technology**one**
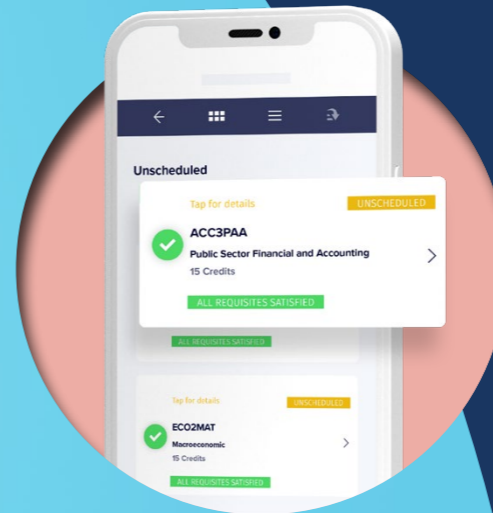
2021
Student Survey Report.

Survey findings from more than 1,700 students across Australia and New Zealand.

What's inside.

Foreword

Higher education across Australia and New Zealand is at a turning point, with more flexible ways of learning evolving out of digital innovation and services that emerged during the pandemic. While online and blended modes of learning have become standard in 2021, the upheaval to how we choose and participate in tertiary education has had a tangible impact on a range of student responses throughout the research.

Key facets of the student experience such as skills development, student engagement, quality of instruction, student support, and learning resources have a varying degree of influence on how students perceive their institution, and the value of education it provides.

This report collates and analyses research about specific aspects of the student experience that are measurable, and which influence learning and education outcomes. The data reveals insights across different institutional contexts, disciplines, and

modes of study. We anticipate that this research will drive conversations within educational institutions while helping them to identify and understand the larger trends and factors that influence higher education choices.

Peter Nikoletatos

Industry General Manager, Education
TechnologyOne

Introduction

What is the purpose of the survey?

The Student Survey Report is an annual survey that collects information on university students and vocational education and training (VET) students across Australia and New Zealand.

The primary purpose of the report is to explore what students expect from their education experience and uncover trends in student behaviours and motivations.

How is the survey conducted?

The online questionnaire was conducted with 1,756 participants in the Australia and New Zealand region, ranging from students enrolled in tertiary-level higher education institutions to vocational students in VET institutes. There were 1,267 Australian respondents and 489 New Zealand respondents. The fieldwork was conducted in September 2021.

Who is this report intended for?

The findings of this report are intended to help ANZ tertiary education institutions identify key areas for technology development that can support their students. The global education marketplace is becoming more competitive, and ANZ institutions must have the tools to keep up with the current trends in the education sector, meet evolving student expectations and continue to provide world-class education experiences.

Key findings in 2021

- Getting accepted in their course of choice emerged as the biggest driver for student enrolment

- More than 31% of respondents felt it was very important to have online enrolment, ability to access course resources and materials from any device at any time

- 25% of respondents said they would switch institutions for a better technology experience

- Only 17% respondents reported complete trust in their institution's use of emerging technologies like AI and automation

- 39% of the respondents expressed an interest in exploring micro-credentialing as an education option
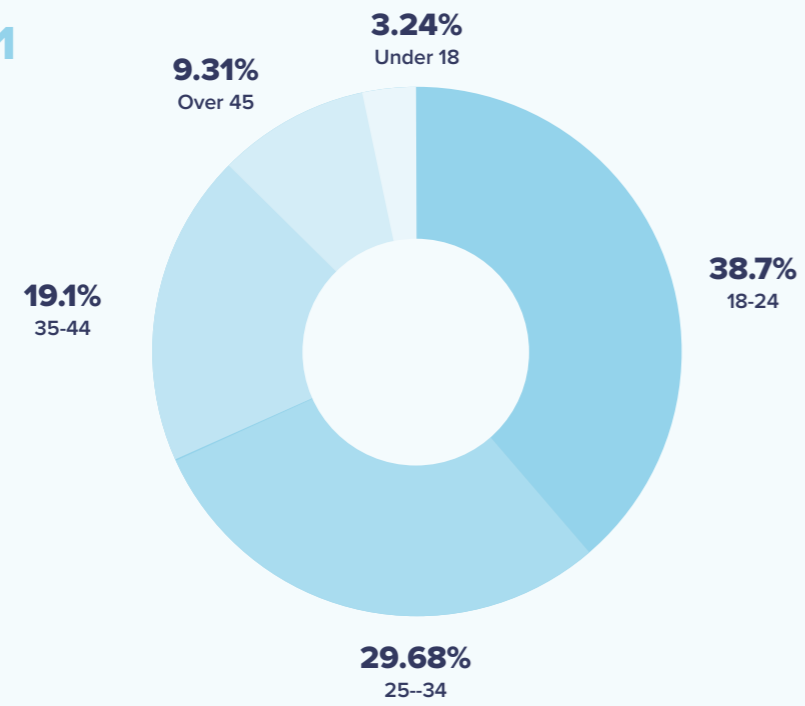
Chapter 01.
Demographics

Key facets of the student experience such as skills development, student engagement, quality of instruction, student support, and learning resources have a varying degree of influence on how students perceive their institution, and the value of education it provides.

This report collates and analyses research about specific aspects of the student experience that are measurable, and which influence learning and education outcomes. The data reveals insights across different institutional contexts, disciplines, and modes of study. We anticipate that this research will drive conversations within educational institutions while helping them to identify and understand the larger trends and factors that influence higher education choices.
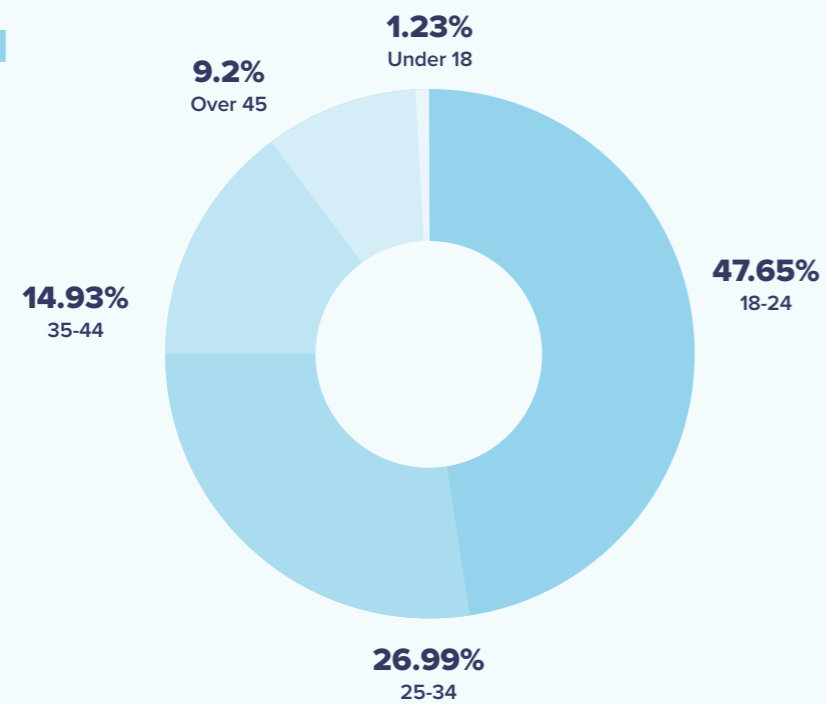
Q1. What is your current age?

Aus 2021

- **3.24%** Under 18
- **38.7%** 18-24
- **29.68%** 25–34
- **19.1%** 35-44
- **9.31%** Over 45

NZ 2021

- **1.23%** Under 18
- **47.65%** 18-24
- **26.99%** 25-34
- **14.93%** 35-44
- **9.2%** Over 45

Q2. Where do you live?

- **1.34%** NT
- **8.76%** WA
- **19.73%** QLD
- **29.28%** NSW
- **2.68%** ACT
- **7.89%** SA
- **27.31%** VIC
- **3%** TAS
- **74.44%** North Island
- **25.56%** South Island
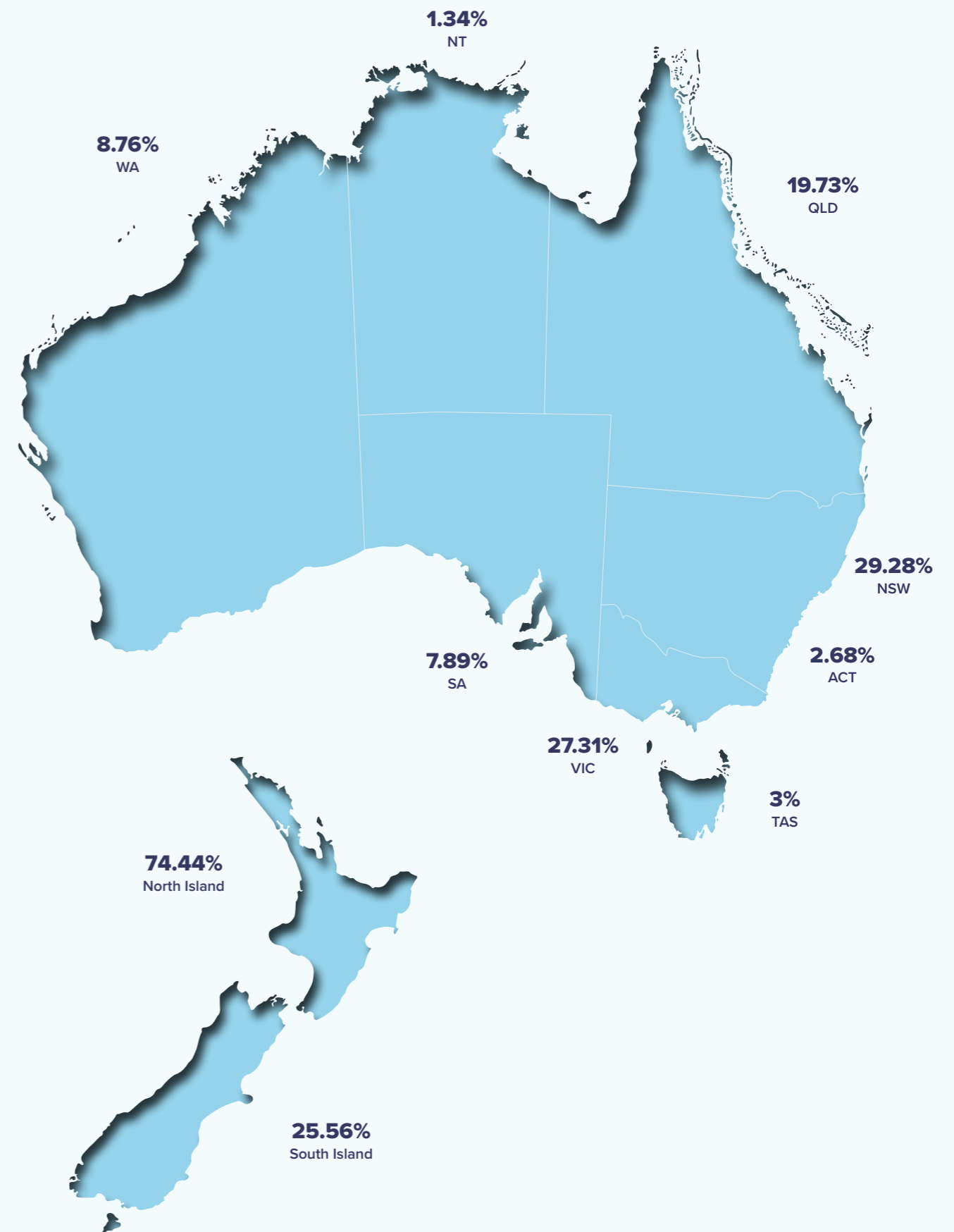
Q3. Are you enrolled part time or full time?

Aus 2021

Full time undergraduate university student	31.18%
Part time TAFE student	20.52%
Full time TAFE student	16.1%
Part time undergraduate university student	10.89%
Full time postgraduate university student	9.16%
Part time postgraduate university student	5.9%
Part time polytechnic student	2%
Full time polytechnic student	3%

NZ 2021

Full time undergraduate university student	36.81%
Full time Institute of Technology & polytechnic student	16.77%
Full time postgraduate university student	13.5%
Part time postgraduate university student	7.3%
Part time undergraduate university student	6.3%
Full time Wānanga student	8.18%
Part time Institute of Technology & polytechnic student	6.1%
Part time Wānanga student	4.9%

Q4. Which mode of study are you currently enrolled in?

Aus 2021

Blending learning - a combination of face-to-face online	38.04%
Completely online	31.97%
On-campus - all courseware delivered via on-campus lectures or tutorials	29.52%
Other	0.47%

NZ 2021

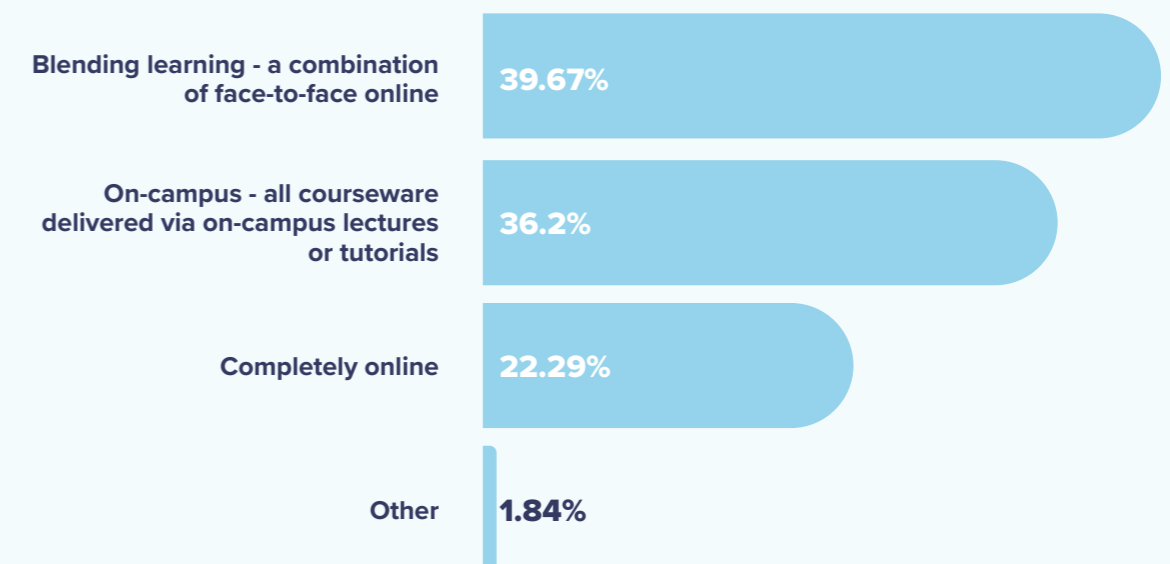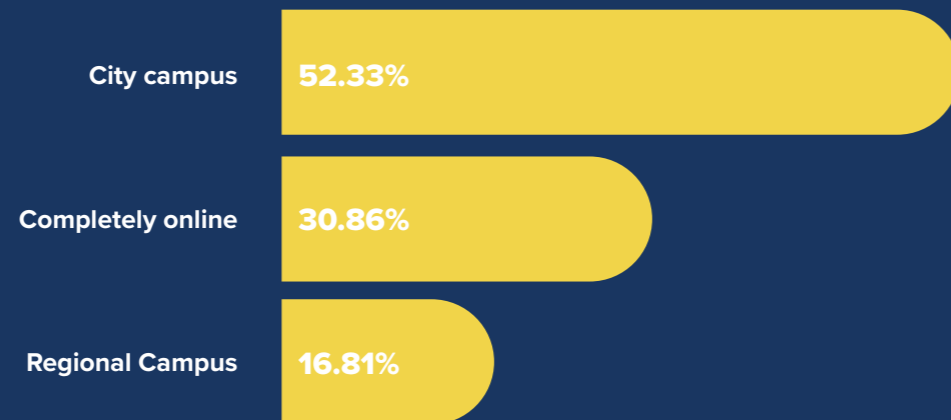|	
Blending learning - a combination of face-to-face online	39.67%
On-campus - all courseware delivered via on-campus lectures or tutorials	36.2%
Completely online	22.29%
Other	1.84%
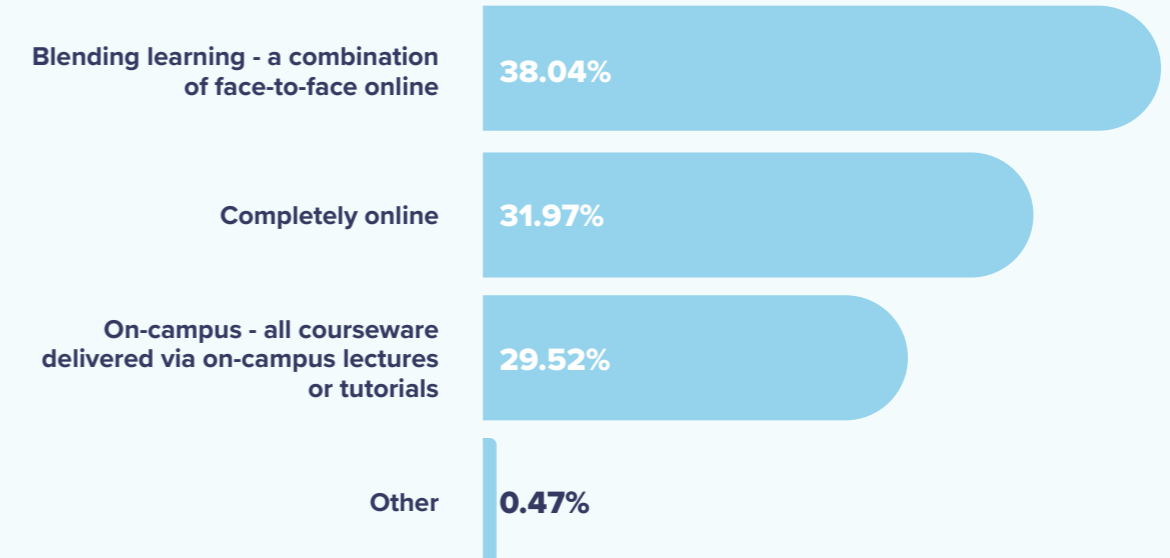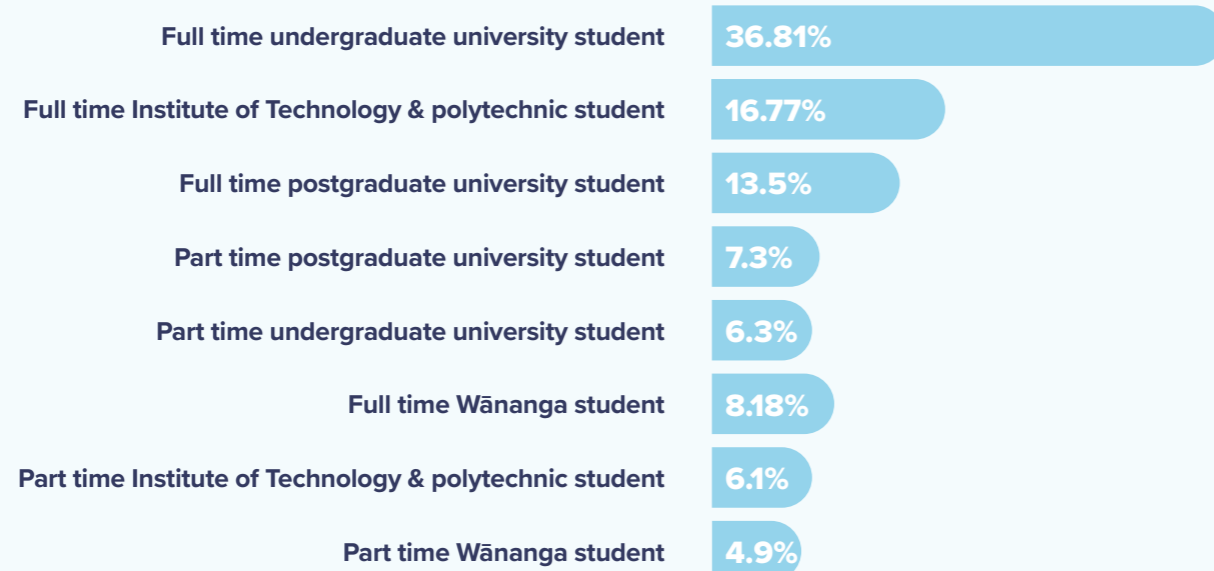
Chapter 02.
The Institute
— Where you
study and why

Across both Australia and New Zealand, 65% are enrolled in universities, with 56% at city campuses. Proximity to home and work-integrated learning opportunities were major factors in deciding where to study, placing just above the cost of courses, in line with last year's research.
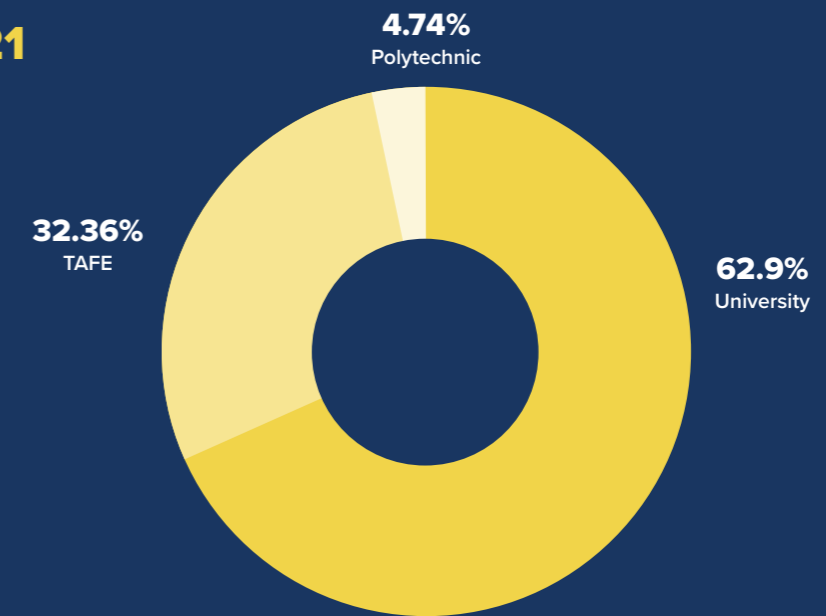
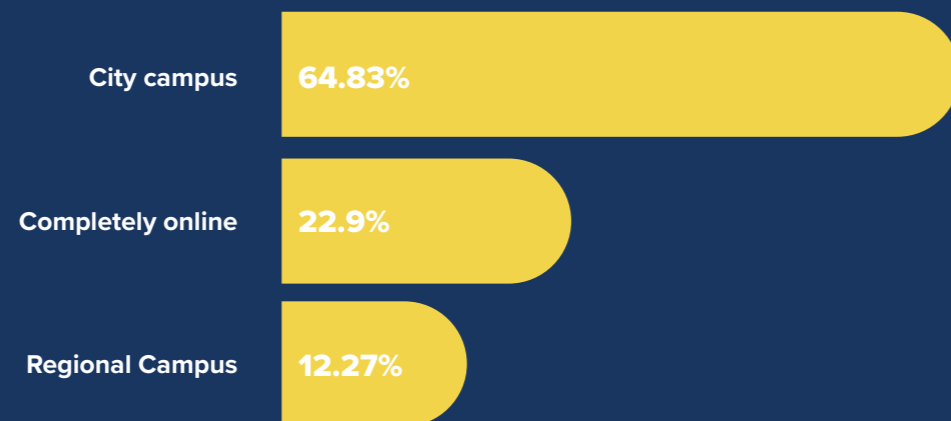## Q1. Where are you currently undertaking study, or completing a course or degree?

Aus 2021

City campus **52.33%**

Completely online **30.86%**

Regional Campus **16.81%**

NZ 2021

City campus **64.83%**

Completely online **22.9%**

Regional Campus **12.27%**

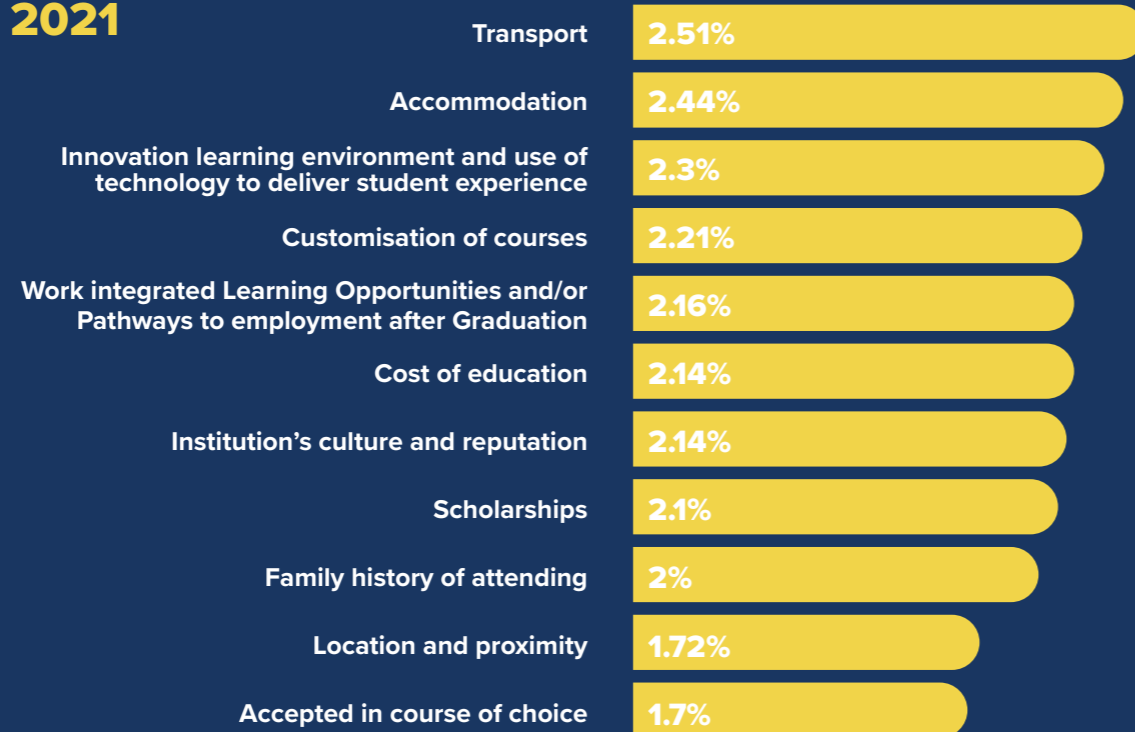## Q2. What type of institution are you studying at?

Aus 2021

4.74%
Polytechnic

32.36%
TAFE

62.9%
University

NZ 2021

5.11%
Wānanga

25.97%
Institue of
Technology
and
Polytechnic

68.92%
University
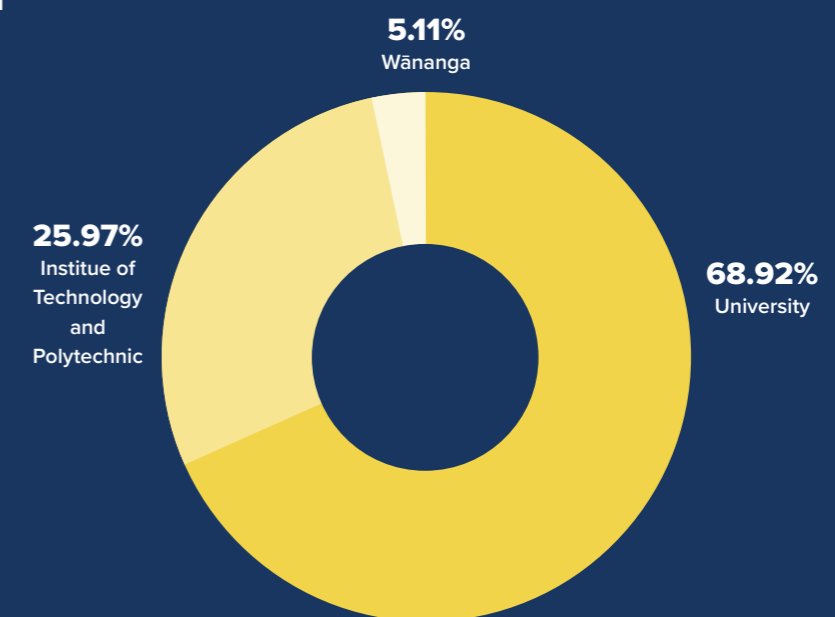
Q3. Reasons for choosing the institution where you study

Aus 2021

Reason	%
Transport	2.43%
Innovation learning environment and use of technology to deliver student experience	2.39%
Accommodation	2.36%
Customisation of courses	2.3%
Cost of education	2.17%
Work integrated Learning Opportunities and/or Pathways to employment after Graduation	2.16%
Institution's culture and reputation	2.11%
Scholarships	2.07%
Family history of attending	2.04%
Location and proximity	1.8%
Accepted in course of choice	1.57%

NZ 2021

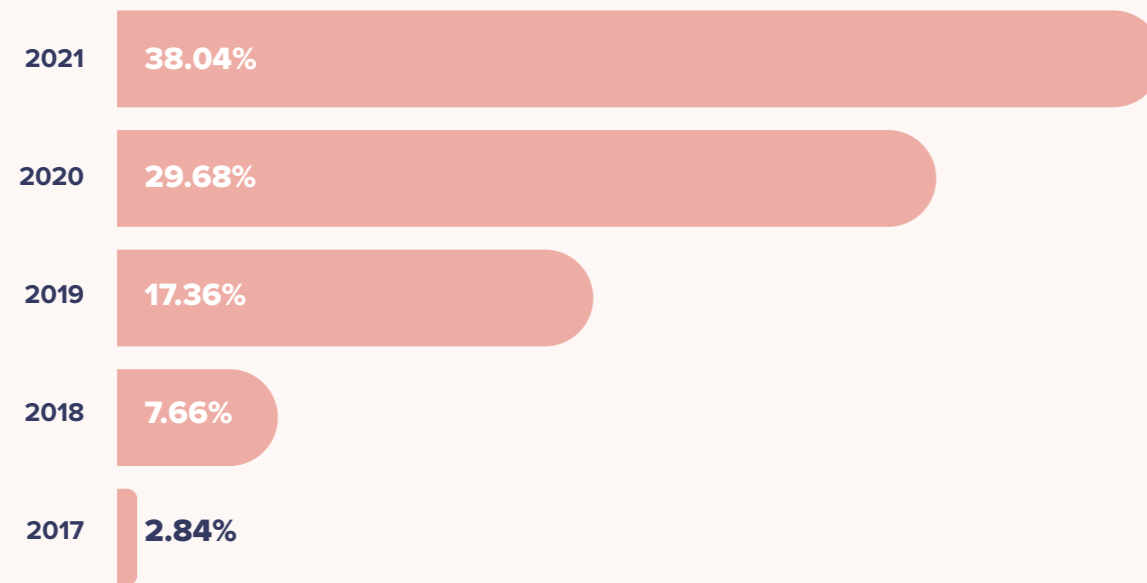| Reason	%
Transport	2.51%
Accommodation	2.44%
Innovation learning environment and use of technology to deliver student experience	2.3%
Customisation of courses	2.21%
Work integrated Learning Opportunities and/or Pathways to employment after Graduation	2.16%
Cost of education	2.14%
Institution's culture and reputation	2.14%
Scholarships	2.1%
Family history of attending	2%
Location and proximity	1.72%
Accepted in course of choice	1.7%

Chapter 03.
The Student Experience – Enrolment and Admissions

In Australia and New Zealand, one trend we see across student experience is the increasing preference for online services— that encompasses enrolment, administration, and the course material itself. Respondents largely favoured a course model where course material is spread across multiple institutions if they could be credited toward a single degree. While the majority of respondents found course enrolments straightforward, around 15% were at least moderately challenged by the task, as opposed to 34% in 2020.

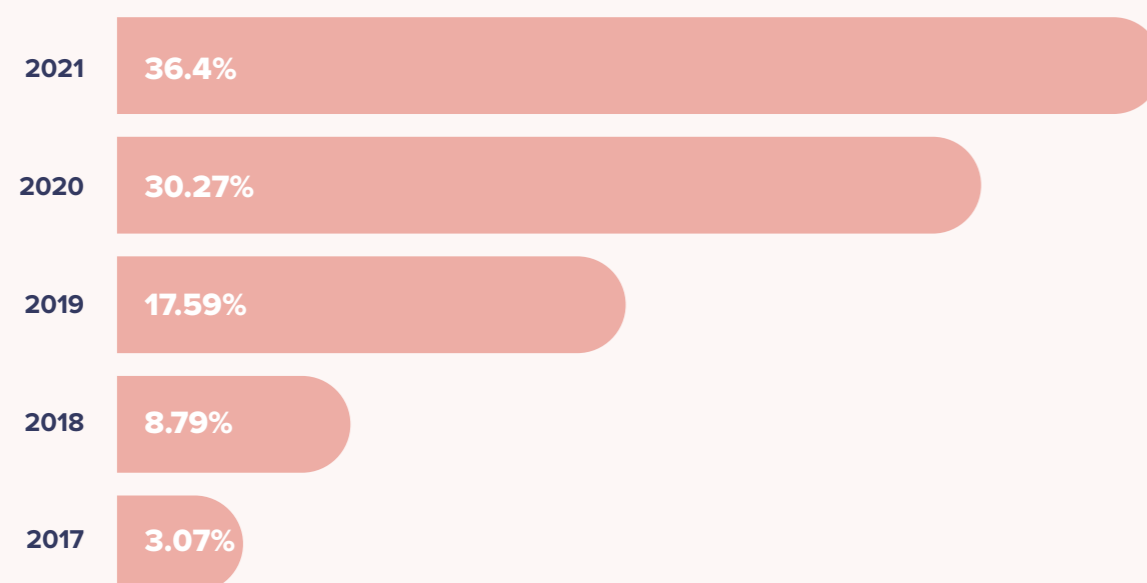## Q1. In what year did you enrol in the course you are currently studying?

Aus 2021

Year	
2021	38.04%
2020	29.68%
2019	17.36%
2018	7.66%
2017	2.84%

NZ 2021

Year	
2021	36.4%
2020	30.27%
2019	17.59%
2018	8.79%
2017	3.07%

Q2. To what degree was the enrolment process for your educational institution able to be completed online?
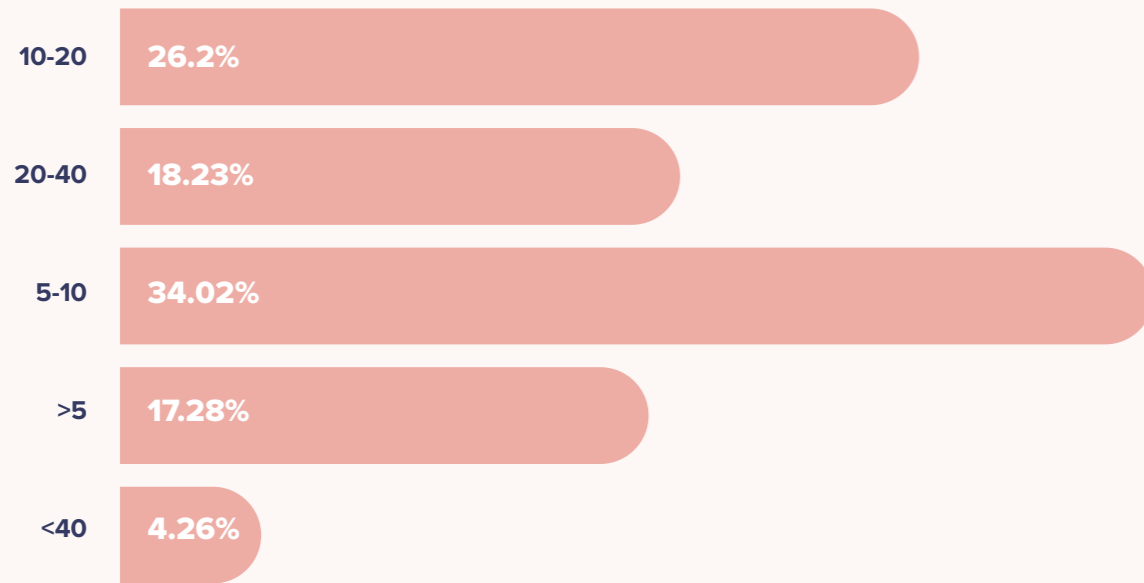
Aus 2021

Completely online	63.27%
Partially online	30.98%
Completely paper-based	5.75%

NZ 2021

Completely online	63.27%
Partially online	30.98%
Completely paper-based	5.75%
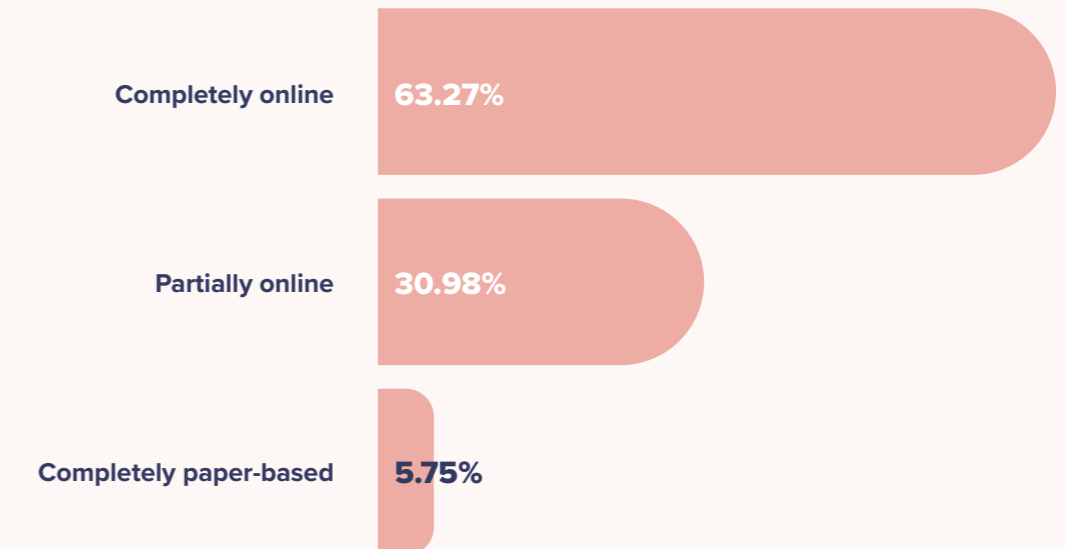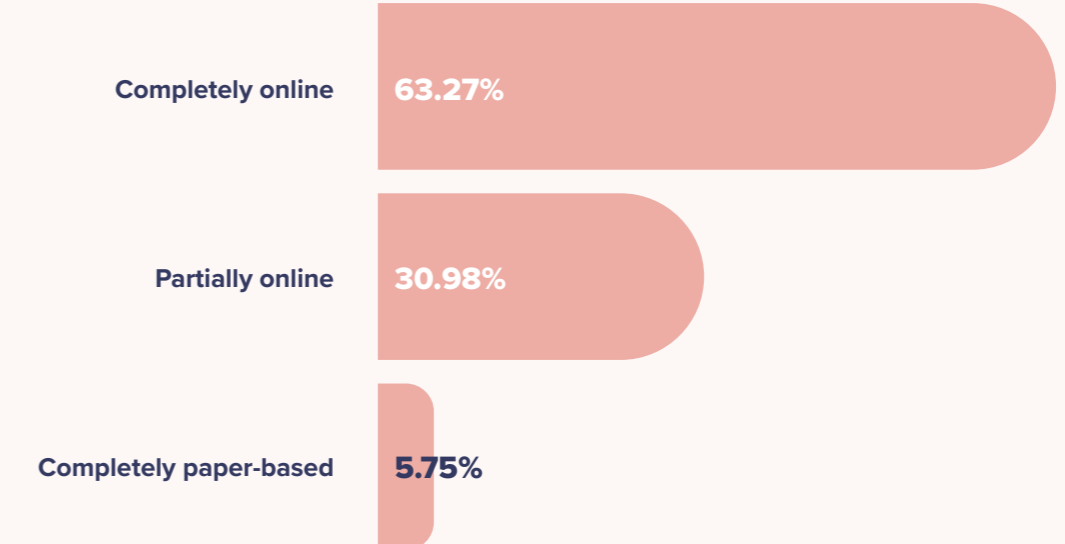
Q3. How many steps were involved in your educational institution's enrolment process?

Aus 2021

10-20	26.2%
20-40	18.23%
5-10	34.02%
>5	17.28%
<40	4.26%

NZ 2021

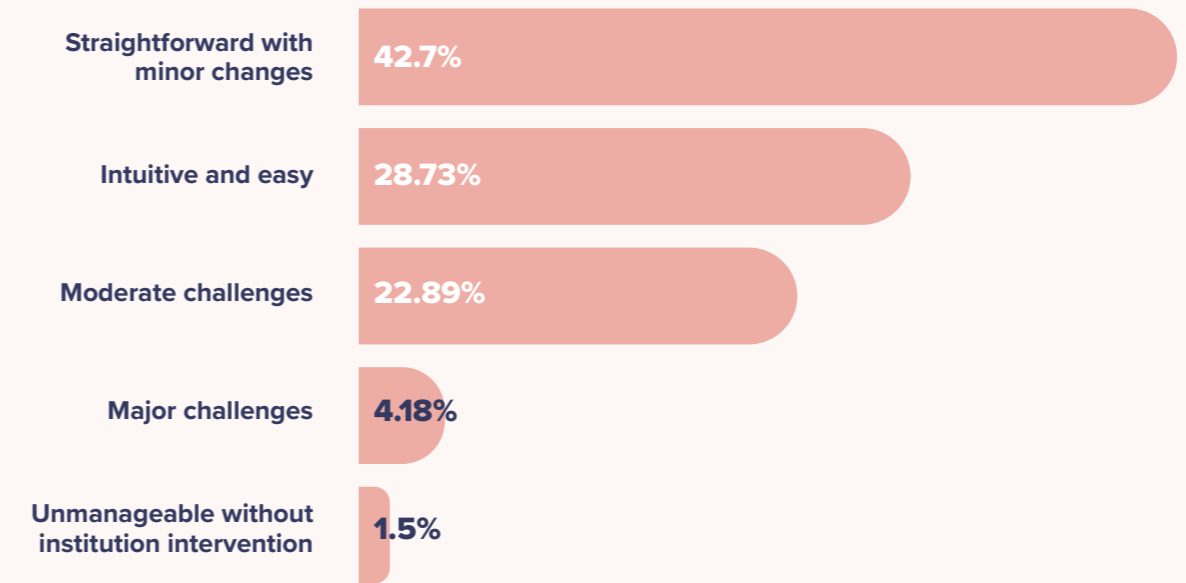|	
10-20	25.36%
20-40	12.88%
5-10	39.06%
>5	20.65%
<40	2.05

Q4. How would you describe the difficulty of the enrolment experience with your education institution?

Aus 2021

Straightforward with minor changes	42.7%
Intuitive and easy	28.73%
Moderate challenges	22.89%
Major challenges	4.18%
Unmanageable without institution intervention	1.5%

NZ 2021

Straightforward with minor changes	43.97%
Intuitive and easy	25.77%
Moderate challenges	23.52%
Major challenges	5.32%
Unmanageable without institution intervention	1.42%
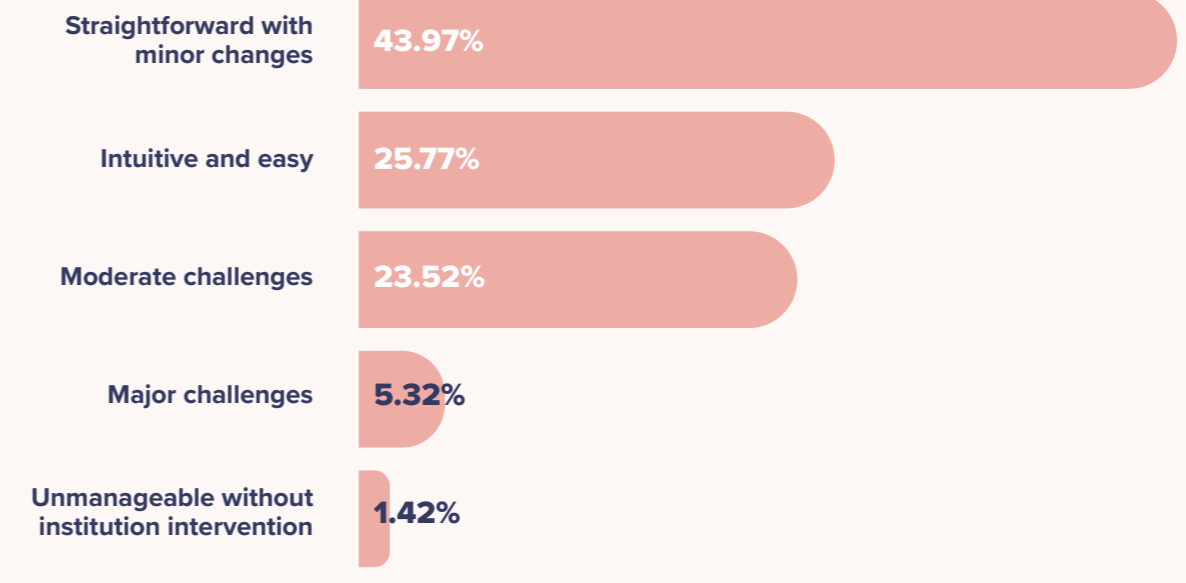
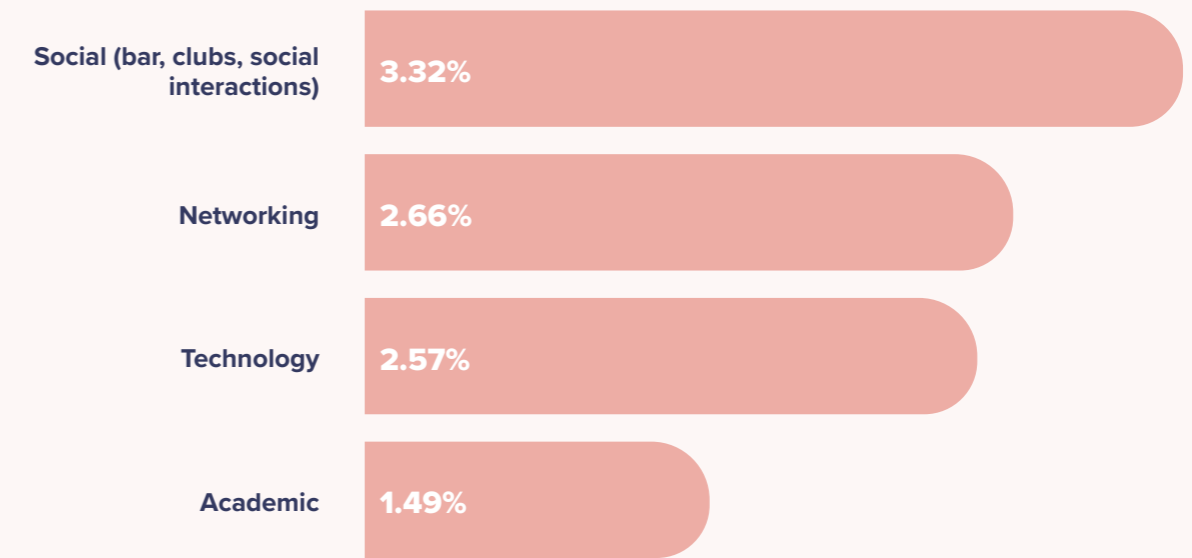## Q5. How important is it for you to be able to self-manage your enrolment and administrative experience online?
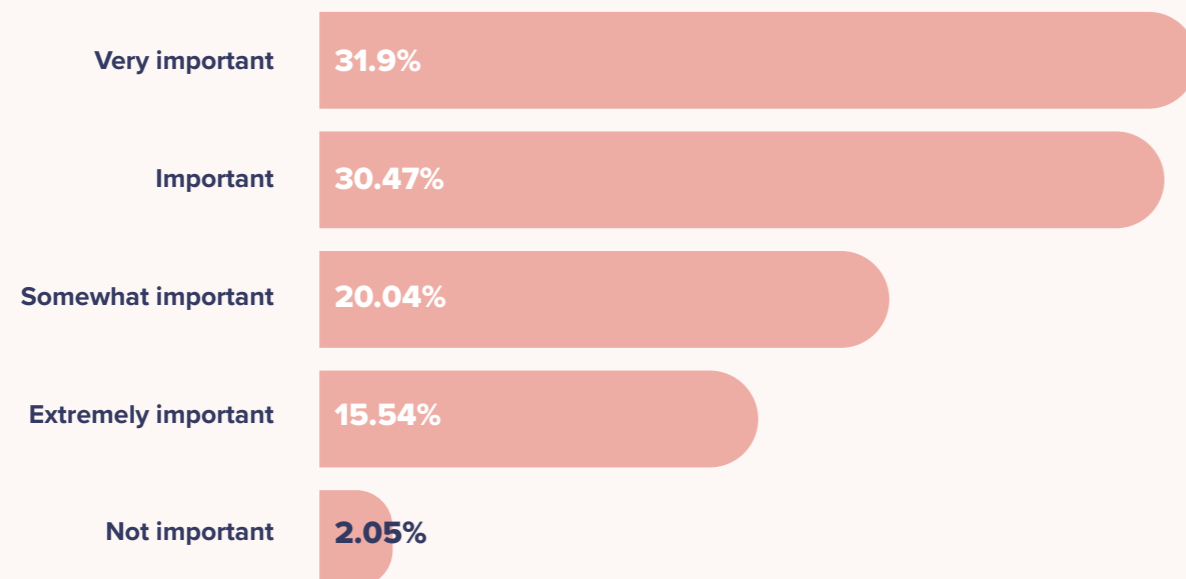
Aus 2021

Very important	**30.54%**
Important	**28.26%**
Somewhat important	**20.84%**
Extremely important	**18.07%**
Not important	**2.29%**

NZ 2021

Very important	**31.9%**
Important	**30.47%**
Somewhat important	**20.04%**
Extremely important	**15.54%**
Not important	**2.05%**
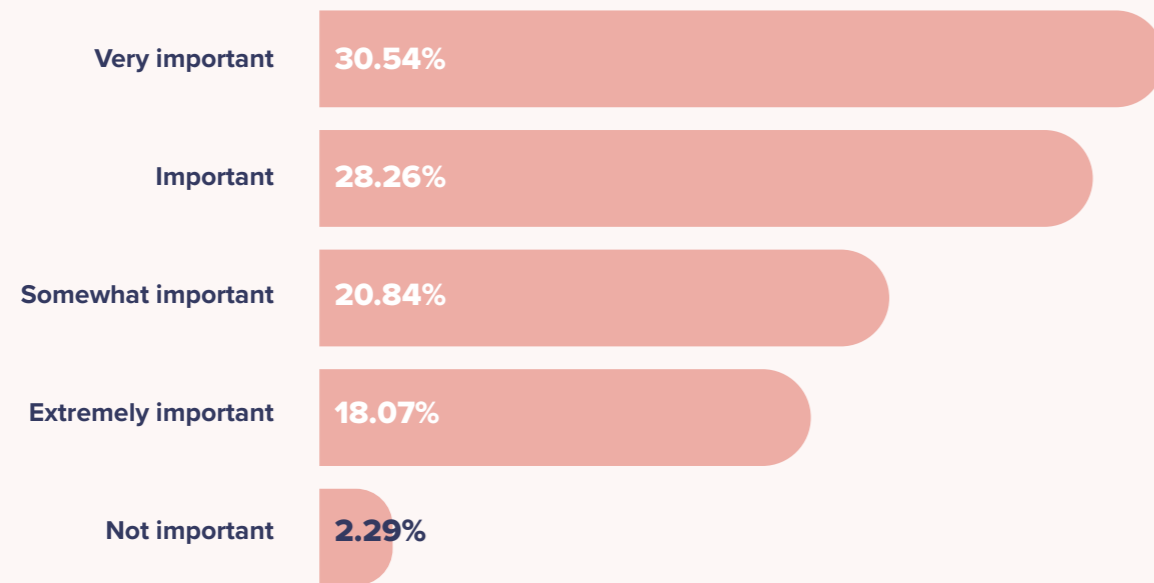
Q6. Rank in order the most important factors to your education experience

Aus 2021

Social (bar, clubs, social interactions)	**3.32%**
Networking	**2.66%**
Technology	**2.57%**
Academic	**1.49%**

NZ 2021

|	
Social (bar, clubs, social interactions)	**3.38%**
Networking	**2.72%**
Technology	**2.71%**
Academic	**1.34%**
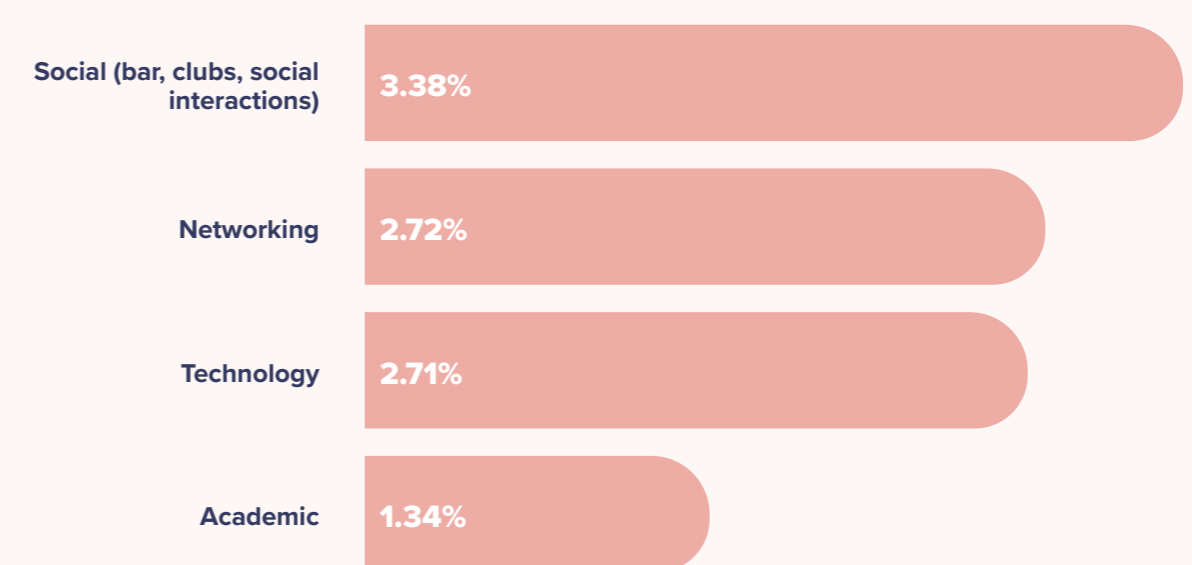
Q7. To what degree do you believe educational institutions are providing the right courses and degrees to develop new skills required in the future workforce?

Aus 2021

3.79%
Not at all

4.97%
Don't know

18.55%
Yes, in select courses/faclties

47.91%
Yes, in the majority of courses/faculties

24.78%
Yes

NZ 2021

3.27%
Not at all

4.29%
Don't know

19.63%
Yes, in select courses/faclties

53.17%
Yes, in the majority of courses/faculties

19.63%
Yes
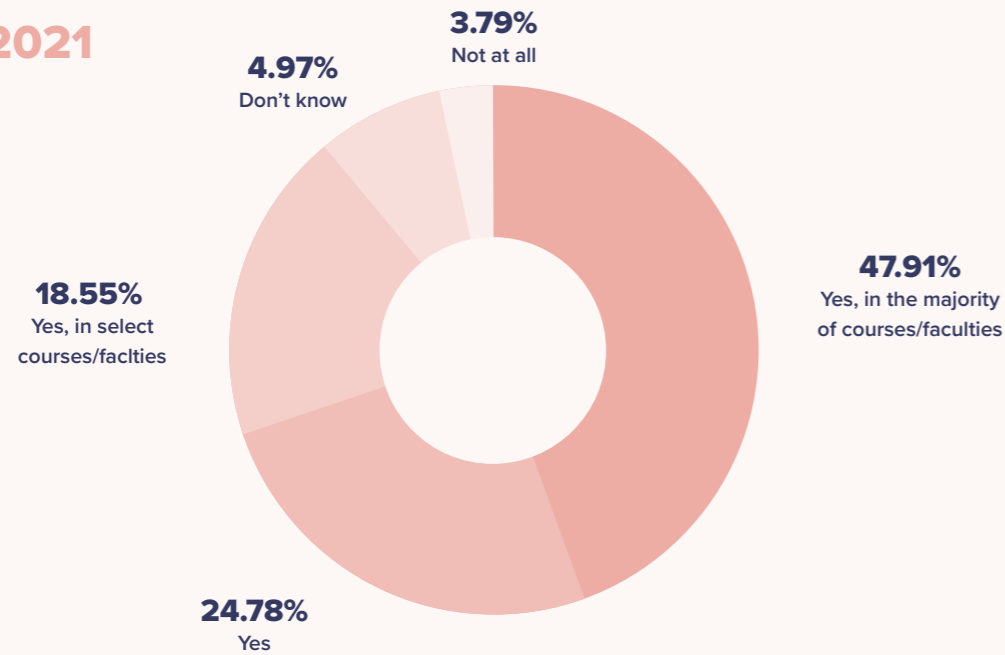
Q8. Would you attend multiple institutions at one time if subjects from different institutions could be credited toward a single degree?

Aus 2021

4.81%
Don't Know

21.23%
No

45.15%
Yes

28.81%
Maybe

NZ 2021

19.63%
Don't Know
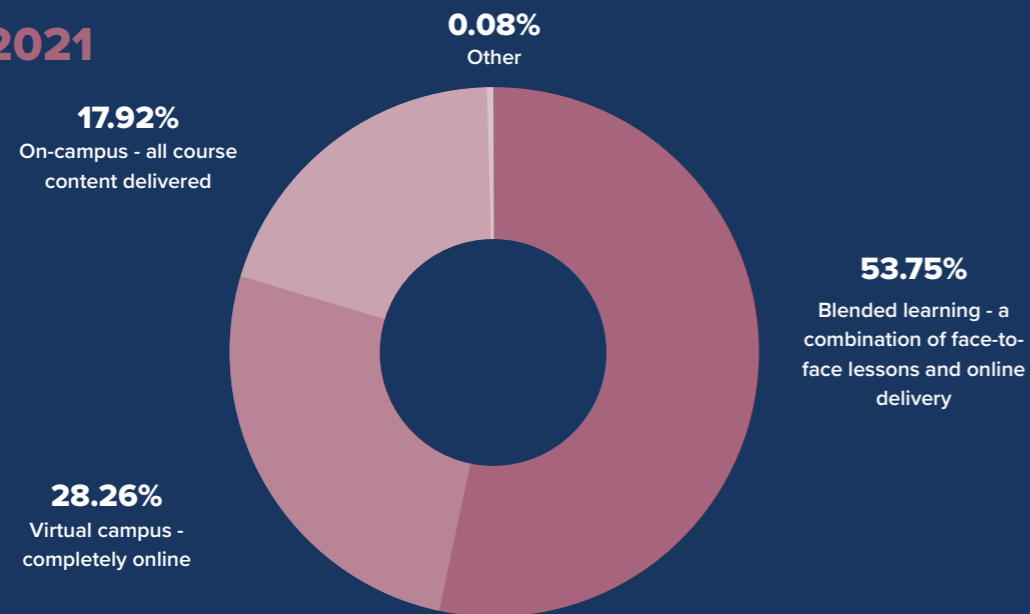
52.76%
Yes

27.61%
No
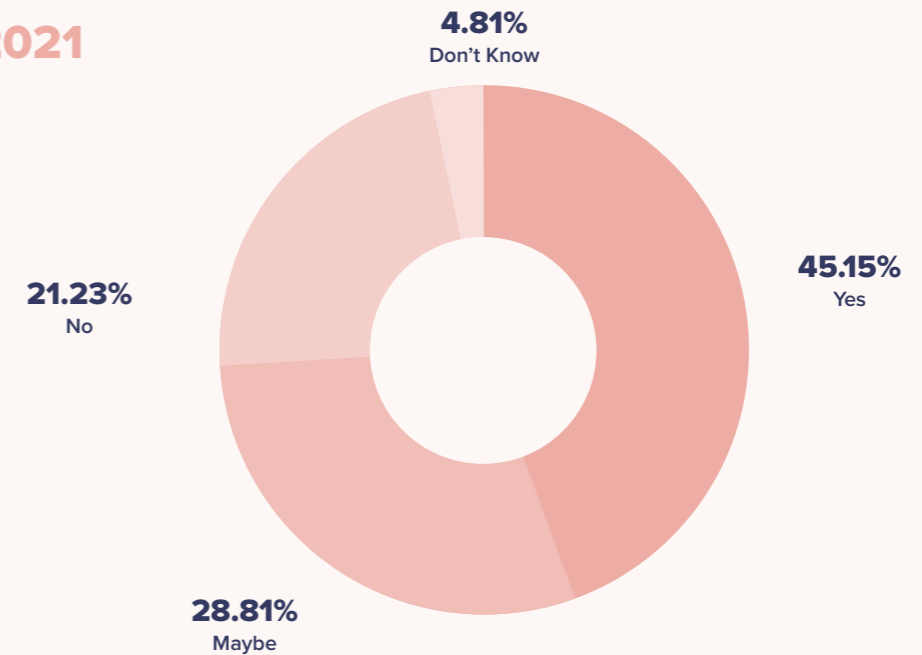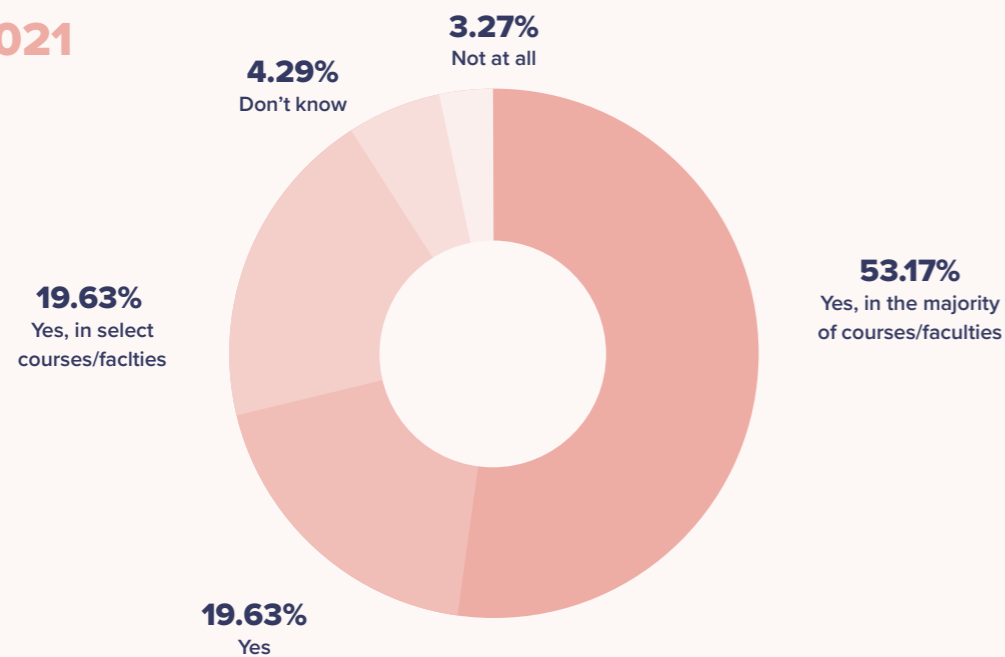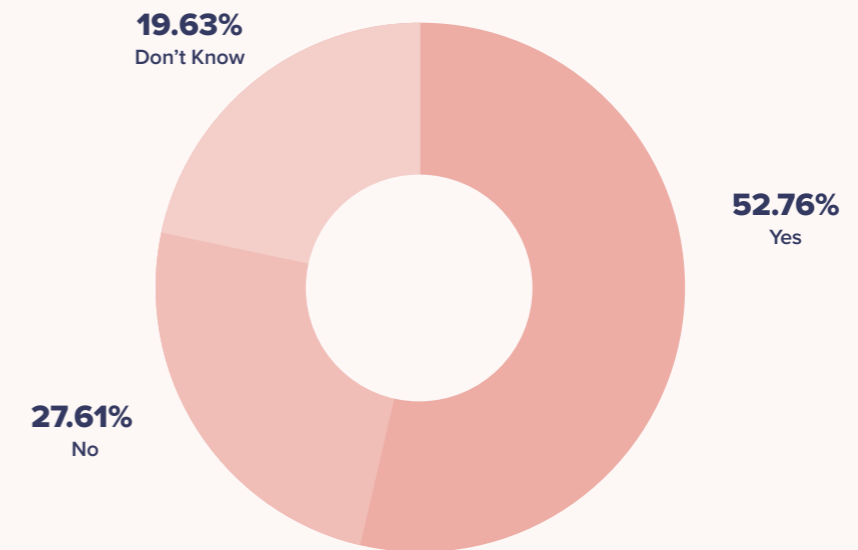
Chapter 04.
The importance of technology and innovation

In Australia, 28% of students preferred a virtual campus, while blended learning is now the most preferred overall method of learning. We see a distinct preference evident for administrative functions being performed online and social activities in person. Given the uncertainty of recent years, and the gradual return to normalcy currently underway, it's noteworthy that an overwhelming majority of respondents ranked a consistent student experience across all course touchpoints or interactions with the highest importance.

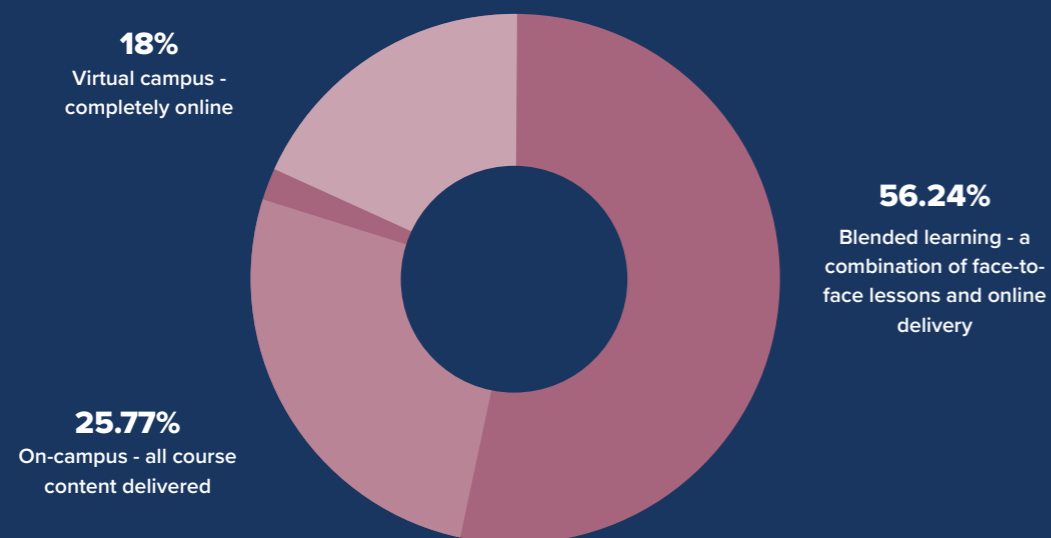## Q1. Which of the following would be your preferred way to attend your educational institution?

Aus 2021

0.08%
Other

17.92%
On-campus - all course content delivered

53.75%
Blended learning - a combination of face-to-face lessons and online delivery

28.26%
Virtual campus - completely online

NZ 2021

18%
Virtual campus - completely online

56.24%
Blended learning - a combination of face-to-face lessons and online delivery

25.77%
On-campus - all course content delivered

Q2. What is your preferred method to communicate with the institution's administration department and interact with administrative functions?

Aus 2021

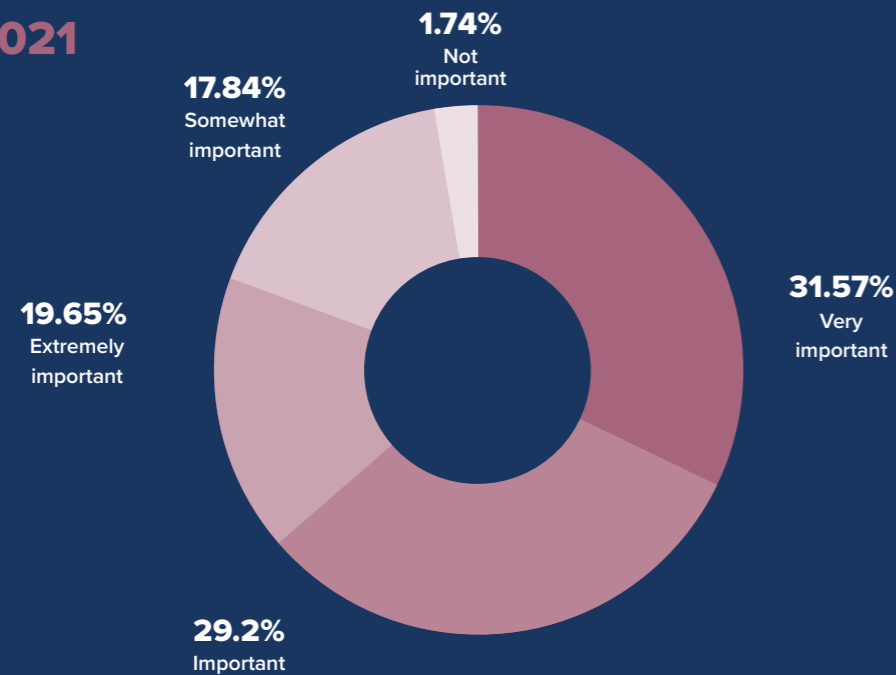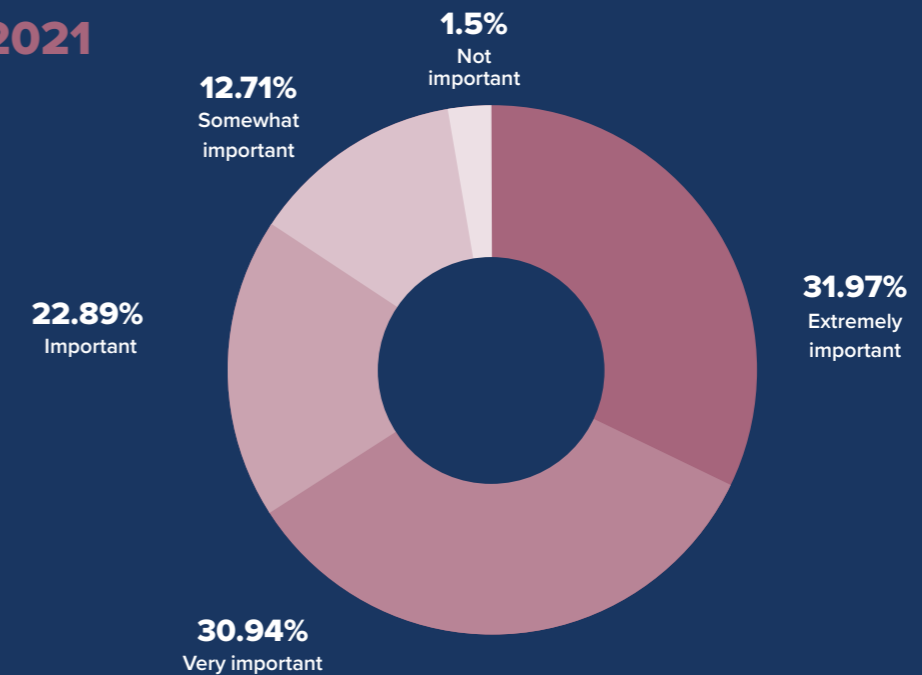**1.66%**
Social media

0.79%
Chatbot

17.6%
On the phone

19.65%
Online/Chat with a live person

32.04%
Via email

27.86%
In person

NZ 2021

1.64%
Chatbot

1.02%
Social media

12.07%
On the phone

20.45%
Online/Chat with a live person

34.56%
Via email

29.86%
In person
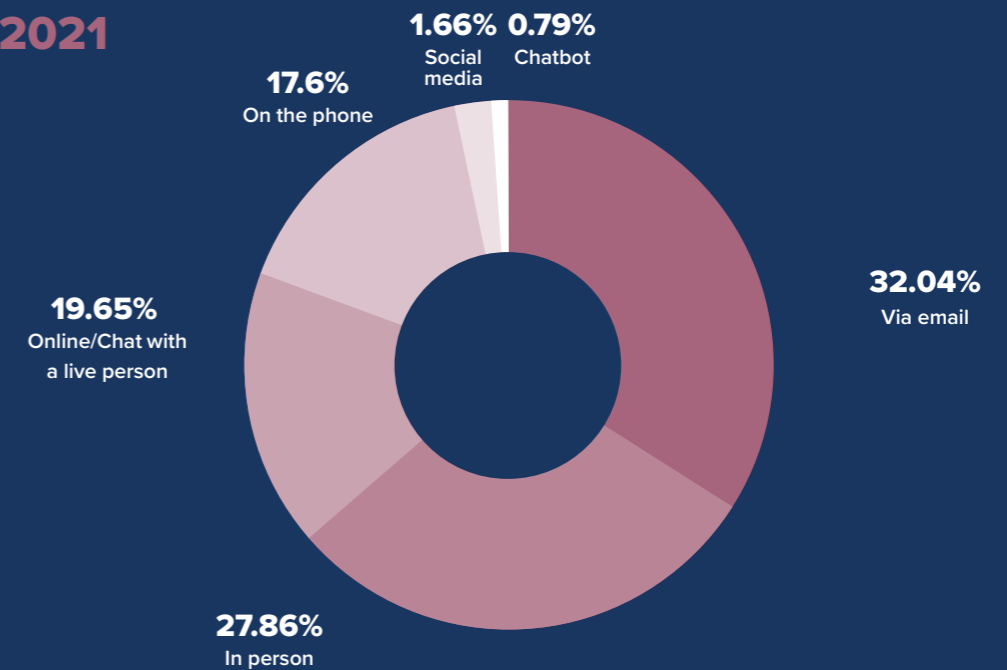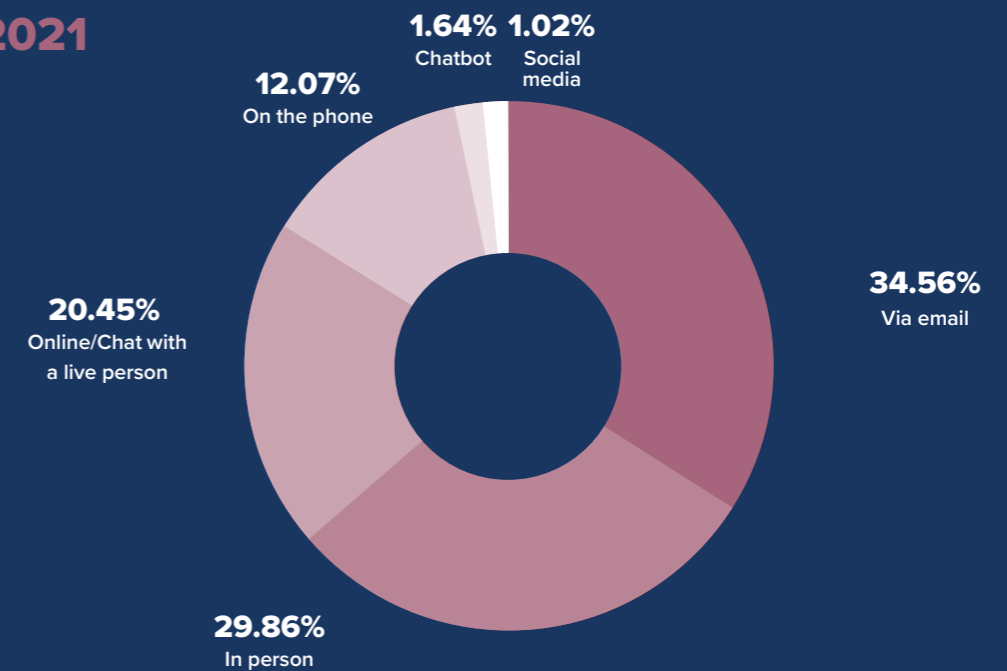
Q3. How important is a consistent student experience across all course touchpoints or interactions?

Aus 2021

- **1.74%** Not important
- **17.84%** Somewhat important
- **19.65%** Extremely important
- **31.57%** Very important
- **29.2%** Important

NZ 2021

- **0.61%** Not important
- **16.16%** Extremely important
- **17.18%** Somewhat important
- **37.01%** Very important
- **29.04%** Important

Q4. How important is your ability to access course resources and materials from anywhere, at any time, from any device (e.g. phone, tablet, PC, smart TV)?
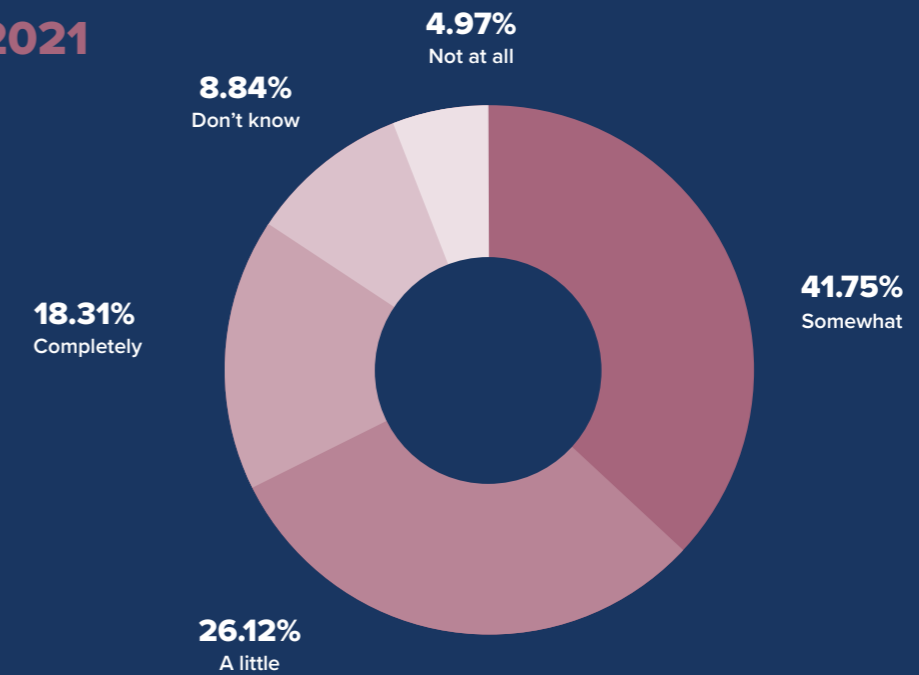
Aus 2021

- **1.5%** Not important
- **12.71%** Somewhat important
- **22.89%** Important
- **31.97%** Extremely important
- **30.94%** Very important

NZ 2021

- **0.61%** Not important
- **9.61%** Somewhat important
- **21.88%** Important
- **34.76%** Extremely important
- **33.13%** Very important
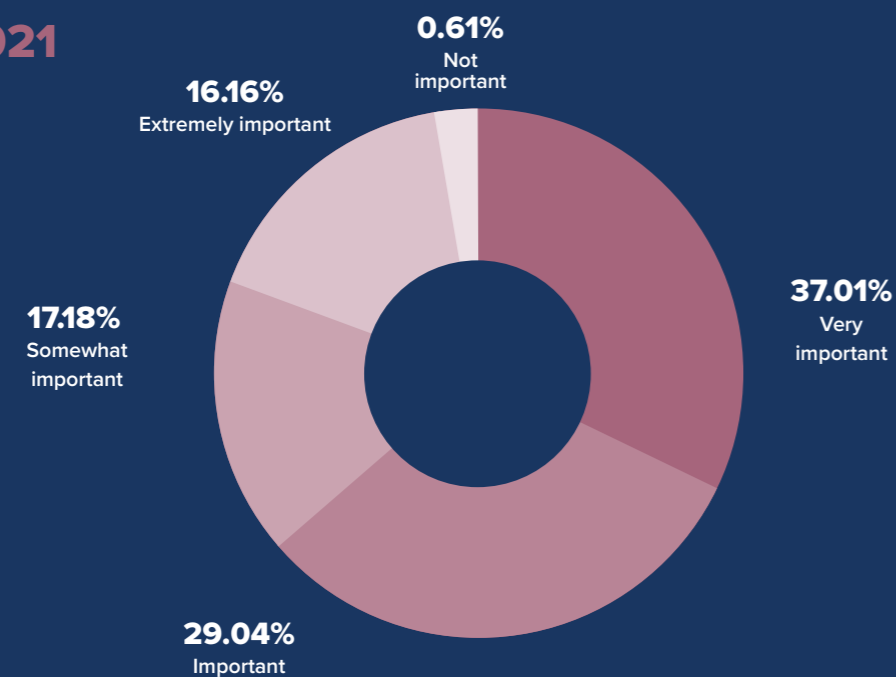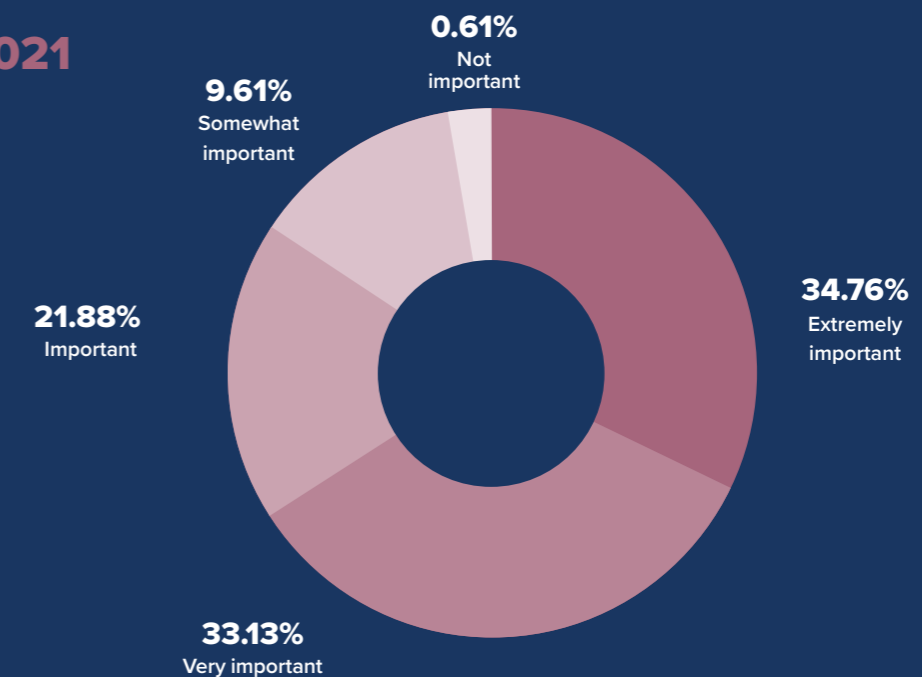
Q5. How would you characterise the role of technology innovation in your course?

Aus 2021

- **0.95%** Non-existent
- **8.45%** Outdated and ineffective
- **25.34%** Innovative and progressive
- **34.1%** Starting to see some new innovations
- **31.18%** Functional but uninspired

NZ 2021

- **0.82%** Non-existent
- **5.11%** Outdated and ineffective
- **23.72%** Innovative and progressive
- **38.24%** Starting to see some new innovations
- **32.11%** Functional but uninspired
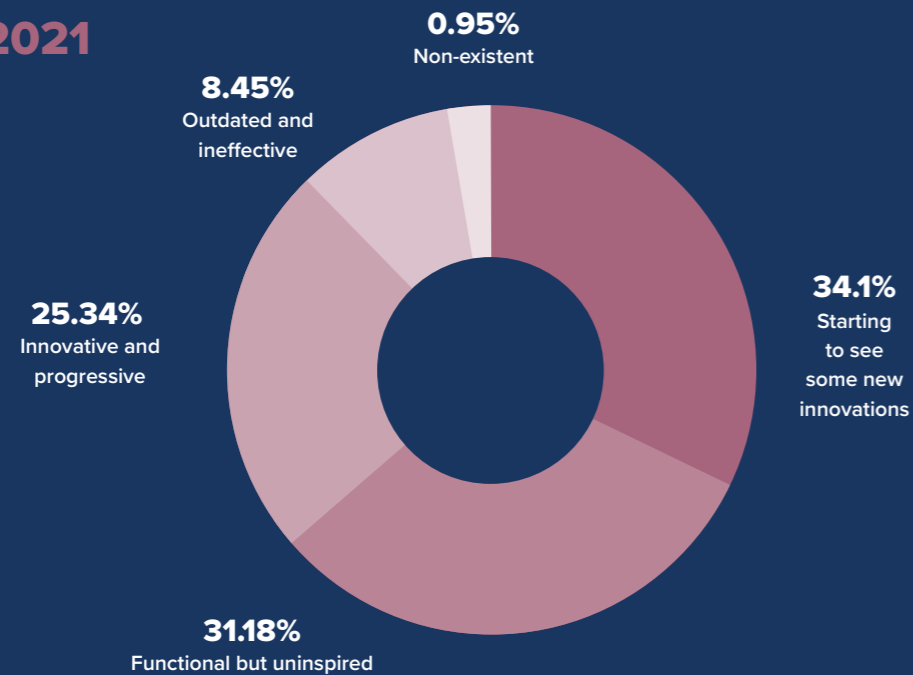
Q6. To what degree do you trust your education institution's ability to integrate progressive technologies such as AI, augmentation and automation?
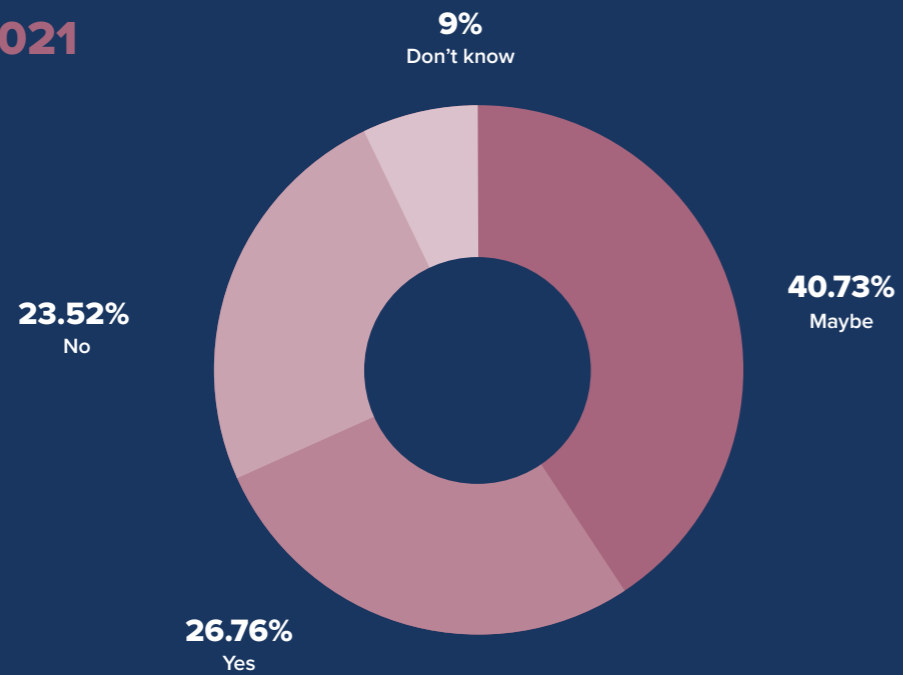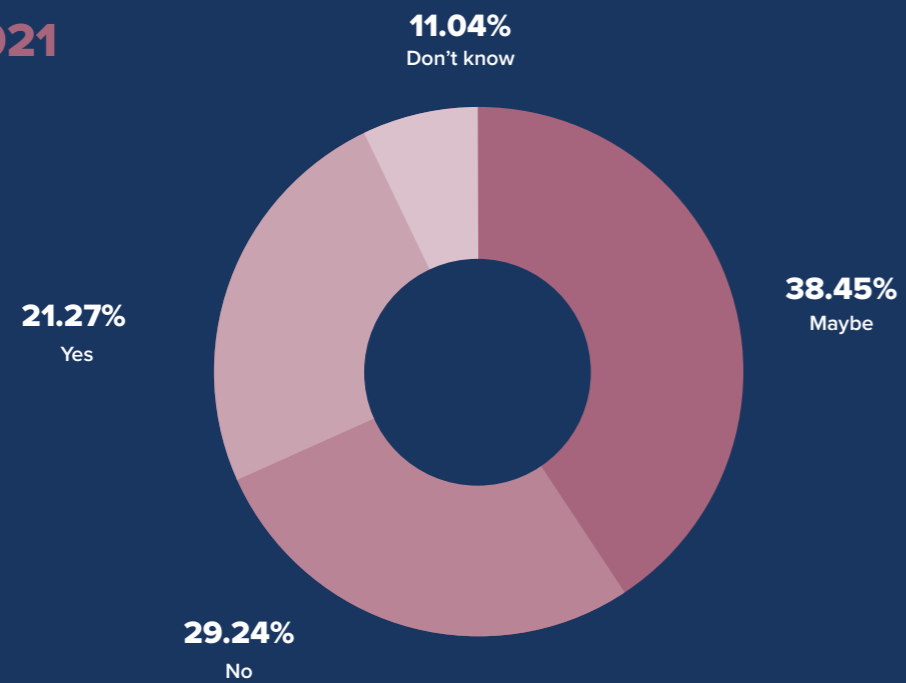
Aus 2021

- **4.97%** Not at all
- **8.84%** Don't know
- **18.31%** Completely
- **41.75%** Somewhat
- **26.12%** A little

Aus 2021

- **5.11%** Not at all
- **13.5%** Completely
- **14.52%** Don't know
- **41.51%** Somewhat
- **25.36%** A little
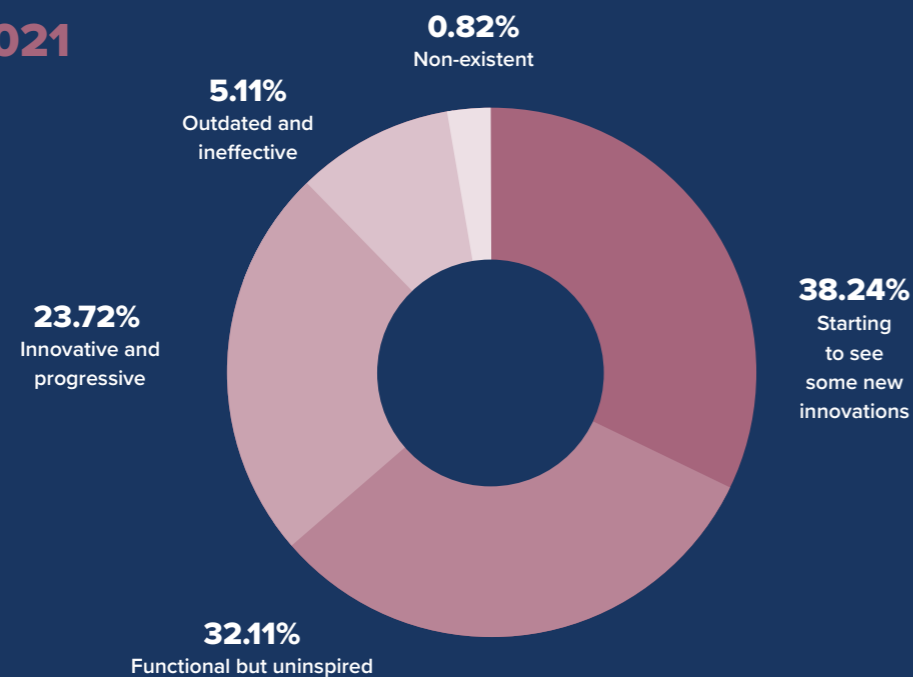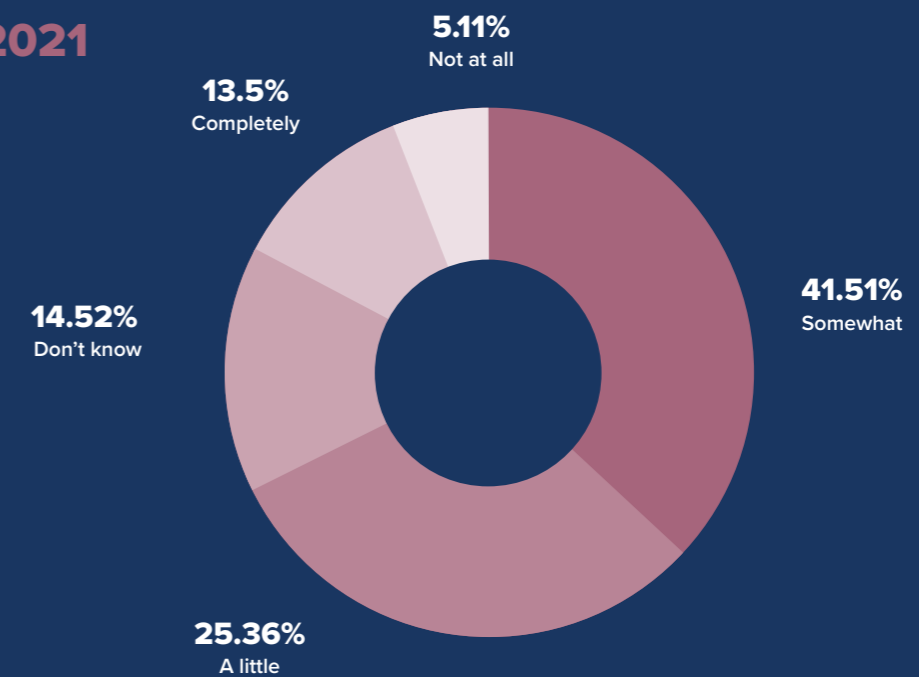
Q7. Would you switch to a different institution if it offered better technology and innovation?

Aus 2021

9%
Don't know

23.52%
No

40.73%
Maybe

26.76%
Yes

NZ 2021

11.04%
Don't know

21.27%
Yes

38.45%
Maybe

29.24%
No

Chapter 05.
Integration and optimisation of remote learning approaches

Of all respondents, over half said the ability to use their institution's administrative functions had been impacted by repeatedly falling back on remote learning. However, nearly all felt their institution did very well in adapting to and implementing 100% remote learning, with a growing capacity to leverage the flexibility in hybrid blended learning environments. Around 77% of respondents felt their institution is dealing adequately with student wellbeing across both nations, with in-person and online student services doing the majority of heavy lifting to ensure management of a field that's clearly grown in complexity throughout the previous two years.

Q1. Has the continued reliance on remote learning arrangements impacted your ability to use your institution's administrative functions at any point?
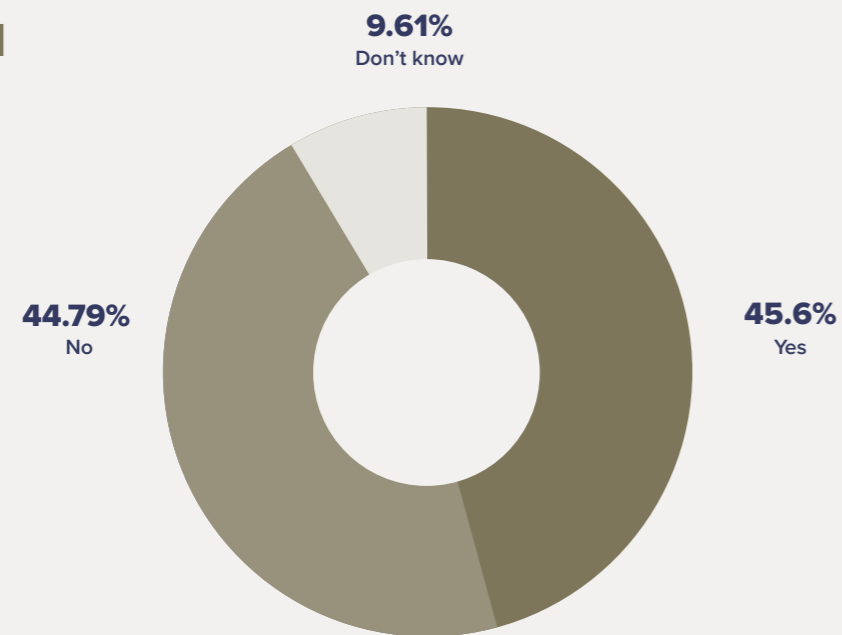
Aus 2021

8.68%
Don't know

40.73%
No

50.59%
Yes

NZ 2021

9.61%
Don't know

44.79%
No

45.6%
Yes
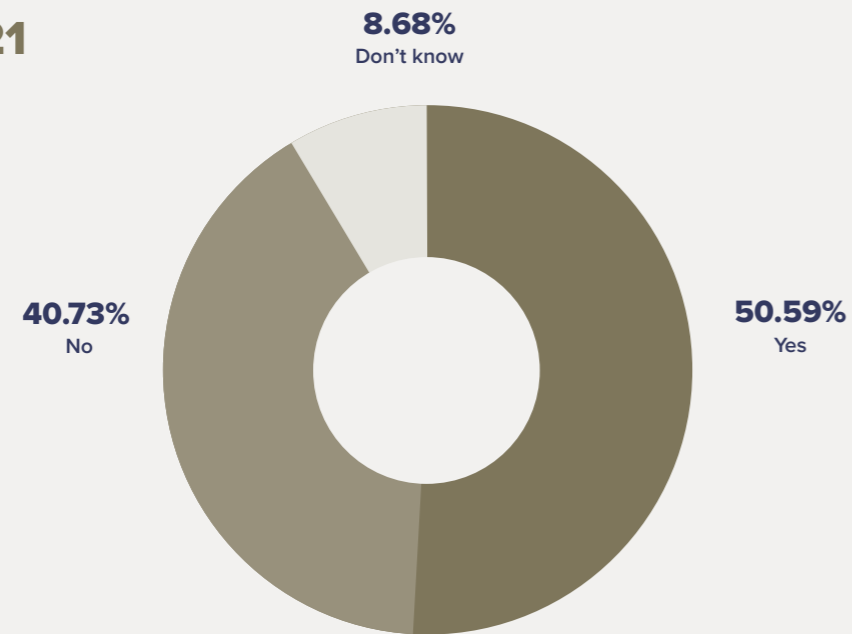
Q2. Do you feel your institution is aware of, and able to adequately respond to, student wellbeing in the present climate?
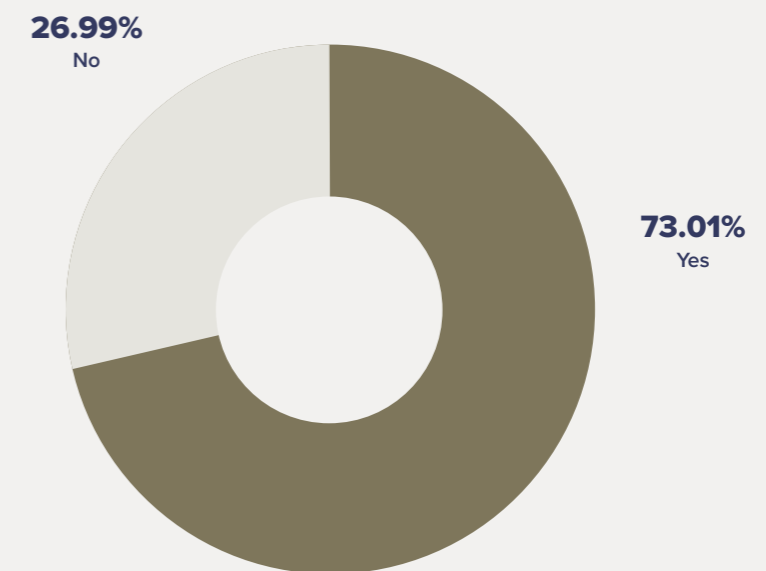
Aus 2021

21.15%
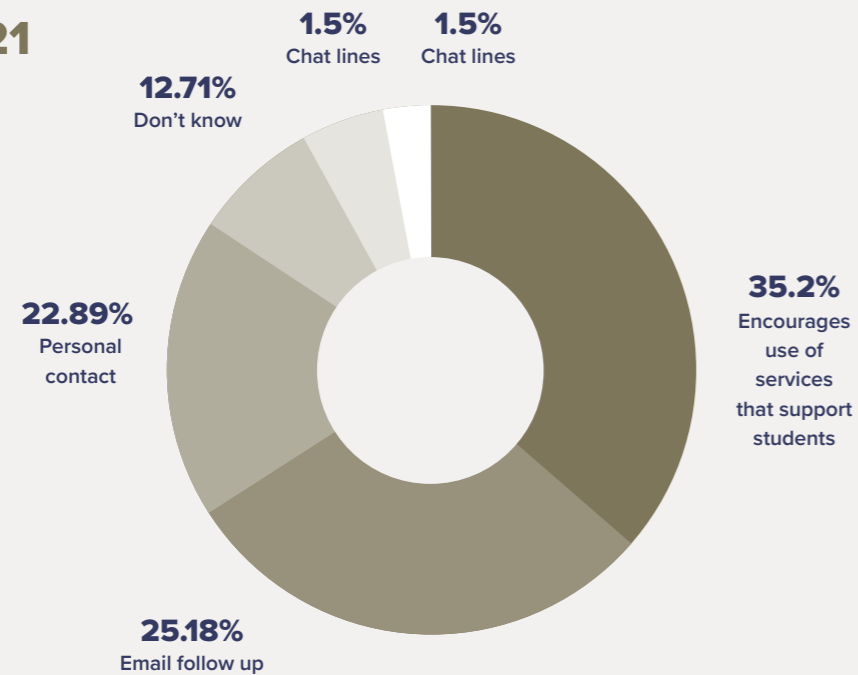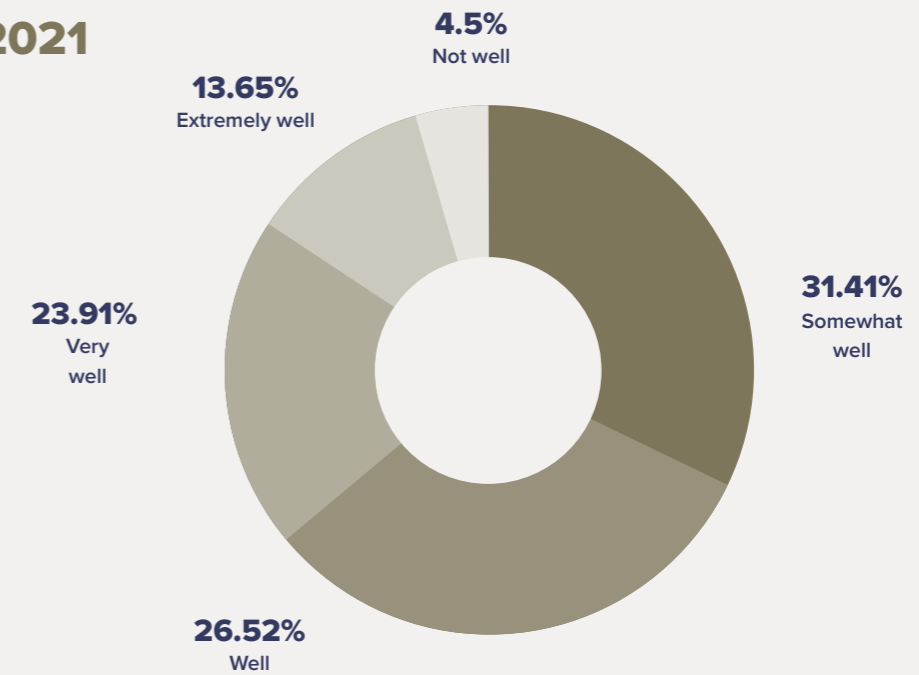No

78.85%
Yes

NZ 2021

26.99%
No

73.01%
Yes
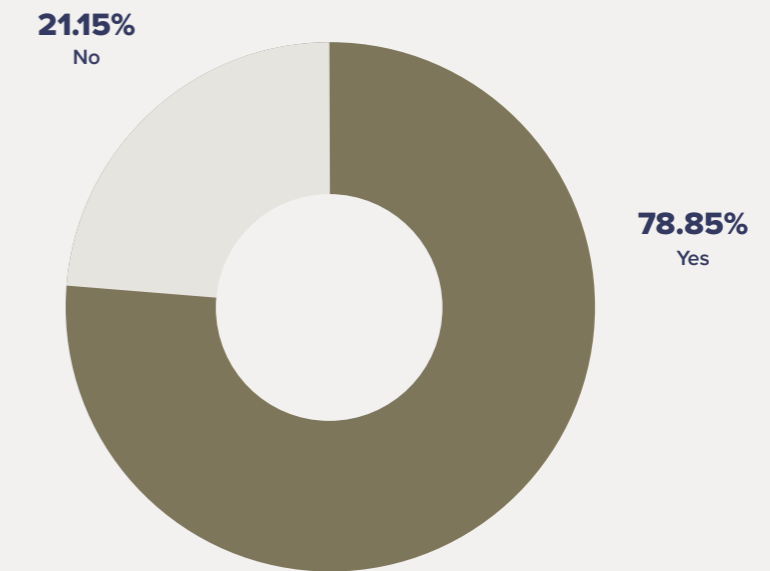
Q3. What processes, if any, does your institution have in place to manage student wellbeing?

Aus 2021

- 1.5% Chat lines
- 1.5% Chat lines
- 12.71% Don't know
- 22.89% Personal contact
- 35.2% Encourages use of services that support students
- 25.18% Email follow up

NZ 2021

- 3.89% None
- 3.48% Chat lines
- 12.47% Personal contact
- 13.7% Don't know
- 46.01% Encourages use of services that support students
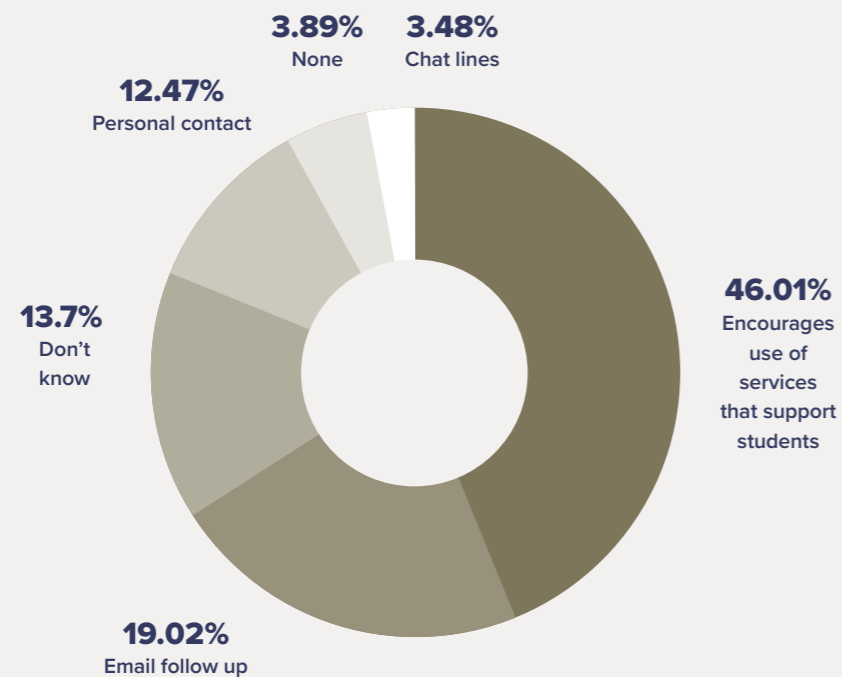- 19.02% Email follow up

Q4. How well did your institution adapt and implement 100% remote learning as it has become standardised and optimised over the previous year?
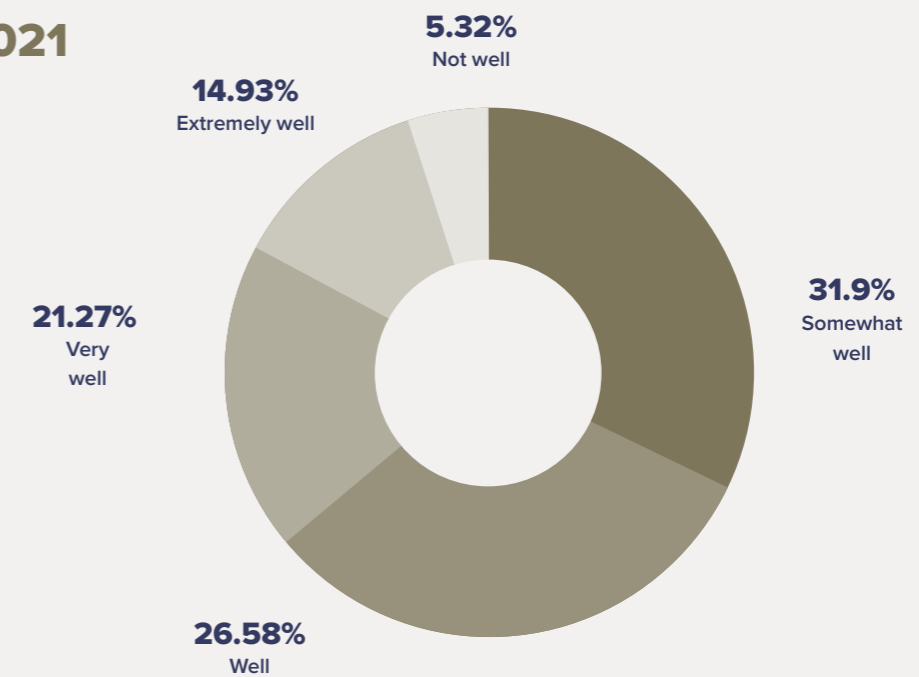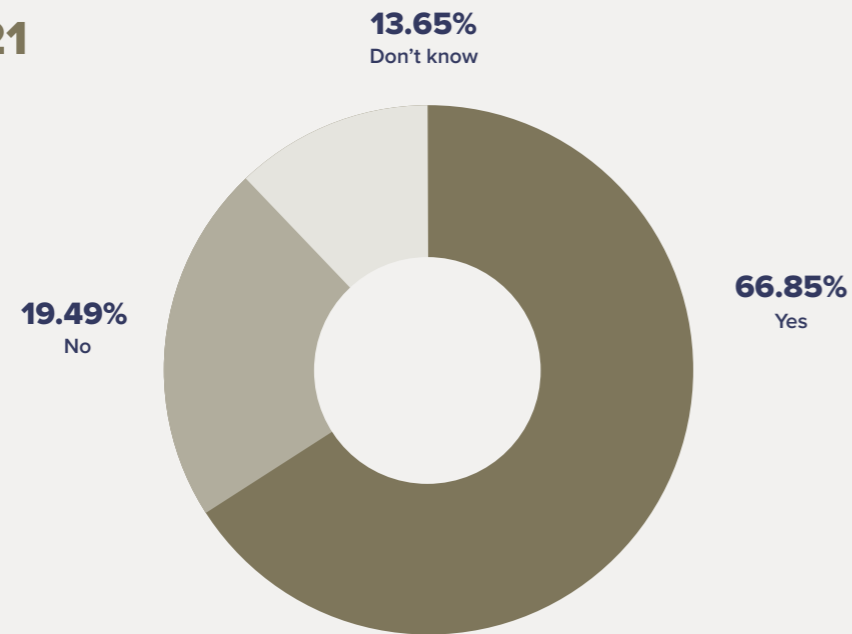
Aus 2021

- 4.5% Not well
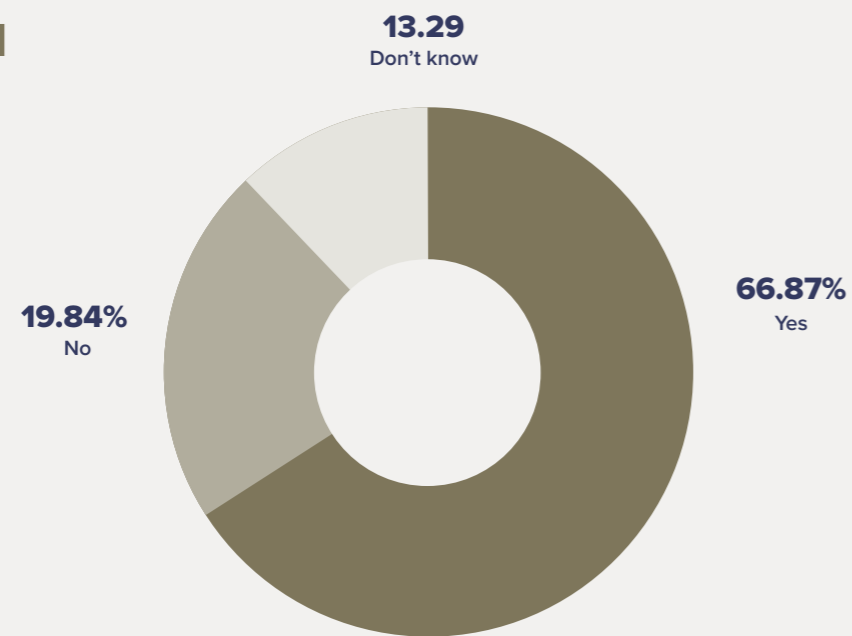- 13.65% Extremely well
- 23.91% Very well
- 31.41% Somewhat well
- 26.52% Well

NZ 2021

- 5.32% Not well
- 14.93% Extremely well
- 21.27% Very well
- 31.9% Somewhat well
- 26.58% Well

Q5. Are you now more likely to use online systems rather than on-campus engagement to carry out administrative tasks?

Aus 2021

13.65%
Don't know

19.49%
No

66.85%
Yes

NZ 2021

13.29
Don't know

19.84%
No

66.87%
Yes

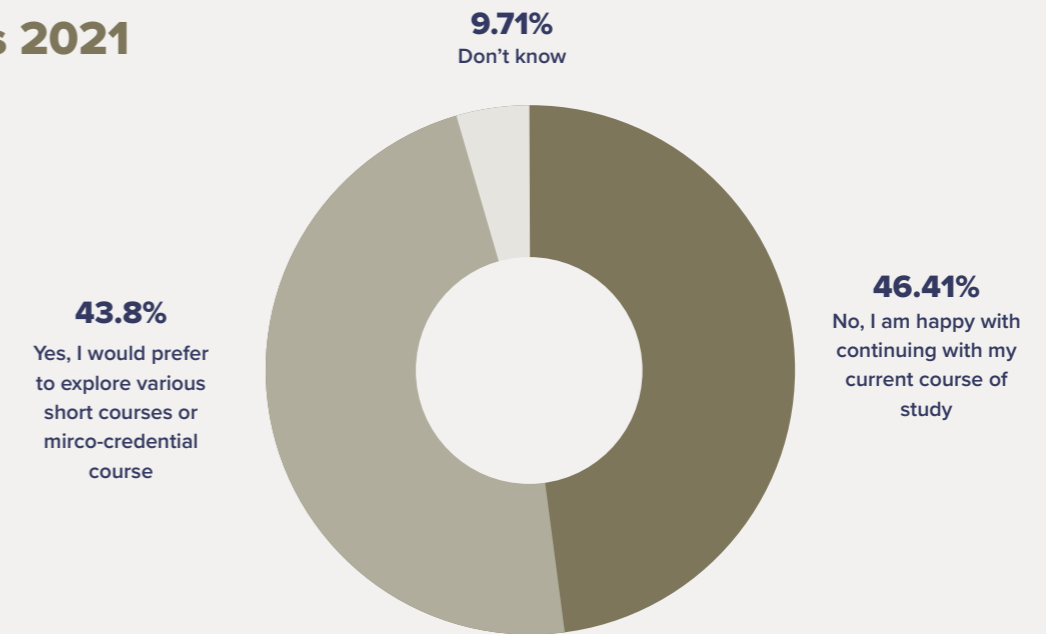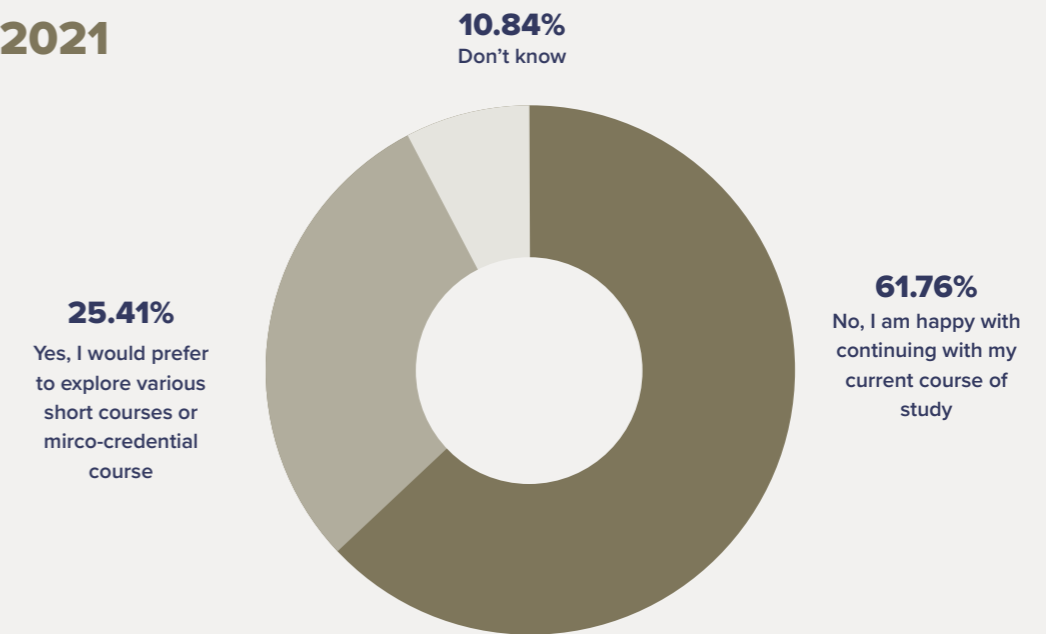## Q6. After a period of virtual learning, are you more inclined to consider enrolling in micro-credential courses (single units of study) rather than a full university degree?
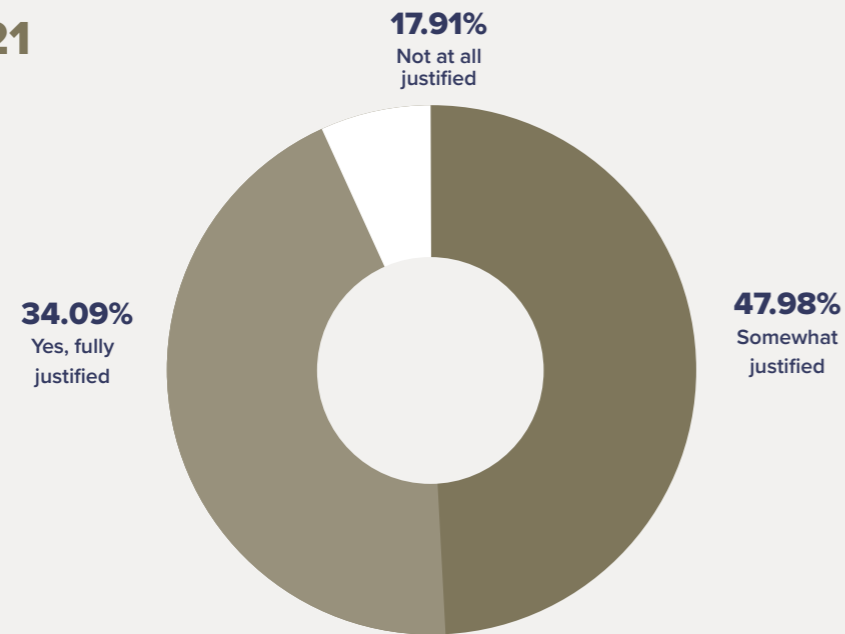
Aus 2021

9.71%
Don't know

43.8%
Yes, I would prefer to explore various short courses or mirco-credential course

46.41%
No, I am happy with continuing with my current course of study

NZ 2021

10.84%
Don't know

25.41%
Yes, I would prefer to explore various short courses or mirco-credential course

61.76%
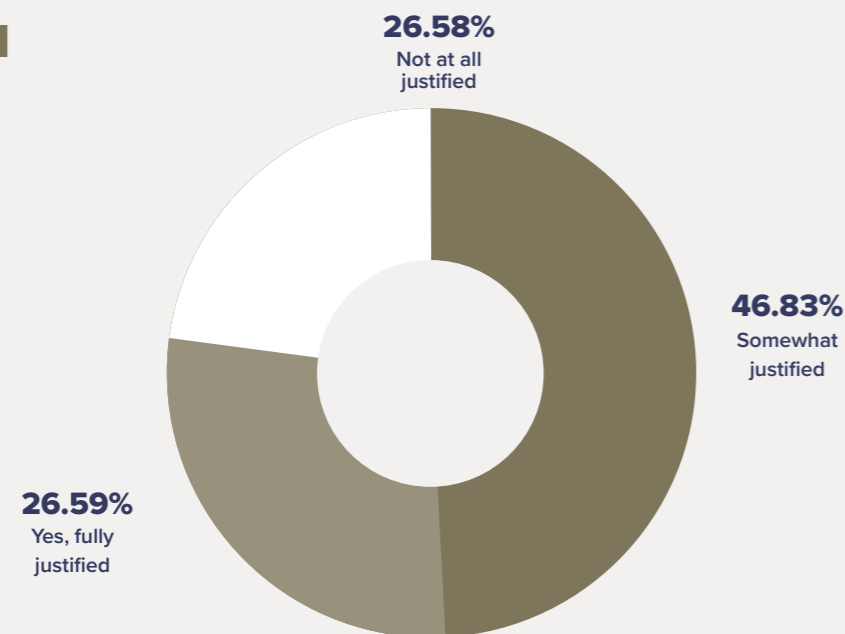No, I am happy with continuing with my current course of study

Q7. Do you feel that your current course fees are fair and justified given that your experience has been mostly virtual in 2021, even though you likely enrolled for an on-campus experience?

Aus 2021

17.91%
Not at all justified

34.09%
Yes, fully justified

47.98%
Somewhat justified

NZ 2021

26.58%
Not at all justified

46.83%
Somewhat justified

26.59%
Yes, fully justified

About TechnologyOne

TechnologyOne (ASX: TNE) is Australia's largest enterprise software company and one of Australia's top 150 ASX-listed companies, with locations across six countries. We provide a global SaaS ERP solution that transforms business and makes life simple for our customers. Our deeply integrated enterprise SaaS solution is available on any device, anywhere and any time and is incredibly easy to use.

Over 1,200 leading corporations, government agencies, local councils and universities are powered by our software. For more than 34 years, we have been providing our customers enterprise software that evolves and adapts to new and emerging technologies, allowing them to focus on their business and not technology.

Technology One Limited ABN 84 010 487 180

Ready to learn more?
technologyonecorp.com

technologyone
Transforming business, making life simple