rate: 100%

Is your institution putting in place a policy or strategies in 2023 to offset the impact of carbon emissions on the environment as a result of student travel?



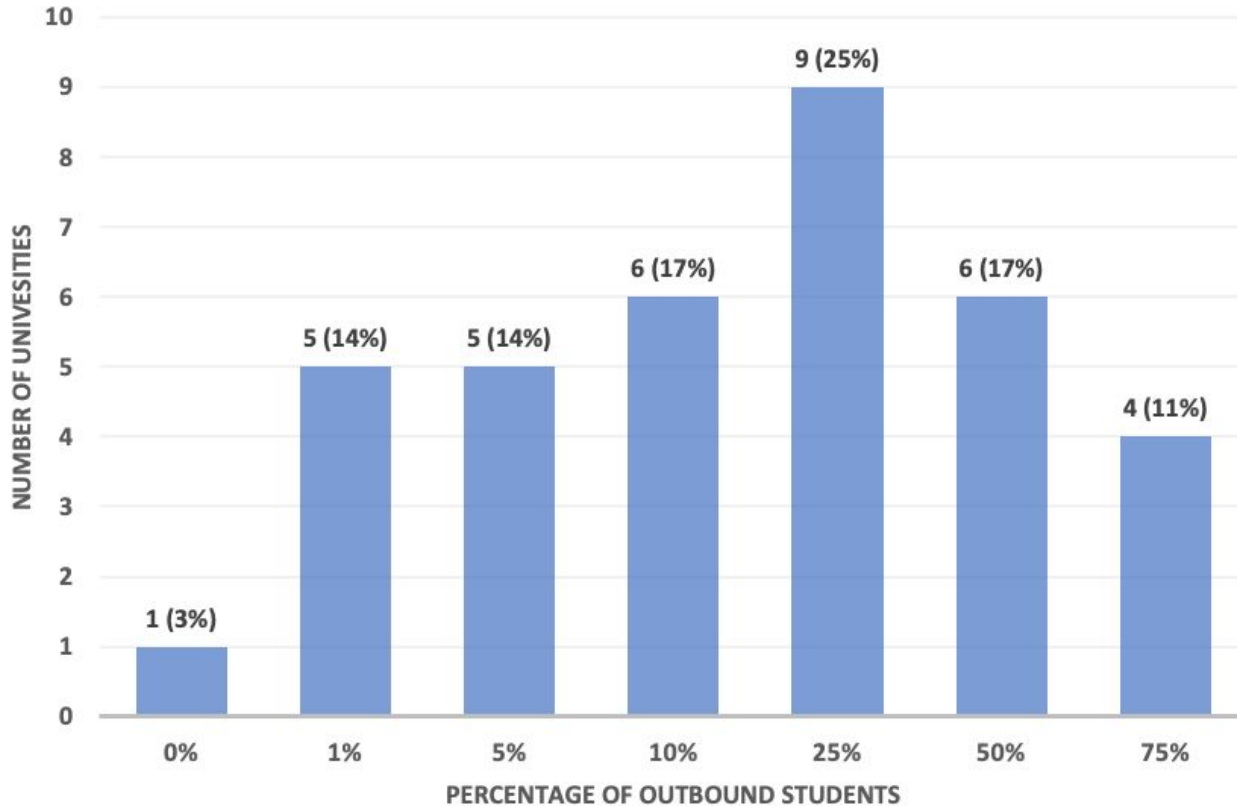
of Responses: 36 | Response Rate: 100%

Will your institution utilise the complimentary [Green Book](#) online resource as part of your pre-departure process (guides / sessions, etc.) for all outbound students in 2023?



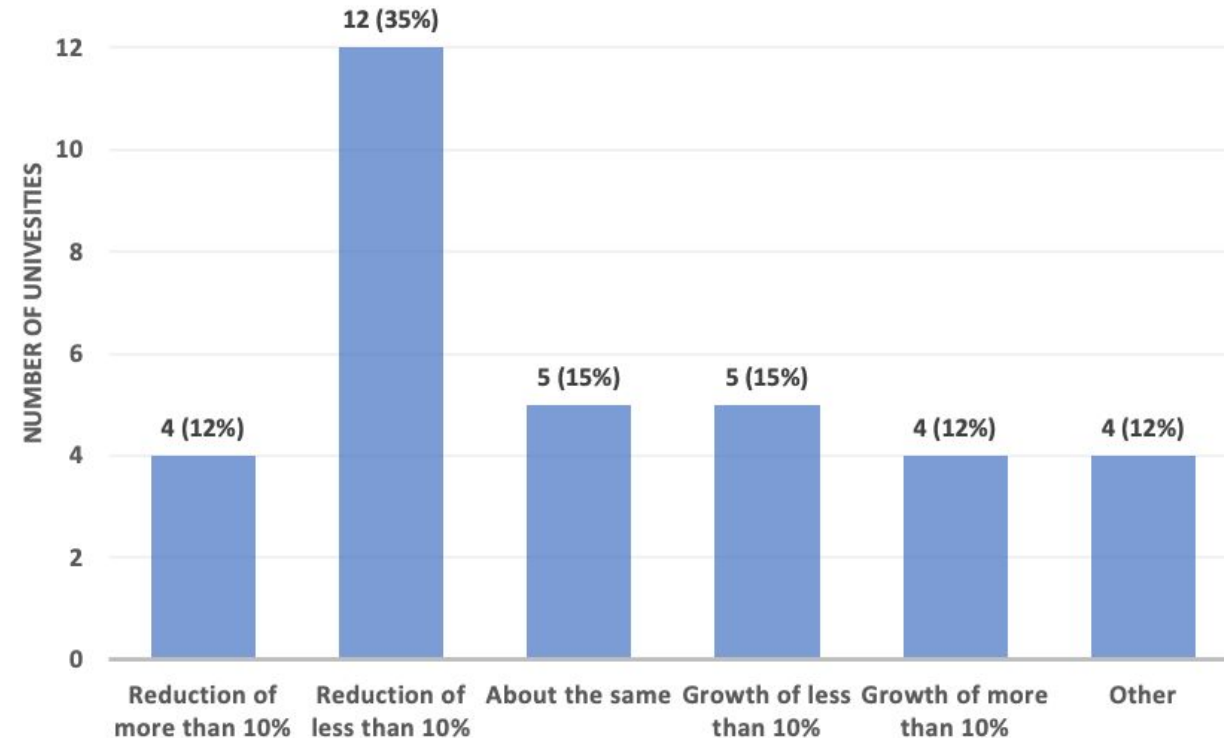
of Responses: 34 | Response Rate: 94%

What (approx.) percentage of your outbound student cohort in 2023 do you expect to go abroad via one of your approved Third-Party Providers (TPP)?



of Responses: 36 | Response Rate: 100%

How does the percentage of outbound students via a TPP compare with a normal year (such as 2019)?

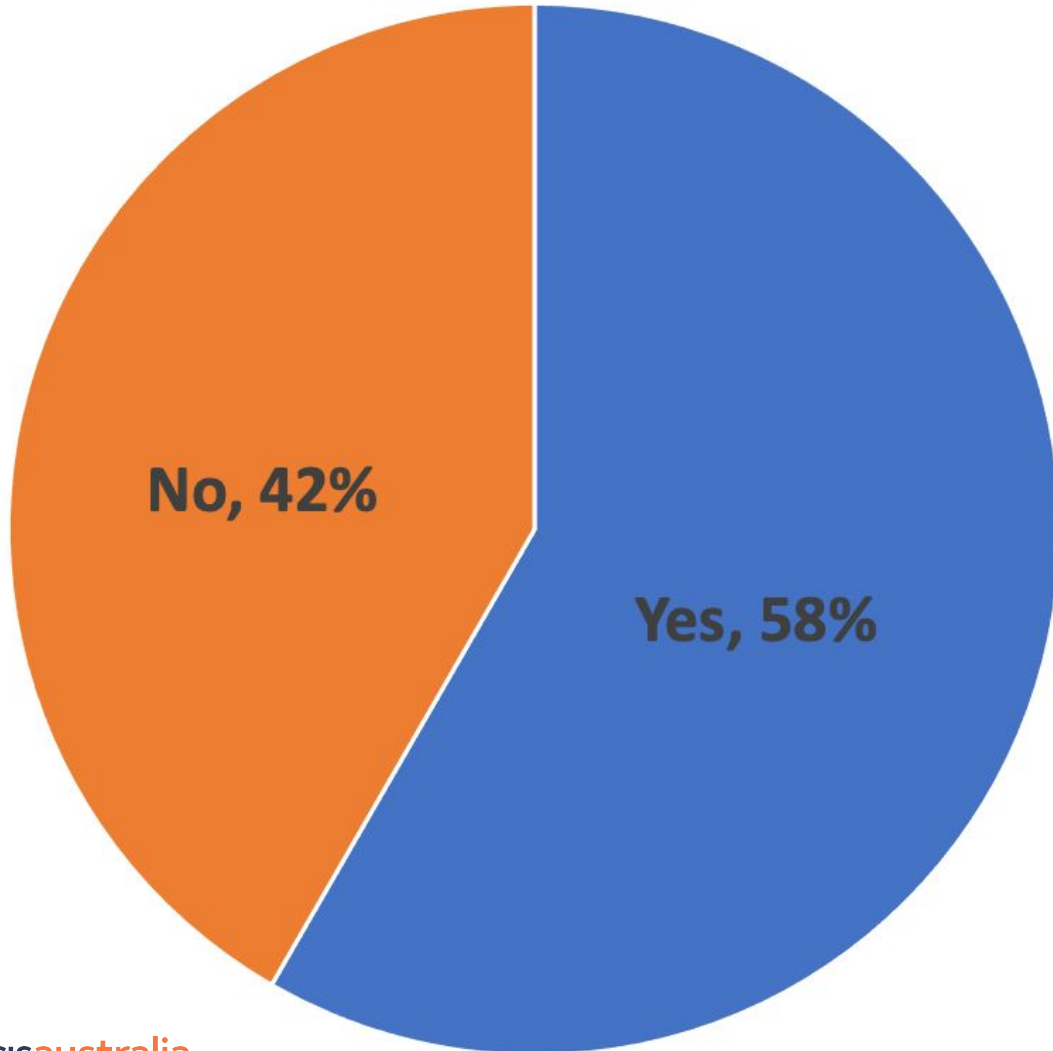


of Responses: 34 | Response Rate: 94%

Did COVID-19 result in the loss of funding for your outbound student mobility program?

July 2022

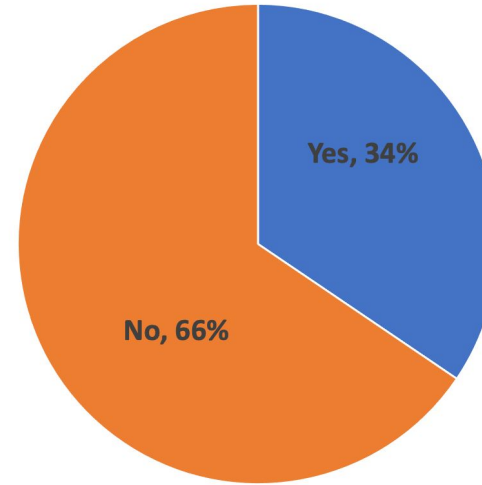
of Responses: 36 | Response Rate: 100%



Has the impact of COVID-19 resulted in the loss of funding for outbound student mobility?

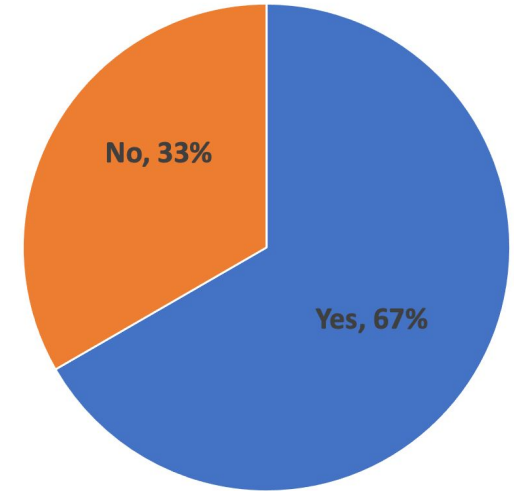
April 2020

of Responses: 29 | Response Rate: 100%



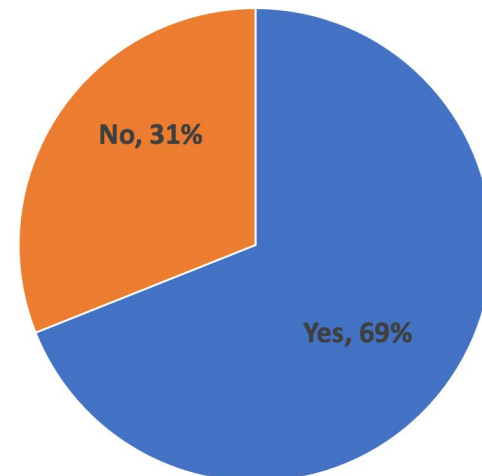
November 2020

of Responses: 27 | Response Rate: 100%



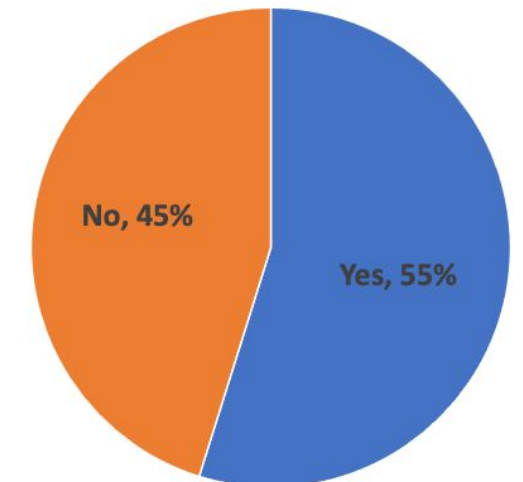
May 2021

of Responses: 29 | Response Rate: 100%

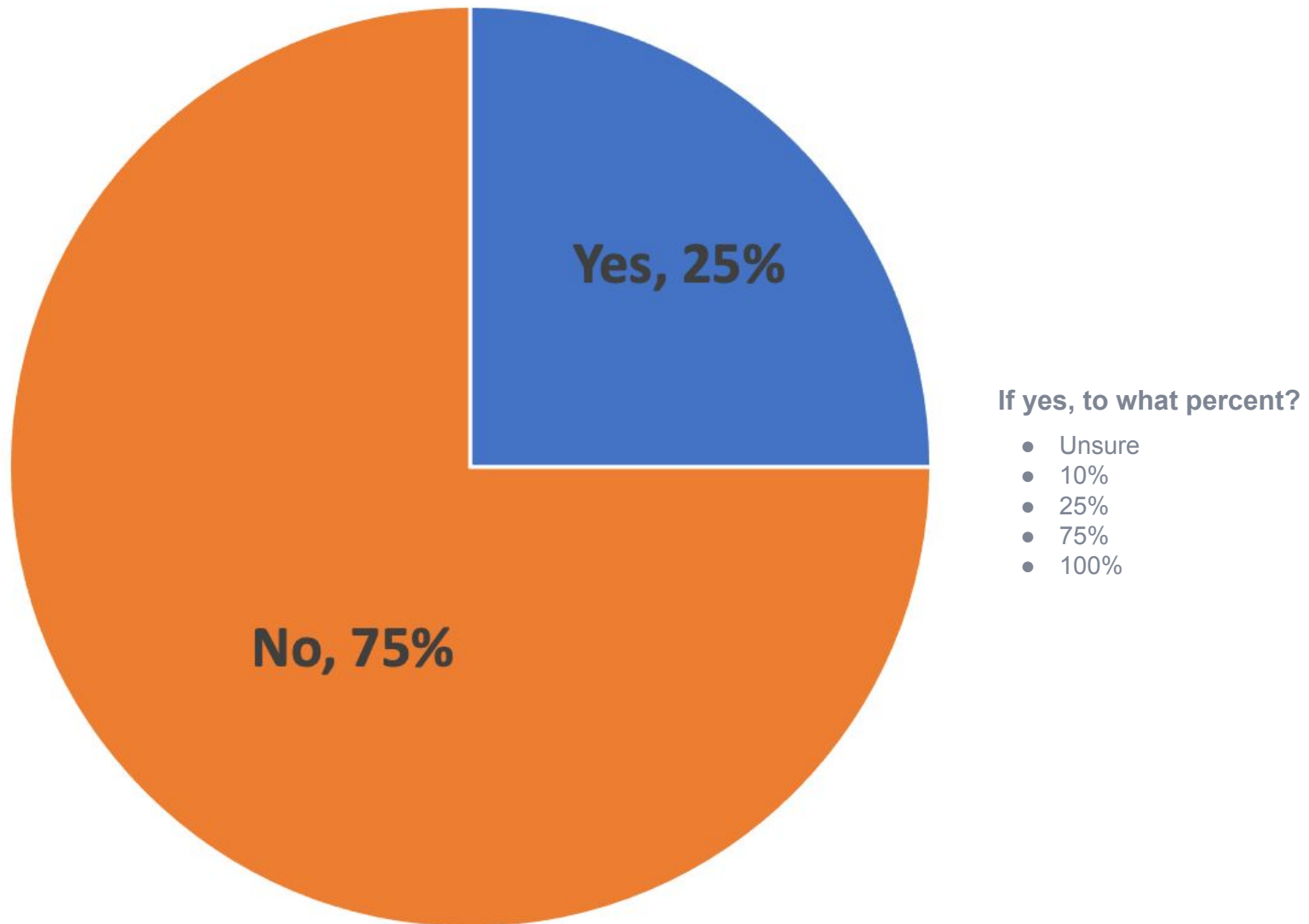


November 2021

of Responses: 31 | Response Rate: 100%



Do you expect any levels of funding support lost between 2020–2022 to be returned in 2023?

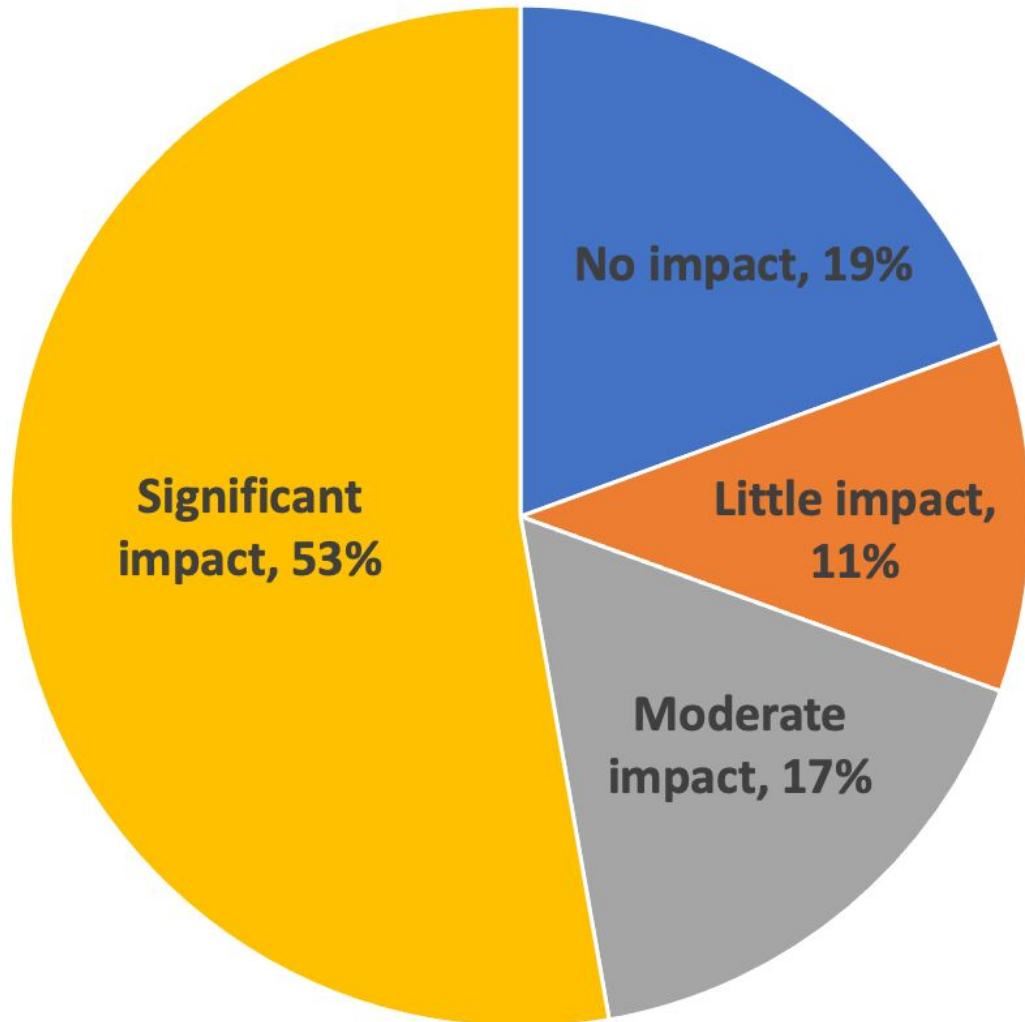


of Responses: 36 | Response Rate: 100%

To what extent has your study abroad and exchange (mobility) office been impacted by COVID-19 resulting in staff losses?

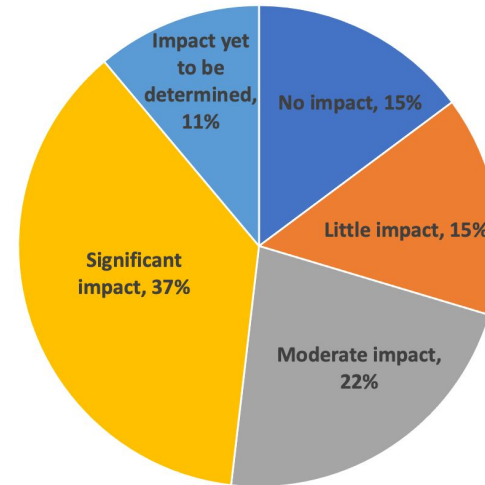
July 2022

of Responses: 36 | Response Rate: 100%



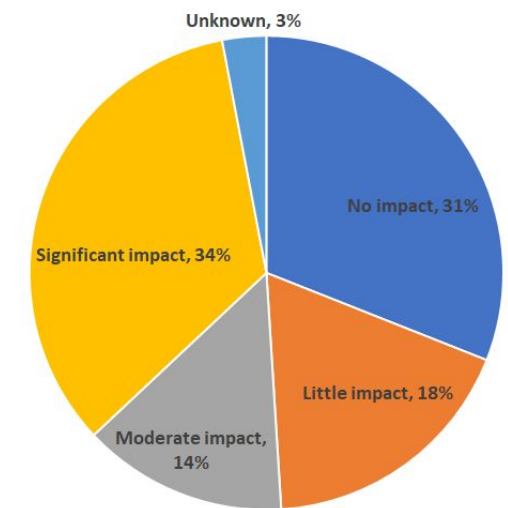
November 2020

of Responses: 27 | Response Rate: 100%



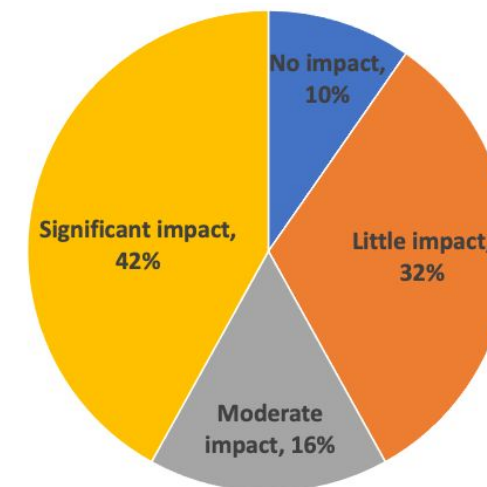
May 2021

of Responses: 29 | Response Rate: 100%



November 2021

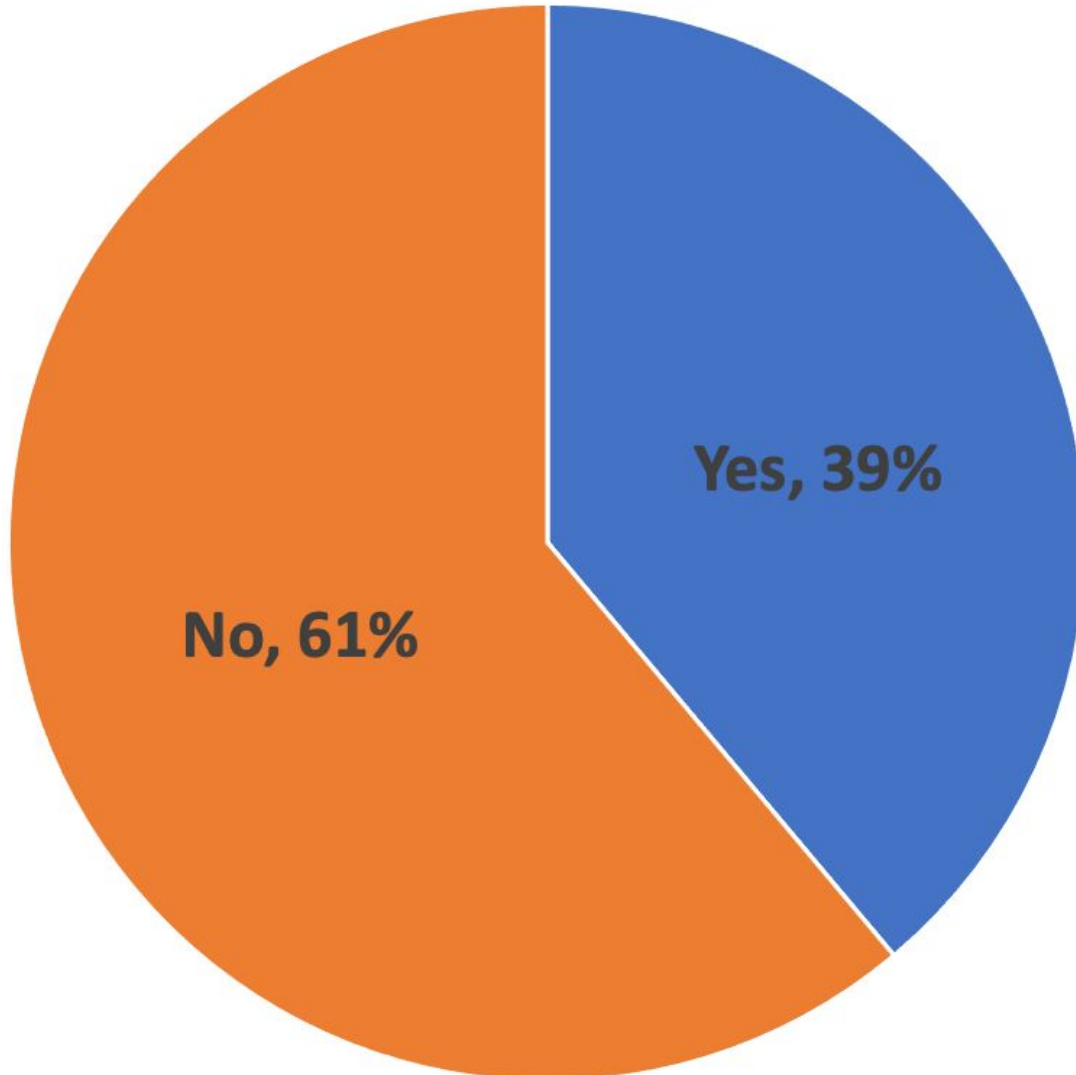
of Responses: 31 | Response Rate: 100%



Have you employed any new staff in the past 6 months?

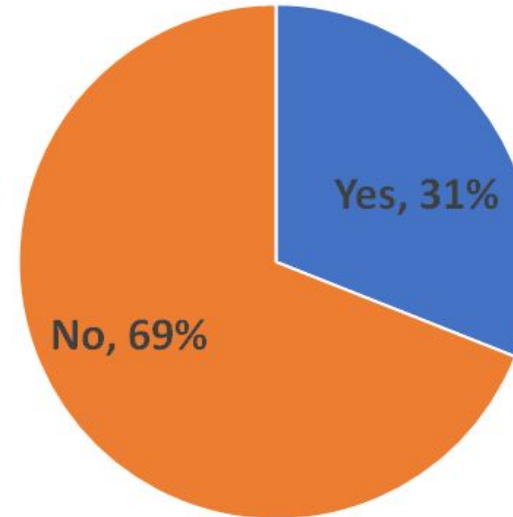
July 2022

of Responses: 36 | Response Rate: 100%



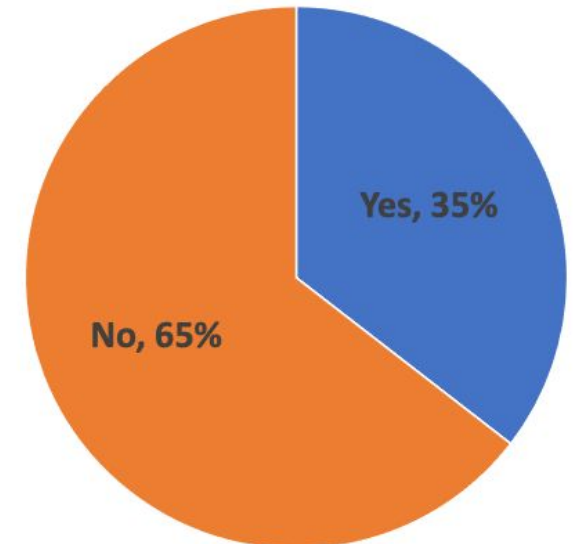
May 2021

of Responses: 29 | Response Rate: 100%



November 2021

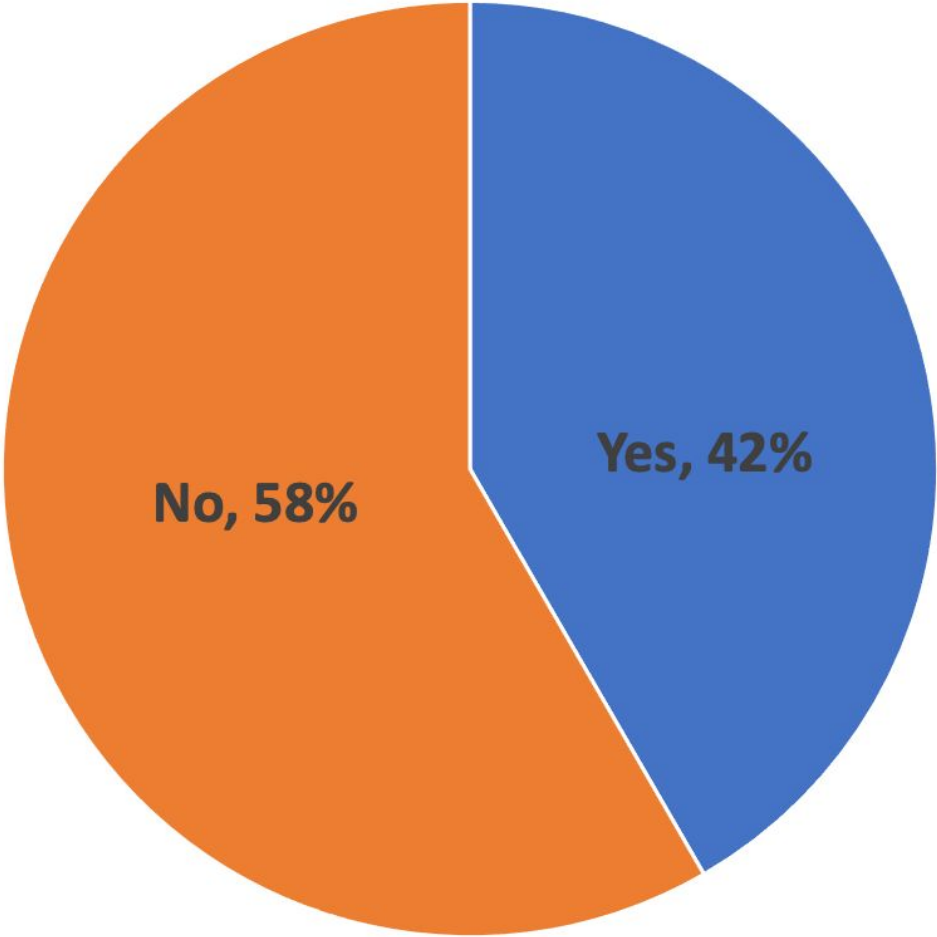
of Responses: 31 | Response Rate: 100%



Do you plan to employ any new staff within the next 9-12 months?

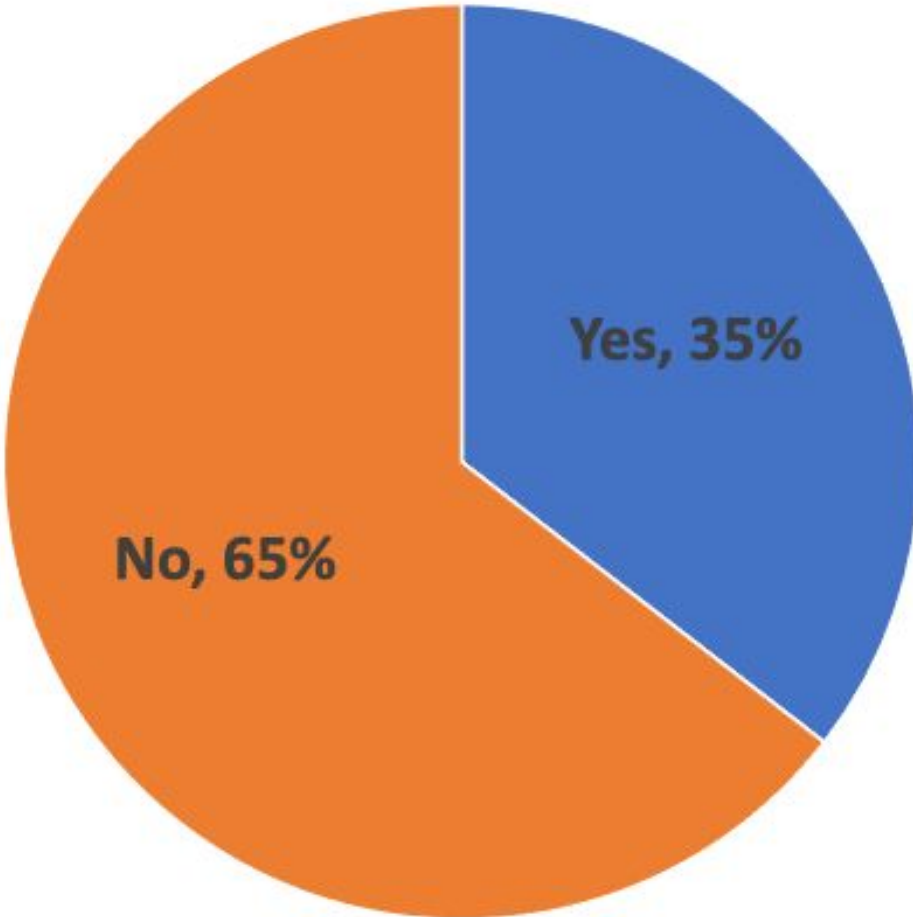
July 2022

of Responses: 36 | Response Rate: 100%



November 2021

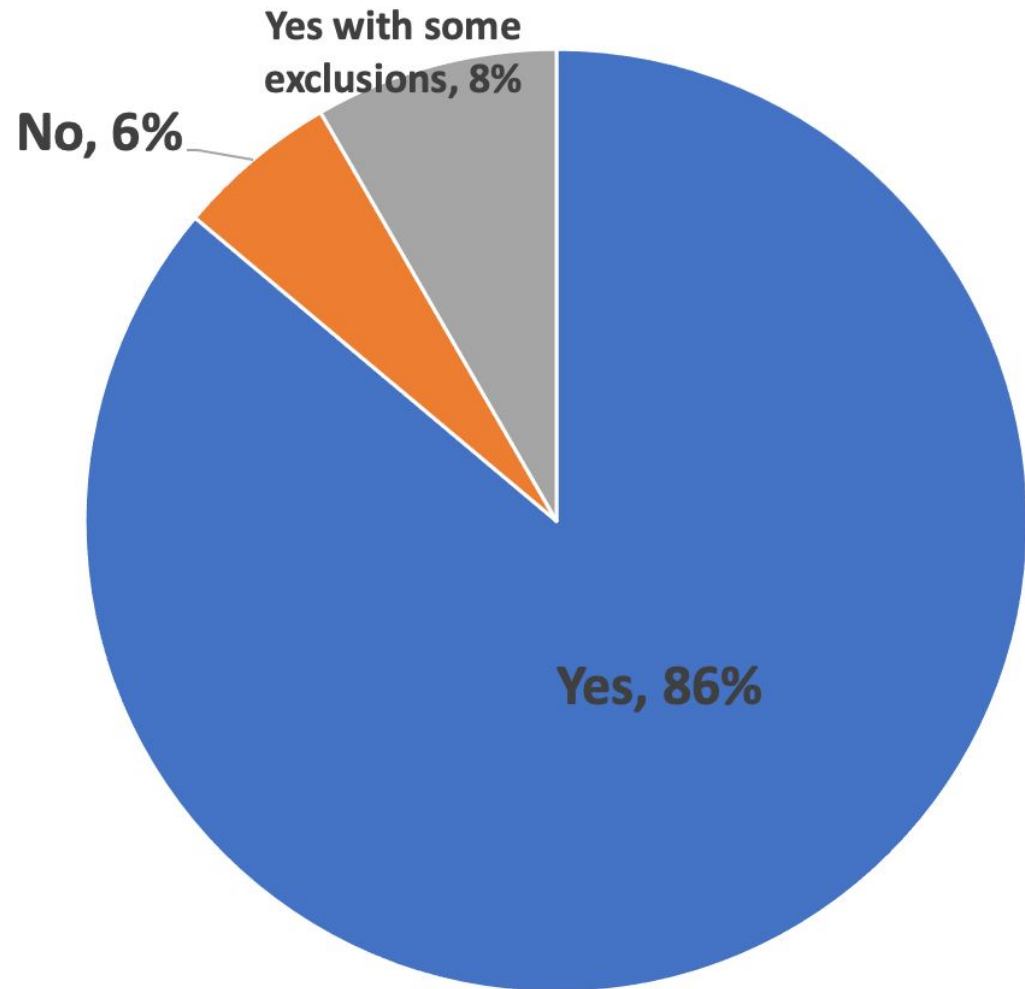
of Responses: 31 | Response Rate: 100%



Is your University currently promoting outbound mobility programs for 2022 and/or 2023?

July 2022

of Responses: 36 | Response Rate: 100%



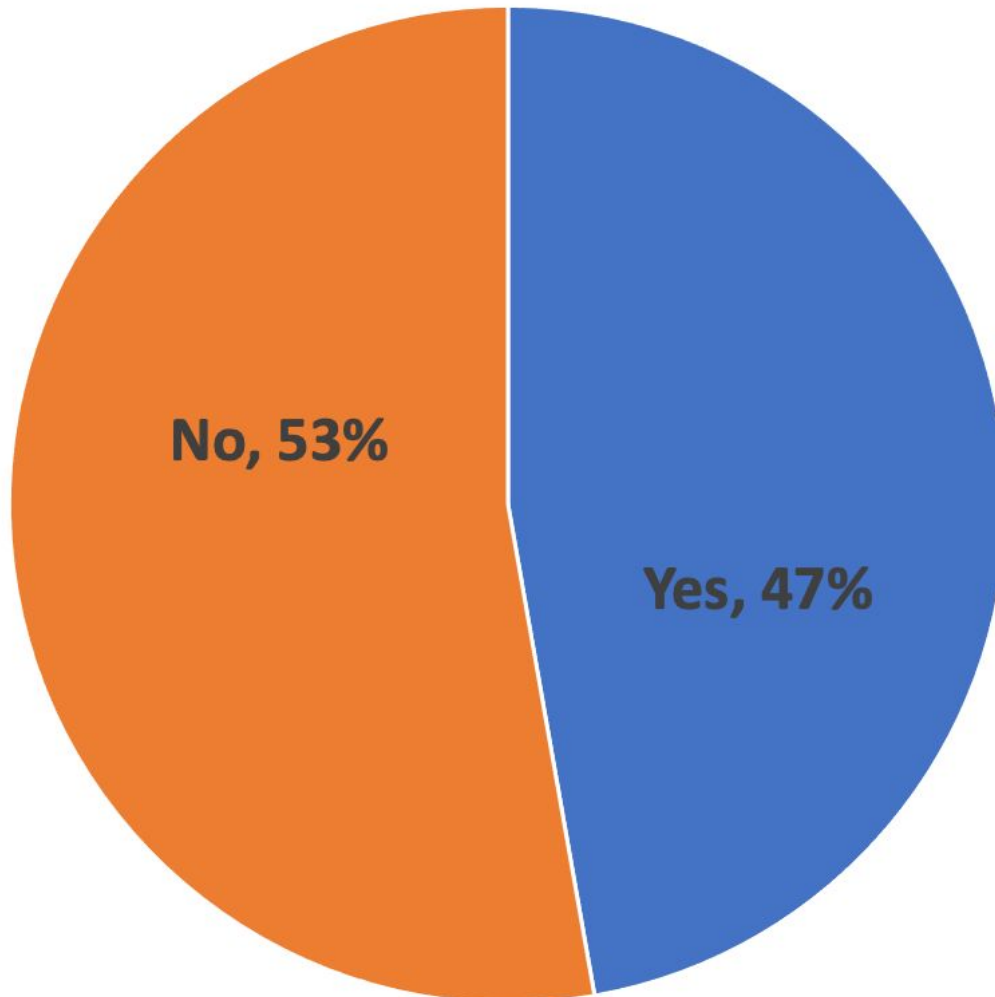
Exclusions:

- Any country listed by Smartraveller as Level 3 or 4 cannot be supported

Do you plan to hold an on-campus (face-to-face) study abroad and exchange fair in the second half of 2022?

July 2022

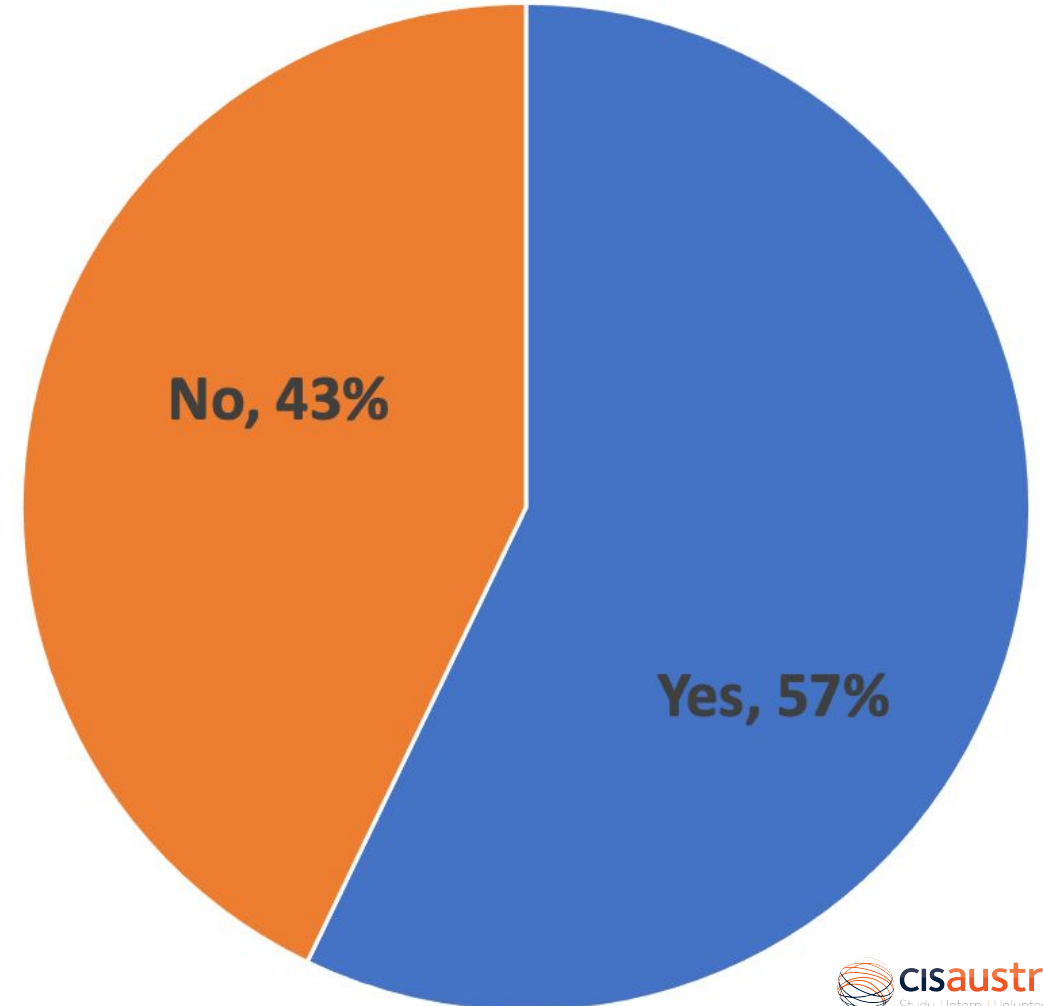
of Responses: 36 | Response Rate: 100%



Do you plan to hold an on-campus (face-to-face) study abroad and exchange fair in the first half of 2023?

July 2022

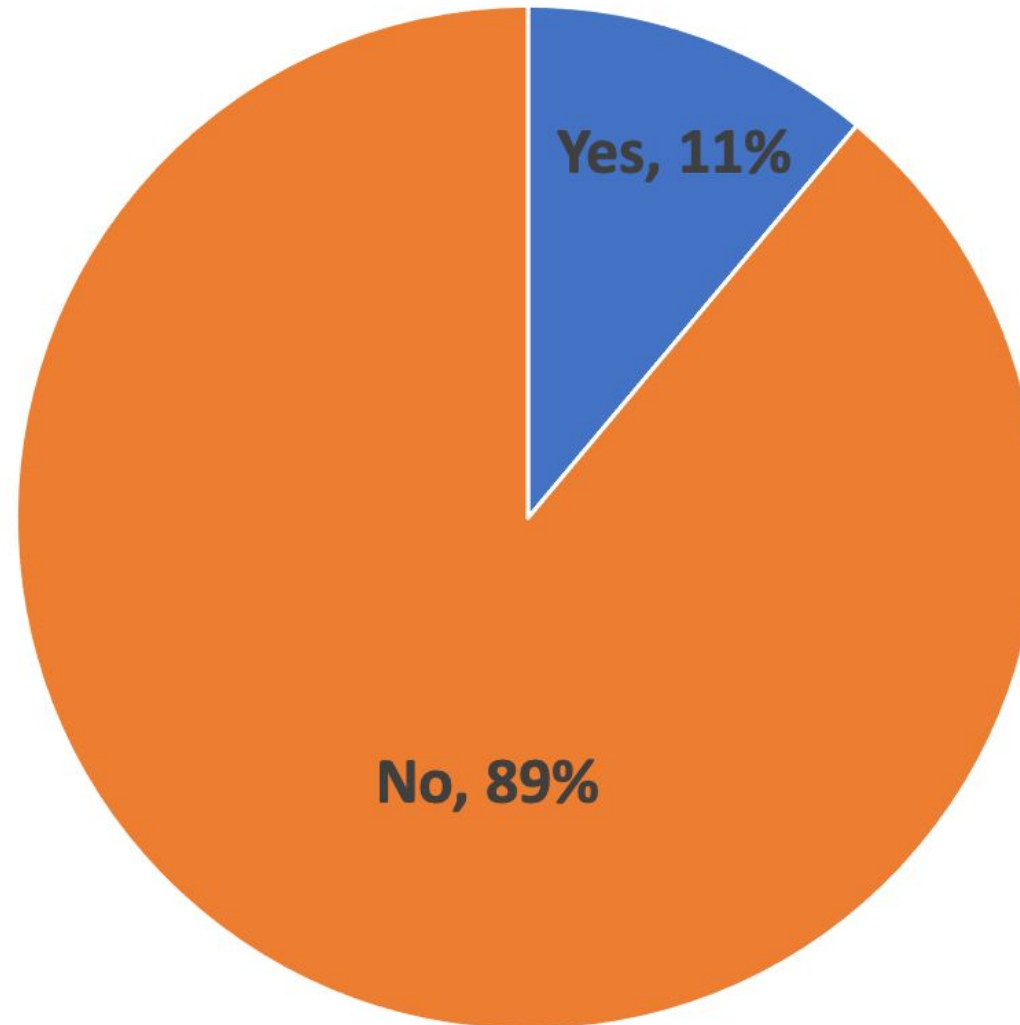
of Responses: 35 | Response Rate: 97%



Do you plan to hold an online / virtual study abroad and exchange fair in the second half of 2022?

July 2022

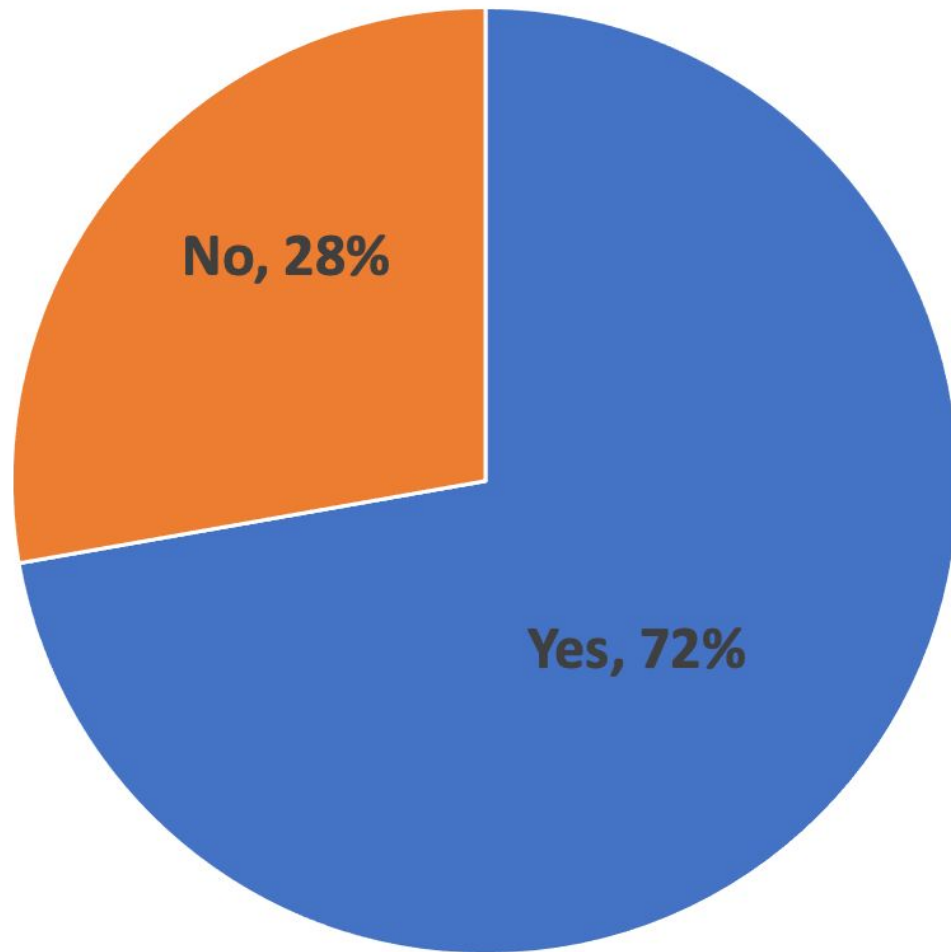
of Responses: 36 | Response Rate: 100%



Is your University planning to offer Virtual mobility programs in 2023 and beyond?

July 2022

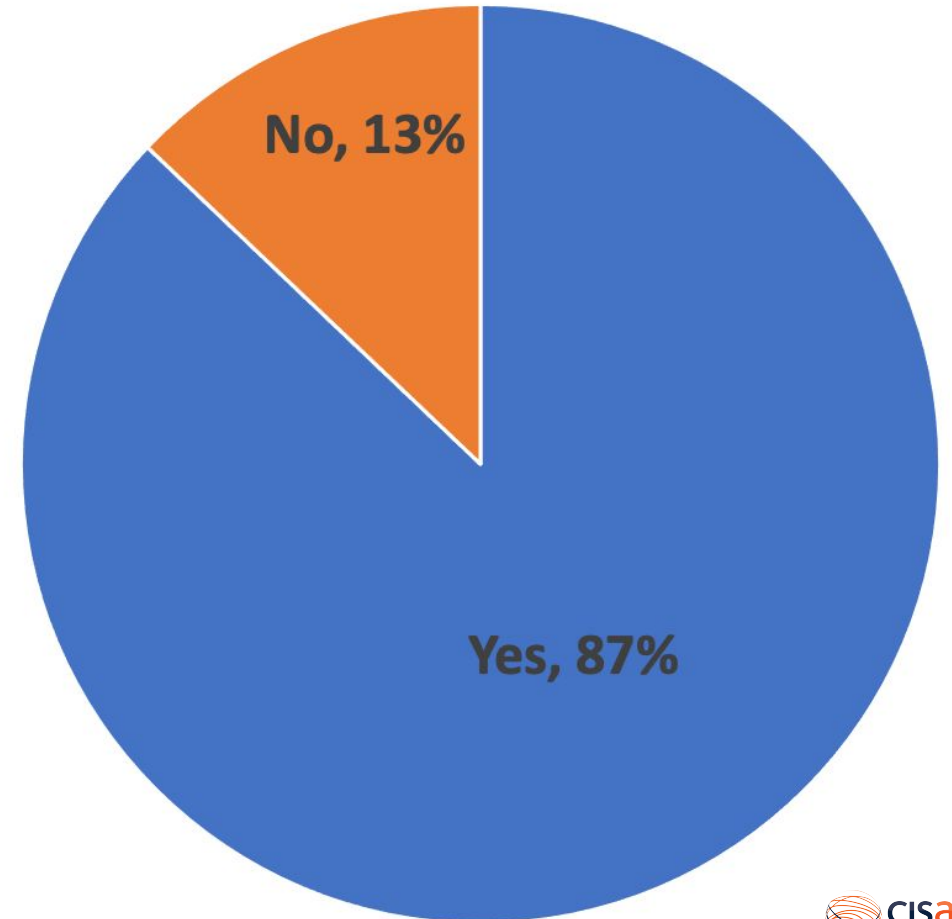
of Responses: 36 | Response Rate: 100%



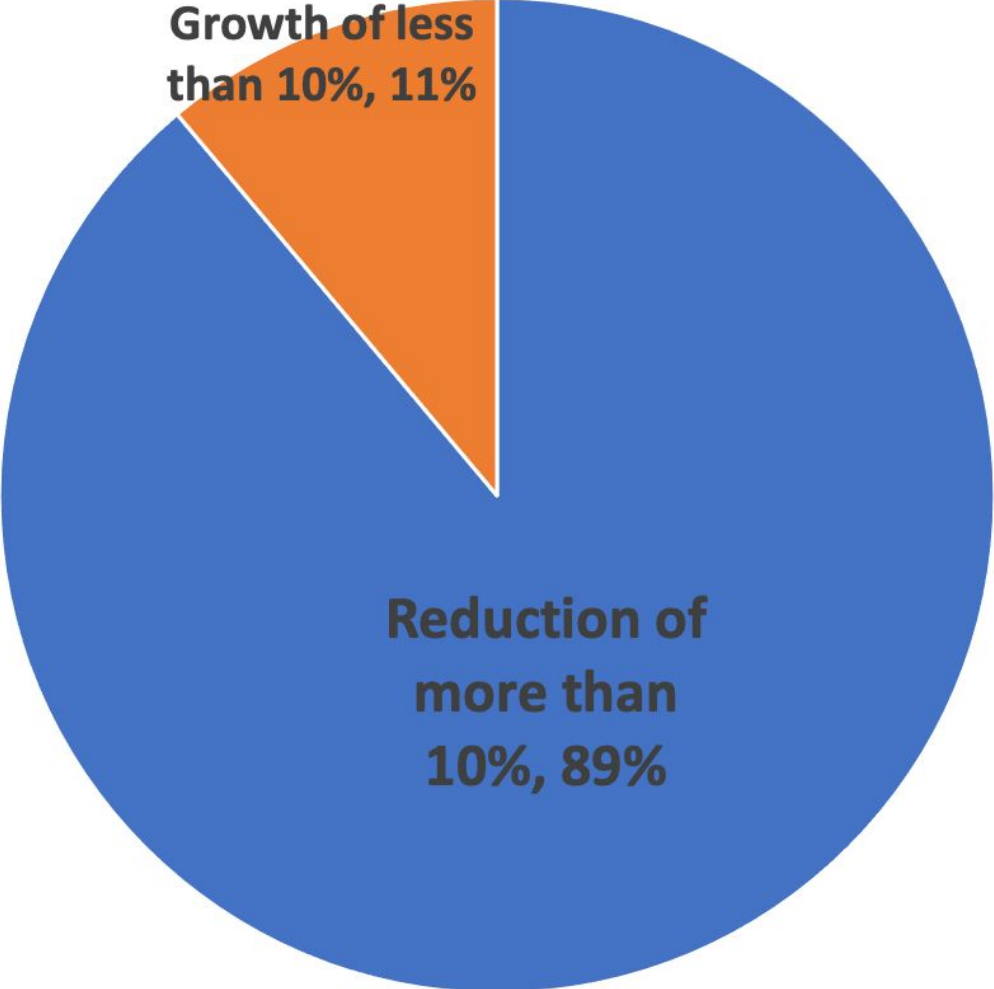
Is your University planning to offer Virtual mobility programs in 2022 and beyond?

November 2021

of Responses: 31 | Response Rate: 100%

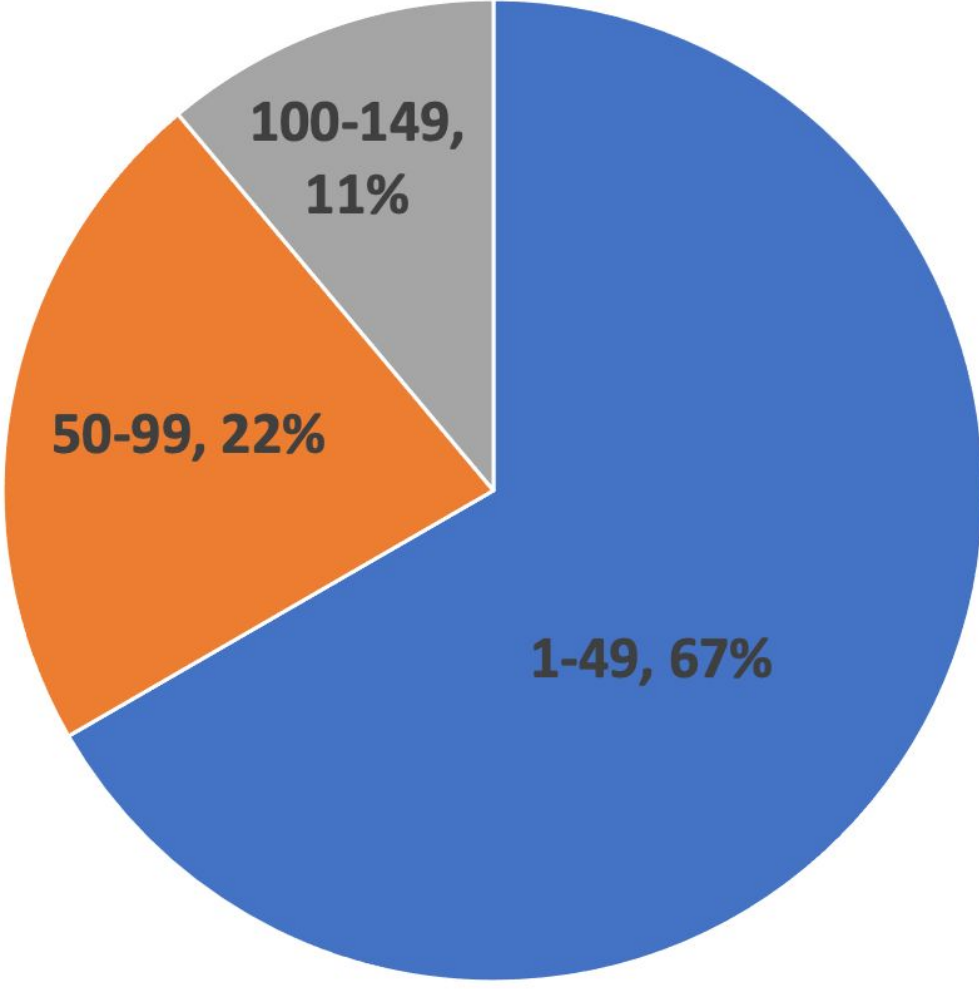


What do you see as the interest from students for Virtual mobility programs in 2023 compared to 2022?



of Responses: 9 | Response Rate: 25%

In 2023, how many students do you expect to place in virtual programs?

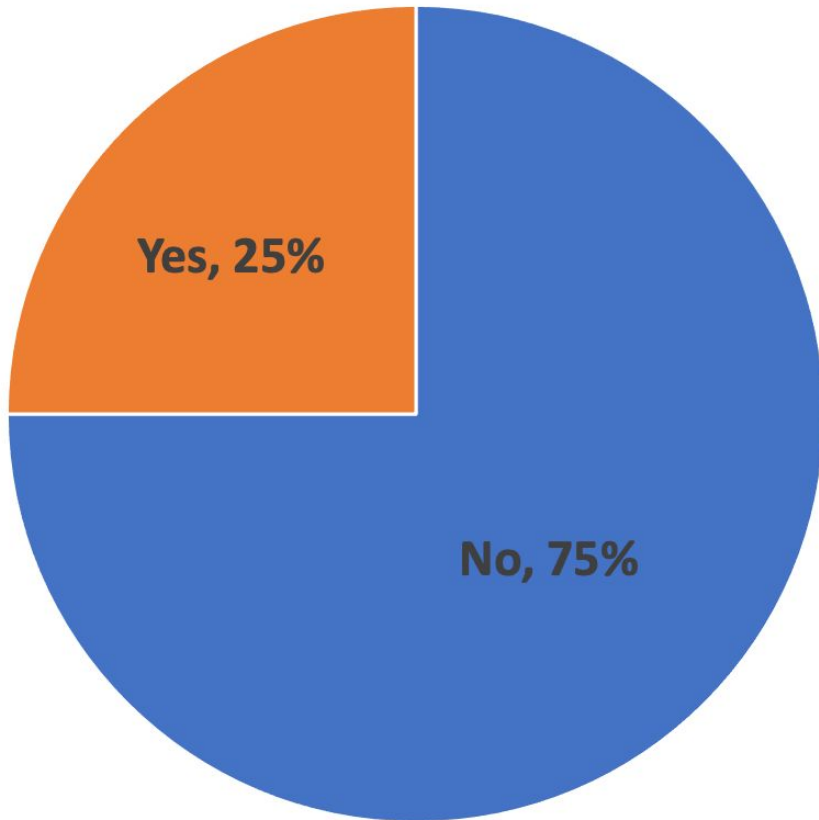


of Responses: 9 | Response Rate: 25%

Is your University planning to offer any internal institutional funding to students for virtual mobility programs in 2022 and/or 2023?

July 2022

of Responses: 36 | Response Rate: 100%



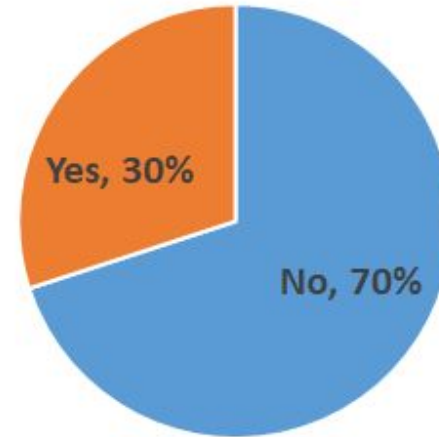
If yes, indicate funding amount per student, per program:

- \$1-500 (22%)
- \$501-1000 (22%)
- \$2,001-3,000 (11%)
- Varies (45%)

Is your University offering any internal institutional funding to students for Virtual mobility programs?

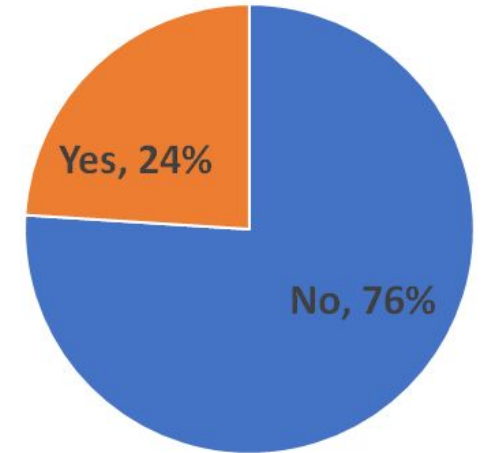
November 2020

of Responses: 27 | Response Rate: 100%



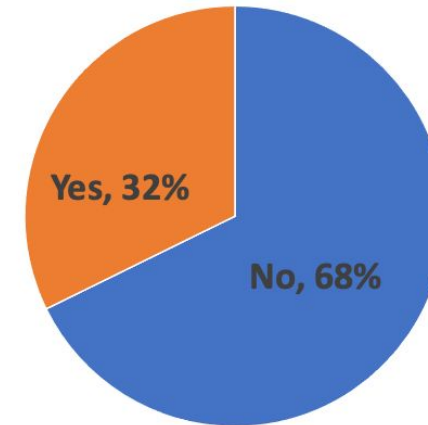
May 2021

of Responses: 29 | Response Rate: 100%



November 2021

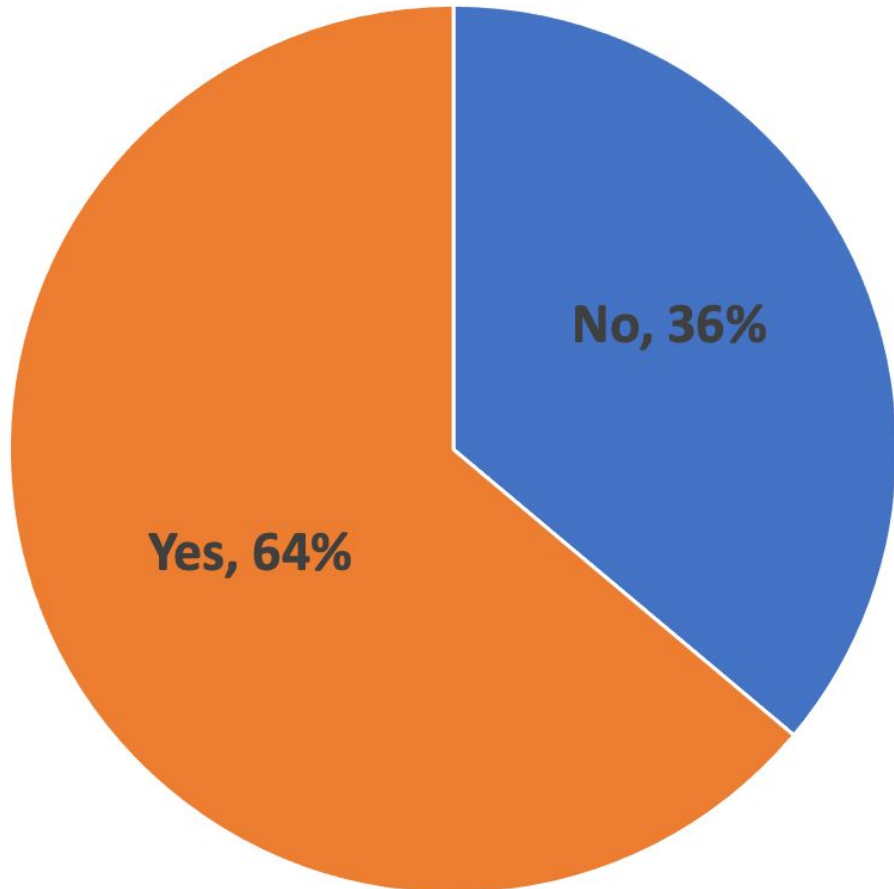
of Responses: 31 | Response Rate: 100%



Is your University planning to offer any internal institutional funding to students on overseas mobility programs in 2023?

July 2022

of Responses: 36 | Response Rate: 100%



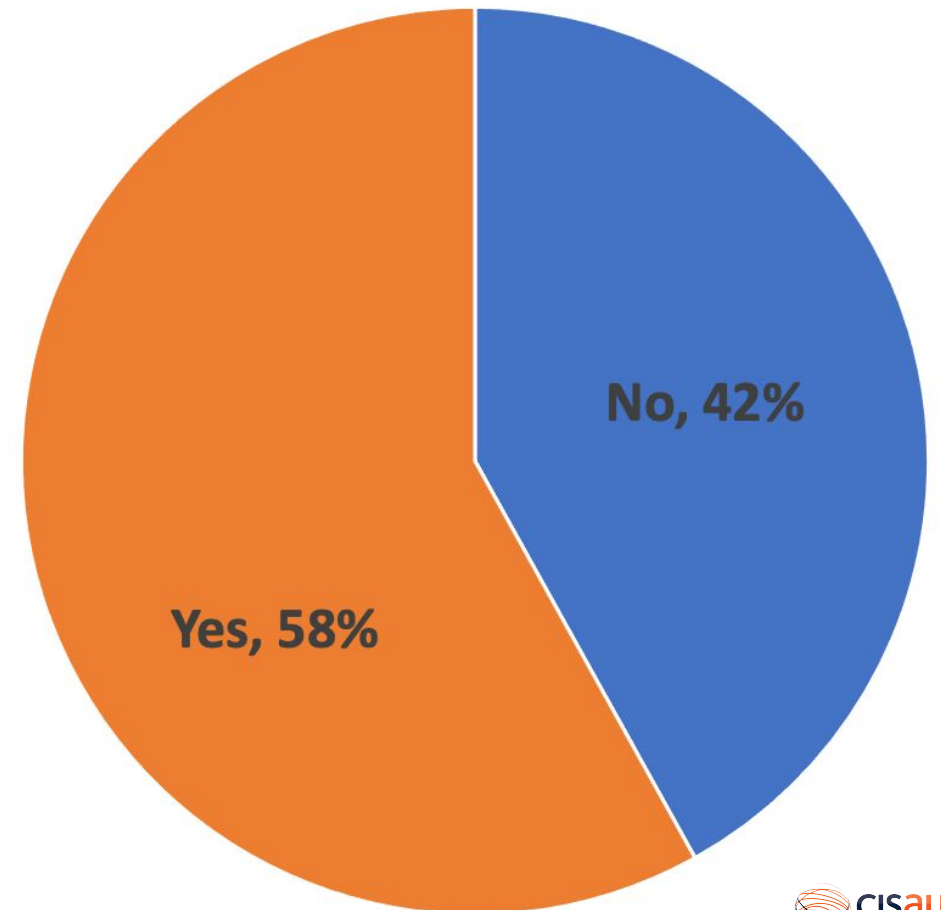
If yes, indicate funding amount per student, per short-term program:

- \$1-500 (9%)
- \$501-1000 (50%)
- \$1,001-2,000 (9%)
- \$2,001-3,000 (4%)
- Varies (14%)
- Depending on budget (9%)
- Undecided (5%)

Is your University planning to offer any internal institutional funding to students on overseas mobility programs in 2022?

November 2021

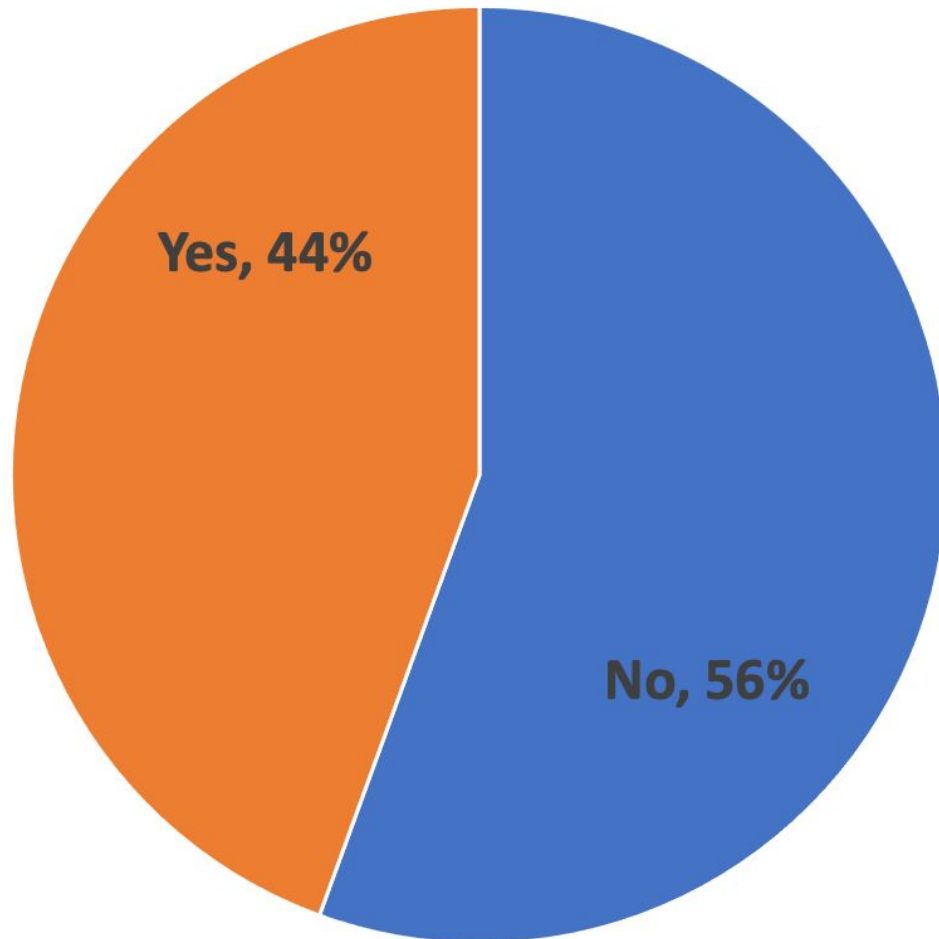
of Responses: 31 | Response Rate: 100%



Has your University made full COVID-19 vaccination mandatory for outbound travel to be approved?

July 2022

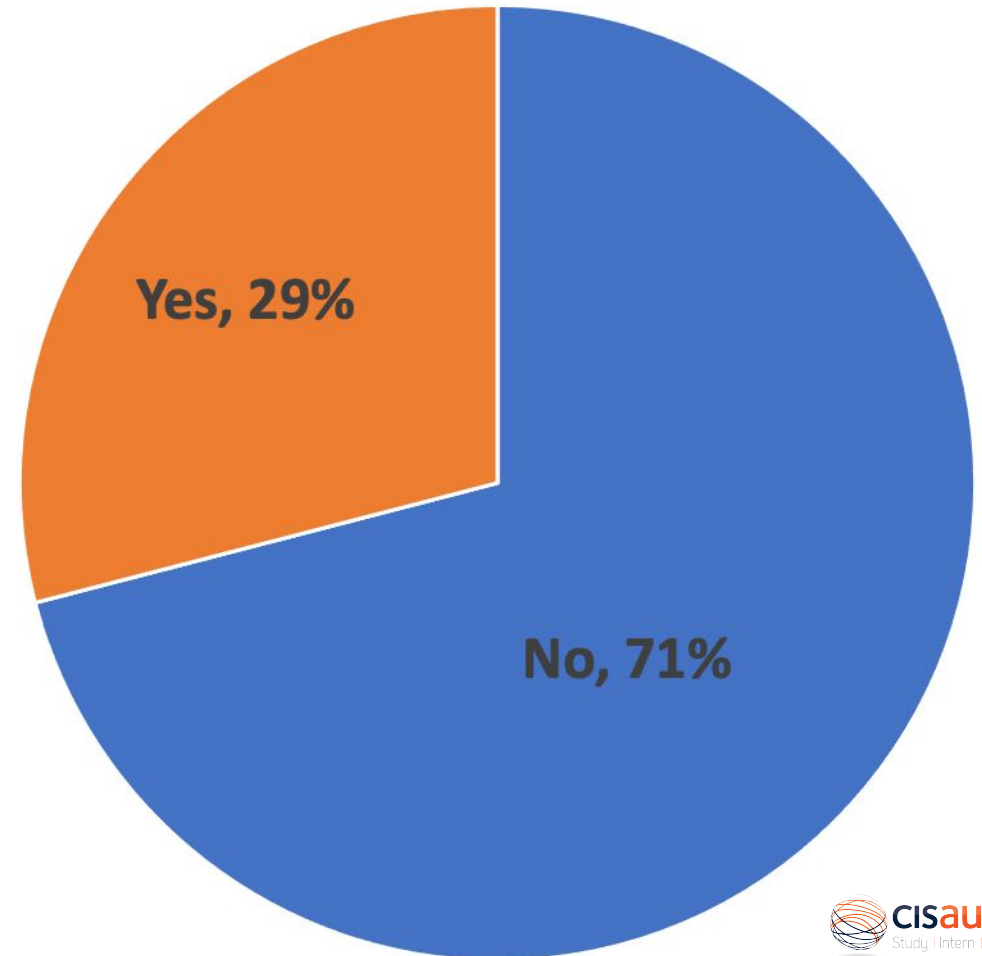
of Responses: 36 | Response Rate: 100%



Will your University make full vaccination mandatory for outbound travel to be approved?

November 2021

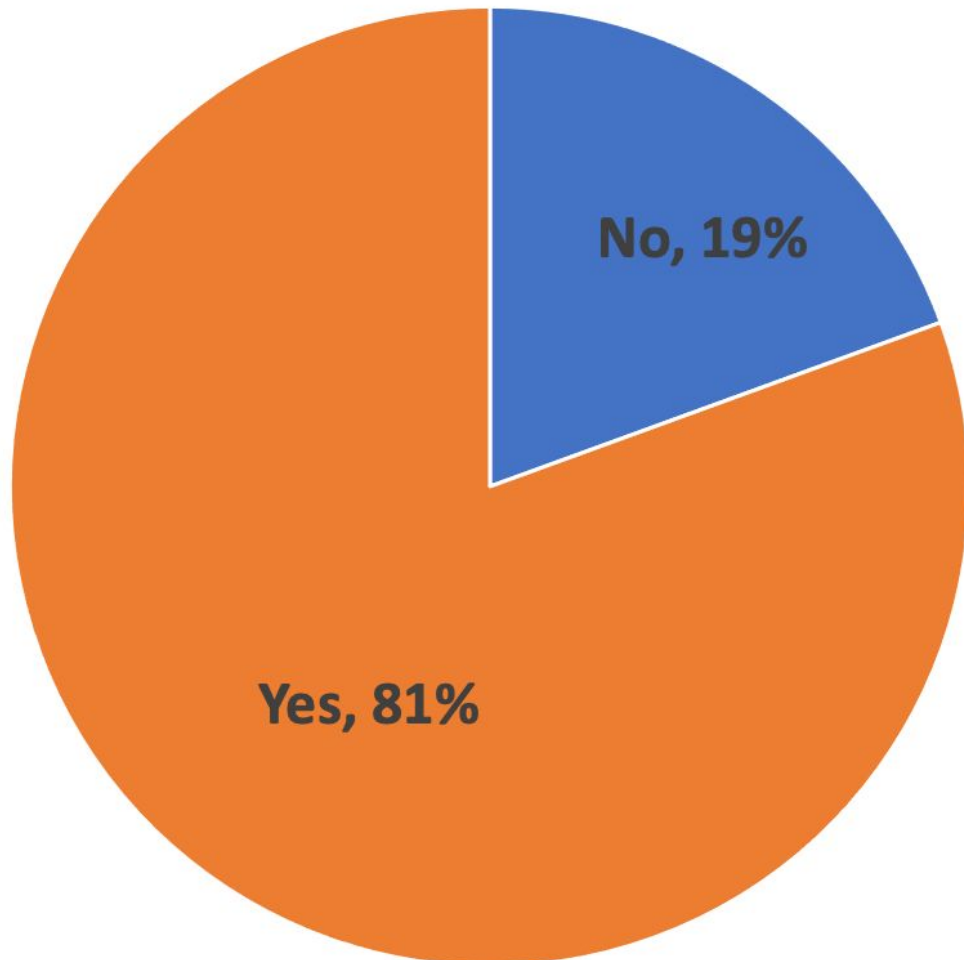
of Responses: 31 | Response Rate: 100%



Does your University have or planning to have a health insurance policy that provides COVID-19 related coverage?

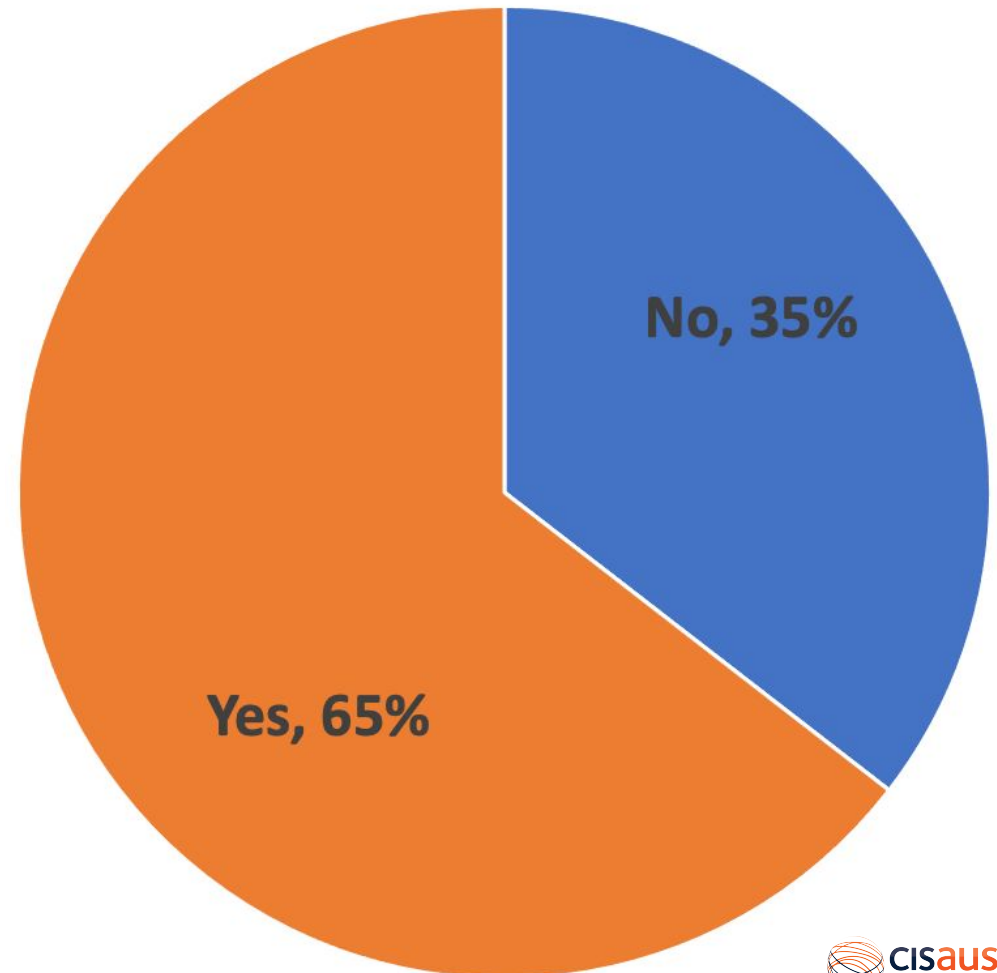
July 2022

of Responses: 36 | Response Rate: 100%

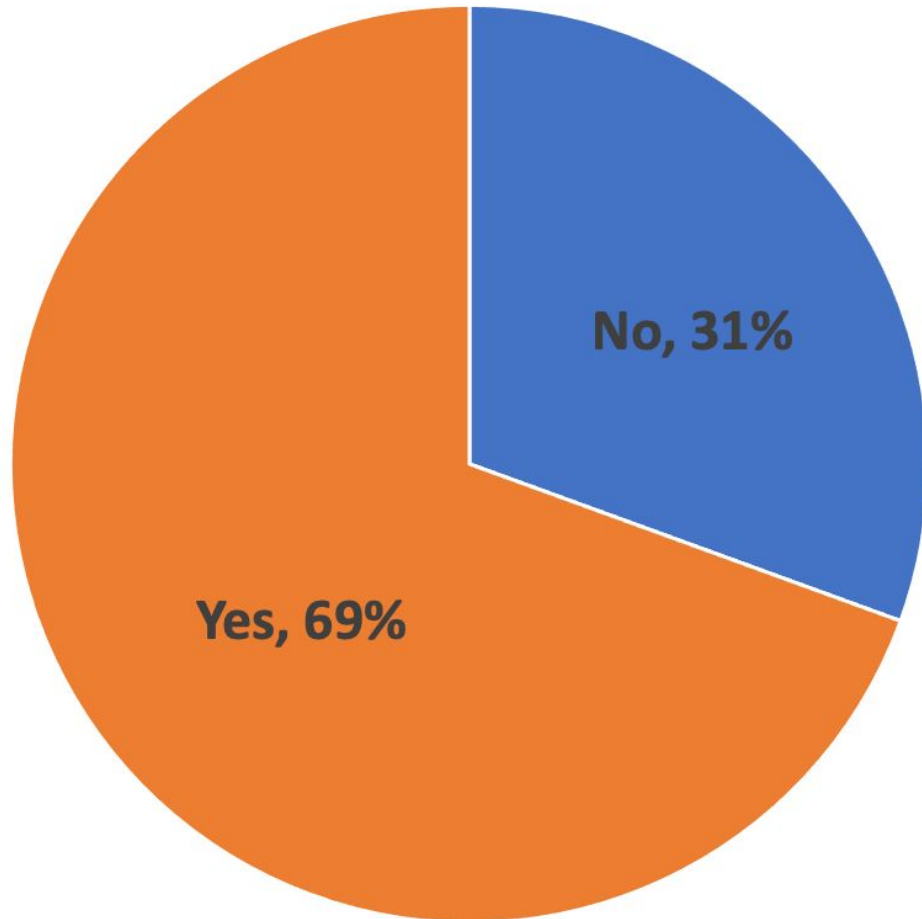


November 2021

of Responses: 31 | Response Rate: 100%



Do you see interest and engagement from your institution's academic staff increasing in 2023 compared with 2022?



of Responses: 36 | Response Rate: 100%

What do you see as the main obstacle to students and academic staff attending and leading outbound mobility programs in 2023?

- Staff are time poor and risk averse
- Uncertainty of travel/travel costs
- Resourcing, travel hesitancy due to pandemic and war, increased cost of travel, challenging foreign relations
- Faculty hesitant to reinstate faculty led programming due to increased risks of groups of students travelling together and limited staff resourcing. Faculties are also hesitant to lose money for fee-paying programs.
- Lack of staff resources, central funding and academic units
- Academic staff - capacity. Workloads have increased and there are fewer staff available to run programs
- Due to staff cuts, academic staff who have previous experience of running programs have left, plus reduced amount of institutional knowledge to train newcomers in the space
- Cohort of students who have not been able to remain gainfully employed as much as previous cohorts and have not had the same travel opportunities due to travel restrictions. This lack of experience with travel and comfort with new experiences is a new challenge faced by our team.
- Student demand but cautious about travel restrictions being put in place, confidence will increase over time
- Adequate staffing support in-country to manage COVID-19 and other incidents
- Rising cost of travel, possibility of borders closing unexpectedly
- All international travel must still be considered and approved by the Vice Chancellor
- Credit approval, reach of advertising
- Budget restraints of sending Academic staff overseas
- Dealing with Covid-19 impacts and additional compliance requirements
- Students - cost and timing (as well as academic flexibility)
- Institutional support
- Workload and complicated risk assessments
- Ongoing impacts of COVID
- Reduction of staff in the university to support initiatives, i.e. academic support staff, staff in risk/compliance/insurance
- Staff changes leading to loss of knowledge and lack of resources to keep up with increased student demand for travel
- Post-pandemic uncertainty and limited resources
- Lack of internal processes, support and awareness
- Budgets - zero funding for mobility
- Academic credit - most of our courses are now so rigidly structured they contain zero electives making it very hard (and often impossible) for students to get credit for overseas programs.

How do you see your marketing mix changing in 2022/23 compared to 2019?

"More digital, less printed - more sustainable"

"More online events"

"Rely on our existing platforms which are used to engage with students. Also engaging directly with academic staff and Schools to support programs."

"Try to imbed learning abroad activities in the curriculum and have pre-approved academic credit facilitated"

"Target advertising of both exchange partners and study tours, moving away from a general 'learning abroad is good' approach and letting students find their own opportunities"

"Creation of more tailored digital media that can be funneled to students at appropriate points in the student life cycle"

"Working with the central comms to highlight learning abroad as part of the wider student experience"

"More in person promotion as students are excited to return to campus and speak to someone face to face"

"More digital promotion, Facebook live info sessions, recorded sessions"

"More Zoom information sessions than face to face"

"Standard channels of Student News, social media, campus screens, website."

"Continue with mixed mode of seminar delivery."

"Students do not read emails or e-news, and have not been attending online info sessions - the only effective way to promote learning abroad is to speak to students face to face."

"Going to student lectures in person to talk to them in class and using academics to talk about study abroad. Trying to bypass digital comms as they are not proving to be effective."

"Given we have no mobility office or officer since 2021, we will be doing no marketing at all compared to 2019"
"No time or budget for marketing"

What new initiatives (if any) has the University implemented to assist students and academic staff in attending / leading programs overseas in the future?

01

Further support to academic staff and students with the use of smart technology

02

Building an academic program site to store information/training/templates and eventually a process flow

03

Implemented student mobility software to automate applications and communication with participants

04

Restructure of Mobility process / procedure and support; New mobility strategy designed to improve pre Covid mobility numbers

05

Creation of Blackboard site to host all outbound study abroad information

06

Emphasis on safety and risk mitigation for Study Tour project leaders and support staff

07

Development of staff training and resources

Additional comments / feedback

"Grateful for your continuing support despite tough times, appreciate your help on a range of issues, it's wonderful we're still able to collaborate with you, looking forward to boosting our numbers as much as possible!"

"When travel is possible CISAustralia is a gold star standard in regards to support, risk mitigation and working with universities closely."

"Being supportive of our institutional goals and providing avenues to achieve these are very appreciated."

"Response rate is amazing! All of your information is very thorough and you have thought of everything – it is fantastic."

"Love your passion, support and understanding, willingness to advocate for mobility and the sector."

"Pleased that CISAustralia is involved in issues impacting sector and building awareness on sustainability and the impact of sector on climate change."

"Keep up the great work - we appreciate the quality and focus on student experience that CISAustralia is well known for."

"Love the newsletters and ongoing support updates."

"Excellent risk and safety planning, sustainability resources."

"CIS provides fantastic comprehensive programs for students and industry support which is very helpful."

"We appreciate the collaboration and support from CISAustralia. Thank you."

"Fabulous working with you and hope to grow our programs with you in the future."



cisaustralia

Study | Intern | Volunteer Abroad

Creating Opportunities
Changing Lives

LET'S TALK ABOUT YOU. GET IN TOUCH

www.cisaustralia.com.au