Internationalisation of Higher Education: Service Quality in Higher Education in Selected Southern Hemisphere Countries

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ABSTRACT The tertiary sector has over the last two decades developed from a predominantly inwards focussed industry serving public interest to an internationalised and commercially competitive industry. This fundamental change resulted in amongst others a drive to better understand the most prominent dimensions that impact on internationalisation, more particularly the expectations and experiences of students. Although some of these changes can be argued to be country specific and thus differentiated between markets, others are universal and impact on the overall industry. One of the latter changes is a pressure to consider and treat students as clients, introducing all the dynamics of service delivery and management. This paper considers the importance of service delivery related to the market positioning of academic institutions in Australia and South Africa with a particular focus on non-academic internationalisation activities. The main findings reveal that the most important variable in the non-academic category is an effective induction program.

INTRODUCTION

The global movement of international students across borders is commonly referred to as the most visible indicator of internationalization of higher education. While nations and economies became more interwoven, people become more aware of the opportunities in a globalised world of studying other cultures, people and associated benefits arising from studying away from home (Rajkhowa 2013; Mazzarol and Souter 2012). This also includes an aspect such as the emergence of studying through online courses (Clarke 2013). Students moving around to study resulted in an increase of 99 percent students studying outside their country of origin between 2000 and 2010. The emergence of this global phenomenon has influenced the shaping of higher education across the world (Rajkhowa 2013; Mazzarol and Souter 2012).

The growth in higher education was further driven by government policies that were designed to attract students as well as skilled migrants. Cheaper air travel, easier access to work visas as well as the rapid spread by the internet also fueled this phenomenon of globalization. Until recently education used to be considered a public good but with its inclusion in the general agreement trade and services of the World Trade Organisation, it has now become an international tradable commodity (Rajkhowa 2013). According to Hira (2003) the USA had 19 percent of the international markets share in 2008 compared to 24 percent in 2000. This implies that competition due to globalization plays a mayor influence in the survival of institutions of higher education. It is therefore important for these institutions to monitor the expectations of students and to ensure that their expectations are met in order to ensure satisfied students and consequently to retain existing students and recruit new ones through a positive image and reputation. This paper focuses on student's expectations (importance) of non-academic international issues at universities, one in South Africa and to compare it with a university in Australia.

Nature of International Education

Trends over the past three decades point to a rapidly growing international education sector. The highest number of transnational education (TNE) providers comes from the UK, Australia and the USA, with emerging numbers from Canada, New Zealand, Europe and even non-traditional international education provider countries such as China, India, Malaysia and Singapore. Dickson (2009) points out that 2.8 million students opt to study abroad, with the main receiving countries being the USA, the UK, France, Germany and Australia. These countries receive a combined total of 50 percent of all students who study abroad. He also points out that many students prefer to take an international degree that is offered by a foreign university

(franchised programs, distant learning or branch campus) in their own countries. The latter type of transnational education accounts for at least another 500 000 students in Australia, the UK and the USA, as the biggest providers.

The extant literature indicates a gap in research on the commercial aspects of transnational education (TNE) operation. In contrast to the perception of TNE as an altruistic public good, international education is commonly described in commercial terms within industry literature. For instance, it has been noted that John Dawkins, the former minister responsible for the expansion of the Australian higher education system in the late 1980s, is of the view that education could be an export commodity that can help improve Australia's current account deficit (Marginson and Considine 2000).

Amidst the shift in expectations of the role of universities and other higher education institutions, the funding of these institutions have often been dramatically reduced (Chao 2013). Similar to other organizations, universities also face increasing budgetary pressures of growing operational costs, and asset investments. With reduced state funding and regulated fee regimes, they find themselves in a tightening cost-price squeeze. For many, venturing into international education provide financial relief (Armstrong 2007).

In reality the internationalisation of education evolves as the home and host country environments and stakeholders develop and change expectations. From a conceptual perspective, international education is argued to move through the following four phases (McBurnie and Ziguras 2007; de Jager and Soontiens 2010):

  ⬧ Demand for tertiary education exceeds local capacity and students travel abroad to study.
  ⬧ Local capacity to deliver tertiary education builds up, outward student mobility reduces and foreign universities build capacity in partnership with local institutions.
  ⬧ Domestic providers develop a competitive capacity, local regulators concentrate on quality delivery and foreign universities establish full blown presences.
  ⬧ A shift from education importer to education exporter, that is, attracting foreign students.

According to Saginova and Belyansky (2008), globalisation in education can take the form of academic mobility, internationalisation of study programs, transnational education and various export modes of education. There is however a shift in focus in globalisation in education from cultural and educational goals to economic goals.

For students an international education offers studying a foreign degree in a local context and at a localised prize (McBurnie and Ziguras 2007). Apart from various modes of delivery and thus the ability to suit a variety of needs and preferences from students, the attraction of international education is further enhanced by a premium placed on Western business and English language skills likely to be derived from an Anglophone qualification. This establishes a commercial value which enhances the commercialisation of education.

A Global Commercialisation Trend

Originally conceived as aid flowing from the developed world to the less developed countries, the provision of international and cross-border education has gradually shifted towards a more commercial orientation (Saginova and Belyansky 2008; Smart and Ang 1993). Bashir (2007) claims that higher education in the 21st century has become a tradable service similar to telecommunications and financial services. In its purest for-profit format the delivery of higher education continues to attract attention on the back of the unavoidable tension between profit and quality (Kinser 2013) and is to some unacceptable (Bernasconi 2013).

As early as 1918, Veblen in his book titled "Higher Learning in America", observed the invasion of commerce into the precincts of the university. A common characteristic is that the university embraced commercial principles and in the process lost its original free pursuit of knowledge (Bashir 2007). Readings (1996) however advises against an attitude of denunciation, and proposes "an engagement with and transvaluation of this shift can allow innovative and creative thinking to occur."

While the growth in commercial drivers is partly a function of the changing market conditions for higher education providers, it also reflects and simultaneously results in a transformation of the relationship between the university and the student. Indeed, Bashir (2007) argues that in some instances students are in a

vulnerable position and subject to aggressive marketing by unscrupulous providers. Higher education in the 21st century has essentially been converted to a professional service/client relationship (Stephenson 2006).

Over time thus, international education has developed in a commodity that can be purchased by consumers that subsequently demand quality standards. Most students that enrol in international education are financially privileged thus further enhancing the exclusive and competitive character of the industry (Stephenson 2006). Meares (2003) argues that universities consider internationalisation as both an expansion strategy and a welcome stream of income as international students are predominantly seen as income generating entities. International education involvement is therefore predominantly driven by commercial drivers resulting in a larger, more lucrative and more competitive industry (Stephenson 2006).

Historically the trend in international education has been a student flow from developing and middle income countries, predominantly in the Asian region, to a small number of Anglophone industrialised nations. As demand for English-based education outstrips supply on a worldwide scale a considerable premium can be, and is levied. This is especially the case in booming metropolitan cities experiencing significant economic growth (Singapore, Hong Kong, Kuala Lumpur and Shangai) (McBurnie and Ziguras 2007). The strongest players and best established tertiary education providers in the international education market have a competitive position that is further enhanced by perceived quality over local degrees and the possibilities of migration.

Decision Criteria

Despite a significant body of research being available on international education and internationalisation of education, there is a dearth of research into the drivers behind choosing a particular education provider by international students (Pyvis and Chapman 2007). The quality of the overall experience of students is arguably reflected in the continuation of a course and viable student numbers. McBurnie and Ziguras (2007) argue that quality education remains both a challenge in terms of regulations and control and is the prime aspect of impacting the international study decision by students.

International education programs capable of evidencing equivalence to their domestic counterparts have a significant intrinsic quality and are attractive to international students. These programs are capable of delivering superior benefits to international students in that they deliver a different learning and development experience and inherently improve employability and career prospects (Desoff 2006).

The actual decision making process for international education has been deciphered by Cubillo et al. (2006) as consisting of three clusters of factors. Two of these are within the influence of the institution; the quality of the program/education experience; and the university image/reputation. The third factor is external to the institution and pivots around personal factors such as country and city image and also the experiences of family and friends. Expressed differently, it appear that the competitive position of an international education provider is established and maintained by ensuring academic and non-academic activities are appropriately managed.

The decision making exercise takes place in different national regulatory environments enhancing or detracting from the attractiveness of a destination. Bashir (2007) notes the possibility to secure migration benefits as a factor influencing student demand as evidenced when the Australian government de-coupled migration from education attainment leading to a slump of international student demand.

Country Specifics

Among Australian universities, international education is a growing portfolio with increasingly critical financial importance. Even the former Australian Universities Quality Agency (AUQA) reports that "Australia has become a leading exporter of (higher) education, and Australian institutions rely heavily on the income from foreign students" (Stella and Liston 2008: 10).

From an Australian perspective, the dovetailing of curtailed funding, the national shift towards a corporatized and commercially-inclined higher education sector, pent-up demand for higher education in Southeast Asia, and the globalization of higher education in the 1980s, led to the first Australian TNE programs in the region. To facilitate this Australian universities

set up, at the time, a non-profit organisation (IDP Australia) aimed to assist interest in Australian higher education into actual enrolments in universities (Bashir 2007). Australian institutions have since then grown their TNE offerings significantly, becoming a major provider worldwide. In 2003, 37 of the 38 Australian universities enrolled international students through 1 569 international programs (Universities Australia 2003). Between 2000 and 2009 the number of international students in tertiary education has grown from just over 100 000 to more than 250 000 (Pham 2013), translating in the creation of about 42 650 jobs and GDP growth of approximately 0.3 percent (Carrington et al. 2007). In 2011, 33 Australian universities reported International Education activities (DEEWR 2011). In 2012, international education exports were valued at almost AUD $10 billion out of a total education exports of AUD $ 14,5 billion (AFR 2013), translating in the top services export for the nation. The significant growth in international education numbers and financial value may however have come at the expense of quality (Pham 2013).

The main challenge for developing countries lies in the mobilisation and equipping of human resources with knowledge to exploit the advantages of globalisation. The information age has provided the developing world with a unique opportunity to play catch-up in a world where knowledge is the only endearing asset of any society (Michael 2004). South Africa has a different approach regarding the provision of higher education, with the emphasis on its own citizens. However it is not limited to them.

The tertiary education sector in South Africa faces many new challenges after the end of apartheid in 1994 and has been transforming its higher education sector to rid itself of its apartheid past (Mpinganjira 2011). This includes structural issues, funding of students and institutions, student composition and size – most fundamentally the merging and transformation of technikons into universities of technology. This transformation has not only brought about a change of status in these institutions but also established intrinsically different institutions. Traditionally, technikons and universities have competed indirectly, whereas they now compete directly, ostensibly for the same market. This increased level of competition in the education environment has led to institutions of higher education employing managerial techniques to improve the efficiency and quality of their provisions (Palihawadana 1999) and switch from a passive to a more active market approach (Naudé and Ivy 1999). Meeting the demands of globalisation has impinged on the tertiary education sector in that government policies for quality assurance have held these institutions up to greater scrutiny and accountability (Kistan 1999).

The higher education sector in South Africa, partly funded by government, is expected to be accountable and to fulfil the changing needs of society. However it should be kept in mind that the debates around quality and standards in government funded higher education are motivated by political accountability. Saint (1992) adds that the demand for education in Africa can best be achieved through a differentiated system of education, composed of private and public institutions with diverse missions, offering a range of choices and study regimes and access control through competitive entrance examination. According to Mpinganjira (2011), South Africa is despite various challenges currently the leading exporter of higher education services in Africa. South Africa's share of international students has grown significantly over the years from 12 557 in 1994 to 45 377 in 2000 and 52 703 in 2006 (IEASA 2006). South Africa is actively involved in marketing the country as an international study destination and in particular as an "African International Student alternative" to studying overseas (Mpinganjira 2011). Due to the highly competitive education market, it appears as if market dynamics prevail and that the institutions of higher education that meet the needs of their target population will be most successful.

Service Quality in Higher Education

According to Saginova and Belyansky (2008), emerging economies in particular are characterised by high levels of complexity, significant reforms in almost all industry sectors, massive restructuring and increased competition. The service quality concept in higher education is inextricably linked to competitive service and the success of a participant in the industry (Abouchedid and Nasser 2002). Service quality serves to meet the basic objective of retention and enrolment of students in universities. This

mindset confirms the value of providing acceptable services to students in order to maintain the stature and academic reputation of an institution. This calls attention to the management process to focus on students as customers, in addition to traditional areas such as accreditation and performance indicators of teaching and research. Yeo (2008) points out that the increasing competition in the service industry, including higher education, has led many organisations to focus on their internal (students) and external customers (potential employers) as there are often no actual products involved.

Higher education is considered as part of the service industry since its primary focus is to provide a quality learning experience to students and its secondary purpose is to meet the industry needs for skills and knowledge. Due to the various options brought about by internationalisation of higher education, tertiary institutions worldwide are under pressure to provide unique learning experiences to students in order to obtain a competitive advantage to capture the educational market.

Tsinidou et al. (2010) explain that education services are often intangible and difficult to measure as the outcome is reflected in the transformation of individuals in their knowledge, their characteristics and their behaviour. Due to this there is therefore no commonly accepted definition of quality that applies specifically to the higher education sector. Yeo (2008) agrees that service quality in higher education is a complex concept and concerns not only a student lecturer relationship but also concerns the physical, institutional and psychological aspects of higher education.

Harvey and Busher (1996) argue that the benefits of managing service quality are likely to exceed the disadvantages. This is particularly the case in an ever increasing competitive tertiary education environment, both domestically and internationally. Much of the assessment of service quality in the higher education environment concentrates on effective course delivery mechanisms (that is, non-academic matters) and the quality of courses and teaching (that is, academic matters) (Athiyaman 1997; Bourner 1998). Oldfield and Baron (2002) determined that it is furthermore important to note that students perceive a clear distinction between academic and administrative staff roles. To influence student choice requires institutions to

have information that has the potential to clarify the attitude of prospective students.

Non- academic Affairs

In a commercial environment the client/consumer nature of students has specific implications for the international education provider. Interestingly, research has indicated that certain components of the study experience have little or no bearing on student satisfaction. For example, Wakefield and Blodgett (1994) determined that the utilitarian nature of facilities such as laboratories, lecture theatres and libraries have no impact on the student experience. Similarly, Oldfield and Barron (2002) report that while students label modern looking equipment unimportant they do attach value to up-to-date technology and infrastructure.

Service delivery outside the learning experience has the potential to complement or counteract and significantly influence the overall student experience and satisfaction, and therefore impact the institutional reputation. Aspects of this cluster of 'non-academic' activities include campus life, including support and engagement activities; course fees; career prospects and employment networking opportunities; and institutional infrastructure.

Problem Statement

The higher education sector is facing increasingly more challenges in the global arena. While institutions of higher education compete for human and financial resources their ongoing existence is equally dependent on understanding and addressing the expectations and demands of students and industry. This is even more so as universities increasingly develop an international presence and seek to attract international students. In relation to the international student cohort, overall the problem is a lack of information to enable institutions of higher education in emerging economies, including South Africa, to identify and meet students' needs, enabling them to recruit from the global market. In this paper a selected range of student expectations and impressions from a South African sample will be compared with a sample from Australia positioned as benchmark, being a developed country with a mature international education presence. As participants in the global

tertiary education market, educational institutions in both countries experience similar circumstances. Both Australia and South Africa have experienced foreign education providers entering and operating in domestic markets while increasingly attracting and accommodating students from other countries. In addition, the education sector in both countries is strategically promoted and used as a national core competency in supporting and driving economic development.

Objective of the Study

The primary objective of the study is to identify the most important (expectations) service quality variables influencing the students' choice in selecting a university in South Africa and to compare it with Australia. The paper only focus on non-academic issues related to internationalisation. A secondary objective is to determine whether there are significant differences between the expectations of the South African and Australian students when deciding on an educational service provider.

RESEARCH METHODOLOGY

The paper forms part of a larger research project considering a comprehensive range of factors and drivers in the area of transnational education, predominantly focussing on aspects of service quality in higher education. The wider research project includes respondents from Australia, Mauritius, Malaysia, Singapore, Hong Kong and South Africa. This paper only reports on reflections of students in South Africa and Australia.

Conceptualising Service Quality in the Internationalisation of Education

In order to execute the objective stated earlier, the paper extracted variables related to service quality of the internationalisation of an institution of higher education and grouped it into substantive groups of academic and non-academic constructs. As mentioned only the non-academic construct are dealt with in this paper.

Subsequently, the following objectives were formulated to be investigated:

- To evaluate the expressed levels of expectations of Australian and South-African students with regard to non-academic internationalisation variables,
- To determine the existence of significant differences between the Australian and South-African students with regard to their expectations of non-academic internationalisation variables.

Research Hypotheses

In order to facilitate a more conclusive interpretation of the comparison between the two data sets the following hypotheses were formulated:

- Ho: There exist no significant differences with regard to the expectations of the non-academic internationalisation related service variables between the Australian and the South-African sample.
- Ha: There exist significant differences with regard to the expectations of non-academic internationalisation related service variables between the Australian and South-African samples.

The Sample Framework

Data collection was conducted amongst two groups of mainly international students studying at two universities, one located in Sydney, Australia and the other in Cape Town, South Africa. A sample of students was selected at the business faculties of each of the two universities. The sample consisted of three hundred and thirty respondents from Australia and three hundred and ninety one respondents from the university in South Africa. Both the cities were survey took place are served by various universities and are considered favourable destinations for foreign students. Respondents were selected and targeted on a convenience basis. While this is not a particularly statistical scientific method of sampling, it is often used as part of exploratory studies. Despite the use of this non-probabilistic sampling method, the data that were yielded showed high levels of internal consistency. A random splitting of each of the two datasets (that is, Australia and South Africa) and subsequent comparison of firstly, demographic characteristics and secondly, the average ratings of key items revealed no significant differences, thus confirming repeatability or reproducibility of measurement.

Overall, the sample comprised of 54 percent male and 46 percent female students. The attitudes of the two student samples were tested regarding the perceived performance of pre-identified service quality variables related to non-academic internationalisation when selecting a specific tertiary institution. The list of variables was based on an extensive literature analysis and further informed by prior focus groups of students and lecturers.

The Measuring Instrument and Reliability Measures

A structured questionnaire was developed to measure the preferences of students when deciding on a specific institution of higher education. For the purpose of this paper the variables related to internationalisation issues are discussed. To this effect the questionnaire addressed the following issues: Demographic information of the respondents including their place of study and seventeen service quality variables to determine the level of importance on internationalisation aspects of a higher education institution. This section however consists of one construct namely, non-academic internationalisation.

While the demographic data uses nominal scales, a five-point Likert-type scale was used to reflect on the internationalisation variables at two institutions of higher education in South Africa and Australia. The scales were categorised as 1=excellent, 2=above average, 3=good, 4=below average and 5=not good at all.

Data Collection and Analysis

The data was collected and captured by trained field workers over a period of eight months during the second semester of 2011. The SPSS version 20.0 statistical package was utilised to analyse the data.

An item analysis was carried out to test the validity and the reliability of the questionnaire and an overall Cronbach's alpha of a 0.890 was obtained.

FINDINGS

Selected demographics are summarized in Table 1 and indicate the different student composition in the South African and Australian

sample, particularly in terms of age and to a lesser extent the level of studies and responsibility for fees. While motivation for studying is in both groups driven by better job prospects, the influence of friends forms a significant notion of the decision making activity.

Table 1: Respondent profile

Selected demographics	Australia n = 330		South African = 391	
Gender	M	F	M	F
	55 %	45 %	53 %	47 %
Level	1st Yr	3rd Yr	1st Yr	3rd yr
	44 %	56 %	49 %	51 %
21-22 yrs old	52 %	33 %		
Better job prospects	48 %	55 %		
Influenced by friends	57 %	52 %		
Parents pay fees	90 %	59 %		
Living with parents	15 %	25 %		

Non-academic Issues

According to Table 2, across both groups of respondents the overall highest expectation in the non-academic internationalisation construct is an effective induction program. Both the Australian and South African sample regarded this variable third most important in terms of expectations. While no statistical significant differences exist between the two samples a higher level of agreement was measured amongst the Australian respondents. For the total sample, the second highest expectation in this construct is hostel accommodation on campus. This however reflected the different university systems in the two countries as it was ranked first by the South African and fifth by the Australian respondents. Again, while no statistical significant differences were measured between the two samples, a higher level of agreement was however measured amongst the Australian respondents.

Lower Level = Ranking of Individual Variable's Level of Importance

For the total sample, the third highest expectation is private accommodation close to the institution. As stated before, this reflects to some extend the varying expectations in the two traditional education spheres as the South African respondents rated this variable second in terms of their expectations, while the Australian re-

Table 2: Expectations of non-academic internationalisation issues

Inter-nationalisation		All respondents		Australia		South Africa		Results of hypothesis test
Item	Item wording	Mn	SD	Mn	SD	Mn	SD	
138*	Hostel accommodation on campus	2.692	1.35	2.875	1.08	2.501	1.51	sig. = 0.05 df = 1p-value = 0.162* Conclusions: Ho accepted
139*	Private accommodation close to institution	2.703	1.28	2.886	1.11	2.522	1.38	sig. = 0.05 df = 1 p-value 0.583* Conclusions: Ho accepted
152*	Reasonable class fees	2.786	0.99	2.794	1.09	2.766	1.16	sig. = 0.05 df = 1p-value = 0.045** Conclusions: Ho rejected
171*	Effective induction program	2.661	1.03	2.733	0.98	2.613	1.08	sig. = 0.05 df = 1p-value = 0.111* Conclusions: Ho accepted
177*	Has international student culture	2.714	1.07	2.641	0.89	2.744	1.19	sig. = 0.05 df = 1 p-value = 0.006** Conclusions: Ho rejected
179*	Participates in student and staff exchanges	2.725	1.08	2.702	0.95	2.744	1.78	sig. = 0.05 df = 1p-value = 0.017** Conclusions: Ho rejected

*p> 0.05   ** p < 0.05

spondents rated it sixth. No statistical significant differences are measured between the two groups. Again the Australian sample has greater consensus relating to this variable.

From a sample specific perspective there is a difference in what is deemed most important by the two groups. The South African respondents ranked accommodation related services and facilities as the two highest non-academic variables, reflecting the nature of a university environment where there is an expectation to live on or near the actual campus. Remarkably, the Australian respondents listed these two aspects as the least important amongst the set of non-academic variables.

The Australian university expectations are more focussed on the nature and opportunities of international exposure to students, both in terms of on-campus dynamics and exchange opportunities. Remarkably these two aspects are rated in the bottom half of importance for the South African respondents.

For the total sample the fourth highest expectation is having in international student culture. The South African sample rated it fourth while the Australian sample rated it in first position. Statistical significant differences are measured between the two groups.

The variable that was expected least by the total sample is reasonable class fees. Although the Australian sample rated this variable in fourth place, the South African sample rated it sixth. Statistical significant differences do exist between the two groups and the Australian sample was more in consensus.

DISCUSSION

The primary objective of the study was to identify the most important service quality variables related to selecting a university in Australia and to compare it with South Africa. A secondary objective was to determine whether there are significant differences between Australia and South African students when deciding on an international educational service provider.

From the *non-academic perspective,* the highest expectation for the total sample in the non-academic internationalisation construct is an effective induction program, although both the Australian and South African samples regarded this variable third in terms of expectations. Induction programmes are always important for potential students and particularly so in an international education environment where students do have to acquaint themselves to socioeconomic and cultural differences in addition to the educational climate. Induction programs aim to orientate students in terms of what to

expect and where to go when assistance is needed, a core aspect to lay the foundation for student success and retention. This echoes findings by Yusoff et al. (2015) reiterating the importance of a positive student experience on both student satisfaction and retention. While misunderstandings and misinterpretations of respective expectations between students and institutions are to be expected, Henard et al. (2012) argue the importance of induction programmes to minimise these. Although an overall notion of highest importance was determined for this variable, the reality was that for both samples this variable was preceded by two other variables in terms of importance.

Overall the second and third highest expectation in this construct is highly related to each other in that they both reflect accommodation-related variables (on campus and near campus accommodation). It was ranked first by the South African sample and fifth by the Australian sample. Due to the fact that the majority of South African students have to drive long distances to their respective universities and the haphazard reliability of public transport, this outcome did not come as a surprise. One should also ask the question whether these students take into consideration the financial burden that is linked to making use of accommodation on campus. This determination confirms findings by Shah et al. (2013) that student choice of a higher education provider is influenced by the location of the institution. Their research determined that proximity to public transport, or even better on campus or near campus accommodation without having to rely on public transport, was a clear advantage for the institution. In the case of the Australian sample, this variable was significantly less important, possibly driven by both a better public transport system but also partially by the reality that on-campus accommodation remains the exception for the vast majority of students in the Australian university sector.

While the total sample rated the fourth highest expectation as having an international student culture, this was rated most important by the Australian respondents and fourth most important by the South African respondents. This aspect is also deemed of importance by Henard et al. (2012) as an established international culture is reflected in organisational structures and facilities being geared towards multicultural interactions. Australia is a leading player in the international education sector since the mid-1980s and has developed a solid reputation as a provider of international education and a destination for international students. Most students, domestic and international, have prominent expectations of being exposed to a multi cultural environment and a learning climate based on cross cultural circumstances reflecting the real business environment. On the contrary and most likely as a reflection of the relevant new feature of international students in South African universities, the South African sample do not regard this variable as very important as the majority of the students are local and have a different set of priorities and expectations.

Despite the overall cost of education and the fact that it requires a significant financial investment, it is remarkable that the variable that was overall considered to have the least impact on the student's decision is reasonable class fees. Since students are increasingly considered consumers of education services, Yusoff et al. (2015) warn that it is imperative that fees reflect the value of the service as students have a range of alternatives to consider in the value proposition. A partial explanation for this is most likely that the majority of respondents in both subgroups indicated that student fees are paid by parents and therefore do not gain prominence in the minds of students.

CONCLUSION

It is evident that different education cultures, systems and international positioning translates in varying needs with regard to issues that matters most when making the decision on attending a specific institution of higher education. The above findings suggest that academic institutions in developing and developed markets have to assess their respective markets carefully and establish and promote a distinctive market offering that satisfy the majority of their respective markets. The internationalisation and/or globalisation of tertiary education not only contributes to the development of similar and diverse expectations in different countries but also, albeit on slightly different levels, results in highly different drivers of expectations by the students.

RECOMMENDATIONS

From a student expectation perspective it is imperative that tertiary institutions develop means and measures to identify the needs and expectations of students at the earliest possible stage. An understanding of the expectations complemented by a sound and clear induction program to align these with the institution's expectations is the first step to a sound platform for student satisfaction. Having a clear understanding and awareness of expectations will most likely influence perceived performance and thus contribute to well focused and successful service delivery. This paper provides insights in the relative importance of non-academic factors as they relate to service quality; however care must be executed when generalising the findings to other countries outside the sampled Australian and South African context. In addition, the consideration of non-academic factors in isolation from academic factors associated with service quality at higher education institutions is likely to provide a somewhat imbalanced perspective. Ultimately the service quality in the higher education environment is influenced by all points of contact between the student and the institution and remains a highly complex concept that will invariably differ between institutions. Future studies could consider the link between non-academic and academic factors in service quality so as to provide a more comprehensive picture.

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