

**INTERNATIONAL EDUCATION IN REGIONAL STUDY
DESTINATIONS: BUILDING THE EVIDENCE BASE
FINAL REPORT**



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Developed for the Australian Government Department of Education, Skills and Employment

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Cover photo: Students at James Cook University, Townsville in September 2019

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Acronyms and abbreviations

7 P's	The 7 P's of Service Marketing
ABS	Australian Bureau of Statistics
ACER	Australian Council for Educational Research
AQF	Australian Qualifications Framework
ARIA+	Accessibility/Remoteness Index of Australia
ARWU	Academic Ranking of World Universities
ASGS	Australian Statistical Geography Standard
ATN	Australian Technology Network of Universities
AUIDF	Australian Universities International Directors' Forum
Austrade	Australian Trade and Investment Commission
CISA	Council of International Students Australia
CRICOS	Commonwealth Register of Institutions and Courses for Overseas Students
DESE	Department of Education, Skills and Employment
DET	Department of Education and Training (now DESE)
DOE	Department of Education (now DESE)
DHA	Department of Home Affairs
EA	English Australia
EAP	English for Academic Purposes
EGI	Enabling Growth and Innovation Program
ELICOS	English Language Intensive Courses for Overseas Students
EMCIE	Expert Members of the Council for International Education
ERA	Excellence in Research for Australia
Go8	Group of Eight
GTE	Genuine Temporary Entrant
GUG	Good Universities Guide
HEI	Higher Education Institution
HEIMS	Higher Education Information Management System
IEAA	International Education Association of Australia
IELTS	International English Language Testing System
IEMF	International Education Marketing Forum
IHEA	Independent Higher Education Australia
IRSD	Index of Relative Socio-economic Disadvantage
IRU	Innovative Research Universities
ISS	International Student Survey
ITECA	Independent Tertiary Education Council of Australia
IVS	International Visitor Survey
MESD	Major English-Speaking Destinations
NSV	Non-student visa
NSW	New South Wales
NT	Northern Territory
PP	Percentage point(s) difference between regional and metropolitan destinations
PRISMS	Provider Registration and International Student Management System
PSWR	Post-study work rights
QILT	Quality Indicators for Learning and Teaching
QLD	Queensland
QS	Quacquarelli Symonds
RTO	Registered Training Organisation
RUN	Regional Universities Network

SA	Statistical Areas 1-4 classified under the ASGS
SEIFA	Socio-Economic Indexes for Areas
SES	Student Experience Survey
SIA	Study in Australia
SOL	Skilled Occupation List
SSCE	Senior Secondary Certificate of Education
STEM	Science, Technology, Engineering and Mathematics
STNA	Short-term non-award
SV	Student visa
TAFE	Technical and Further Education
TAS	Tasmania
THE	Times Higher Education (World University Rankings)
TRA	Tourism Research Australia
UA	Universities Australia
VET	Vocational Education and Training
VIC	Victoria
WHM	Working Holiday Maker
WIL	Work Integrated Learning

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The project team wishes to acknowledge the Department of Education, Skills and Employment, Austrade and the Enabling Growth and Innovation (EGI) Program for supporting this research.

The spatial mapping of international student enrolments throughout this report was made possible by *National Map*¹, an online map-based tool developed by the Australian Government.

This report would not be made possible without the enthusiastic support of stakeholders from sectoral peak bodies, associations and providers who generously gave their time to participate in the research.

Finally, we wish to thank the 40,000+ university students who completed the project survey and the 63 students who participated in focus groups in Hobart, Townsville, Armidale, Darwin and Geelong.

¹ Available at: <https://nationalmap.gov.au/>

Preface

This is a significant period of time for international education in regional Australia. To put this research project in context, the timeline of key events is as follows:

- In **March 2019**, the Members of the Expert Council for International Education provided their advice to the Minister for Education on how to grow international education in regional Australia following a series of national consultations².
- In **August 2019**, this research project was funded through the Enabling Growth and Innovation (EGI) Program to develop the evidence base.
- In **November 2019**, the Australian Government introduced the *Destination Australia* scholarships and extended the post-study work rights of international students in regional areas.
- In **April 2020**, ACER presented its report to the Department of Education, Skills and Employment and Austrade.

All data collections were completed prior to the 2019-2020 bushfire season in Australia and the outbreak of the COVID-19 pandemic. The effects of the latter on regional education providers and economies, particularly those reliant on tourism, are likely to be significant and last into the foreseeable future. The authors acknowledge that these unprecedented events have potentially wide-ranging implications for international education in both regional and metropolitan Australia and should be taken into consideration when interpreting and implementing the results.

Finally, definitions and technical classifications are critically important to developing the evidence base on international education in regional Australia. The authors fully acknowledge the unsuitability of 'regional' as an all-encompassing term to classify study destinations. Student-directed marketing and promotional material should be, and is, moving into more nuanced understandings of distinctive and heterogeneous study destinations. Where the 'regional' label has been used in this report, it is to ensure absolute clarity when differentiating those students who are within scope from those who are not. Further details on the project definition are included in Section 2.1.1.

² More information is available at: <https://internationaleducation.gov.au/News/Latest-News/Pages/Growing-International-Education-in-Regional-Australia.aspx>

Executive Summary

This report is the primary output from the Enabling Growth and Innovation (EGI)-funded project '*International education in regional study destinations: Building the evidence base*'³ commissioned by the Australian Government Department of Education, Skills and Employment (DESE) in collaboration with Austrade.

Background

International education contributed \$37.6 billion⁴ to the Australian economy in 2018-19 (DFAT, 2020). Now the third largest destination for international students, after the United States and Britain, Australia has by far the largest proportion of overseas students enrolled onshore in its universities at around 25 per cent⁵. While two-thirds of the Australian population reside in capital cities (ABS, 2017), around 80 per cent of international student enrolments are located at campuses in Sydney, Melbourne or Brisbane. A further 15 per cent are located in other major cities such as Canberra, Perth, Adelaide and the Gold Coast.

When applying the Australian Statistical Geography Standard (ASGS) Remoteness Structure, the share of international higher education commencements in regional or remote Australia has averaged around three per cent⁶ since geocoded data became available in 2017. The corresponding share of domestic commencements in higher education has averaged around 21 per cent⁷ since 2011. In recognition of these issues, the Commonwealth ten-year National Strategy for International Education 2025 (the Strategy) included a Strategic Action for Australia to:

‘...attract more international students to regional communities by promoting internationally the excellence and the advantages of education, training and research in regional Australia’ (Australian Government, 2016, Strategic Action 9.2).

Since the Strategic Action was announced, there have been a number of significant developments. In early 2019, the Expert Members of the Council for International Education released a discussion paper on '*Growing International Education in Regional Australia*' and undertook a series of targeted roundtables in regional study destinations⁸. Announced as part of the Australian Government's policy '*Planning for Australia's Future Population*' (Australian Government, 2019a), the Council's advice led to the introduction of the *Destination Australia* scholarships. These have been introduced to, among other objectives, attract and support international and domestic students to study in regional Australia (Tehan & Ley, 2019).

Alongside reviews into rural, regional and remote Australia, (Naphine *et al.*, 2019; Halsey, 2018), there have also been a number of recent changes to migration settings with the introduction of regional visas and changes to the post-study work rights (PSWR) of international students. Under the announced arrangements, those on a temporary graduate visa will be able to access up to two

³ Referred to as '*Growing the number of international students in regional areas*' in the published list of '2018-19 Enabling Growth and Innovation projects–30 June 2019'

⁴ Education-related travel services – which includes international student expenditure on tuition fees and living expenses in Australia

⁵ DESE Higher Education Statistics Collection - 2018 Section 2 All students (Table 2.10: All Students by State, Higher Education Institution, Citizenship and Residence Status, Full Year 2018)

⁶ Based on campus location

⁷ Based on student home address

⁸ This included roundtables in the ACT, Geelong, Warrnambool, Adelaide, Newcastle, Cairns, Armidale and Perth.

additional years of PSWR in a regional area if they graduated from the regional campus of a registered institution and have maintained ongoing residence in a regional area.

Why this research project is important

The objectives of this project are to develop the evidence base in ways that enable the development of marketing messages that attract international students into regional areas in Australia. To achieve this objective, the project has identified: the profile of international students in regional areas; the pull factors that attract them to study there; the rate at which students appear to convert from short-term non-award courses into formal qualifications; and factors underpinning success in attracting international students to regional areas.

Drawing on significant advancements in the geocoding of enrolment data to the Australian Statistical Geography Standard (ASGS) Remoteness Structure and underlying Accessibility/Remoteness Index of Australia (ARIA+), the analyses of the latest enrolment data contained in this report identifies, with some precision, where and what international students were studying in Australia in 2019.

In terms of primary data collection, a series of bespoke questions were included in the national Student Experience Survey (SES). This involved collecting information, for the first time, from more than 40,000 international higher education students about topics relating to their future intentions and off-campus experience of Australia. To provide qualitative stories of student experiences, in-depth focus groups were conducted with 63 students enrolled in five regional campus locations across Australia in 2019.

Key findings

Based on the evidence gathered and available, this project reports the following key findings:

1. Using the project definition⁹, there were **55,685 international student enrolments in regional study destinations in 2019**. This equates to around **six per cent of the total** number of onshore international students in Australia. The largest shares of these enrolments are located at campuses in New South Wales, Queensland and Tasmania and are **concentrated in just 13 Statistical Areas**¹⁰.
2. The number of international higher education enrolments in regional destinations decreases as the distance from the nearest capital city increases. Enrolments are **spread across a diverse range of socio-economic circumstances**. In addition, there are a subset of smaller study destinations – typically tourism-driven coastal economies - where enrolments are more likely to be in non-award, VET and ELICOS courses.
3. Compared to their metropolitan-based peers, international students in regional areas are more likely to:

Mr T is from China and is studying at The University of Tasmania in Hobart. He was encouraged by his agent in China to consider studying in Tasmania for the lifestyle benefits and the extra migration points.

He is planning to study a Master of Professional Accounting after he completes his English program, and it was his agent who recommended UTAS. He had only heard of Sydney, Melbourne and Adelaide before deciding to study in Tasmania.

He stated that he prefers the fact it is a “small city” as he comes from Guangzhou which is “too big and busy”.



⁹ The project definition of ‘regional’ is detailed in Section 2.1.1.

¹⁰ Statistical Areas Level 4 - The SA4 regions are the largest sub-State regions in the Main Structure of the Australian Statistical Geography Standard (ASGS).

- a. be enrolled in **higher education courses** at the **postgraduate degree level**, particularly in the **STEM¹¹-related fields of education**;
 - b. be from the **Middle East, Africa and North/South America**;
 - c. have previously completed a **TAFE or RTO course in Australia**;
 - d. be **employed** while studying;
 - e. be **happier and satisfied** with their studying and living experience;
 - f. have **engaged with local students**; and
 - g. have participated in **community engagement activities** organised by their institution.
4. Based on the best available data, the project estimates that **35 per cent of visitors and working holidaymakers** transition from short-term non-award courses on these visas into formal qualifications on student visas. This is roughly the same as the percentage of individuals on student visas that complete an ELICOS course and transition directly into a higher education course.
 5. The project survey has affirmed **cost and affordability** of tuition fees and living costs as key drivers that differentiate the decision-making process of international students in regional study destinations from those in metropolitan cities. While cost and campus location are comparatively more important to students in regional areas than those in metropolitan areas, **reputation and quality** remain the key drivers overall.
 6. Focus groups conducted with enrolled students revealed the complex arrangement of factors that lead students to enrol in a regional location. In addition to campus location and the costs of studying and living, students also took into account the **availability of niche and specialist courses**, the **expertise of research supervisors** and teaching staff, the availability of **existing networks** (family/friends), **recommendations** from trusted sources, and the speed with which institutions **responded to their initial enquiries about a course**.
 7. Mapped to the 7 P's of the service marketing mix, the project has identified a series of **success factors and points of differentiation** that have implications for the development of marketing messages. In particular, **the role of the natural, social and economic environment** in which the education providers are based can be critically important to course selection.
 8. There are also a number of persistent barriers and challenges, such as gaining part-time work, accessing public transport and generally negotiating the practicalities of day-to-day life. As expected, **the largest difference between international students is the inaccessibility of public transport in regional areas**.

Ms D is from Nigeria and is studying at James Cook University in Townsville. She stated that she has had “best educational support in my life”. It has been “mind blowing”.

She was encouraged by her lecturers to pursue a PhD and found staff “going the extra mile” to help her achieve her goals. The strong support has encouraged her to focus on moving to an academic career and she plans to go back to Nigeria to build capacity within the university sector there.



¹¹ Science, Technology, Engineering and Mathematics; incorporating the broad fields Natural and Physical Sciences, Agriculture, Environmental and related studies, Information Technology and Engineering and related Technologies

Conclusions and recommendations

International students have reported for many years that they believe they will receive a high-quality, internationally-recognised qualification in a safe environment when they choose to study in Australia. For regional study destinations, the value proposition is that they will receive all these benefits – as well as a range of unique, individualised and immersive experiences and post-study opportunities – at a more affordable price than what is available in other locations.

The findings of this study affirm and support these long-standing observations with new evidence collected directly from student surveys and focus groups, supported by in-depth analysis of three years of geocoded enrolment data.

Building on the findings, ACER has developed an evidence-based messaging framework. This maps the core values underpinning marketing messages to all international students (Austrade, 2020b) to the pull and success factors relevant to international students in regional destinations (see Figure ES1). Following further testing with the sector, ACER suggests that the framework could add considerable value to the development and alignment of marketing messages.

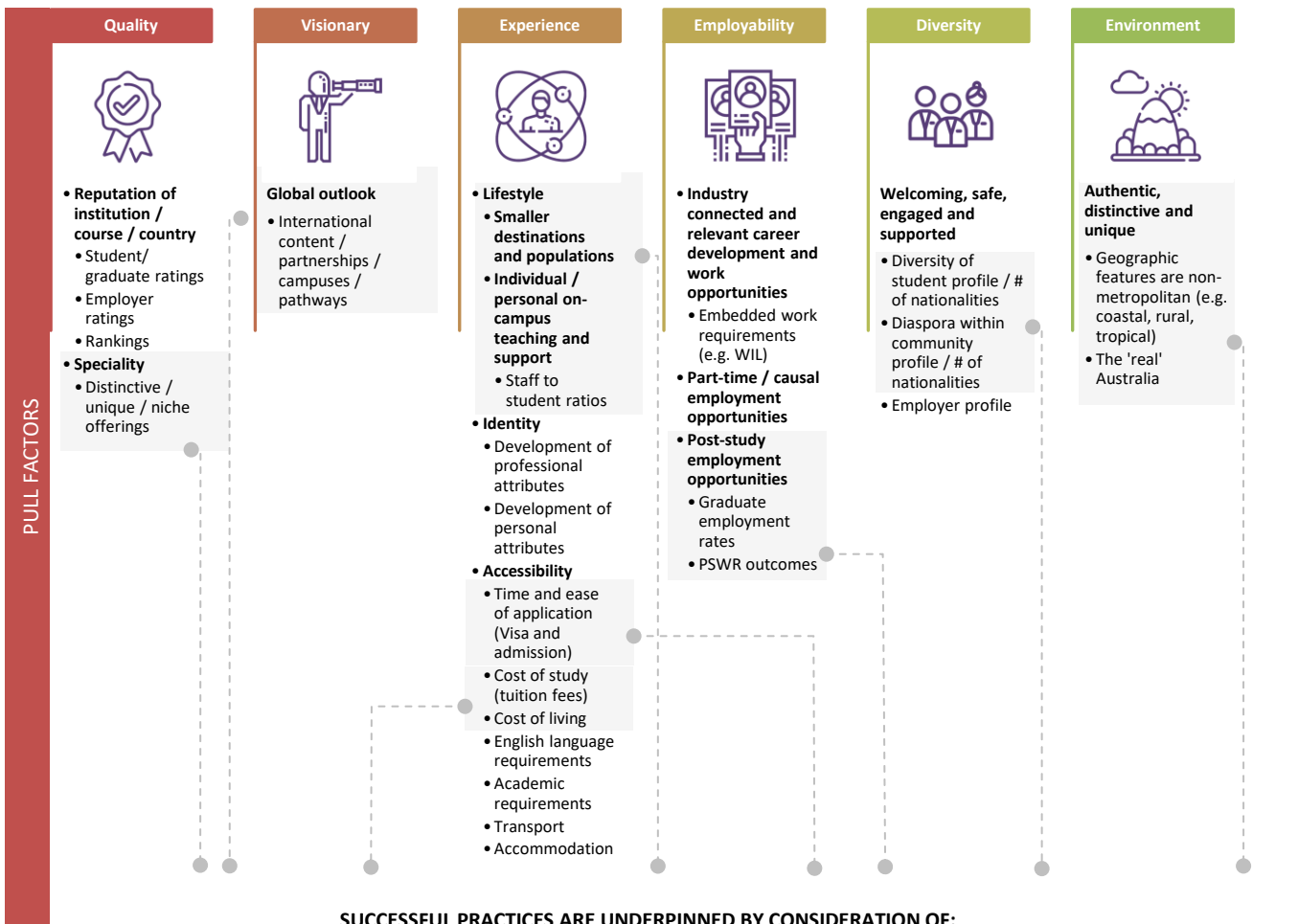
Mr B is from the Philippines and is studying at The University of New England in Armidale. He is from the Philippines and is in the final semester of his Master in Professional Accounting.

He was originally advised by his agent about the course at UNE. He already had friends in Australia and close friends in Armidale told him that UNE is a good choice. He was tossing up between Adelaide and Armidale. He has observed that Armidale is more like his home as he is not from a big city in the Philippines.

His goals are to finish this semester, apply for postgraduate visa (post study work rights), work for two to three years, and ideally wants to stay in Australia.



CORE VALUES APPLICABLE TO ALL DESTINATIONS



SUCCESSFUL PRACTICES ARE UNDERPINNED BY CONSIDERATION OF:

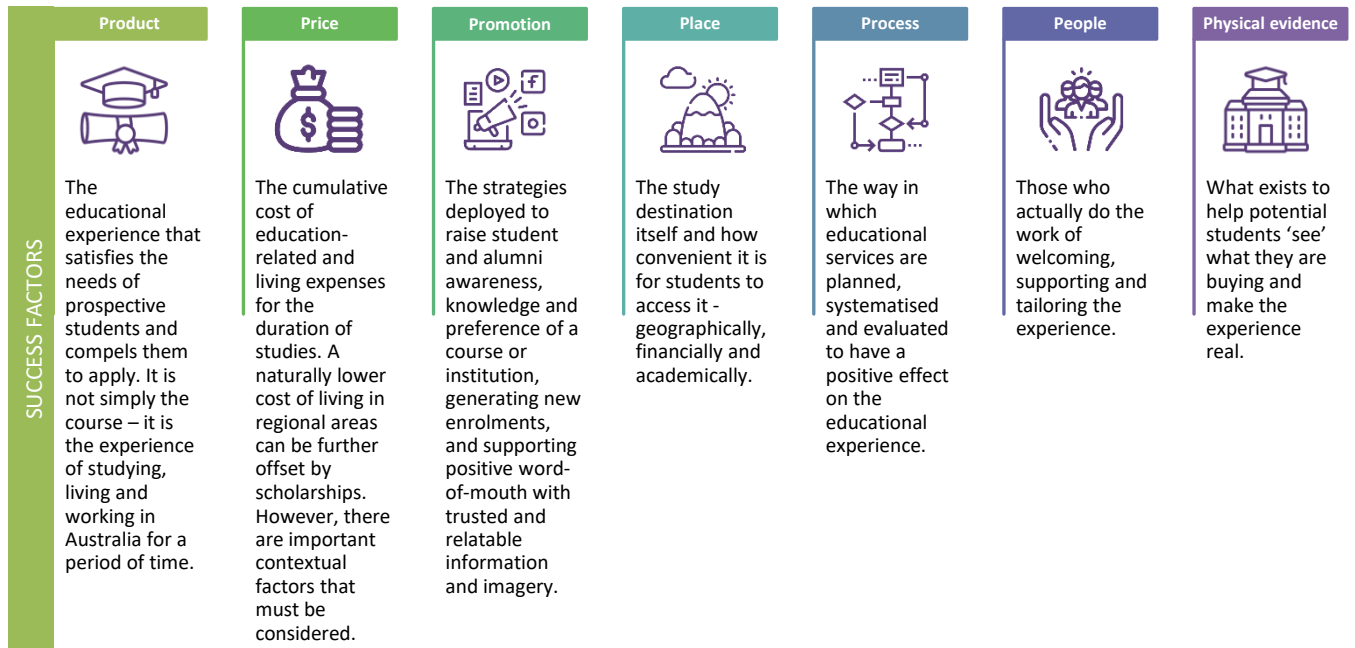


Figure ES1: Simplified messaging framework for marketing and promoting regional study destinations

Based on the evidence gathered in this research project, ACER makes the following five recommendations:

Understanding student needs and expectations (Section 5.2.1)

The project findings affirm cost and affordability as key drivers that differentiate the decision-making process of international students in regional study destinations from those in metropolitan cities. Using the project findings as a baseline, more objective and replicable evidence is needed to better understand and quantify how these factors – and the scholarships used to offset these concerns – impact student choice and decision-making.

Recommendation 1: That the Department, in collaboration with Austrade, continue to improve the evidence base by identifying, and ideally quantifying, the impact of policy measures to reduce the costs of study and living – foreseen and unforeseen – for various market segments¹².

Articulating and aligning the value proposition (Section 5.2.2)

The project has developed a framework of pull and success factors that align to the current Austrade Strategic Messaging Framework. With refinement and further testing, the Framework could be used to ensure that the benefits of regional study destinations are communicated and evidenced against a common framework.

Recommendation 2: That Austrade, in collaboration with the Department, further develop a clear and strategic line-of sight between the core values, pull factors and proof points used to attract international students to regional study destinations.

While cost and campus location are comparatively more important to students in regional areas than those in metropolitan areas, reputation and quality remain the key drivers overall.

Recommendation 3: That Austrade, in collaboration with the Department, maintain a consistent and authentic ‘always on’ message of quality educational services to prospective students. Such an approach would recognise that while quality is the central message, there are powerfully influential cost, employment and experiential drivers that intersect and compound to enhance the attractiveness of the regional proposition.

Scaling up and promoting the factors that underpin success (Section 5.2.3)

The project findings affirm that students in regional study destinations can struggle with gaining part-time work, accessing public transport and generally negotiating the practicalities of day-to-day life. There are a number of opportunities to improve the transition into and beyond studying, living and working in regional Australia.

Recommendation 4: That Austrade, in collaboration with the International Education Marketing Forum and the Department, further explore the potential of facilitating and incentivising community-led employer engagement programs to raise awareness of the benefits of international education and post-study work rights in regional areas.

¹² Such work should not be limited to courses offered by the Regional Universities Network. It should also not be limited to destinations included with the ASGS Remoteness Structure of ‘regional’ and ‘remote’ locations but include the 13 Statistical Areas included in this project.

Improving the evidence base (Section 5.2.4)

There have been significant advancements in the geocoding of international enrolment data in Australia since 2017. While the project findings affirm a number of known data gaps, they also point to opportunities in terms of data linkages and integration to enhance understanding of the relationship between international education and regional Australia at a local level.

Recommendation 5: That the Department, in collaboration with Austrade, explore the potential of developing:

- a. an index of geographic, economic, social and economic factors customised to the specific context of international education in Australia;
- b. brief and accessible community profiles that integrate geocoded international student enrolment data with existing community profiling data, in order to better understand how local socio-economic factors may act as enablers and/or barriers to the expansion of international education at a local level;
- c. data collection instruments that capture off-campus engagement, experiences and post-study intentions of onshore international students, using the 10 bespoke questions included in this project as a baseline;
- d. reporting templates that differentiate, at broad level of education, the percentage share of international students in regional study destinations; and
- e. processes to extract and report information on the pathways taken by international students on student visas based on location.

1. Introduction

This report is the primary output from the Enabling Growth and Innovation (EGI)-funded project '*International education in regional study destinations: Building the evidence base*'¹³ commissioned by the Australian Government Department of Education, Skills and Employment (DESE) in collaboration with Austrade.

1.1. Background to the research

International education contributed \$37.6 billion¹⁴ to the Australian economy in 2018-19 (DFAT, 2020). Now the third largest destination for international students, after the United States and Britain, Australia has by far the largest proportion of overseas students enrolled in its universities at around 25 per cent¹⁵. In a recent paper on '*Global perspectives Employability*', Berquist et al. (2019, p.7) argued that:

Several of the MESD¹⁶ (Australia, Canada, New Zealand) are concerned with the concentration of international students in major metropolitan areas and seek to demonstrate the trickle-through indirect economic benefits to the regions (Deloitte Access Economics, 2016). They also aim to incentivise regional settlement through immigration policy. Regional retention strategies have developed in the Canadian provinces (Esses *et al.*, 2018), whereas Australia and New Zealand incentivise through bonus points in skilled migration and/or post-study work rights (PSWR). In the United States, the Pew Research Center has developed an online tool showing the regional relocation trends through Optional Practical Training (OPT) that demonstrate robust employment rates in major regions attracting international graduates.

While two-thirds of the Australian population reside in capital cities (ABS, 2017), around 80 per cent of international student enrolments are located at campuses in Sydney, Melbourne or Brisbane. A further 15 per cent are located in other major cities such as Canberra, Perth, Adelaide and the Gold Coast. When applying the Australian Statistical Geography Standard (ASGS) Remoteness Structure, the share of international higher education commencements in regional or remote Australia has averaged around three per cent¹⁷ since geocoded data became available in 2017. The corresponding share of domestic commencements in higher education has averaged around 21 per cent¹⁸ since 2011.

In recognition of these issues, the Commonwealth ten-year National Strategy for International Education 2025 (the Strategy) included a Strategic Action for Australia to:

'...attract more international students to regional communities by promoting internationally the excellence and the advantages of education, training and research in regional Australia' (Australian Government, 2016, Strategic Action 9.2).

Since the Strategic Action was announced, there have been a number of significant for international education in regional Australia. In early 2019, the Expert Members of the Council for International Education released a discussion paper on '*Growing International Education in Regional Australia*'

¹³ Referred to as '*Growing the number of international students in regional areas*' in the published list of '2018-19 Enabling Growth and Innovation projects–30 June 2019'

¹⁴ Education-related travel services – which includes international student expenditure on tuition fees and living expenses in Australia

¹⁵ DESE Higher Education Statistics Collection - 2018 Section 2 All students (Table 2.10: All Students by State, Higher Education Institution, Citizenship and Residence Status, Full Year 2018)

¹⁶ Major English Speaking Destinations

¹⁷ Based on campus location

¹⁸ Based on student home address

and undertook a series of targeted roundtables in regional education destinations¹⁹. The Council published a summary of the themes of these consultations:

‘Key themes from the submissions included low awareness of the range of course choices and study destinations across Australia and the need for better coordination and communication of existing choices and efforts. There were mixed views on the effectiveness of incentives, including visa incentives, with some submissions advocating expansion of post-study work arrangements and others signalling the risks associated with linking study destinations to visa conditions. Submissions also highlighted the problems associated with setting up a binary divide between metropolitan and regional Australia, suggesting that while students should be encouraged to consider a broad range of study destinations, the term regional does not translate well in some markets.’ (EMCIE, 2018b, p.1)

On 22 March 2019, the Council provided their advice to the Minister for Education on how to grow international education in regional Australia.

1.1.1. A nationally consistent approach to marketing and promotion

In a paper for the national consultation process titled *‘Growing International Education in Regional Australia’*, it was stated that ‘...one of the challenges for the sector is how to inform international students of the availability of high quality education, meaningful employment opportunities, and community engagement in regional Australia’ (EMCIE, 2018a, p.1). In recognition of this challenge, in the area of *‘Destination Marketing and Branding’* the Council made the following recommendations to government:

- Adopt a **nationally consistent approach** to marketing and promotions through Australia’s new nation brand, and use Study in Australia and other digital platforms to promote the unique strengths and attributes of regionally-based institutions through targeted campaigns.
- **Engage and support education agents** to be promoters and champions of institutions in a broader range of study destinations.
- **Encourage co-investment in collaborative marketing** in collaboration with state and territory governments.’ (Australian Government, 2019a)

1.1.2. Destination Australia scholarships

The introduction of the *Destination Australia* scholarships in March 2019 was designed to, among other objectives, attract and support international and domestic students to study in regional Australia (Tehan & Ley, 2019).

The \$93.7 million Program allows tertiary education providers, including vocational education and training and higher education providers, to apply for funding through a competitive grants process to administer and promote scholarships for Australian and international students who live and study in regional Australia. Over 1,000 scholarships valued at \$15,000 per student, per year, will be available for students undertaking a Certificate IV through to PhD. The Department of Education submission to the Joint Standing Committee on Migration stated that the Destination Australia scholarships:

¹⁹ These consultations included roundtables in the Australian Capital Territory, Geelong, Warrnambool, Adelaide, Newcastle, Cairns, Armidale and Perth.

‘...will encourage diversification of where international students choose to study, as the majority study in Australia’s three largest cities (Sydney, Melbourne, and Brisbane).’ (DoE, 2019, p.4)

The definition of regional Australia used by the Department of Education, Skills and Employment for this purpose is based on areas classified as ‘regional’ or ‘remote’ under the ASGS Remoteness Structure. As a result, destinations that have offered an alternative to their neighbouring capital cities (e.g. Geelong, Wollongong, Newcastle and the Sunshine Coast) are not eligible for the scholarship.

1.1.3. Post-study work rights and migration

New regional visas and post-study work rights (PSWR) have also been introduced from November 2019²⁰. Under the announced arrangements, those on a temporary graduate visa will be able to access up to two additional years of PSWR in a regional area if they graduated from the regional campus of a registered institution and have maintained ongoing residence in a regional area.

The definition of regional Australia used by the Department of Home Affairs for this purpose will be the same of as the definition announced for skilled migration – all of Australia except Sydney, Melbourne, Perth, Brisbane and the Gold Coast. This means some destinations, previously classified as cities, will be included in the list of regional areas (e.g. Newcastle and Wollongong). There are also ongoing changes to the classification of destinations as having ‘regional’ status for migration purposes. Perth and Gold Coast were reclassified as regional in 2019.

A number of submissions made by peak bodies, associations and universities to the 2018 national review of international education in regional Australia recommended increases to post-study work rights and visa processing priority for students in regional areas. For example, the University of Wollongong made the following suggestions regarding incentives: a rebate on visa fees; extension of the work hour limit from 40 to 60 hours per fortnight; extension of post-study work rights from two to four years; addition points in support of their application for a Skilled Migration visa; and incentives for business who provide employment in the form of tax concessions who employ students on post-study work visa streams.

1.2. Consultations to inform the research

To better understand the impact of these developments and others, ACER conducted consultations with stakeholders from across the international education sector. These were supplemented by a review of the relevant national and international literature. A set of common themes emerged during these stakeholder consultations. However, it is important to acknowledge that there are diverse views across the international education sector. In the main, stakeholder views focused on three overarching sets of factors, summarised in Table 1.1.

A list of stakeholder consultations is included as Attachment 1.

²⁰ Subclass 491 Skilled Work Regional (Provisional) visa; Subclass 494 Skilled Employer Sponsored; and Subclass 191 Permanent Residence (Skilled Regional)

Table 1.1: Summary of findings from stakeholder consultations

1. Policy factors	2. Marketing and branding factors	3. Technical factors
<p>a. The policy drivers, objectives and measures of success require clarification</p> <p>b. Any changes to Australia’s approach must ‘do no harm’ to students and Australia’s global competitiveness</p> <p>c. ‘Choice’ and ‘control’ are critical to international students’ decision-making</p> <p>d. Incentives must align with capacity, infrastructure and employment opportunities</p> <p>e. A more coherent and strategic approach to post-study opportunities is needed</p>	<p>a. There are strong foundations of distinctive and differentiated offerings to build from</p> <p>b. There are many examples of good practice to learn from but they must be contextualised</p> <p>c. The umbrella ‘regional’ label has negative connotations – a destinations approach is welcomed</p> <p>d. There needs to be a more co-ordinated and multi-level approach that aligns national, state and destination messages</p> <p>e. Promoting a high quality study and living experience in all destinations must remain the priority</p> <p>f. Influencers and decision-makers must be equipped with practical and authentic information</p> <p>g. A more direct emphasis on edu-tourism has potential for some, but not all, study destinations</p>	<p>a. Technical classifications must be properly calibrated as they determine how we plan, act and reflect</p> <p>b. The regions are diverse and nuanced and data has a tendency to mask issues. There is support for:</p> <ul style="list-style-type: none"> • improving understanding of sub-country information; and • better integration of existing datasets. <p>c. We need to better understand the non-student visa (NSV) holder market</p>

The findings from the stakeholder consultations subsequently informed the development and refinement of the project methodology, data collections and reporting.

1.3. Research objectives

The objectives of this research project are to deliver:

1. an **overall profile** of international students studying in regional higher education institutions by different visa type²¹;
2. evidence-based knowledge on **pull factors** for international students to study in Australian regional higher education institutions, including study pathway connections with metropolitan and offshore courses;
3. evidence-based knowledge on the **rate of conversion** of short-term non-award courses into formal qualification enrolments in regional and metropolitan locations;
4. evidence-based information about **what underpins existing success** in attracting international students to study in regional areas and identifying opportunities for further expansion; and
5. evidence-based information to enable the **development of marketing messages**, including the student decision-making process and students' reasons for choosing to study in regional areas over other options.

²¹ This includes the following questions: where did they come from?, what are their future plans?, whose future plans involve long-term regional study?, and how do we encourage others to also consider long-term regional study?

1.4. Data sources and analysis

To address these objectives, ACER developed a methodology focused around five data collections, supplemented by a review of the research literature and mapping of policy and practice (Table 1.2).

Table 1.2: Description of data types and sources

Data type	Description	Size	Reference year	Sources
Administrative data	1. International student enrolments for individuals holding a student visa	55,685 (Population)	2019	Department of Education, Skills and Employment
	2. 'Last visa held' of individuals granted for higher education, postgraduate research and VET courses	282,220 (Population)	2018-19	Department of Home Affairs
Survey data	3. 10 bespoke questions added to the 2019 Student Experience Survey (SES)	42,278 onshore undergraduate and postgraduate coursework students in 34 institutions (Sample) ²²	2019	Department of Education, Skills and Employment via the Social Research Centre
	4. Number of ELICOS students on non-student visas	59,607 (Sample)	2018	English Australia
Case study data	5. 10 focus groups with 63 university students in five locations.	63 (Sample)	2018	1. The University of Tasmania 2. James Cook University 3. The University of New England 4. Charles Darwin University 5. Deakin University

Throughout the report, a number of charts refer to the 'percentage point difference' between regional study destinations and metropolitan study destinations. This simply refers to the difference between the share of enrolments or survey responses in each destination type (as opposed to the percentage difference in the count of enrolments or responses). For example, if 30 per cent of enrolments in regional destinations are in ELICOS courses and 25 per cent of enrolments in metropolitan destinations are in ELICOS enrolments, the percentage point difference is reported as +5 percentage points.

1.5. Structure of this report

This report is structured in five parts:

1. **Introduction** of the project and background to the research.
2. **Statistical profile** of international students in regional areas – An analysis of international student enrolment data, visa data, and an array of other international education datasets to develop a profile of international students in regional destinations in 2019.

²² The analyses focus on the responses from 36,604 students who provided a response to the question about their campus location that was able to be coded into a regional area. This represents around 11 per cent of higher education enrolments in regional study destinations in 2019. Students whose responses indicated that they were studying online or offshore were not included in the analyses.

3. **Case study profiles** of regional study destinations – An analysis of socio-economic and enrolment data, supported by detailed case studies of five university providers across Australia.
4. **The decision-making process** of international students and regional study destinations – A detailed analysis of the various pull and success factors that currently existing in the marketing messages of providers, study clusters and other stakeholders to identify the prevalence in the current marketing and promotional material and their relative importance to students.
5. **Conclusions and recommendations** – A set of concluding remarks accompanied by a set of actionable recommendations focus on the current and future work of the Department of Education, Skills and Employment and Austrade.

2. A statistical profile of international students in regional study destinations

Research Objective 1 of this project is to develop an **overall profile** of international students studying in regional higher education institutions by different visa type.

The campus location of international students – as distinct from the *main* campus location of their institution - is a key variable in this analysis. While the overall profile of the international student population is regularly reported, often at state/territory level, little has been reported to date on the campus location of international students at a detailed geographic level.

With international enrolment data now coded to the Australian Statistical Geography Standard (ASGS) and Accessibility/Remoteness Index of Australia (ARIA+) classifications, the following analysis is able to build, with some precision, a profile of international students in Australia based on the socio-economic profile and remoteness of the campus location.

The chapter begins by outlining the primary statistical classifications of the term ‘regional’ currently in use in Australia. It then presents a statistical profile of: (1) where students are by campus **location**; (2) what **sectors** and courses of education and training they are studying; (3) the **provider types** delivering these courses; (4) the **levels and fields of education** of these courses; and (5) the **nationalities** of students.

This is followed by an analysis of: (1) the **pathways** students have taken into their most recent courses, including through non-student visa (NSV) pathways; and (2) the **outcomes**, both actual and anticipated, during and upon completion of their studies in Australia. The chapter concludes with a set of key messages.

A limitation to this dataset is that in although a total of 956,773 enrolments were reported in 2019, around 30,000 lacked correct geocoding and so are not included in this analysis. This disproportionately affects enrolments in government schools in NSW and Victoria as they are collectively geocoded to the education department head office, in central Sydney and Melbourne respectively.

For this reason, international school students in regional areas are underrepresented in this analysis. This has been noted in the Department’s February 2010 research snapshot of *‘International students studying in regional areas’* (DESE, 2020a). Similarly, where survey data from the Student Experience Survey (SES) cannot be reliably able to be coded to an ASGS Statistical Area, these responses have been excluded from the analysis. This is only estimated to apply to less than one per cent of completed survey responses.

2.1. Technical definitions

Current definitions of ‘regional’ Australia are contested and not customised to an international education context. The definition currently applied by the Department of Education, Skills and Employment (DESE) for the purposes of statistical analysis and awarding Destination Australia scholarships is based on the ASGS Remoteness Structure that classifies detailed Statistical Areas (1-4) into classifications of remoteness based on the ARIA+ index (Box 2.1). The Department of Education submission to the Joint Standing Committee on Migration stated that:

‘Use of the Australian Bureau of Statistics’ Australian Statistical Geography Standard is consistent with definitions used for other education programs in the Education portfolio.’ (DoE, 2019, p.4)

The definition currently applied by the Department of Home Affairs is specified in the *‘Migration (LIN 19/217: Regional Areas) Instrument 2019’* (Department of Home Affairs, 2019). This instrument was adjusted in late 2019 to reclassify Perth and the Gold Coast as ‘regional’ for the purposes of migration and post-study work rights. Some states have developed their own definitions in response to their circumstances²³.

Neither the ARIA+ index nor the Home Affairs instrument has been developed specifically for the context of international education. While it does continue to be refined and updated, ARIA was created as a joint project with the Australian Department of Health and Ageing in 1998 when the number of international higher education enrolments in Australia was around 57,000²⁴.

2.1.1. The project definition

The analysis in this project presents data from administrative and survey collections based on four categories of enrolment:

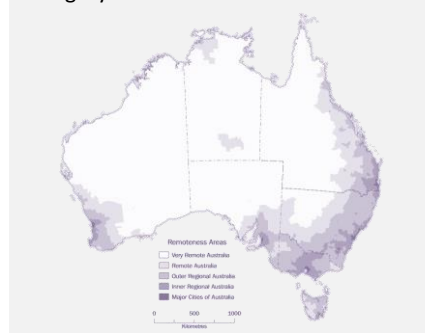
- **Category 1:** Major Cities (Brisbane, Sydney, Melbourne) ;
- **Category 2:** Cities (Perth, Adelaide, Gold Coast, Canberra);
- **Category 3:** Major Regional Centres (Sunshine Coast, Newcastle, Wollongong, Geelong, Hobart and metropolitan areas classified as ‘inner regional’); and
- **Category 4:** Regional Centres and Other Regional Areas.

Therefore, the analysis focuses on the six per cent of international student enrolments in Categories 3 and 4 (referred to as **‘regional study destinations’**) to build a profile of international students in regional areas in 2019.

Box 2.1: Indices for classifying geographic areas as regional

ARIA+ is a continuous varying index with values ranging from 0 (high accessibility) to 15 (high remoteness), and is based on road distance measurements from over 12,000 populated localities to the nearest Service Centres in five size categories based on population size (i.e. Major cities of Australia, inner regional, outer regional, remote and very remote).

This classifies four levels of Statistical Areas (SA1-4) under the Australian Statistical Geography Standard (ASGS) a category of remoteness.



²³ For example, the Tasmanian Skilled Occupations List is derived from the list of eligible occupations for the Skilled Nominated visa (subclass 190) and Skilled Work Regional (Provisional) visa (subclass 491), as defined by the Australian Government.

²⁴ Australian Government Department of Education and Training (2019). *‘International Student Enrolments in Australia 1994–2018’* Retrieved 14 February, 2020.

Table 2.1 compares the three classifications relevant to this project. Consistent with current Department of Education policy, this report applies the ARIA+ index as the main basis for the classification of ASGS Statistical Areas. Therefore, all Statistical Areas classified as ‘inner regional’, ‘outer regional’, ‘remote’ or ‘very remote’ under the ARIA+ classifications are within scope of this analysis. The main difference between the project classifications and the ARIA+ classification is that the former also includes Newcastle, Wollongong, Geelong and the Sunshine Coast within its scope.

When applying the ASGS Remoteness Structure, the Department of Education, Skills and Employment (2020)²⁵ reports that there were 31,493 (3.4 per cent) international student enrolments across all sectors in 2019. An important caveat to this figure is that it represents the share of regional enrolments across *all sectors* of international education and training in Australia. Therefore, a 10 week English language course in Sydney carries the same weight as a four year doctoral degree in Armidale.

Table 2.1: Classifications of ‘regional’ in Australia, 2019 [Current at March 2020]

Criteria	1. Department of Education, Skills and Employment	2. Department of Home Affairs	3. ACER project definition
Technical classification	Australian Statistical Geography Standard (ASGS) Statistical Areas (1-4) are classified into the 5 classes of remoteness on basis of relative access to services under the Accessibility and Remoteness Index of Australia (ARIA+)	Migration (LIN 19/217: Regional Areas) Instrument 2019 Specification of postcodes	ARIA+ with adjustments to include The Sunshine Coast, Newcastle / Lake Macquarie, Wollongong / Illawarra and Geelong (Category C below)
Classifications	Major Cities of Australia Inner Regional Outer Regional Remote Very Remote	Category 1 - ‘Major Cities’ Category 2 - ‘Cities and Major Regional Centres’ Category 3 - ‘Regional Centres and Other Regional Areas’	Category 1: Major Cities Category 2: Cities Category 3: Major Regional Centres Category 4: Regional Centres and Other Regional Areas
Categorisation of destinations			
Sydney, Melbourne and Brisbane	‘Major Cities of Australia’ with minor exceptions	Category 1 - ‘Major Cities’ ²⁶	Category 1
Perth, Adelaide, the Gold Coast, Canberra	‘Major Cities of Australia’ with minor exceptions	Category 2 - ‘Cities and Major Regional Centres’ ²⁷	Category 2
The Sunshine Coast, Newcastle, Wollongong, Geelong and Hobart	‘Major Cities of Australia’ with the exception of Hobart which is classified as ‘Inner Regional’		Category 3
Darwin, Cairns, Toowoomba, Townsville, Byron Bay, Lismore, Armidale, Launceston, Ballarat, Rockhampton and other Regional Centres and Areas not elsewhere specified	‘Inner Regional’, ‘Outer Regional’, ‘Remote’ and ‘Very Remote’	Category 3 - ‘Regional Centres and Other Regional Areas’ ²⁸	Category 4

²⁵ DESE (2020). International students studying in regional areas Research Snapshot February 2020

²⁶ No access to any regional area incentives

²⁷ 25,000 regional places are available; priority processing on regional visas; includes the Regional Occupations List – more jobs compared to non-regional lists; and access to an additional year in Australia on a post-study work visa for students at regional university campuses.

²⁸ 25,000 regional places are available; priority processing on regional visas.; access to the Regional Occupations List – more jobs compared to non-regional lists; access an additional 2 years in Australia on a post-study work visa for international students at regional campuses; Priority processing of region-specific Designated Area Migration Agreements (DAMAs).

This share of total international student enrolments of six per cent when applying the project definition is higher than the three per cent regularly reported by the Department of Education, Skills and Employment (DESE, 2020a; DET, 2019a). The reason for this is that the project definition includes within its scope an additional 24,000 enrolments from regional centres classified as ‘Major Cities of Australia’ in ARIA+ (Table 2.2). This results in a total population of 55,685 international student enrolments across all sectors in 2019. To provide a sense of proportion, this is roughly equivalent to the total number of international student enrolments in non-award and schools courses (on Student visas) in Sydney, Melbourne and Brisbane alone in 2019.

Table 2.2: International student enrolments, comparison of ASGS and Project definitions, 2019

	Project definition						Regional study destinations (%)
	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total		
ASGS Remoteness Structure definition	Major Cities of Australia	727,678	144,048	24,015	177	895,918	
	Inner Regional Australia			13,414	10,082	23,496	
	Outer Regional Australia			34	7,940	7,974	
	Remote Australia				23	23	
	Total	727,678	144,048	37,463	18,222	927,411	
	Major Cities of Australia	78.5%	15.5%	2.6%	0.0%	96.6%	‘ASGS’ definition = 3.4%
	Inner Regional Australia	0.0%	0.0%	1.4%	1.1%	2.5%	
	Outer Regional Australia	0.0%	0.0%	0.0%	0.9%	0.9%	
	Remote Australia	0.0%	0.0%	0.0%	0.0%	0.0%	
	Total	78.5%	15.5%	4.0%	2.0%	100.0%	
Regional study destinations (%)	‘Project’ definition = 6.0% (3.4%+2.6%)						

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

An advantage of the ASGS Remoteness Structure is that it provides a data standard to align international education data with other DESE datasets. A standardised definition allows for a comparison of: (a) the share of total onshore *international* commencements in regional and remote Australia (campus location); with (b) the share of total onshore *domestic* student commencements in regional and remote Australia (student home address).

Figure 2.1 shows that the share of onshore domestic commencements in higher education has averaged around 21 per cent²⁹ since 2011. The corresponding share of onshore international commencements in higher education has averaged around three per cent³⁰ since geocoded data became available in 2017. This equates to an 18 percentage point gap between the two student types in 2017 and 2018.

²⁹ Based on student home address

³⁰ Based on campus location

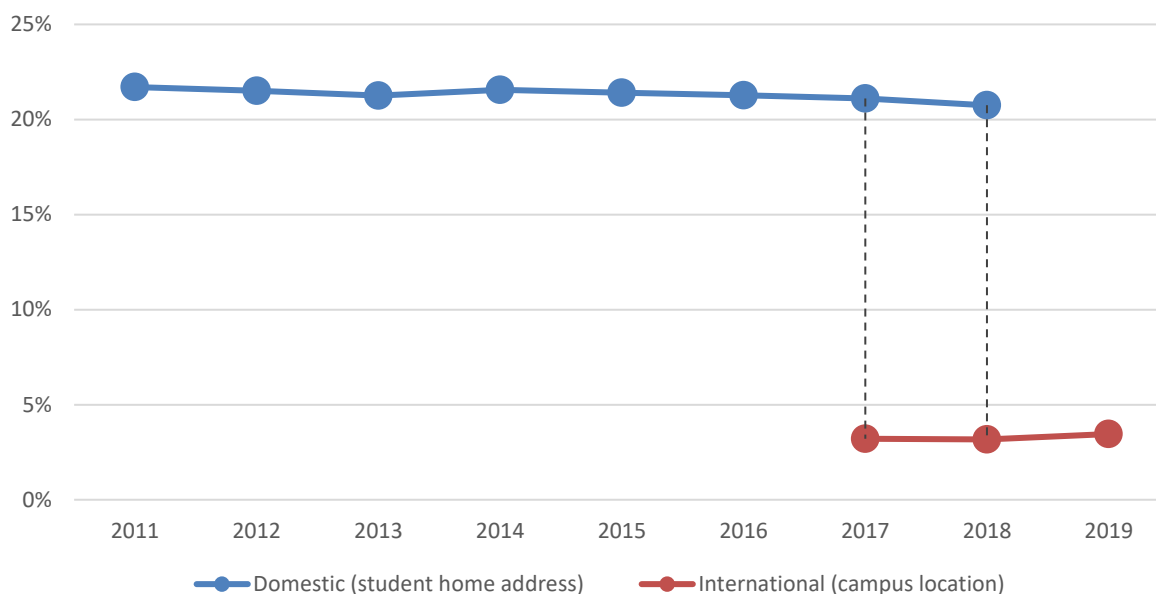


Figure 2.1: International and Domestic Commencements (Higher Education) - % of Total, 2011-2019

Sources:

Domestic student data – Selected Higher Education Statistics – 2018 Student Full Year data - ‘Section 11 Equity groups – Table 11.1’.

International student enrolment data – Supplied by the Department of Education, Skills and Employment

2.2. Destinations

This section of the analysis applies the project definition of regional and remote³¹ to focus on the geographic areas in which international students are located based on their **campus location**. Data are analysed at two levels: (1) State and Territory of campus location; and (2) Australian Statistical Geography Standard (ASGS) Statistical Area of campus location.

2.2.1. Categories

The percentage of enrolments in Category 3 or 4 destinations has remained at around six per cent for the last three years. Applying the project definition, Figure 2.2 shows the share of total international enrolments by category. This highlights the relatively small size of the enrolment population in regional study destinations compared to the total. For the years in which geocoded international enrolment data are available (2017-2019), enrolments in regional study destinations have consistently accounted for around six per cent of the total.

³¹ Specified in Section 2.1.1

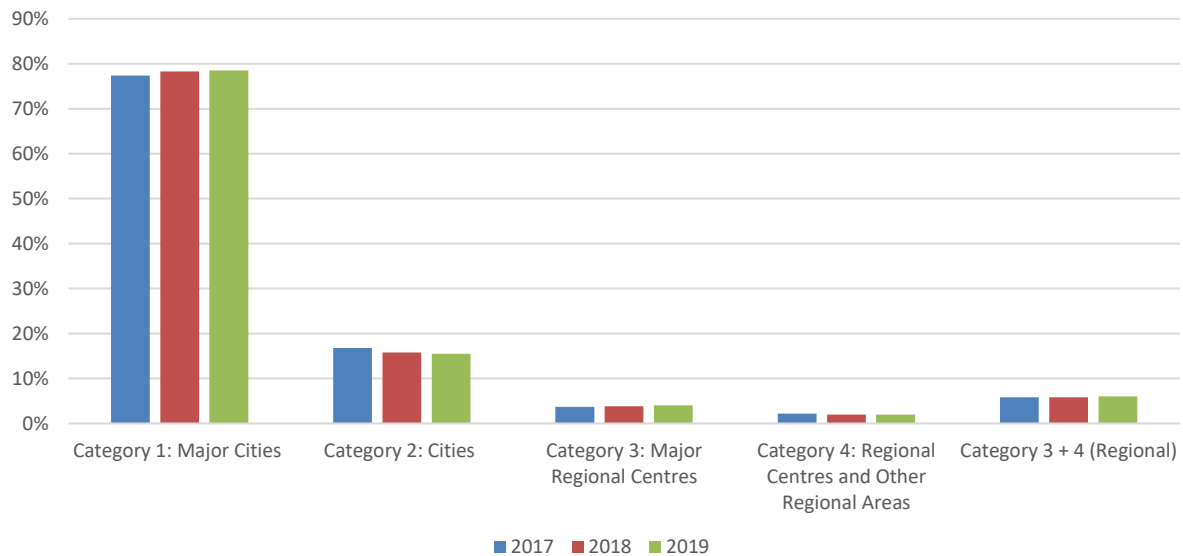


Figure 2.2: International Student Enrolments (All Sectors), by category, % of Total, 2017-2019

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

The regional share of total international enrolments varies by sector. Table 2.3 shows that while the overall percentage of international students is six per cent, it varies from four per cent in the ELICOS sector to 10.6 per cent in the schools sector. Regional VET has increased from 3.1 per cent in 2017 to 4.6 per cent in 2019, due in large part to growth in the private VET sector in Hobart.

Table 2.3: International Student Enrolments in regional study destinations, by sector, % of Total, 2017-2019

Sector	2017	2018	2019
Higher Education	7.4%	7.2%	7.3%
VET	3.1%	3.7%	4.6%
ELICOS	4.8%	4.4%	4.0%
Non-award	6.8%	6.5%	6.1%
Schools	11.5%	11.1%	10.6%
Total	5.8%	5.8%	6.0%

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

2.2.2. States and Territories

Almost 80 per cent of international students are enrolled in Sydney, Melbourne or Brisbane (Category 1 locations). Figure 2.3 shows the share of total enrolments by state and territory. This indicates that NSW - Sydney (36.6%); Victoria - Melbourne (31.5%); and Queensland - Brisbane (10.3%) comprise 78.5 per cent of the total. This is consistent with the latest QS *'Best Student Cities'* rankings which included seven Australian cities in the top 120, all of which were in Categories 1 or 2.

- Category 1: Melbourne (#3); Sydney (#9); Brisbane (#22);
- Category 2: Canberra (#23); Adelaide (#26); Perth (#41); and Gold Coast (#84) (QS, 2019a).

More information on QS rankings is included in Attachment 3.

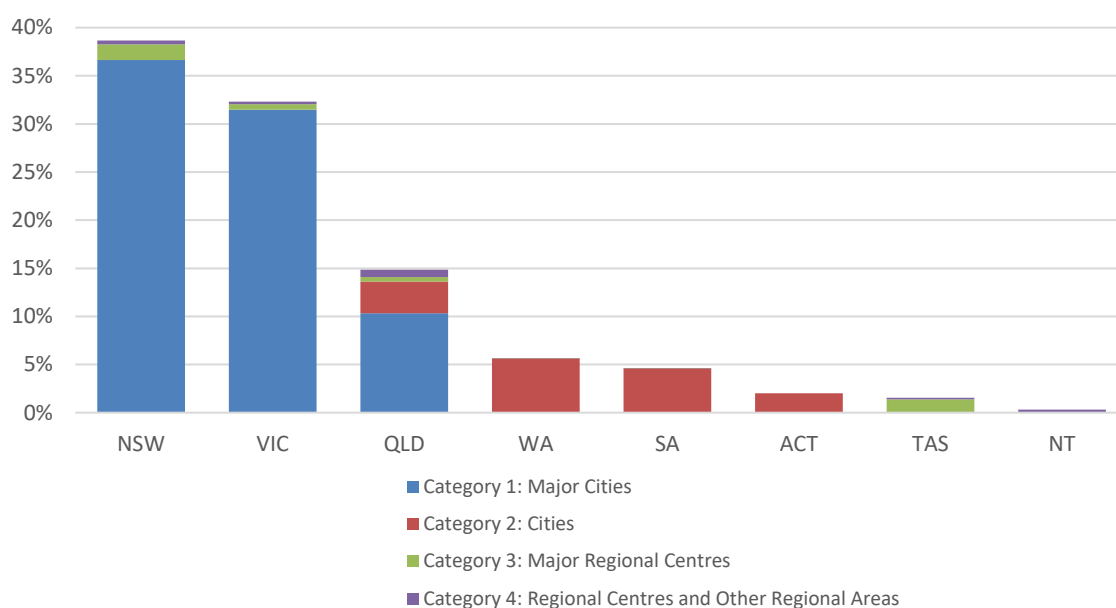


Figure 2.3: International Student Enrolments (All Sectors), by state/territory and category, % of Total, 2019
Source: International student enrolment data supplied by the Department of Education, Skills and Employment

At state and territory level, the largest shares of regional enrolments are in New South Wales, Queensland and Tasmania. Tasmania comprises just 1.2 per cent of total international enrolments but 21.7 per cent of enrolments in regional study destinations. Similarly, the Northern Territory comprises 0.3 per cent of total enrolments across Australia but 5.3 per cent of enrolments in regional study destinations (Table 2.4). While Queensland has 14.8 per cent of all international student enrolments, it has 20.3 per cent of all regionally-located international student enrolments in Australia.

Table 2.4: International Student Enrolments (All Sectors), by state/territory, % of Totals, 2019

State/Territory	Where <i>regional</i> international students are located by state/territory	The share of <i>regional</i> international students <i>within</i> the state/territory	Where <i>all</i> international students are located by state/territory
NSW	33.7%	5.2%	38.7%
QLD	20.3%	8.2%	14.8%
TAS	25.9%	100.0%	1.6%
VIC	13.8%	2.6%	32.3%
NT	5.5%	100.0%	0.3%
WA	0.6%	0.7%	5.7%
SA	0.2%	0.3%	4.6%
ACT	0.0%	0.0%	2.0%
Total	100.0%	6.0%	100.0%
# totals	55,685		927,411

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

Queensland has a distinctive profile. The share of enrolments in Queensland that are Category 3 (3%) and Category 4 (5.2%) means that 8.2 per cent of enrolment in the state are classified as ‘regional’ (Figure 2.4). If the Gold Coast is included, as it currently is for migration purposes by the Department of Home Affairs, the share of international enrolments in Queensland is 30 per cent. Queensland alone makes up 39.3 per cent of Category 4 enrolments.

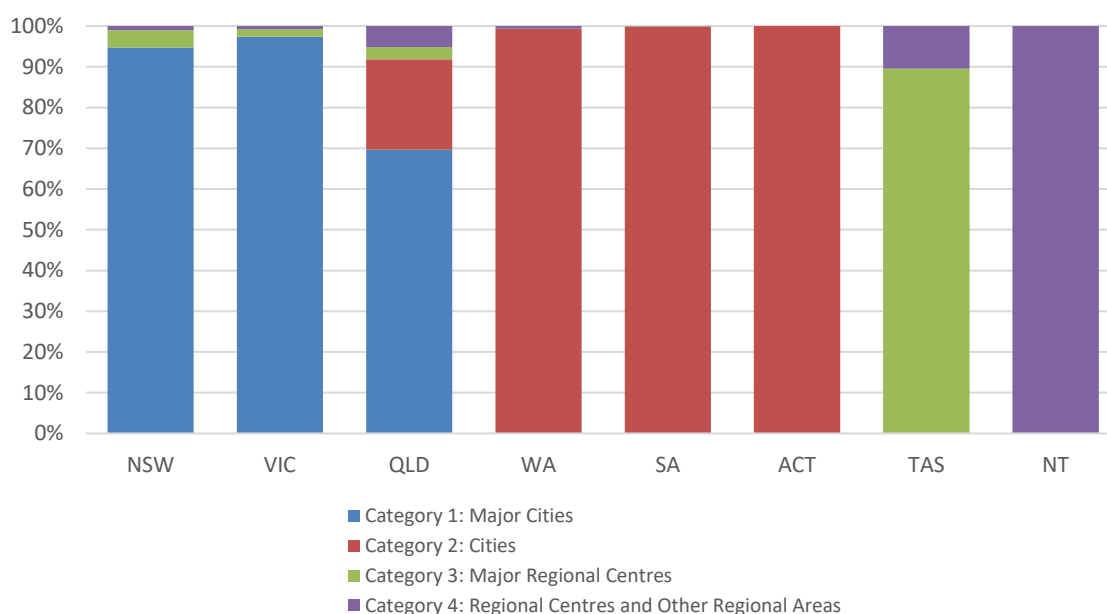


Figure 2.4: International Student Enrolments (All Sectors) by category, % in Total State/Territory, 2019

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

2.2.3. Australian Statistical Geography Standard (ASGS) Statistical Areas

International student enrolments across all sectors are concentrated in just 13 ASGS Level 4 Statistical Areas. The destinations shown in Figure 2.5 comprise 95.2 per cent of all enrolments in regional study destinations in 2019. Grouped by state and territory, these include:

- **New South Wales (4)** – Illawarra (Wollongong), Newcastle and Lake Macquarie, Richmond – Tweed (Byron Bay / Lismore), New England and North West (Armidale);
- **Queensland (4)** – Sunshine Coast, Cairns, Toowoomba, Townsville;
- **Victoria (2)** – Geelong, Ballarat;
- **Tasmania (2)** – Hobart, Launceston;
- **Northern Territory (1)** – Darwin.

Of these 13 Statistical Areas, eight are located in just two states: New South Wales and Queensland. There are a further 38 Statistical Areas that comprise the remaining 4.8 per cent of the total number of enrolments in regional study destinations (Box 2.2). The full distribution across all Level 4 Statistical Areas is shown in Attachment 5.

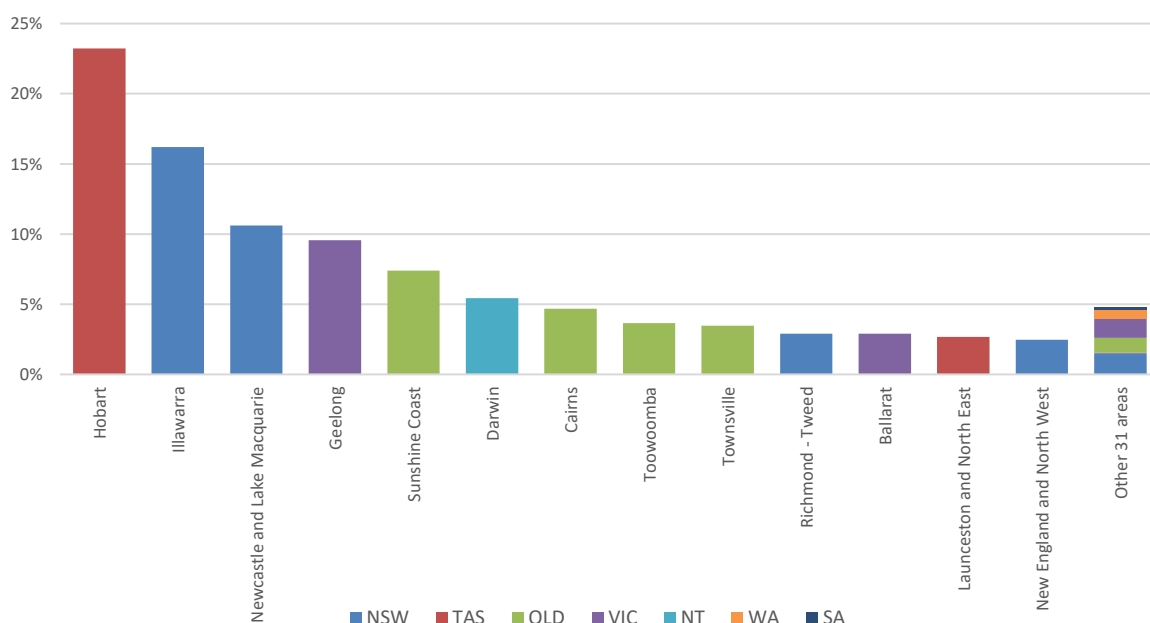


Figure 2.5: International Student Enrolments (All Sectors) in regional destinations, by ASGS SA4, 2019

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

Box 2.2: The other 4.8 per cent of enrolments located in 38 regional study destinations

The long tail of 38 ASGS Level 4 Statistical Areas cover a diverse range of campus locations across NSW (1.5%); Victoria (1.3%); and Queensland (1%), with very small numbers recorded in regional Western Australia and South Australia.

The highest number of enrolments across all sectors in this group were in: Central Queensland/Rockhampton (320); North West/Mildura (180); and La Trobe/Gippsland (177).

Figure 2.6 shows the geographic spread of *higher education* international enrolments in the largest 12 regional study destinations.

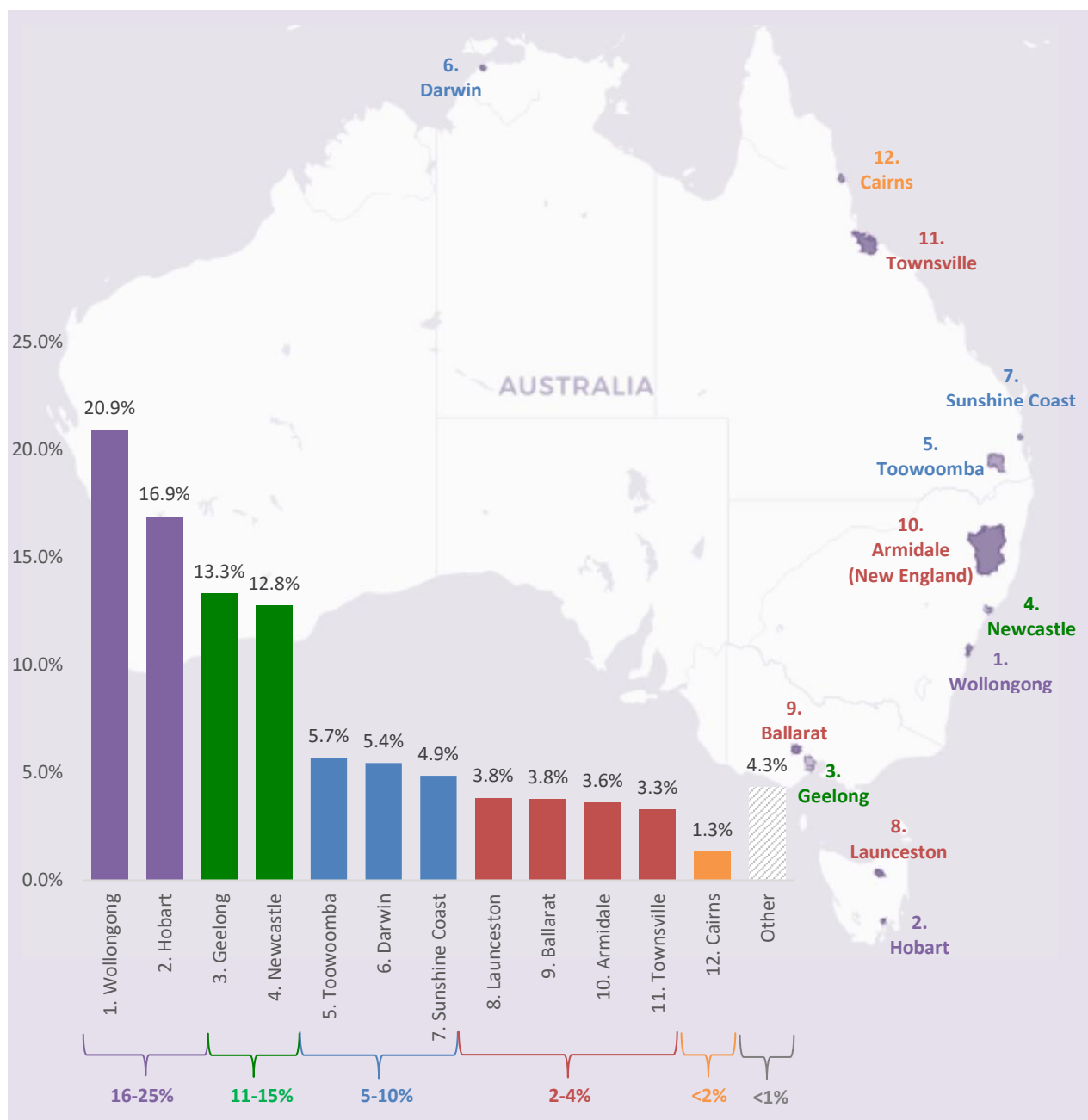


Figure 2.6: International Student Enrolments (Higher Ed) in regional destinations, % of total, 2019³²
 Source: International student enrolment data supplied by the Department of Education, Skills and Employment

The number of international higher education enrolments in regional destinations decreases as the distance from the nearest capital city increases. In 2019, just 12 ASGS Level 4 Statistical Areas³³ recorded more than 1,000 regional enrolments in higher education courses. Figure 2.7 shows these enrolments distributed across five groups based on their distance from the nearest capital city. As would be expected, Hobart and Darwin (Group 1) appear as anomalies as they are themselves capital cities. Groups 2-5, however, show a clear downward trajectory as the distance from the closest capital city increases from 100km to 500km+.

³² The spatial mapping of international student enrolments throughout this report was made possible by the Australian Government's online map-based tool National Map. For clarity, Statistical Areas with fewer than 200 higher education enrolments are not included

³³ Richmond-Tweed (Byron Bay / Lismore) has comparatively few higher education enrolments.

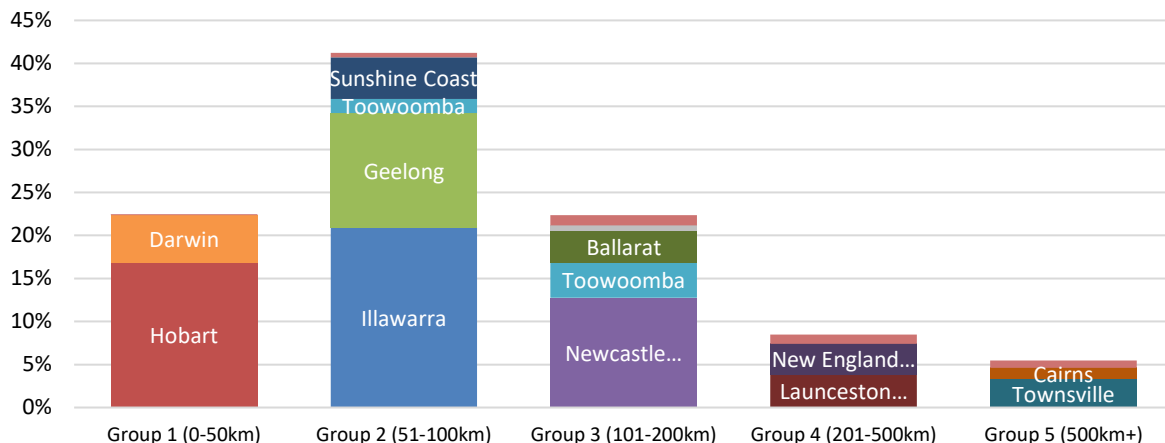


Figure 2.7: International Student Enrolments (Higher Ed) in regional destinations, location/proximity, 2019
 Source: International student enrolment data supplied by the Department of Education, Skills and Employment

International higher education enrolments are spread across a diverse range of socio-economic locations. International higher education enrolments in regional destinations are spread across five groups based on their SEIFA IRSD³⁴ decile (1-10). Around one-quarter of international higher education enrolments in regional study destinations are classified with a SEIFA IRSD decile of 4 or below. Figure 2.8 shows a clustering of enrolments in four types of location:

- **Capital city locations** with a SEIFA IRSD decile of 8 (22.3%) (e.g. Hobart, Darwin).
- **Locations 51-100km** from a capital city with a SEIFA IRSD decile of 5 (37.2%) (e.g. Wollongong, Geelong, the Sunshine Coast).
- **Locations 101-200km** from a capital city with a SEIFA IRSD decile of 3-4 (e.g. Toowoomba and Newcastle³⁵) and 7 (Newcastle³⁶ and Ballarat).
- **Locations 500km+** from a capital city with a SEIFA IRSD decile of 7 (8.9%) (e.g. Cairns and Townsville).

Box 2.3: Launceston

Launceston – with over 1,200 higher education enrolments in 2019 - is around 200km from Hobart and has a SIEFA IRSD decile of 1, indicating a high level of socio-economic disadvantage relative to other parts of Australia.

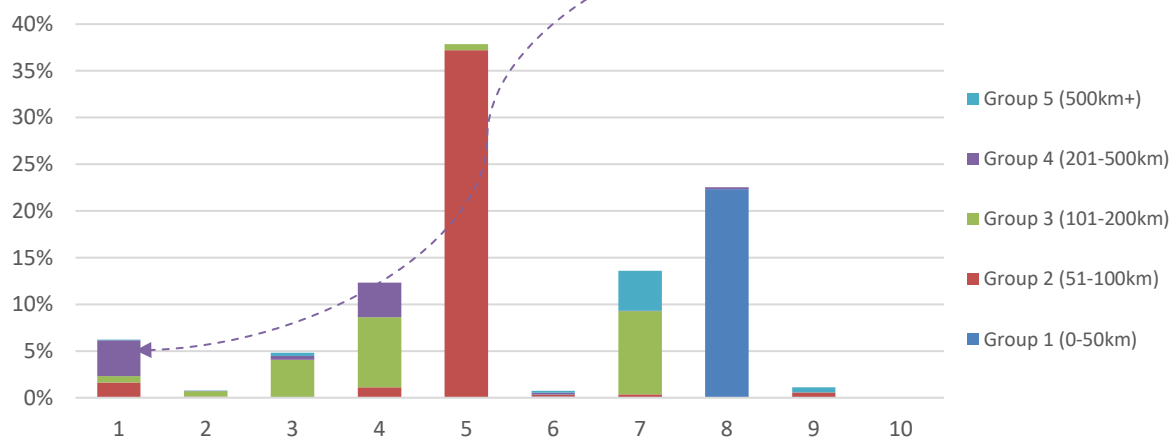


Figure 2.8: International Student Enrolments (Higher Ed) in regional destinations, IRSD decile, 2019
 Source: International student enrolment data supplied by the Department of Education, Skills and Employment

³⁴ The Index of Relative Socio-economic Disadvantage (IRSD) is a general socio-economic index that summarises a range of information about the economic and social conditions of people and households within an area. Unlike the other indexes, this index includes only measures of relative disadvantage.

³⁵ Statistical Area 2 - Waratah - North Lambton

³⁶ Statistical Area 2 Newcastle - Cooks Hill

Box 2.4: Destination Australia scholarships

Introduced in 2019, Destination Australia scholarships are funded by the Australian Government to provide scholarships of up to \$15,000 a year for domestic and international students to study at a regional university or vocational training provider.

The stated aim is to attract and support international and domestic students to study in regional Australia, to grow and develop regional Australian tertiary education providers and offer students a high quality learning experience.

Eligibility is determined by the definition of regional and remote Australia used in the 2011 Australian Statistical Geography Standard (ASGS): Remoteness Structure classifications (inner regional, outer regional, remote and very remote). The scholarships are offered only to students studying at a regional campus *and* living in a regional or remote area.

For the 2020 round, 518 scholarships were awarded to international students (Figure 2.9). This equates to around 3 per cent of international student commencements (Certificate IV-Doctoral degree) in regional and remote areas in 2019.

Two-thirds of the scholarships awarded to international students were for Bachelor Degrees (36.9%) or Masters or Doctoral degree (30.7%) courses. The remaining third were for VET Diploma (19.1%), Certificate IV (6.6%) or Other courses (6.8%).

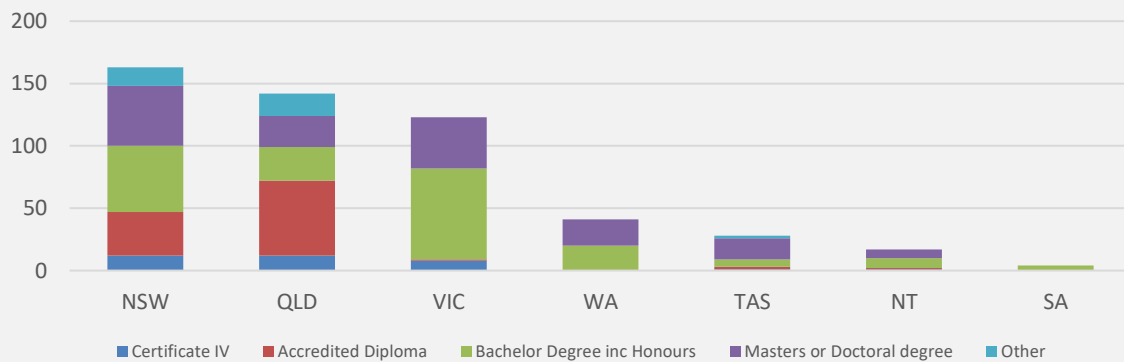


Figure 2.9: Destination Australia scholarships, State/Territory, International only, 2019-2020

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

Figure 2.10 shows that the number of higher education scholarships – compared to non-higher education scholarships – varies by location. For example, while 29 scholarships were awarded to international students in Cairns, only four of these were for study in a higher education level course.

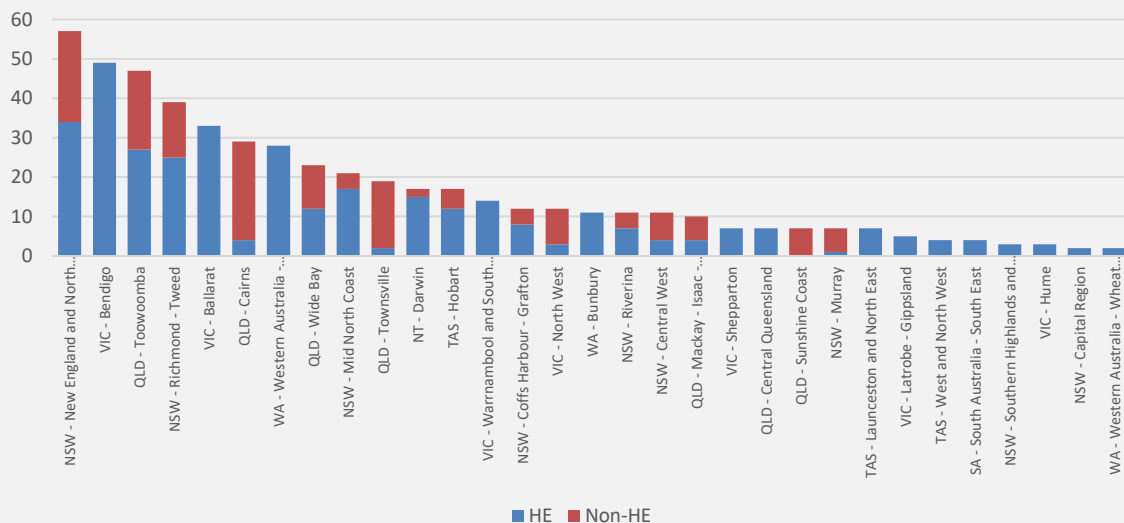


Figure 2.10: Destination Australia scholarships, SA4, International only, 2019-2020

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

2.3. Enrolments

This section looks deeper into the international student enrolment data to investigate the sectors and courses of study in each of the regional study destinations.

2.3.1. Sectors

International student enrolments in regional destinations are more likely to be in the higher education sector. Enrolments in higher education courses are 10.4 percentage points higher in regional study destinations than they are elsewhere in Australia (Table 2.5; Figure 2.11). Collectively, the percentage of regional enrolments in VET and ELICOS courses is 33.2 per cent, compared to 45.9 per cent elsewhere in Australia. This equates to a difference of -12.7 percentage points in 2019 (Figure 2.11).

Table 2.5: International Student Enrolments (All Sectors) in regional study destinations, % of Category, 2019

Sector	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total	Regional subtotal
Higher Education	45.8%	49.0%	58.1%	54.0%	47.0%	56.8%
VET	30.1%	25.2%	21.8%	23.2%	28.8%	22.2%
ELICOS	16.7%	16.4%	10.8%	11.2%	16.3%	10.9%
Non-award ³⁷	5.1%	5.6%	6.0%	3.7%	5.2%	5.2%
Schools	2.4%	3.8%	3.4%	7.9%	2.7%	4.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

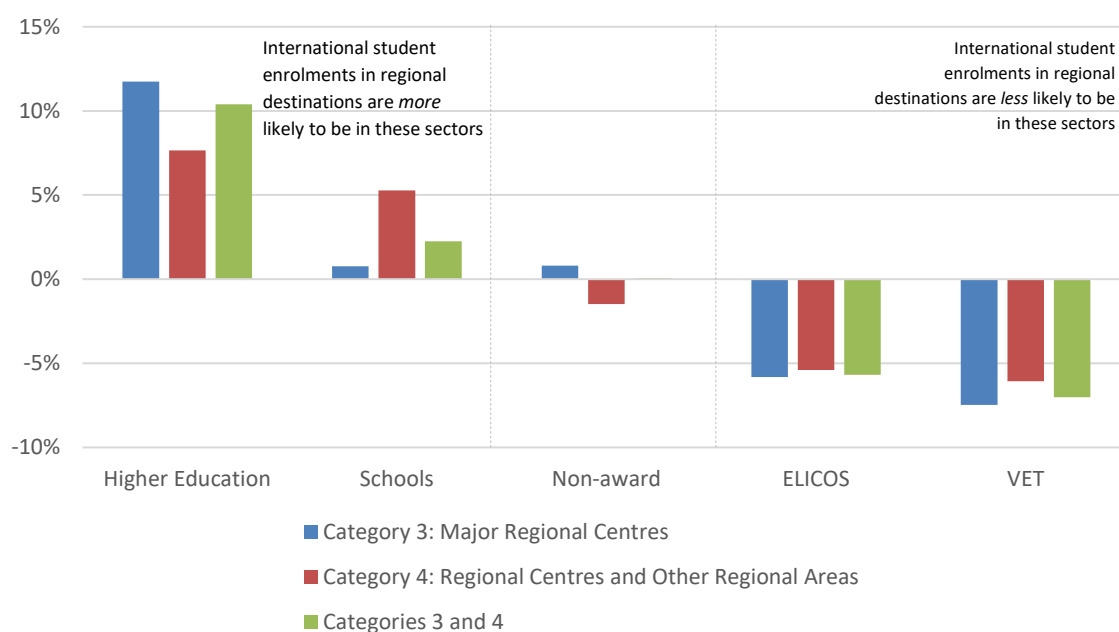


Figure 2.11: International Student Enrolments, by sector, 2019 – Difference regional and metropolitan

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

³⁷ Non-award courses include two broad types: foundation and other enabling courses; and mobility courses, which include study abroad and student exchange programs.

At a Statistical Area level there are differences by sector. Some notable examples, shown in Table 2.6, include the *higher* share of enrolments in:

- the schools sector in the Sunshine Coast (15.8%) and Cairns (13.5%);
- the higher education sector in Toowoomba (87.9%) and Launceston (80.9%);
- the VET and ELICOS sectors in Richmond-Tweed (81.5%) and Cairns (69.6%); and
- the non-award sector in Townsville (14.1%).

Of the 13 Statistical Areas where most regional enrolments are located, nine have a *higher* share of their total enrolments in the higher education sector than the national average. Of these nine, areas where higher education comprises a particularly high share of enrolments compared to the national average are: Toowoomba (+41.6 points); New England North West (+36.3 points); and Launceston and North East (+34.5 points). Conversely, there are lower shares of international higher education enrolments in Richmond-Tweed (Bryon Bay/Lismore) (-34.8 points); Cairns (-30.3 points) and the Sunshine Coast (-9.1 points).

Table 2.6: International Student Enrolments (All Sectors) in regional destinations, % of ASGS SA4, 2019

State / Territory	Australian Statistical Geography Standard (ASGS) Statistical Area 4	Enrolments 2019	Higher Education	VET	ELICOS	Non-award	Schools	Total
TAS	Hobart	12,933	41.3%	49.7%	5.1%	1.6%	2.2%	100.0%
NSW	Illawarra	9,021	73.3%	1.0%	15.0%	10.3%	0.4%	100.0%
NSW	Newcastle and Lake Macquarie	5,907	68.3%	4.8%	14.2%	12.6%	0.2%	100.0%
VIC	Geelong	5,324	79.1%	8.7%	6.4%	2.9%	3.0%	100.0%
QLD	Sunshine Coast	4,113	37.3%	21.7%	20.4%	4.7%	15.8%	100.0%
NT	Darwin	3,031	56.8%	27.6%	9.7%	2.1%	3.8%	100.0%
QLD	Cairns	2,608	16.0%	44.4%	25.2%	1.0%	13.5%	100.0%
QLD	Toowoomba	2,037	87.9%	1.8%	5.1%	1.9%	3.3%	100.0%
QLD	Townsville	1,939	53.6%	20.4%	3.0%	14.1%	8.8%	100.0%
NSW	Richmond - Tweed	1,620	11.5%	52.3%	29.2%	6.4%	0.6%	100.0%
VIC	Ballarat	1,620	73.4%	20.1%	3.5%	1.4%	1.6%	100.0%
TAS	Launceston and North East	1,494	80.9%	3.7%	7.6%	1.3%	6.6%	100.0%
NSW	New England and North West	1,377	82.6%	0.6%	11.5%	2.8%	2.5%	100.0%
	Other 38 SA4s	2,661	44.4%	21.0%	5.3%	3.4%	25.8%	100.0%
	Regional study destination total	55,685	56.8%	22.2%	10.9%	5.2%	4.8%	100.0%
	National total	927,411	47.0%	28.8%	16.3%	5.2%	2.7%	100.0%

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

2.3.2. Providers and courses

Enrolments in higher education courses in regional study destinations are generally in smaller universities. Figure 2.12 shows the spread of international higher education enrolments by university across all categories of destination. These enrolments are clustered among universities with smaller numbers of international enrolments overall, with the exception of Deakin University which, while based in Geelong (Category 3), has a large international student population at its Burwood Campus in Melbourne (Category 1).

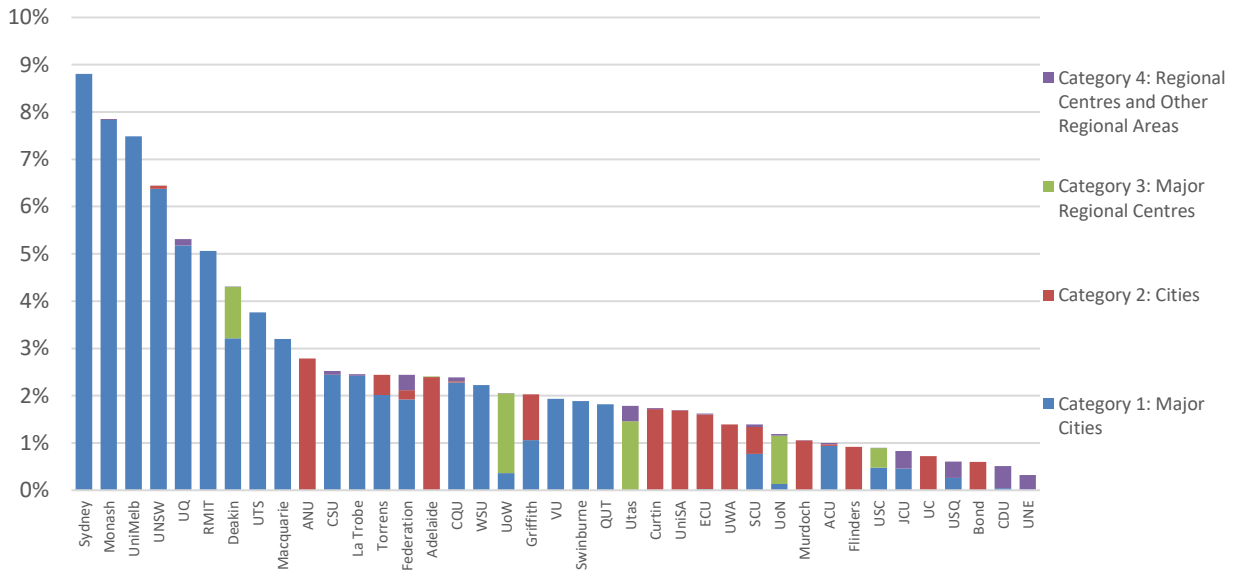


Figure 2.12: International Student Enrolments (Higher Ed) in regional destinations, University, 2019

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

Four universities comprise around two-thirds of all higher education enrolments in regional destinations. In 2019, 21 universities enrolled international higher education students in regional destinations. However, 67.3 per cent of these enrolments are with just four universities:

- University of Tasmania (UTas) (21.3%) of total higher education enrolments in regional study destinations in 2019);
- University of Wollongong (UoW) (20.2%);
- Deakin University (Deakin) (13.1%); and
- The University of Newcastle (UoN) (12.7%).

These four universities are followed by a group of six universities that each comprise around four to six per cent of international higher education enrolments in regional destinations (CDU, USC, JCU, USQ, Federation and UNE) (Figure 2.13).

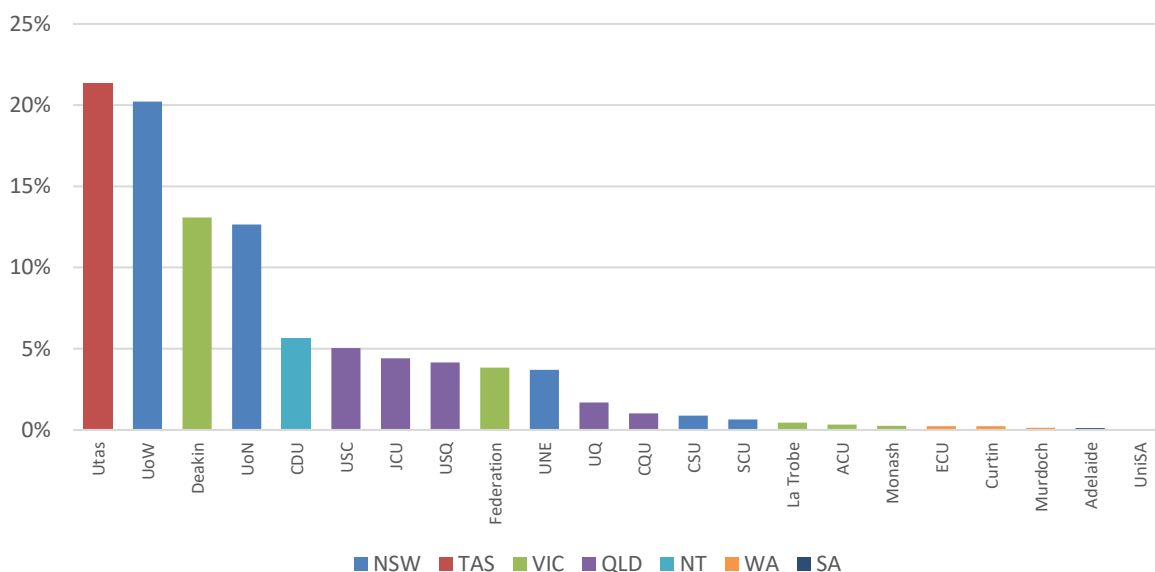


Figure 2.13: International Student Enrolments (Higher Ed) in regional destinations by University, 2019

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

‘Ungrouped’ universities enrol two-thirds of higher education enrolments in regional study destinations. There are four main groupings of Australian universities. Formed to promote the mutual objectives of the member universities, the current groupings include:

- Group of Eight (Go8)³⁸
- Australian Technology Network (ATN)³⁹
- Innovative Research Universities (IRU)⁴⁰
- Regional Universities Network (RUN)⁴¹

The project brief included a requirement that this research have ‘...a specific focus on identifying the regional footprint of Group of Eight universities, given their particular attraction to Chinese students who represent around 30 per cent of international students in Australia’. While 48 per cent of Category 1 enrolments are with Group of Eight (Go8) universities, just two per cent of higher education enrolments in Category 3 or 4 are in a Go8 university. In their submission to the 2018 government review, the Group of Eight explained an important barrier, particularly in the fields of medicine and health:

‘Go8 universities collectively offer over 550 locations outside major metropolitan locations for medical and health placements..., and have campuses, clinical presences or facilities in 41 locations across regional Australia, including Port Headland, Kalgoorlie, Dubbo and Spring Ridge... However, under current settings, funding provided under the Rural Health Multidisciplinary Training program cannot be used to support clinical placements for international students. ...This is a major barrier to giving international students enrolled in metropolitan universities access to a rural experience via such a placement. Addressing this issue is one practical step the government could take to dramatically increase the numbers of international students who spend time in regional areas while studying.’ (Group of Eight, 2018, p.10)

In contrast, while they comprise 22 per cent of total international student enrolments, universities that do not align to a particular university grouping, (i.e. University of Tasmania, University of Newcastle and Deakin University), comprise 67.5 per cent of international higher education enrolments in regional destinations.

Within each university grouping, 99.6 per cent of Group of Eight enrolments are in Category 1 (84%) or Category 2 (15.6%) locations. Just 15.2 per cent of higher education enrolments in the Regional Universities Network (RUN) were in Category 3 or 4 destinations (Table 2.7).

³⁸ The University of Melbourne, Australian National University, The University of Sydney, The University of Queensland, Monash University, The University of New South Wales, The University of Western Australia, The University of Adelaide.

³⁹ Curtin University of Technology, The University of South Australia, RMIT University, University of Technology Sydney, Queensland University of Technology

⁴⁰ Charles Darwin University, James Cook University, Griffith University, La Trobe University, Flinders University, Murdoch University, and Western Sydney University

⁴¹ University of Southern Queensland, Central Queensland University, Southern Cross University, Federation University Australia, University of New England, University of the Sunshine Coast

Table 2.7: International Student Enrolments (Higher Ed) by Category, University Group, 2019

Category University grouping	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total	Category 3 and 4 (Regional sub-total)
Share of Category						
Go8	47.9%	38.6%	0.2%	6.1%	42.5%	2.0%
Ungrouped	16.9%	13.3%	92.5%	14.5%	20.5%	67.5%
ATN	11.9%	19.8%	0.0%	0.7%	12.3%	0.2%
RUN	11.0%	4.6%	7.3%	44.6%	10.6%	19.3%
IRU	8.3%	17.1%	0.0%	33.2%	10.0%	10.6%
Private	2.7%	6.2%	0.0%	0.0%	3.1%	0.0%
Multi-state	1.3%	0.2%	0.0%	1.0%	1.0%	0.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Share of University Grouping						
Go8	84.0%	15.6%	0.0%	0.4%	100.0%	0.4%
Ungrouped	61.3%	11.2%	25.6%	1.9%	100.0%	27.5%
ATN	72.0%	27.8%	0.0%	0.2%	100.0%	0.2%
RUN	77.3%	7.5%	4.0%	11.3%	100.0%	15.2%
IRU	61.8%	29.3%	0.0%	8.8%	100.0%	8.8%
Private	65.3%	34.7%	0.0%	0.0%	100.0%	0.0%
Multi-state	93.8%	3.6%	0.0%	2.6%	100.0%	2.6%
Total	74.4%	17.2%	5.7%	2.7%	100.0%	8.4%

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

Compared to the average of six per cent across all levels and sectors, the share of international student enrolments in regional study destinations varies considerably by level of study. While the overall average, across all sectors, is around six per cent according to the project definition of ‘regional’, there are important distinctions to be made by qualification level. As shown in Figure 2.14, Graduate Certificate (17.1%); Doctoral Degrees (16.8%); Graduate Diploma (11.8%); and Master’s Degree (Research) (11.1%) levels are two-to-three times the average percentage across all enrolments. These qualifications are also four-to-five times the average percentage reported under the ASGS remoteness structure classification (3% in 2019).

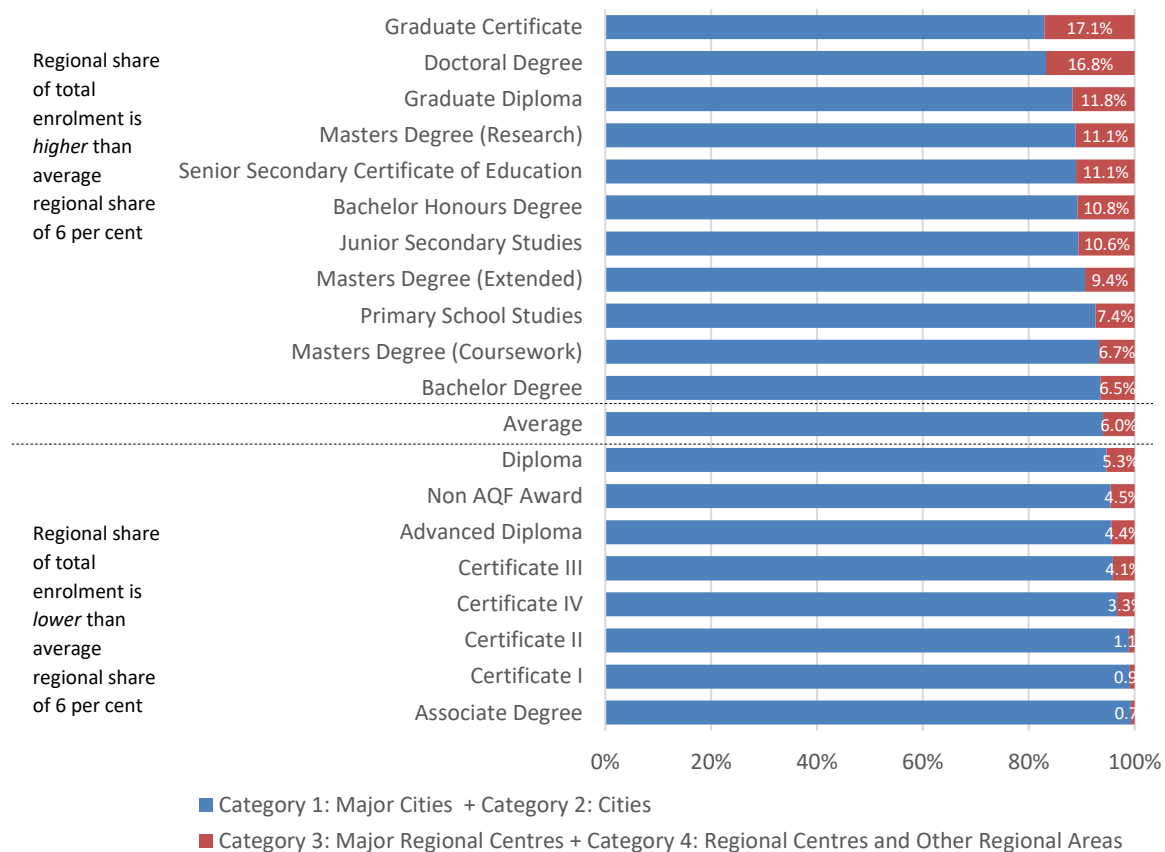


Figure 2.14: International Student Enrolments (All Sectors), level and category, 2019

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

The two highest enrolling source countries for higher education courses across all categories of destination in Australia are India and China. China comprises 37.6 per cent of total international higher education enrolments in Australia. However, it comprises a comparatively smaller percentage of international higher education enrolments in Category 3 (31.7%) and Category 4 (14.7%) destinations.

Category 4 differs most markedly from the national profile in that it is the only category where India (26.7%) comprises a larger share than China (14.7%). A further notable difference is the inclusion of Canada and the USA in the Category 4 top 10 and Saudi Arabia in the Category 3 top 10 (Table 2.8).

Table 2.8: International Student Enrolments (Higher Ed) by Category, Nationality (Top 10), 2019

Rank	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total
1-2 (%)	59.1%	55.5%	54.6%	41.4%	57.9%
1	China (38.8%)	China (36.8%)	China (31.7%)	India (26.7%)	China (37.6%)
2	India (20.3%)	India (18.7%)	India (22.9%)	China (14.7%)	India (20.3%)
3-10 (%)	26.2%	22.4%	26.4%	31.1%	25.5%
3	Nepal	Malaysia	Nepal	Nepal	Nepal
4	Vietnam	Nepal	Pakistan	Philippines	Vietnam
5	Indonesia	Hong Kong	Vietnam	Malaysia	Malaysia
6	Pakistan	Vietnam	Malaysia	Vietnam	Pakistan
7	Sri Lanka	Singapore	Sri Lanka	Bangladesh	Sri Lanka
8	Malaysia	Pakistan	Bangladesh	Canada	Indonesia
9	Hong Kong	Bhutan	Saudi Arabia	USA	Hong Kong
10	Bangladesh	Sri Lanka	Singapore	Sri Lanka	Singapore
Other	168 (14.7%)	150 (21.1%)	117 (19%)	110 (27.5%)	174 (16.6%)

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

At a sectoral level, the source country breakdown for regional study destinations (Categories 3 and 4), show the diversity and distinctiveness of each sector of international education (Table 2.9). For example, the comparatively high share of students from India in VET (14.8%); from Japan in ELICOS (9.2%); from the USA in Non-award (27.5%); and from Germany in the schools sectors (12.9%).

Table 2.9: International Student Enrolments (All Sectors), Nationality (Top 10), Regional destinations⁴², 2019

Rank	Higher Education	VET	ELICOS	Non-award	Schools	Grand Total
1-2 (%)	50.5%	27.7%	41%	41.5%	36.6%	41.2%
1	China (26.4%)	India (14.8%)	China (31.8%)	USA (27.5%)	China (23.7%)	China (23.2%)
2	India (24.1%)	China (12.9%)	Japan (9.2%)	China (14%)	Germany (12.9%)	India (18%)
3-10 (%)	26.9%	42.8%	39%	32.7%	43.8%	27.4%
3	Nepal	Nepal	India	Norway	PNG	Nepal
4	Vietnam	Pakistan	Spain	France	Italy	Pakistan
5	Malaysia	Philippines	Nepal	UK	Hong Kong	Vietnam
6	Pakistan	Brazil	Brazil	Germany	Brazil	USA
7	Sri Lanka	USA	South Korea	Japan	Vietnam	Malaysia
8	Bangladesh	South Korea	Vietnam	Denmark	Japan	South Korea
9	Saudi Arabia	Taiwan	Saudi Arabia	Sweden	South Korea	Brazil
10	Hong Kong	Sri Lanka	Colombia	Canada	Thailand	Philippines
Other	128 (19.2%)	97 (29.5%)	80 (20%)	84 (25.8%)	53 (19.6%)	141 (31.5%)

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

⁴² Category 3 and Category 4 destinations

The main differences between metropolitan and regional higher education student enrolment profiles are summarised in Figures 2.11-2.14. In addition to this higher education focus, international higher education enrolments in regional destinations are also more likely to:

- be at Doctoral degree and Bachelor Honours Degree levels; and
- be in the Health and STEM⁴³-related fields and less so in the Management and Commerce and Information Technology broad fields of education; and
- have a considerably lower share of Chinese nationals and correspondingly higher share from Middle East, Africa and North/South America (Figure 2.15).

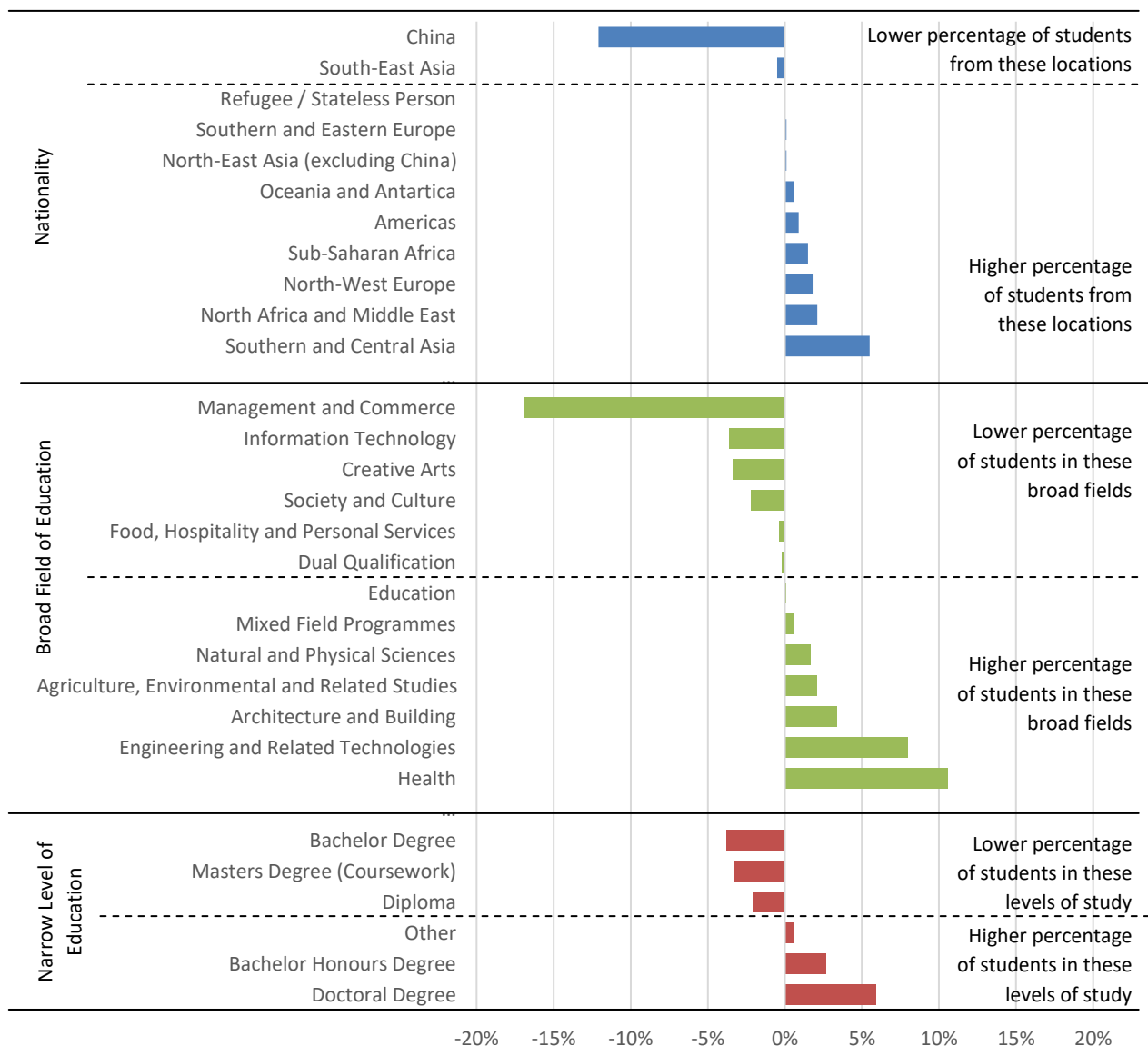


Figure 2.15: International Student Enrolments (Higher Ed), Metropolitan vs Regional, 2019

⁴³ Science, Technology, Engineering and Mathematics; incorporating the broad fields Natural and Physical Sciences, Agriculture, Environmental and related studies, Information Technology and Engineering and related Technologies

Compared to the average across all universities, universities in regional destinations tend to have a lower overall proportion international students. In a report on the regional contribution of international education in Australia, Deloitte Access Economics (2016, p.37) reported that:

‘While only a small absolute number of international students choose to study in regional areas, they can still make up a sizeable proportion of the local campus and community populations’.

Diversity is often cited as a significant drawcard or pull factor to attract students to regional destinations. Sorted by highest share of onshore international students, Figure 2.16 shows that the majority of universities that are either based, or have an active presence in, regional areas are likely to have a below average share of their total enrolment made up by international students. Regional enrolments in these universities are represented by the orange columns.

Compared to the national average of around 25 per cent, regionally-based universities where there are notably lower shares of international students include: The University of New England (4.3%); University of Southern Queensland (9.1%); the University of Newcastle (13.3%).

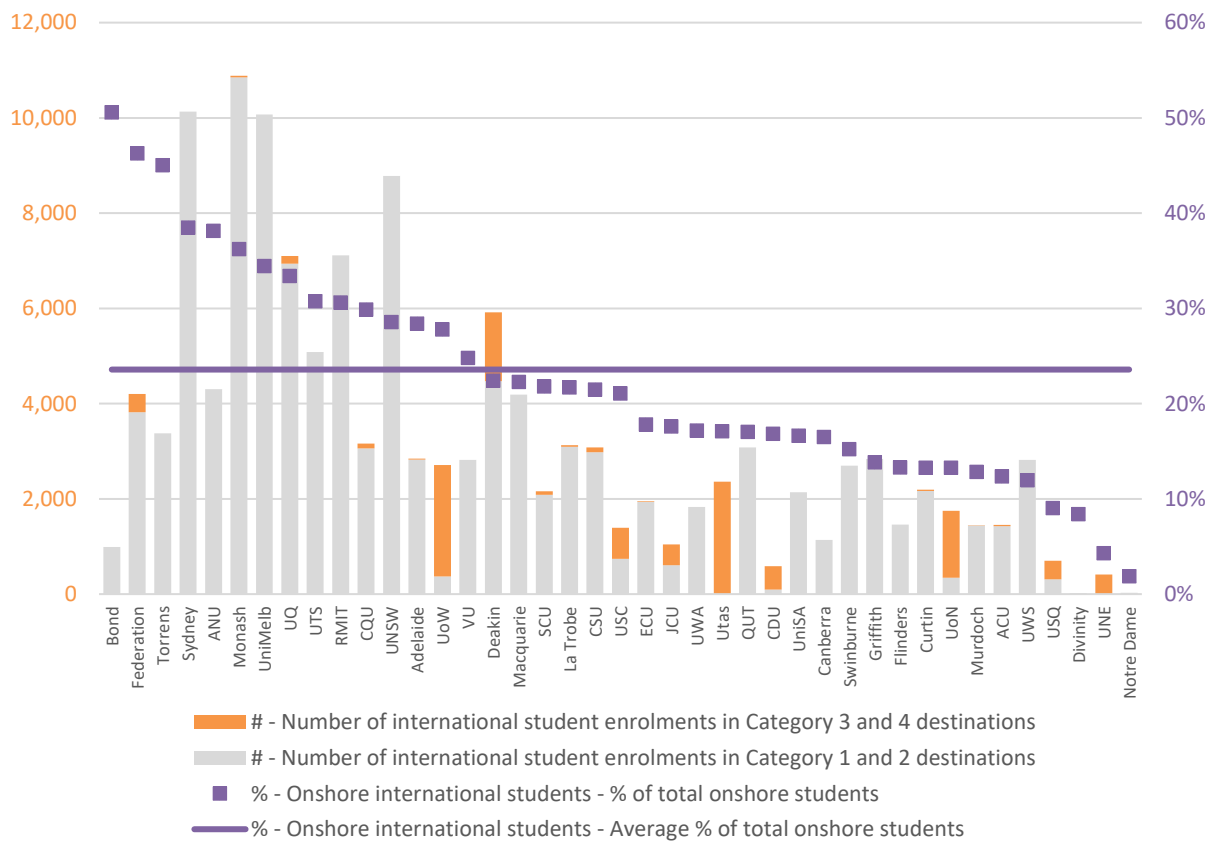


Figure 2.16: Onshore international students and enrolments by University, Full Year 2018

Source: Number of total onshore students by institution extracted from DESE website⁴⁴ | Number of international student enrolments by institution supplied by DESE.

⁴⁴ DESE Higher Education Statistics Collection - Table 2.10: All Students by State, Higher Education Institution, Citizenship and Residence Status, Full Year 2018; Table 7.5: Commencing and All Overseas Students by State, Higher Education Institution and Onshore/Offshore Status(a), Full Year 2018

2.4. Pathways

This project is interested in the pathways taken by international students prior to undertaking a course in a regional location in Australia. The following analysis is focused on two aspects of these pathways: (1) the previous courses completed by students at an Australian institution, in Australia and overseas; and (2) individuals completing short-term non-award (STNA) courses on non-student visas (NSV), such as visitor and working holiday maker (WHM) visas.

International enrolment data can provide trend and point-in-time insights into the profile of students, providers and courses. To further build on the profile, survey data are required to capture information not found in administrative datasets. For this reason, the following sections on pathways and outcomes draw on primary data collected for the first time through bespoke questions included in the 2019 Student Experience Survey (SES) of around 40,000 students. This survey responses represent around 11 per cent of higher education enrolments in regional study destinations in 2019.

2.4.1. Previous courses

Around 22 per cent of students in regional study destinations had completed a course in Australia prior to their current higher education course. The results of the project survey show that 22.3 per cent of Category 3 and 22.1 per cent of Category 4 destination responses indicated a completed course in Australia. These indicate that they were slightly less likely to have completed a course in Australia than students in metropolitan areas. A smaller proportion, 6.1 per cent of Category 3 and 5.3 per cent of Category 4 destinations, indicated they had completed a course overseas (Table 2.10).

Of those who had completed a course, the course type students in regional destinations were most likely to have completed overseas was an English Language course (48.0%) or an Australian university course (34.8%). The course type students in regional destinations were most likely to have completed in Australia was a university course (41.5%). For comparison, recent research on the intentions of international students completing Australian qualifications overseas shows that only around five per cent intend to undertake further study in Australia (DET, 2019d).

Table 2.10: Percentage of students that completed a course prior to current higher education course, 2019

Location Provider Type	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total	Regional subtotal
Location						
Yes, In Australia	23.5%	25.8%	22.3%	22.1%	23.8%	22.2%
Yes, Overseas	6.2%	5.8%	6.1%	5.3%	6.1%	5.7%
No prior course	71.2%	69.4%	72.5%	73.4%	71.0%	72.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Location and provider type						
1. Overseas - English language course	43.8%	44.4%	45.5%	51.2%	44.3%	48.0%
2. In Australia - University or HEI	36.5%	35.0%	45.3%	37.1%	36.6%	41.5%
3. Overseas - Studied at an Australian university or HEI	30.7%	27.3%	35.7%	33.7%	30.4%	34.8%
4. In Australia - English language course	36.3%	34.8%	32.9%	30.5%	35.6%	31.8%
5. Overseas - Foundation, bridging or academic preparation course	34.5%	36.7%	30.4%	18.6%	34.1%	25.3%
6. In Australia - Foundation, bridging or academic preparation course	33.4%	31.0%	23.2%	21.7%	31.9%	22.5%
7. In Australia - TAFE or RTO	9.8%	13.6%	18.3%	25.0%	11.7%	21.4%
8. In Australia - Secondary school	7.7%	7.3%	7.7%	7.1%	7.6%	7.5%
9. Overseas - Studied at an Australian secondary school	4.5%	5.1%	3.6%	4.7%	4.6%	4.0%
10. Overseas - Studied at an Australian TAFE or RTO	3.6%	6.5%	2.7%	2.3%	4.1%	2.5%

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question 'Which of the following statements best describe the course you completed at an Australian institution overseas before you started your current studies? 2019'
 N.B. Cell values represent the percentage of responses to each question for each category. No column or row sums to 100%.

Students in regional study destinations were less likely to have come through an Australian Foundation, bridging or academic preparation course and more likely to come through a VET/TAFE pathway. Students indicated that they were -10.3 percentage points less likely to have completed a Foundation, bridging or academic preparation course in Australia or overseas (-9.7 points). Conversely, students in regional destinations were 10.7 percentage points more likely to have completed a VET qualification with a TAFE or RTO in Australia and 5.4 percentage points more likely to have complete a course with a university of higher education institution (Figure 2.17).

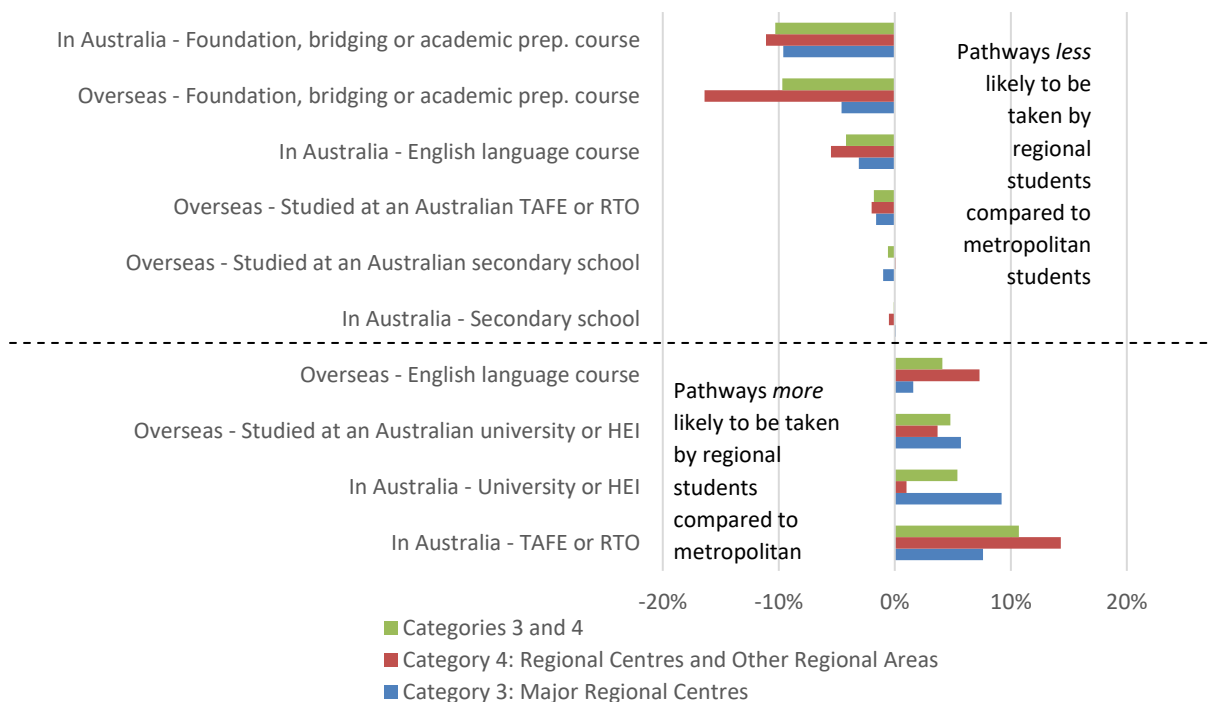


Figure 2.17: International student prior course completions in Australia

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Before commencing your current course, did you complete any other course at an Australian institution (either in Australia or overseas)?, 2019’

2.4.2. Estimates of the conversion rate from short-term non-award courses (STNA) into formal qualifications

The 2018 consultation paper for ‘*Growing international education in regional Australia*’ asked the following question of stakeholders: ‘*Given the strong interplay between tourism and education, particularly in regional settings, how can government, institutions and the community capitalise on the relationship, map its value and promote regional strengths?*’ (Question 5) (EMCIE, 2018a, p.3). The Regional Universities Network (RUN) responded in their submission that:

‘There are opportunities to promote study in Australia to people who are already in regional destinations on tourist or working holiday visas, or are studying English or participating on a Study Abroad program’ (RUN Network, 2018, p.4).

In an article on the IEAA’s ‘*Broaden our Horizons*’ website, Hall and Godfrey of Austrade (2019) state:

‘The data clearly shows the interdependence between international education and tourism – an area that has not been well documented and or understood to date. Collectively, the benefit of international students, their visiting friends and relatives and other short-stay education tourists make a significant contribution to Australia’s economic prosperity and cultural outlook.’

A particular market segment of interest in this area are non-student visa holders. These are typically understood to be broadly-defined ‘learners’ who have obtained a tourist visa or working holiday maker visa and are undertaking a course for a comparatively short period of time compared to ‘learners’ on student visas.

At present, there is no official statistical definition of this group. Lawrence (2016, p.3) has previously offered the following useful definitions of the two key segments:

- **Edu-tourism** – ‘...package programmes, generally short-term (i.e. 1 to 4 weeks), where participants combine tourist-related activities with education programmes (e.g. language teaching, specialist short courses)’
- **Study tours** – ‘...short-term programmes, consisting of groups of students visiting a destination for such purposes as language education, social and cultural familiarisation, specialist short courses and lifestyle experiences’.

Other definitions have included ‘executive education short courses’ (Study Cairns, 2018). The CRICOS course and institution database provides a list of all ‘Non-AQF Award’ courses and their duration in weeks. This offers a starting point for understanding the types of courses classified as ‘Non AQF Award’ that are less than 12 weeks in duration (Figure 2.18). An analysis of CRICOS-registered courses and providers in 2019 show that the majority of these are ELICOS courses that run for 10 weeks in duration.

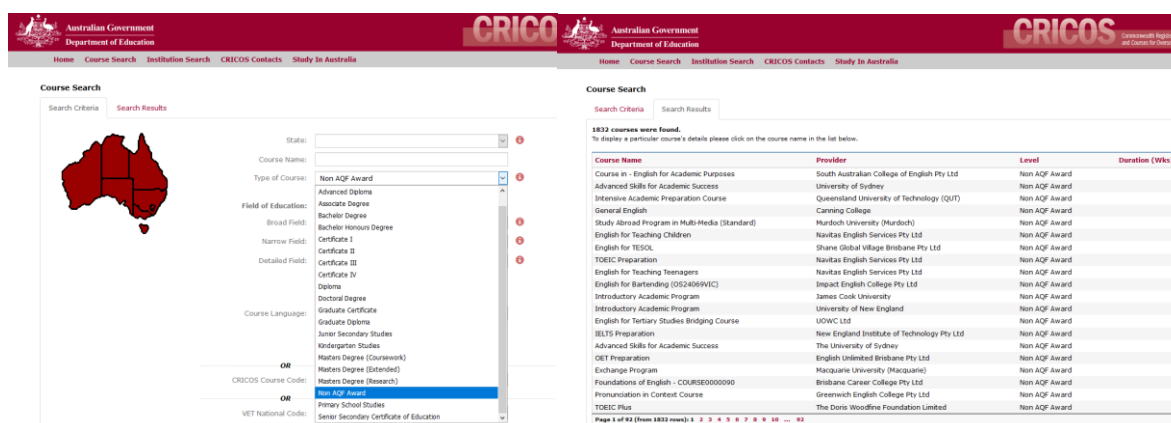


Figure 2.18: CRICOS database of Non AQF Awards
Source: CRICOS website (<https://cricos.education.gov.au/>)

The 2018 consultation paper also states that ‘Education-related activities undertaken by non-student visa (NSV) holders is not easily quantified on a region by region basis, but some regions have reported high numbers of learners’ (EMCIE, 2018a, p.3). Although not specified in the paper, one those regions may be Cairns (see Box 2.5). In its submission to the Productivity Commission’s 2018 Review of International Education Services, English Australia wrote:

‘English Australia recommends that a secondary focus on the role of non-student visas in international education and the ease with which non-student visa holders can transition to a student visa onshore would also be valuable....**Significant numbers** of short course non-student visa holders transition to further study on student visas onshore’ (English Australia, 2014, p.4)

Unfortunately the report⁴⁵ used to support the claim that ‘significant numbers’ transition into further study was referenced as an attachment to the submission but not made public.

⁴⁵ ‘English language students in Australia in 2013: An analysis of the non-student visa cohort’ (English Australia, November 2014)

Box 2.5: Profiling non-student visa learners in Cairns

Study Cairns is the peak body for international education and training in Cairns. StudyCairns.com.au includes the following information:

‘Perfectly positioned between the rainforest and the reef, it’s no wonder Cairns is the world’s most liveable tropical city. Every year, thousands of students choose to study in Cairns whether it is for a few days on a study tour program or at any one of our first class internationally accredited schools, colleges or Universities for a qualification. Cairns offers a broad range of programs within a diverse cultural environment.’



A March 2020 article in the Cairns Post by the President of Study Cairns titled ‘Growing education sector’, stated that:

‘In Cairns, [international education] currently contributes \$166 million. However, this is only 1.84 per cent of the state enrolments, so we have a lot of opportunities to grow’. (Bowmaker, 2020)

Study Cairns has previously stated that a barrier to realising these growth opportunities is the limited evidence available on non-student visa holders. In their submission to the 2018 consultation process, the study cluster stated that ‘Currently data on non-student visa (NSV) enrolments (including in executive education short courses, school study tours and English languages courses⁴⁶) is not captured effectively in key Australian Government data sources’ (Study Cairns, 2018, p.3).

Study Cairns self-reports large number of ‘learners’ who visit Cairns to study on visa types other than student visas. In 2017, the study cluster reported that there were ‘... nearly 30,000 international students from over 76 countries choosing to study in Cairns each year’⁴⁷.

An important caveat to this figure, as Study Cairns notes, is that it includes ‘11,000 [visitors] from Japan, each year’⁴⁸. It is also important to note that Cairns is the only Australian city with direct flights to and from Japan’s two largest cities.

In 2019, there were around 2,600 international student enrolments in Cairns (Figure 2.19). One-quarter of these were non-award courses in the ELICOS sector and only one higher education student was a Japanese national.

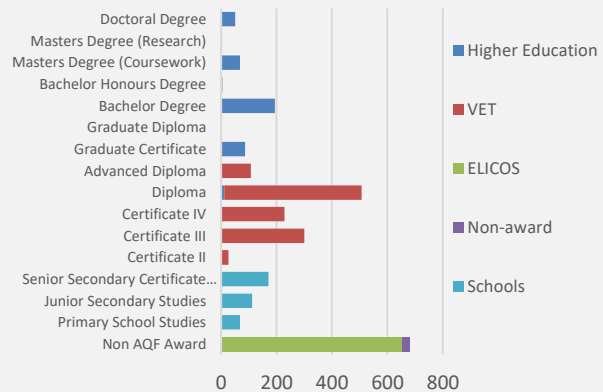


Figure 2.19: Number of international student enrolments in Cairns, 2019
Source: International student enrolment data supplied by the Department of Education, Skills and Employment

It is also unclear how prevalent these transitions and pathways are in regional destinations when compared to metropolitan cities. Deloitte Access Economics (2016, p.14) previously reported that non-student visa holders:

‘...were more likely to choose destinations based on lifestyle, and were more likely to be attracted to metropolitan areas such as Sydney, Melbourne, or the Gold Coast. In contrast, **participants noted that regional areas tend to attract SV [student visa] students who were on pathway programs to enter their preferred universities in those regions.**’

To further understand the scale of this potential market, Research Objective 3 of this project is to develop evidence-based knowledge on the **rate of conversion** of short-term non-award (STNA) courses into formal qualification enrolments in regional and metropolitan locations. The following

⁴⁶ The Cairns Language Centre (CLC) includes the following information on the website: ‘Below are the most popular visa types held by students at CLC: (1) Tourist Visa: You may study in Australia for less than 12 weeks but are not allowed to work; (2) Working Holiday Visa: You may study in Australia for up to 17 weeks, work up to six months for one employer, and stay in Australia for one year; and (3) Student Visa: You may study longer than 17 weeks and can work 40 hours per fortnight.’

⁴⁷ Study Cairns website (<https://www.studycairns.com.au/author/studycairnsaus/page/9/>). Also cited in Department of Education submission to Inquiry into migration in regional Australia (DoE, 2019)

⁴⁸ Study Cairns website (<https://www.studycairns.com.au/author/studycairnsaus/page/7/>).

sections outline: (a) what conversion rates are; (b) what we already know from existing datasets; (c) estimates of the conversion rate based on the available evidence; and (d) the key limitations and assumptions in the methodology.

a. Conversion rates

With the rise of international education in Australia, and globally, there has been increasing interest in the ‘recruitment funnel’ between the point at which a prospective student becomes aware and/or interested in a country, institution or course and the point at which they apply and/or enrol. As the term suggests, the funnel describes the process of students moving from a relatively large pool of prospective students through several ‘conversions’ such as enquiry, application and admission to arrive at the final, smaller pool of enrolled students.

Data are publicly available in Australia on the pathways taken from one course to another by international students, providing these individuals are enrolled in both courses while on a student visa⁴⁹. However, no datasets currently exist that link the study pathways of non-student visa holders to student visa holders. Nor are data publicly available that link the cross-sectoral study pathways of students on student visas by location.

To build the evidence base, this project has been tasked with applying a ‘funnel’ principle to an emerging market of interest: international visitors in Australia who have undertaken a short-term non-award course (STNA) and subsequently enrolled in formal qualifications.

For the purpose of calculating this conversion rate, ACER has defined two students groups:

1. International visitors in Australia who have previously completed a short-term non-award course onshore in Australia on a non-student visa. These individuals are studying courses defined as ELICOS and other short courses of less than 12 weeks in duration. This is the **denominator** in the equation.
2. International students enrolled in formal qualifications onshore in Australia. These individuals are studying courses defined in this project as higher education and VET AQF level 5-10 qualification types i.e. Certificate I – PhD. This is the **numerator** in the equation.

b. What we already know from existing datasets

There are a number of datasets and reports that ACER has drawn on to populate the conversion rate with accurate and replicable estimates. The four relevant findings from these datasets are:

- **Data captured by Tourism Research Australia (TRA)**⁵⁰ in the report ‘*Students Studying on Non Student Visa and International Student Visa Statistics*’ (Austrade, n.d.) shows that in addition to the more than 693,000 international students on student visas in 2018 reported by the Department of Education⁵¹, an estimated additional 116,000 visitors undertook a course in Australia on another visa type (Figure 2.20). This means that around 20 per cent of

⁴⁹ The DESE international education website includes information on ‘*Pathways for international students on a student visa*’

⁵⁰ Tourism Research Australia (TRA) conducts the International Visitor Survey (IVS) as an annual survey of international visitors passing through Australia’s international airports. The results from the sample based survey are weighted to passenger card data from the Department of Home Affairs to determine the number of short term visitors (less than 12 months) aged 15 years and above by purpose and nationality, and provide insight into details of their trips. Since 2017, IVS respondents who identified that they had undertaken a course or studied in Australia on their trip have been asked whether they were travelling on a student visa. This supplementary survey question provides insight into the number of international students in Australia by sector of education and training who are not on a student visa.

⁵¹ Now Department of Education, Skills and Employment (DESE)

arrivals are in Australia for educational purposes but are non-student visa holders. Of the 116,000 visitors, 78,300 had studied either an ELICOS course (48,000) or ‘Other’ course (31,000)⁵².

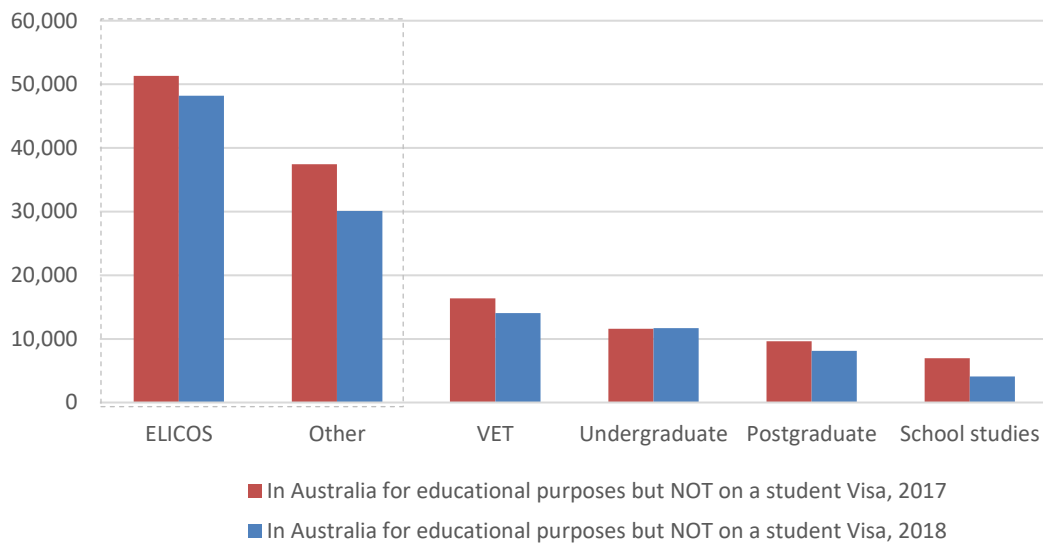


Figure 2.20: International Visitor Survey estimates of students not on student visas, 2017-2018

Source: Tourism Research Australia, International Visitor Survey 2018 | There are a number of limitations and caveats associated with these data that are outlined in Austrade (n.d.).

- Data extracted from the Department of Home Affairs website⁵³ shows that in 2018-19 the **‘last visa held’ of 17 per cent** of higher education, postgraduate research or VET visa grantees was a visitor or working holiday maker visa. 11.9 per cent of higher education visa grantees ‘last visa held’ was a visitor (11.1%) or working holiday maker (0.8%) visa. The comparable rate for VET visas was 28.5 per cent in 2018-19, having risen from around 10 per cent over the last decade (Figure 2.21)⁵⁴.

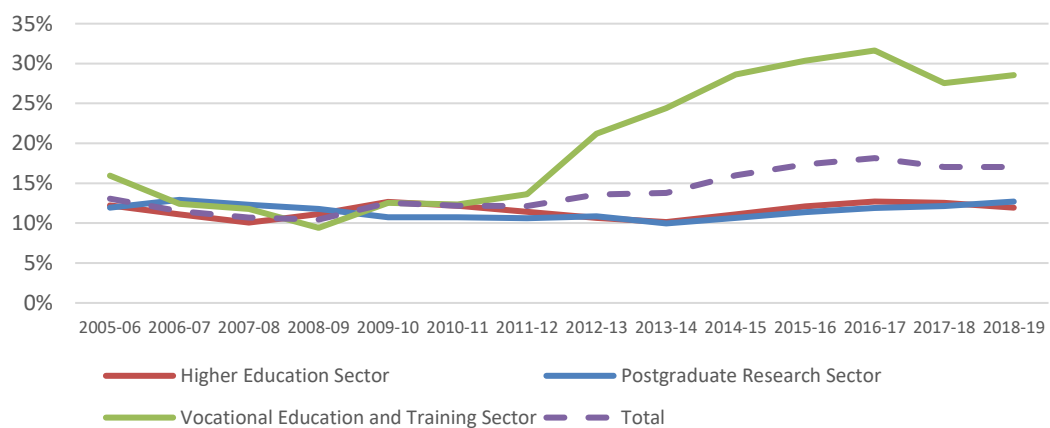


Figure 2.21: Visas granted for tertiary studies where the ‘last visa held’ was a visitor or WHM visa

Source: Department of Home Affairs – BP0015 Student visas granted pivot table (DHA, 2020)

⁵² Defined in the TRA publication as ‘foundation studies and any other types of courses specified or unspecified’.

⁵³ Pivot table spreadsheet downloaded from <https://data.gov.au/dataset/ds-dga-324aa4f7-46bb-4d56-bc2d-772333a2317e/details> (BP0015 Student visas granted pivot table (XLSX)) (DHA, 2020)

⁵⁴ In 2018, the Government of South Australia reported: ‘... most referrals to education agents servicing the VET market in Australia come from international students already in Australia on either a tourist or working holiday visa. This signals the working holiday market as an area for further investigation to promote Adelaide as a destination market from other states.’ (Government of South Australia, 2018, p.5)

- One-third of ELICOS students are non-student visa holders.** The most recent English Australia survey of ELICOS providers estimates that 33 per cent of ELICOS students do not hold a student visa (English Australia, 2019). The share has remained fairly constant in recent years (Figure 2.22). Totalling around 50,000-60,000 students, this appears consistent with the figure reported in the TRA report described earlier. While the overall proportion of NSV holders overall is 33 per cent, there are important differences by state. Queensland is the exception, where 48 per cent of ELICOS students are non-student visa holders. In Queensland, 13 per cent of all visa holders were studying in a regional location which is almost twice the national average.

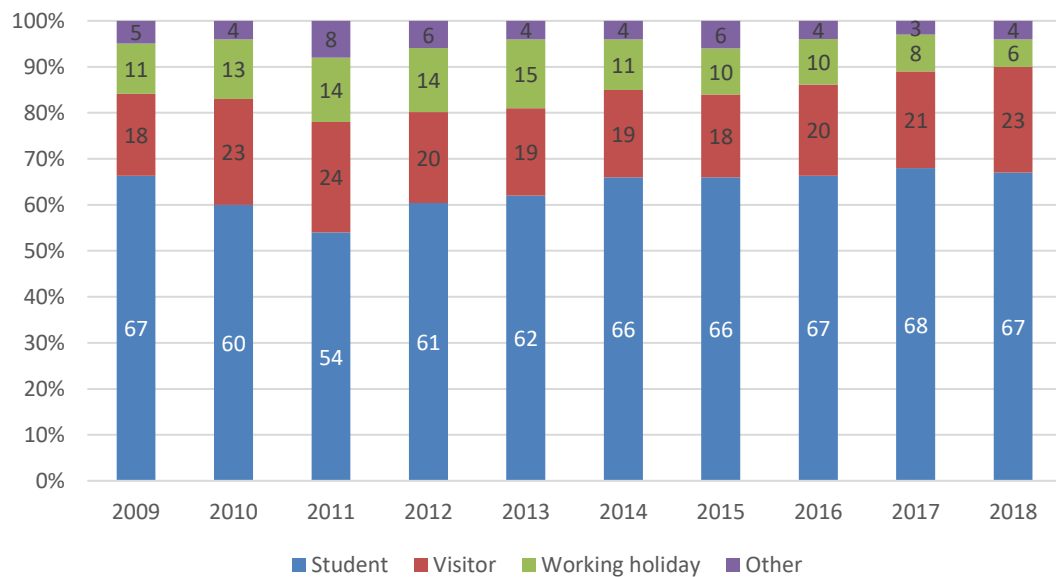


Figure 2.22: Visa status – Percentage of total ELICOS enrolments 2009-2018

Source: English Australia National ELICOS Market Report

- Over two-thirds of courses list as ‘Non AQF Award’ on the CRICOS website are ELICOS courses of 10 weeks in duration.** To construct a profile of short-term non-award courses, ACER searched the CRICOS database⁵⁵ for ‘Non AQF Award’ courses. The results were filtered to include CRICOS-registered courses that are less than 12 weeks in duration. The analysis found that the overwhelming majority of the results were ELICOS courses of 10 weeks in duration.
- Only a small share of higher education students report having previously completed another course on a non-student Visa.** The results of the project survey suggest that only a comparatively small share of undergraduate higher education students who previously completed a course in Australia did so on a non-student Visa. Table 2.11 indicates that around 4.2 per cent of all survey respondents held either a Visitor (0.6%); Working Holiday Maker Visa (0.7%) or Other Visa (2.9%). There are negligible differences between the regional student population and the total student population.

⁵⁵ Courses and institutions listed as <https://cricos.education.gov.au/>

Table 2.11: Visa held while completing previous studies

Visa type	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total	Regional subtotal
Student visa	96.1%	95.7%	93.7%	94.8%	95.8%	94.2%
Visitor visa	0.6%	0.4%	1.6%	0.3%	0.6%	1.0%
WHM visa	0.7%	0.8%	0.2%	1.9%	0.7%	1.0%
Other visa	2.7%	3.0%	4.4%	3.0%	2.9%	3.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘What visa did you hold while completing your previous course?’

c. Estimates

Calculation 1 – Estimating the denominator (Individuals completing a short-term non-award course on a non-student visa)

Working from the start of the funnel (individuals in short-term non-award courses), data from the International Visitor Survey estimates there were 116,000 individuals in Australia on non-student visas. Around 78,000 of these were studying an ELICOS or ‘Other’ (as distinct from Non-award) course.

In 2018, the percentage of all ELICOS and non-award students on student visas that went on to higher education studies was 35 per cent and 38 per cent respectively (DESE, 2020b). If we assume that students on NSV completing a STNA convert at 30 per cent that would equate to around **23,492 individuals in formal qualifications from a base of 78,000 (Figure 2.23).**

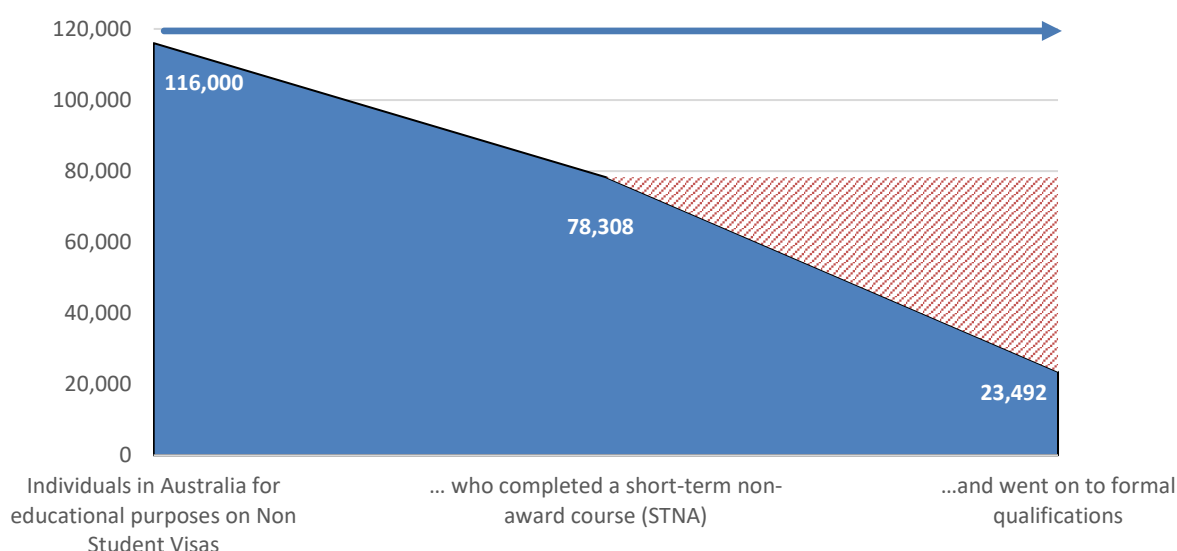


Figure 2.23: Estimates of conversion rates from STNA courses into formal qualifications (Calculation 1)

Calculation 2 – Estimating the numerator (Individuals ‘converting’ from short-term non-award courses into formal qualifications)

Working back from the end of the funnel (student visa holders enrolled in formal qualifications), the number of visas granted for ‘formal qualifications’⁵⁶ in 2018-19 was 282,427. Based on analysis of the most recent data, 11.9 per cent of these visas were granted to ‘Primary Applicants’ where their ‘last visa held’ was a ‘visitor’ or ‘working holiday maker’ visa. The *maximum* numerator, therefore, is reduced to 48,059.

However, this represents *all* visitors and working holiday maker visas granted for tertiary study not just those who completed a short-term non-award course on a non-student visa. If we input a conservative estimate that 40 per cent of these tertiary education-bound visitors and working holiday makers completed a short-term non-award course while on those visas, this produces a result of **19,224 individuals**.

Comparing calculations 1 and 2

The mid-point conversion rate between the two calculations is around **35 per cent** (21,300 conversions). This estimate is comparable to the conversion rate of students in ELICOS courses moving into higher education courses on student visas and equates to around six or seven per cent of international student commencements in higher education and VET in 2019 (Table 2.12).

If the 23,492 included in Calculation 1 (the higher estimate) is apportioned on the basis of current enrolments (94% in metropolitan and 6% in regional locations), this equates to around 1,400 ‘conversions’ in regional study destinations (Figure 2.24).

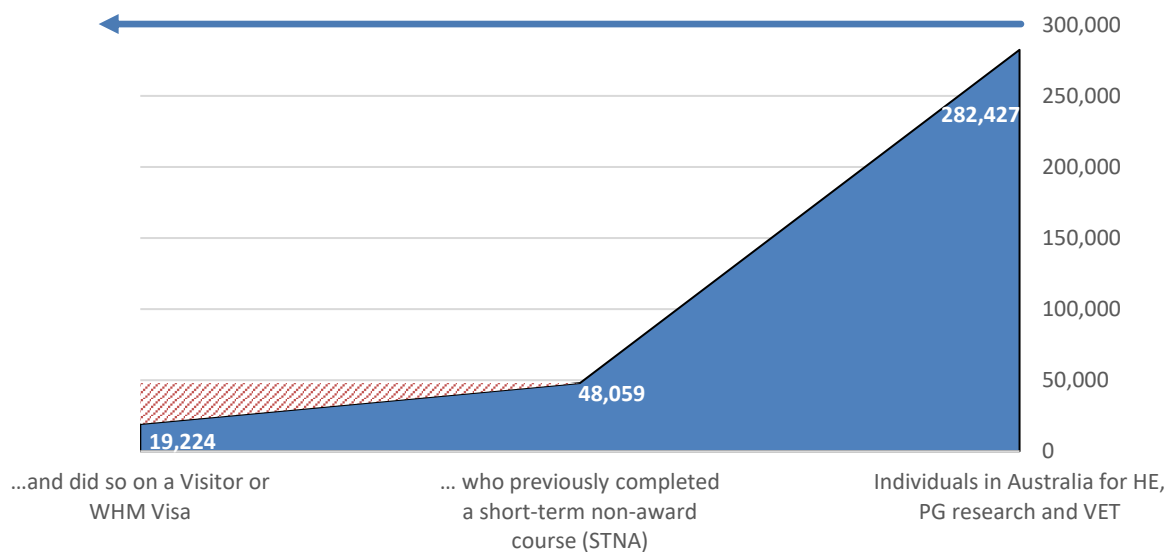


Figure 2.24: Estimates of conversion rates from STNA courses into formal qualifications (Calculation 2)

⁵⁶ Defined here as Higher Education, Postgraduate Research and VET sectors

Table 2.12: Estimating a conversion rate from STNA courses into formal qualifications - Calculations

Calculations	Data source	Unit of measurement	Ref. period	Number / %
Calculation 1 – Estimating the numerator				
Individuals in Australia for educational purposes on non-student visas	TRA paper (Austrade, n.d.); International Visitor Survey	Number of Arrivals stating 'no' to having a student visa	2018	116,000
... who completed a short-term non-award course (STNA)	TRA paper (Austrade, n.d.); International Visitor Survey		2018	78,308
...and went on to formal qualifications	Estimate (assumes 30% went on to formal qualifications)		2018	23,492 (7% of HE and VET commencements in 2019)
... in a regional location	Estimate (assumes 6% in regional areas)			1,410
Calculation 2 – Estimating the denominator				
Visas granted for HE, PG research and VET study (formal qualifications)	Department of Home Affairs – BP0015 Student visas granted pivot table	Number of visas granted by Primary Applicant type	2018-19	282,427
...where the 'last visa held' was a Visitor or WHM visa (17% in 2018-19)	Department of Home Affairs – BP0015 Student visas granted pivot table		2018-19	48,059
...and where individuals had completed a short-term non-award course (STNA)	Estimate (assumes 40% completed a STNA)		2018-19	19,224 (6% of HE and VET commencements in 2019)
... in a regional location	Estimate (assumes 6% in regional areas)			1,153
Points of comparison				
Non-ELICOS sector starting after the student's first ever ELICOS course completed in 2018	Department of Education - Pathways for international students on a student visa (DESE, 2002b)	International student enrolments	2018	HE - 35% VET - 27% Other - 38%
Sector (other than Non-award) starting after the student's first ever non-award course completed in 2018	Department of Education - Pathways for international students on a student visa (DESE, 2002b)		2018	HE - 38% VET - 3% Other - 59%
Sector studied immediately before the commencement of the student's first ever higher education course in 2019	Department of Education - Pathways for international students on a student visa (DESE, 2002b)		2019	ELICOS - 19% Non-award⁵⁷ - 10% No visa - 63% Other - 7%

Sources:

- (1) International student enrolment data supplied by the Department of Education, Skills and Employment;
- (2) Data on 'Last visa held' by 'Primary Applicant' individuals granted a visa to study in the higher education, postgraduate research or vocational education and training sectors downloaded from the Department of Home Affairs website. The primary applicant must satisfy the primary criteria for the grant of a visa under the Migration Regulations. A secondary applicant is a member of the family unit of the primary applicant, i.e. their spouse, a dependent child or a dependent relative of the primary applicant or spouse.
- (3) International student enrolment data on 'Pathways' downloaded from the internationaleducation.gov.au website (DESE, 2020b).

⁵⁷ This dataset shows that 10.7 per cent of this 2019 cohort had previously studied a 'non-award course' on a student visa. Around two-thirds of this cohort are Chinese nationals (65.4%), followed by Nepal (4.2%), Hong Kong (3.8%), Vietnam (3.5%) and Malaysia (3.3%).

d. Key limitations

ACER wishes to stress that these calculations are entirely exploratory and are intended to provide a base for ongoing work. Their accuracy is highly contingent on the availability and quality of data made available to the project. There are four key limitations that need to be considered when interpreting the results:

- **Differing units of measurement and time periods** – By necessity, the inputs are a combination of different units of measurement (i.e. enrolments and visas) across different reference periods (i.e. calendar years and financial years).
- **Lack of data available on pathways by location of student** - No datasets were made available to the project on the geographic location (campus or residence) of students undertaking pathways from ELICOS and non-award courses into Higher Education and VET courses. Such data would have differentiated the pathways taken by student visa holders in metropolitan and regional areas. It is also important to note, as shown earlier in this report, ELICOS and non-award enrolments appear to comprise a lower share of enrolments in the regions than they do in metropolitan areas. Therefore, the share of overall enrolments may be lower than average of six per cent applied in this calculation.
- **Lack of unit record and longitudinal data** - Estimates are based on aggregated datasets not unit record data tracking the pathways of individuals. Therefore, the conversion rate does not take into account student movement from short-term non-award courses on non-student visas into formal qualifications on student visas where it occurs in the same reference period or some years later.
- **Captured data may not always reflect the real underlying trend.** Factors in the external environment must be considered when interpreting these results. For example, ACER was advised during the consultation phase that future students may choose, and/or be advised, to apply for the non-student visa option in the first instance because a student visa is not required for courses that are less than 12 weeks in duration. Students may also be advised the process is cheaper and administratively less onerous. Students may also opt to apply for a non-student visa offshore to reduce their level of assessment risk and subsequently apply for a student visa once they are onshore in Australia.

2.4.3. Employment during studies

Employment opportunities are generally assumed to be important and influential factors in the decision-making process of international students. CEO of the IEAA, Phil Honeywood, was quoted in Campus Morning Mail (2018) as saying:

‘As increasing numbers of international students are driven by both part-time and, post study, full-time course related employment opportunities the challenge for our regional unis will be able to guarantee employment offerings in their regional communities. If the PM can provide a fix to these employability-pull factors then he might be onto a winner. But it is a big call at this stage!’

Regardless of location, Berquist *et al.* (2019) identified four barriers to international student employability: (1) Language skills; (2) Work experience in host market; (3) Insufficient professional networks; and (4) Employer perceptions. Recent research by Chew (2019) and Tran *et al.* (2019) has found barriers to meaningful and sustainable employment also exist for graduates with post-study work rights (PSWR) in Australia. Chew (2019, p.12) notes that:

‘The importance of better understanding PSWR to inform policy and practice in international education is apparent in the fact that the Australian Government has recently opted to **extend PSWR and use it as a lever to encourage international students to study in regional areas.**’

Using the ASGS Remoteness Structure, Chew found that ‘...fewer than four per cent of temporary graduates live outside of a major city, including just two per cent in inner regional population centres (Chew, 2019, p.29).

In the regions, the barriers to employment can be even higher, particularly in areas where industry and labour markets can be narrow and highly contextualised to the local socio-economic circumstances. Anecdotally, the project case studies revealed how these barriers can be exacerbated by a general lack of employer awareness of, and engagement with, the benefits to be gained from employing international students during and after they complete a qualification.

Students in regional destinations are more likely to be employed than those in other locations.

Results from the project survey suggest that students in Category 3 (42.0%) and Category 4 (48.3%) destinations are more likely to be employed to support their studies than students overall (38.9%) (Table 2.13).

Table 2.13: International students in paid employment by category

Response	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total	Regional subtotal
Yes	39.0%	35.6%	42.0%	48.3%	38.9%	44.9%
No, but seeking paid employment	40.5%	39.9%	38.9%	34.9%	40.1%	37.0%
No, and not seeking paid employment	20.4%	24.5%	19.1%	16.8%	21.0%	18.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Percentages may not total to 100% due to rounding. Survey question ‘Are you currently working in any type of paid employment?’

When looking at the percentage point differences with the rest of Australia, students in Category 3 locations are 3.8 percentage points more likely to be employed. The share appears to increase with proximity as students in Category 4 locations are 10 percentage points more likely to be employed (Figure 2.25).

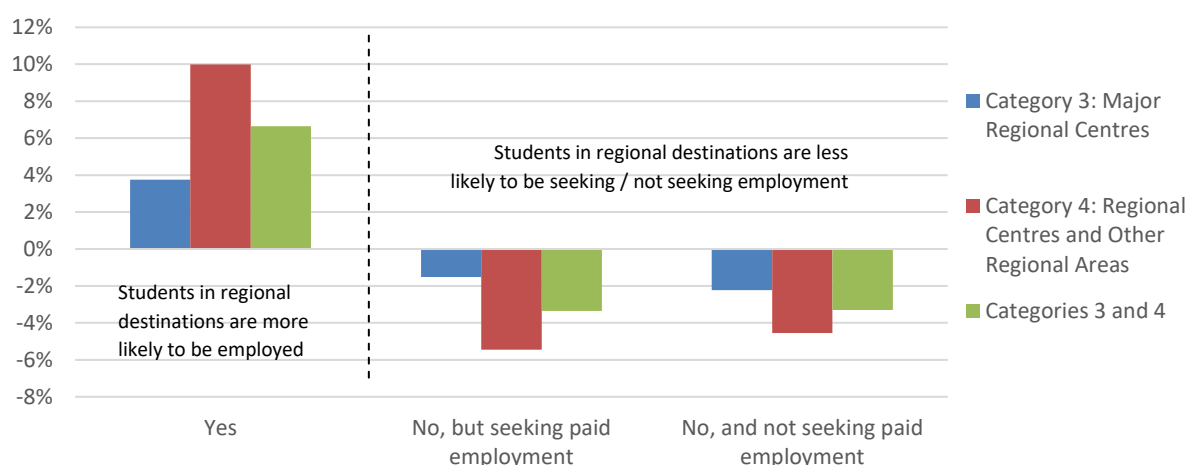


Figure 2.25: International students in paid employment – Difference regional and metropolitan

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Are you currently working in any type of paid employment?’

2.5. Outcomes

This section presents an analysis of four types of outcomes: (1) satisfaction with courses and institutions; (2) experience with life in Australia; (3) participation in off-campus activities; and (4) post-study plans and intentions.

As with the section on pathways, the following analysis draws on primary survey data collected for the first time through the 2019 Student Experience Survey (SES) of around 40,000 higher education students to uncover fresh insights on the outcomes of international students in regional study destinations.

2.5.1. Satisfaction with courses and institutions

Overall, there are small differences in the satisfaction rates between categories of campus location. Table 2.14 shows that the percentage of respondents rating their overall educational experience as ‘good’ or ‘excellent’ was 76.3 per cent in regional study destinations and 75.1 per cent in non-regional study destinations.

Table 2.14: Overall satisfaction with overall educational experience

Response	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Regional subtotal
Poor	4.1%	3.7%	4.7%	4.8%	4.7%
Fair	21.2%	20.0%	19.0%	18.8%	18.9%
Good	55.0%	54.6%	54.7%	53.1%	53.9%
Excellent	19.8%	21.7%	21.7%	23.3%	22.4%

Source: Bespoke questions included in the 2019 Student Experience Survey (SES)

The dimensions of quality are also rated similarly by metropolitan and regional students. Figure 2.26 shows that international higher education students in regional and metropolitan areas rate each element of their education experience in similarly high, regardless of their location.

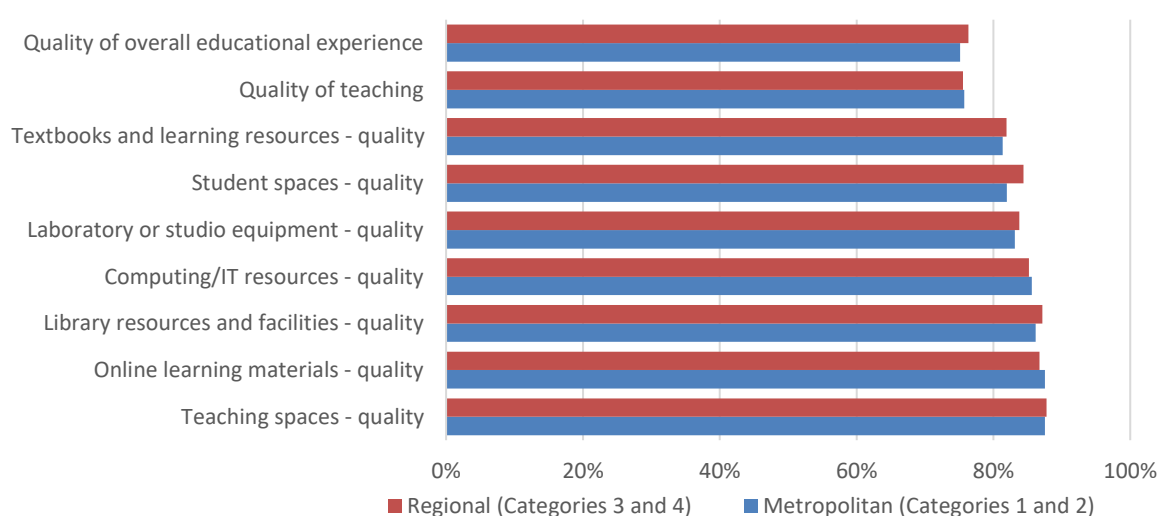


Figure 2.26: Satisfaction of students in regional destinations with quality of university services

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Ranked by percentage of ‘Very Much’ or ‘Very Often’ responses

The dimensions of quality that services that students in regional destinations rate most highly relate to the course in terms of knowledge and confidence development. These dimensions, detailed in Figure 2.27, include:

- confidence to learn independently developed by course (77.6%);
- efficient enrolment and admissions processes (77.5%); and
- knowledge of study areas developed by course (77.0%).

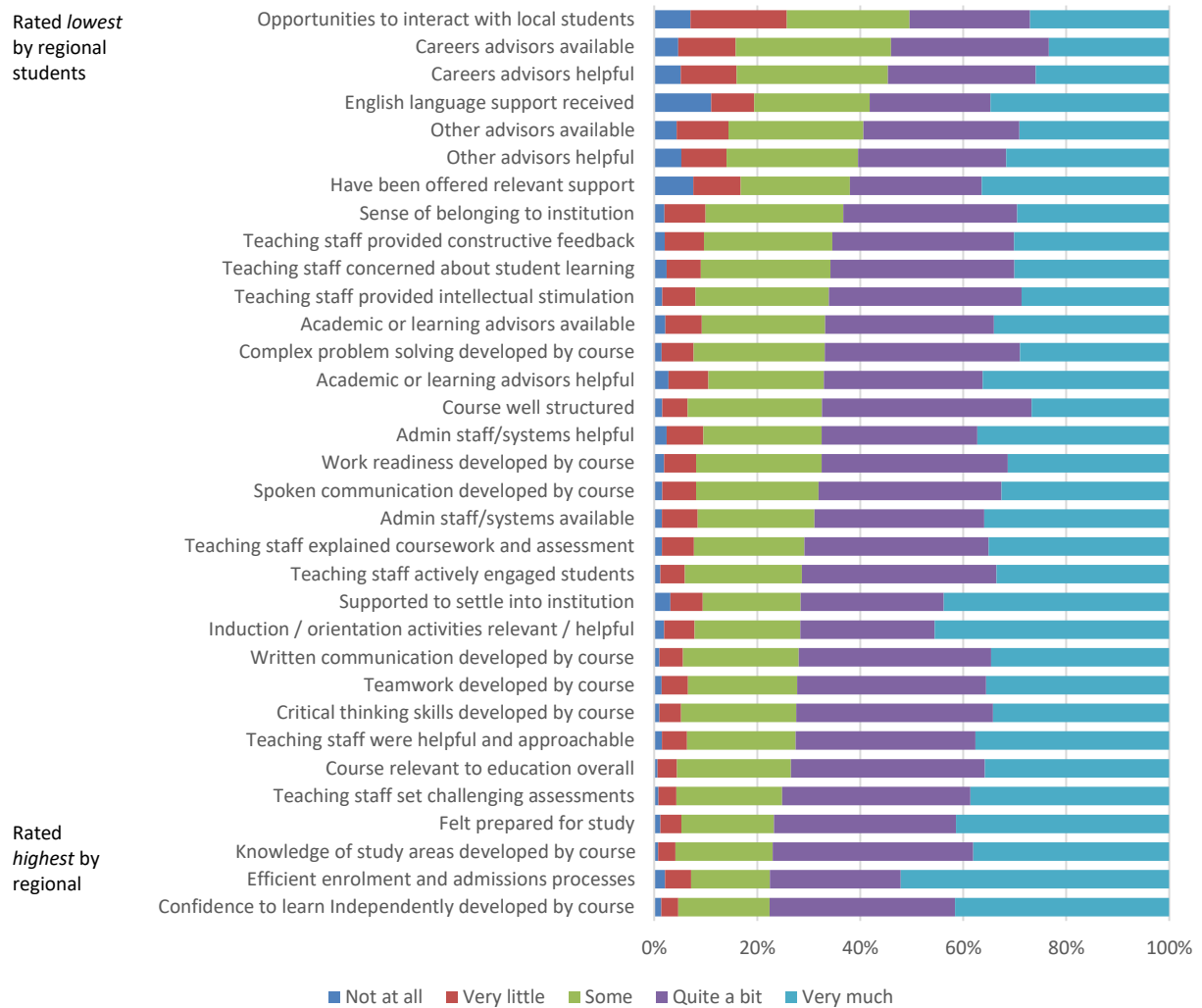


Figure 2.27: Satisfaction of students in regional destinations with various dimensions of university services
 Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Ranked by percentage of 'Very Much' or 'Very Often' responses

Compared to metropolitan students, students in regional destinations are most and more positive about opportunities to interact with local students. Across the 33 dimensions of quality listed in Figure 2.27, students in regional destinations responded more positively than metropolitan peers across all these dimensions. The five areas where regionally-based students differed most in the share responding 'quite a bit' or 'very much' were:

- opportunities to interact with local students (+8.2 percentage points);
- careers advisors helpful (+6.4) and careers advisors available (+6.1);
- spoken communication developed by course (+5.2); and
- admin staff/systems available (+4.6).

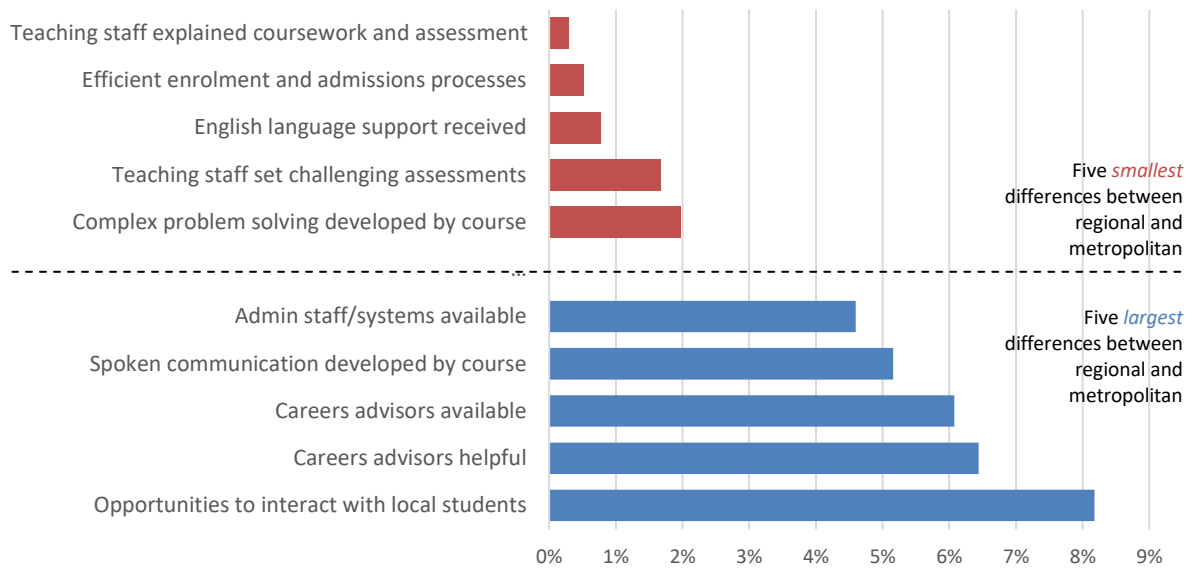


Figure 2.28: Satisfaction with dimensions of university services – Difference regional and metropolitan
 Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Ranked by percentage of 'Very Much' or 'Very Often' responses | Percentage point difference in 'Quite a bit' and 'Very much' responses | Largest positive and negative differences

Compared to metropolitan students, students in regional destinations report that they have had their studies less affected by living arrangements and paid work. Students in regional destinations were two-to-three percentage points less likely to have living arrangements and paid work 'not at all' affect their studies than students in metropolitan areas.

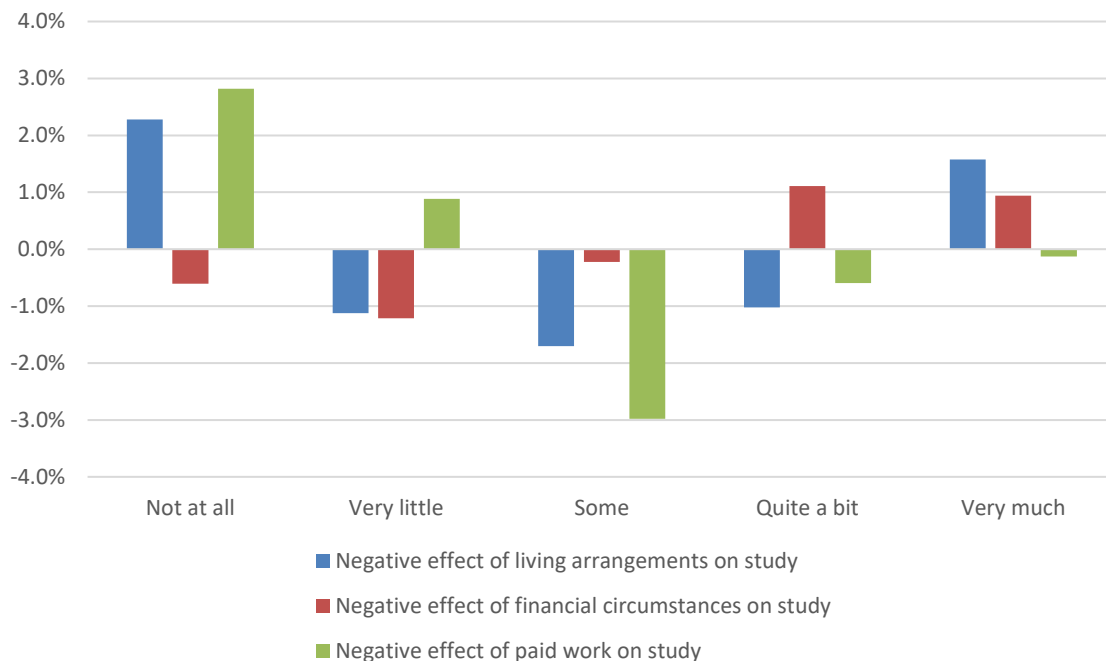


Figure 2.29: Living, financial circumstances and paid work – Difference regional and metropolitan
 Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Percentage point differences

Compared to metropolitan students, students in regional destinations are more likely to have interacted outside study. Figure 2.30 shows that while international students in regional destinations are more likely to interact outside study, they are also less likely to have worked with other students.

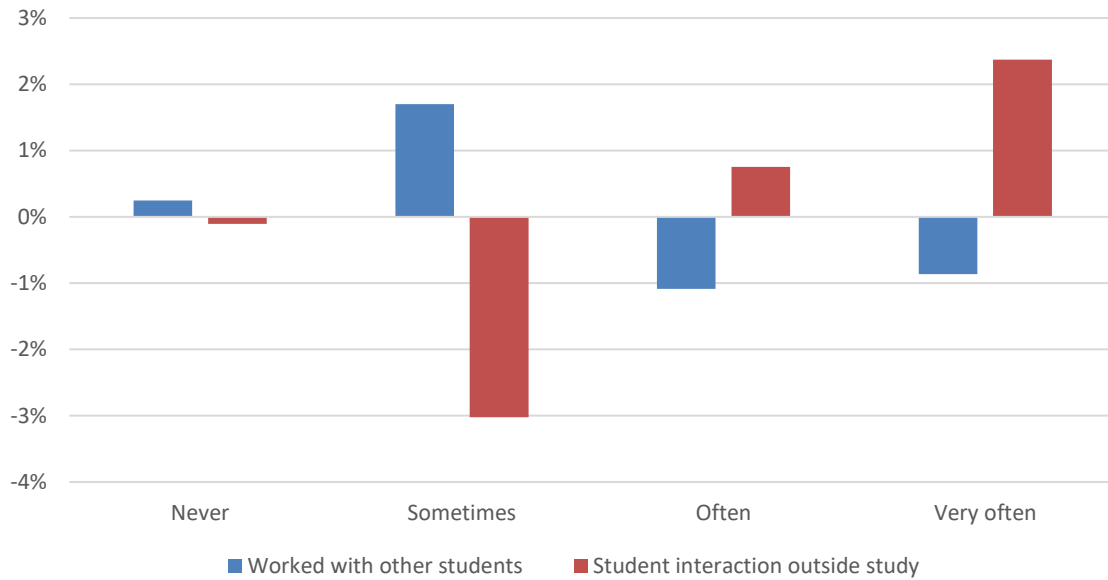


Figure 2.30: Working and interacting with other students – Difference regional and metropolitan
 Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Percentage point differences

2.5.2. Experience of life in Australia

Compared to other dimensions of life in Australia, the project survey reveals that international students in regional destinations are more likely to agree that with the statement ‘I feel safe where I am living (84%); ‘I enjoy studying here’ (80.1%); and ‘I can easily access my campus where I am living’ (79.4%). The areas where they were less likely to agree were in response to ‘I have access to paid work’ (51.2%); ‘I have good access to public transport where I am living’ (63.6%); and ‘I am able to access affordable accommodation’ (67.3%) (Table 2.15).

Table 2.15: Experience of living in Australia

Response	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total	Regional subtotal
I feel safe where I am living	81.6%	84.6%	83.8%	84.3%	82.5%	84.0%
I enjoy studying here	78.6%	80.2%	80.8%	79.3%	79.1%	80.1%
I can easily access my campus where I am living	81.3%	82.3%	79.5%	79.3%	81.3%	79.4%
I am living in a community that celebrates diverse cultures	70.0%	68.7%	67.2%	73.0%	69.7%	69.9%
I am living a happy life	65.8%	67.8%	68.5%	69.7%	66.5%	69.0%
I am able to access affordable accommodation	64.7%	67.4%	64.1%	71.0%	65.5%	67.3%
I have good access to public transport where I am living	83.1%	80.7%	68.9%	57.6%	80.7%	63.6%
I have access to paid work	49.3%	45.2%	50.1%	52.5%	48.7%	51.2%

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Thinking about your experiences living in Australia, please indicate the extent to which you agree or disagree with each of the following statements’ | Percentage point difference in ‘Strongly agree’ or ‘Agree’ responses

Figure 2.31 shows that 21.8 per cent of respondents in regional destinations disagree/strongly disagree that they ‘have access to paid work’. A further 27 per cent neither agreed nor disagreed with the statement. Although access to campus is not a major concern for students in regional destinations, 19.2 per cent disagree or strongly disagree that they ‘have good access to public transport’ where they are living.

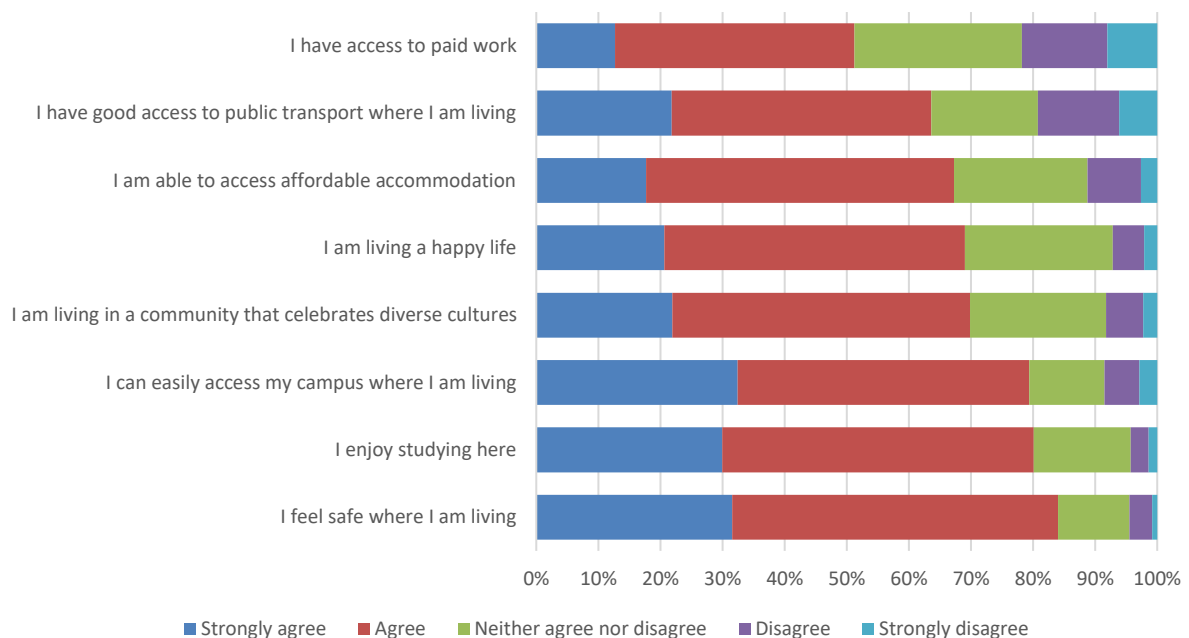


Figure 2.31: Experience of living in Australia – Respondents in regional study destinations

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Thinking about your experiences living in Australia, please indicate the extent to which you agree or disagree with each of the following statements’ | Percentage point difference in ‘Strongly agree’ or ‘Agree’ responses

Compared to their metropolitan peers, students in regional destinations report they are happier and have greater access to paid work and accommodation. The three factors students in regional destinations were more likely to ‘agree’ or ‘strongly agree’ compared to metropolitan students were: (1) I have access to paid work (+4.1 points in Category 4; +1.7 points in Category 3); I am living a happy life (+3.4 points in Category 4; +2.2 points in Category 3); and I am able to access affordable accommodation (+5.7 points in Category 4) (Figure 2.32).

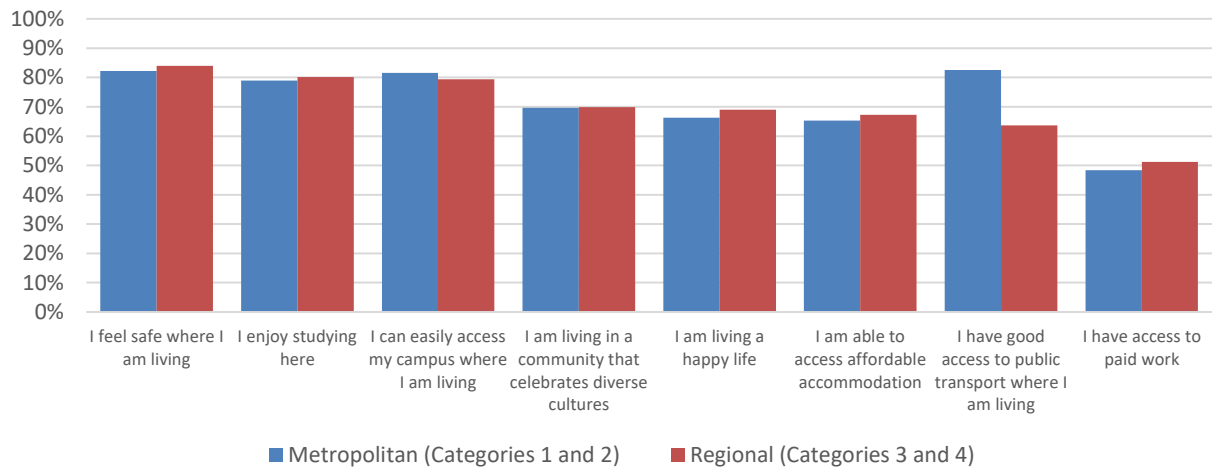


Figure 2.32: Experience of living in Australia – Regional / Metropolitan
 Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Thinking about your experiences living in Australia, please indicate the extent to which you agree or disagree with each of the following statements’ | Percentage point difference in ‘Strongly agree’ or ‘Agree’ responses

The main difference between metropolitan and regional students is in the accessibility of public transport. Overall, the differences between metropolitan and regional differences are minor with one exception (Figure 2.33). In response to the statement ‘I have good access to public transport where I am living’, respondents in regional study destinations were considerably less likely to agree of strongly agree (-25.0 points in Category 4; -13.7 points in Category 3).

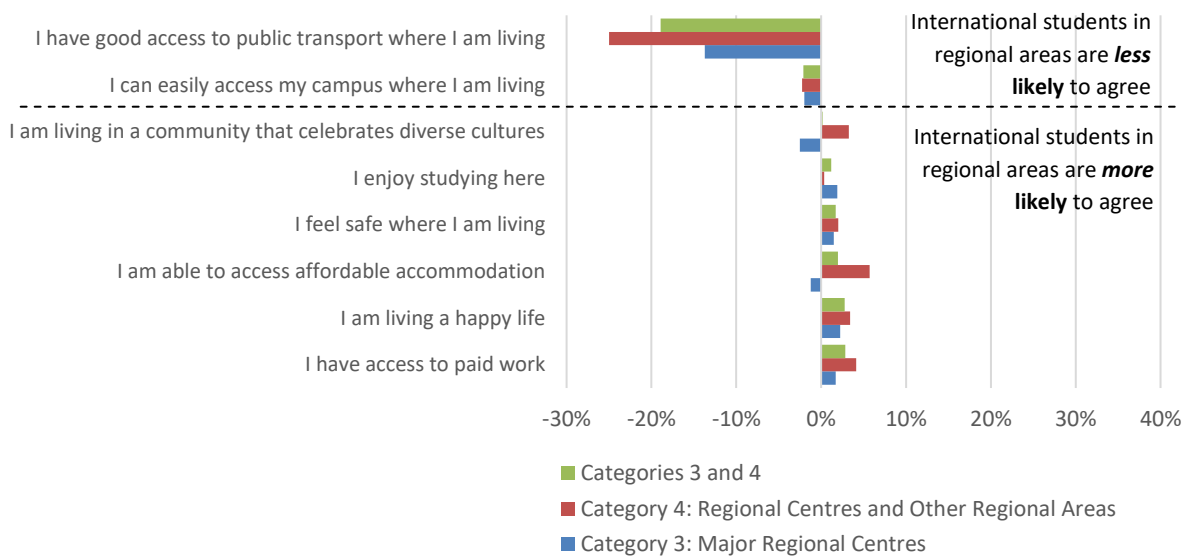


Figure 2.33: Experience of living in Australia – Difference between regional and metropolitan
 Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Thinking about your experiences living in Australia, please indicate the extent to which you agree or disagree with each of the following statements’ | Percentage point difference in ‘Strongly agree’ or ‘Agree’ responses

2.5.3. Participation in off-campus activities

Overall, international students in Australia have made friends, visited places such as libraries, museums and art galleries and attended public events. All international students generally agreed with the following statements: (1) ‘I have made friends outside of my studies’ (74.4%); (2) ‘I have visited public amenities in Australia, such as, libraries, museums, art galleries’ (64.0%); and (3) ‘I have attended public events in Australia, such as, concerts, festivals, sport’ (57.9%) (Table 2.16; Figure 2.34).

Table 2.16: Engagement with broader community in Australia

Response	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total	Regional subtotal
I have made friends outside of my studies	74.2%	74.4%	75.3%	75.9%	74.4%	75.6%
I have visited public amenities in Australia, such as, libraries, museums, art galleries	63.8%	65.2%	63.3%	61.9%	64.0%	62.6%
I have attended public events in Australia, such as, concerts, festivals, sport	57.3%	59.1%	57.3%	60.6%	57.9%	58.8%
I have participated in community engagement activities organised by my institution	25.0%	29.8%	30.8%	35.5%	26.8%	33.0%
I am a member of an off-campus gym or sporting club	21.6%	22.2%	26.1%	19.0%	21.8%	22.9%
I am a member of an off-campus religious community	8.8%	12.4%	12.9%	13.6%	10.0%	13.2%

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Thinking about the ways in which you have engaged with the broader community while living in Australia, which of the following statements apply to you?’ [Percentage point difference in ‘Selected’ or ‘Not selected’]

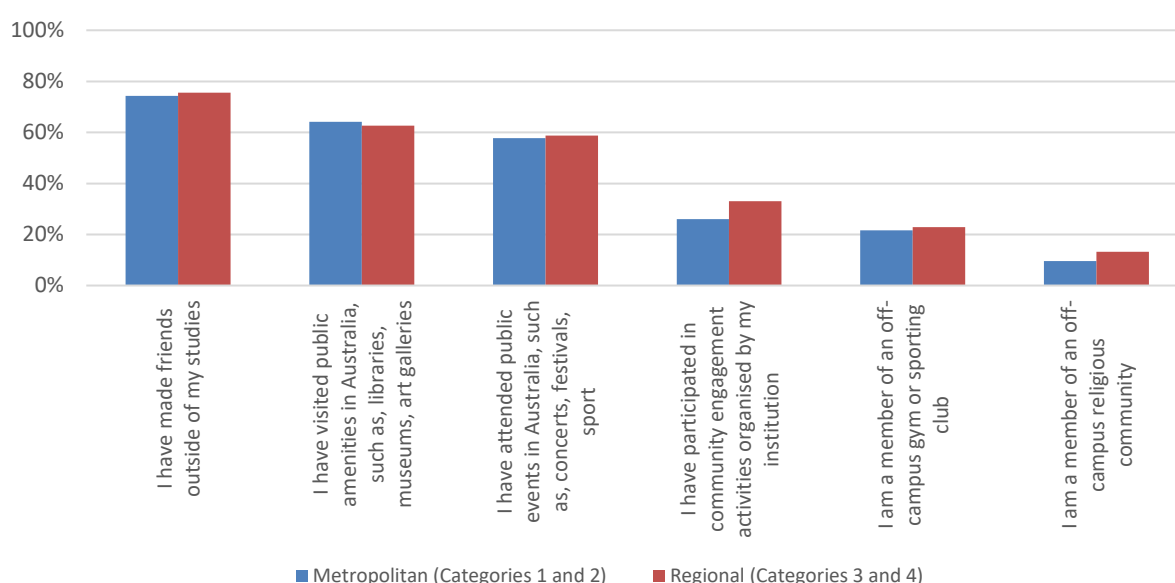


Figure 2.34: Engagement in broader community – Regional / Metropolitan

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question 'Thinking about the ways in which you have engaged with the broader community while living in Australia, which of the following statements apply to you?' [Percentage point difference in 'Selected' or 'Not selected']

International students in regional destinations are more likely to have participated in community engagement activities organised by their institution. Students in regional areas were more likely to agree or strongly agree that they have participated in community engagement activities organised by my institution (+9.5 points in Category 4; +4.8 points in Category 3).

There are only marginally more likely to agree with the following statements: (1) 'I am a member of an off-campus religious community' (+3.6 points); (2) 'I have made friends outside of my studies' (+1.3 points); (3) 'I am a member of an off-campus gym or sporting club' (+1.2 points); and (4) 'I have attended public events in Australia, such as, concerts, festivals, sport' (+1.1 points). The statement where students in regional students were less likely to agree or strongly agree related to whether they have visited public amenities in Australia, such as, libraries, museums, art galleries (-1.5 points; Figure 2.35).

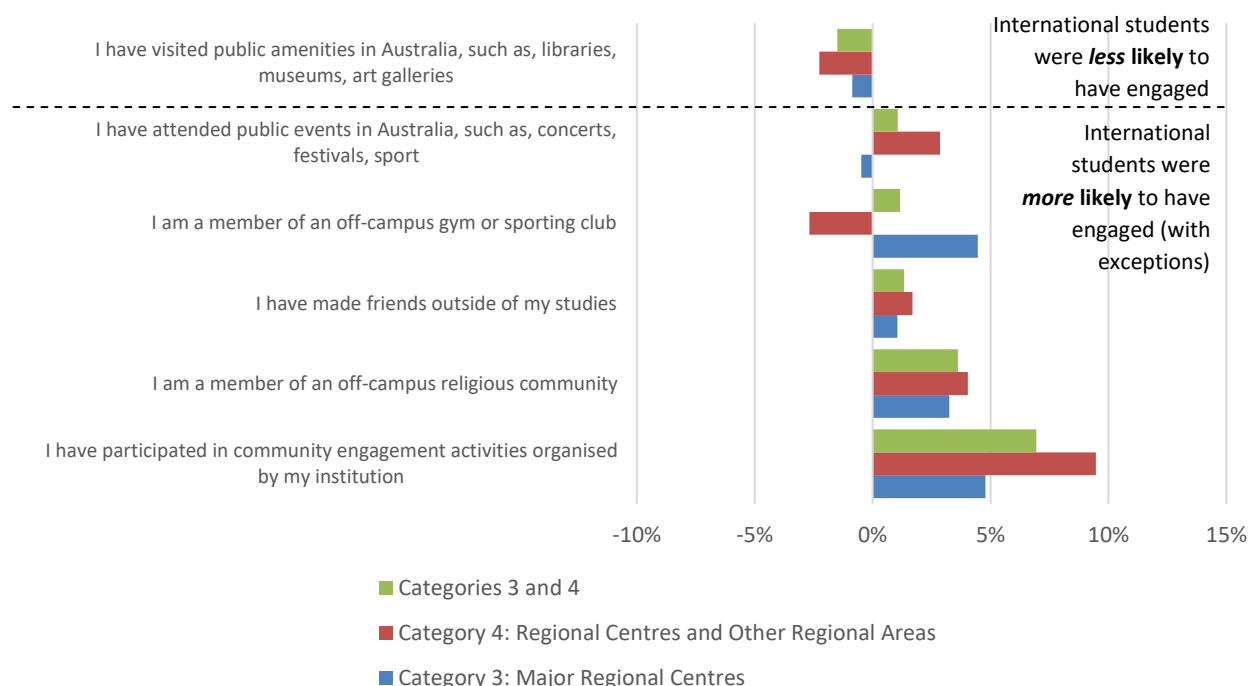


Figure 2.35: Engagement in broader community – Difference between regional and metropolitan

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Percentage point difference between regional and metropolitan Survey question 'Thinking about the ways in which you have engaged with the broader community while living in Australia, which of the following statements apply to you?' [Percentage point difference in 'Selected' or 'Not selected']

2.5.4. Post-study plans and intentions

There is little difference in student plans by category of destination. When students were asked 'Are you considering applying for a visa to stay in Australia when you complete your current course?', close to half of the students in regional study destinations responded 'Yes', slightly higher than respondents in metropolitan locations. Around 40 per cent in all destinations responded that they were 'Not sure' (Figure 2.36).

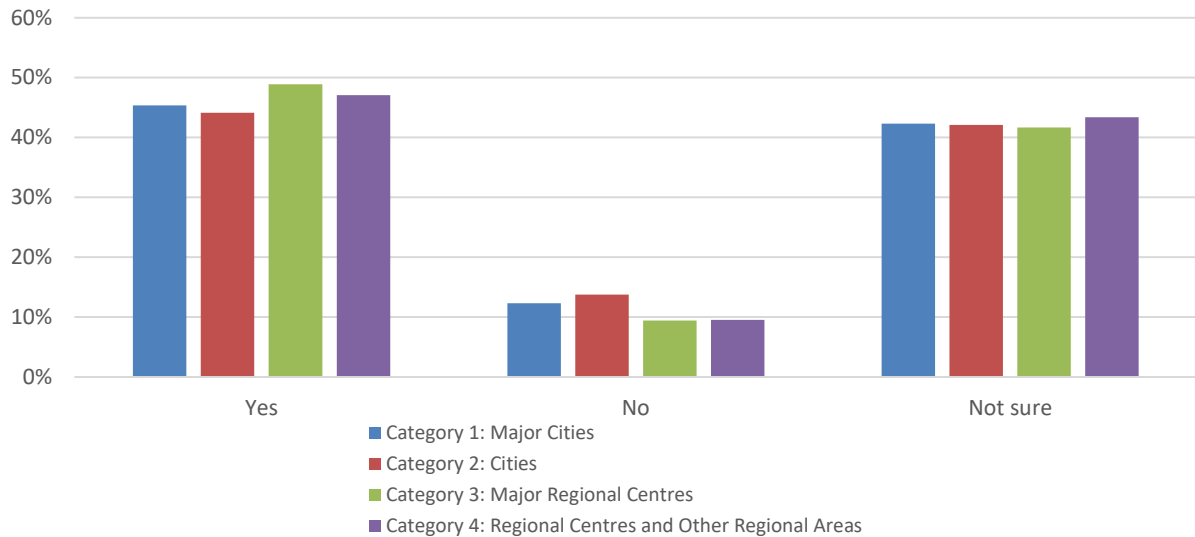


Figure 2.36: Students considering applying for a visa after their current course

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Are you considering applying for a visa to stay in Australia when you complete your current course?’

The activity that most international students are wanting to do after completing their course – regardless of their location – is working in paid employment. The project survey asked students ‘Which of the following activities are you considering doing in Australia after completing your current course?’ Around 60 per cent of students across all destinations would be ‘working in paid employment’. The next highest responses were in ‘Undertaking an internship or work experience’ and in ‘Undertaking further study’ (Figure 2.37).

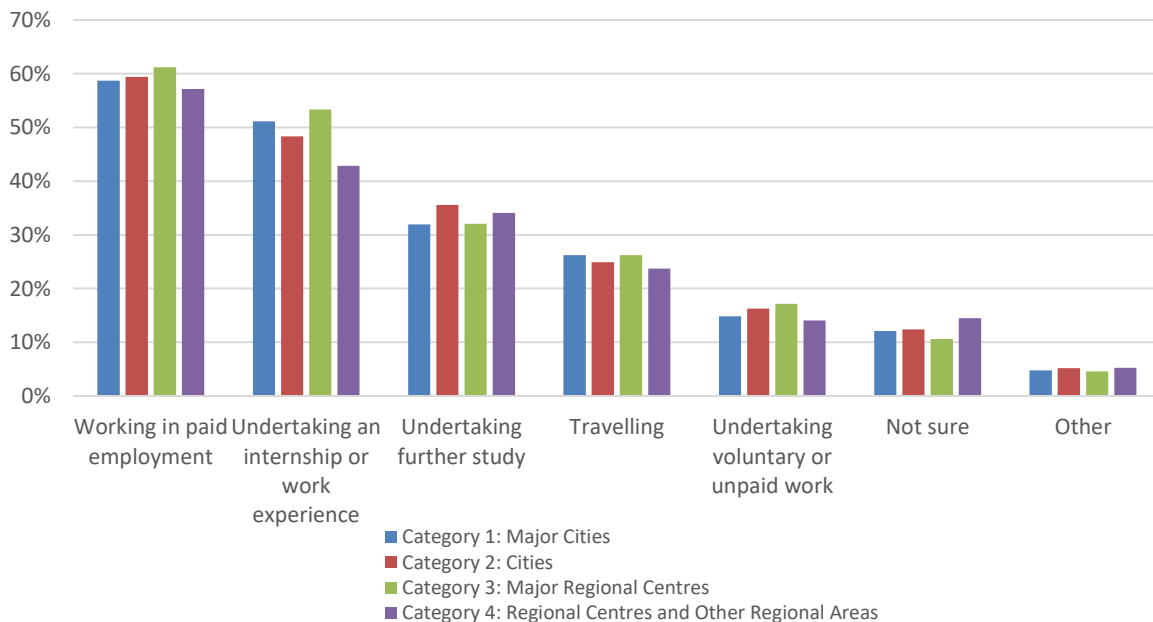


Figure 2.37: Student consideration of post-course activities

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Which of the following activities are you considering doing in Australia after completing your current course?’

Around two-thirds of all international students would consider living in a different state. The project survey asked students ‘In which of the following locations in Australia would you consider living?’ This enabled an analysis of how ‘open’ international students are to interstate mobility after they complete their studies. Of all the responses, the highest percentage overall – 80.1 per cent – was recorded by students in Category 1 destinations who are considering living in the same state (NSW, VIC or QLD) and in the capital city – students in a large capital city would consider living in the same (Table 2.17).

Table 2.17: Locations where students would consider living

Response	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total	Regional sub-total
Consider living in same state as campus location and in capital city	80.1%	72.2%	66.0%	59.9%	76.8%	63.2%
Consider living in same state as campus location but NOT in capital city	20.7%	20.7%	46.4%	45.0%	23.2%	45.7%
Consider living in different state as campus location and in capital city	51.2%	54.1%	54.8%	48.8%	51.9%	52.0%
Consider living in different state as campus location but NOT in capital city	15.4%	16.5%	23.6%	24.1%	16.5%	23.9%
Not considering living in Australia	12.4%	14.0%	9.5%	9.7%	12.5%	9.6%

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | N.B. Cell values represent the percentage of responses to each question for each category. For example, 80.9% of Category 1 respondents selected that they would consider living in the same state as their campus location and in the capital city. Conversely, 19.1% would not. No column or row sums to 100%.

A comparatively higher proportion of regional students would consider living in a different state as their campus location but *not* in the capital city (23.9%) (i.e. students in Newcastle that would consider living in Geelong) or in the same state as their campus location but *not* in the capital city (45.7%) (i.e. students in Townsville that would consider living in Toowoomba) (Figure 2.38).

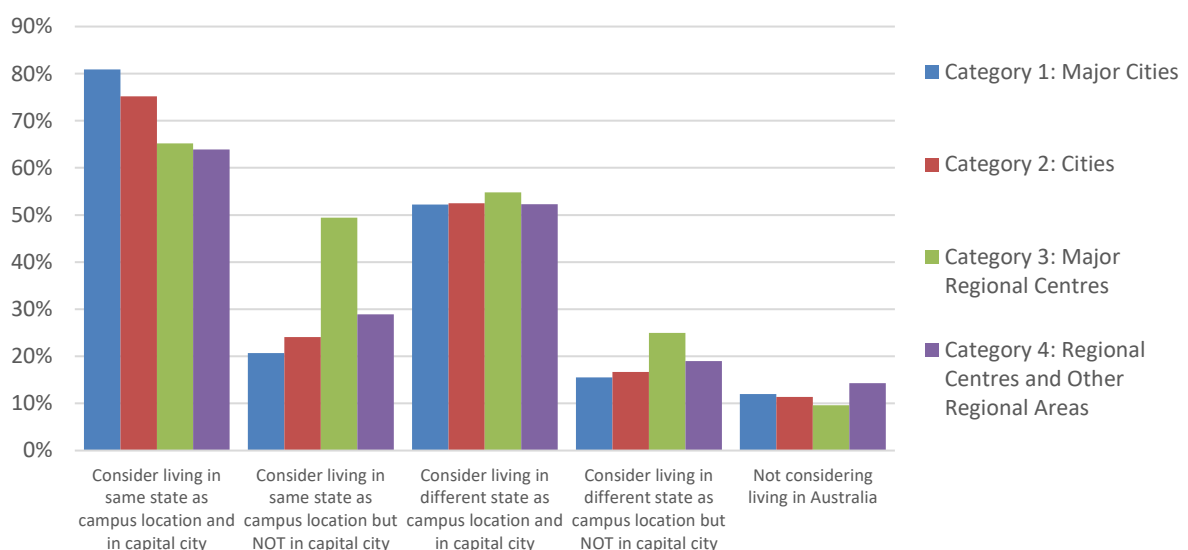


Figure 2.38: Locations where students would consider living

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘In which of the following locations in Australia would you consider living?’

2.6. Summary of key messages

The profile of international students in regional study destinations is summarised in Figure 2.39.

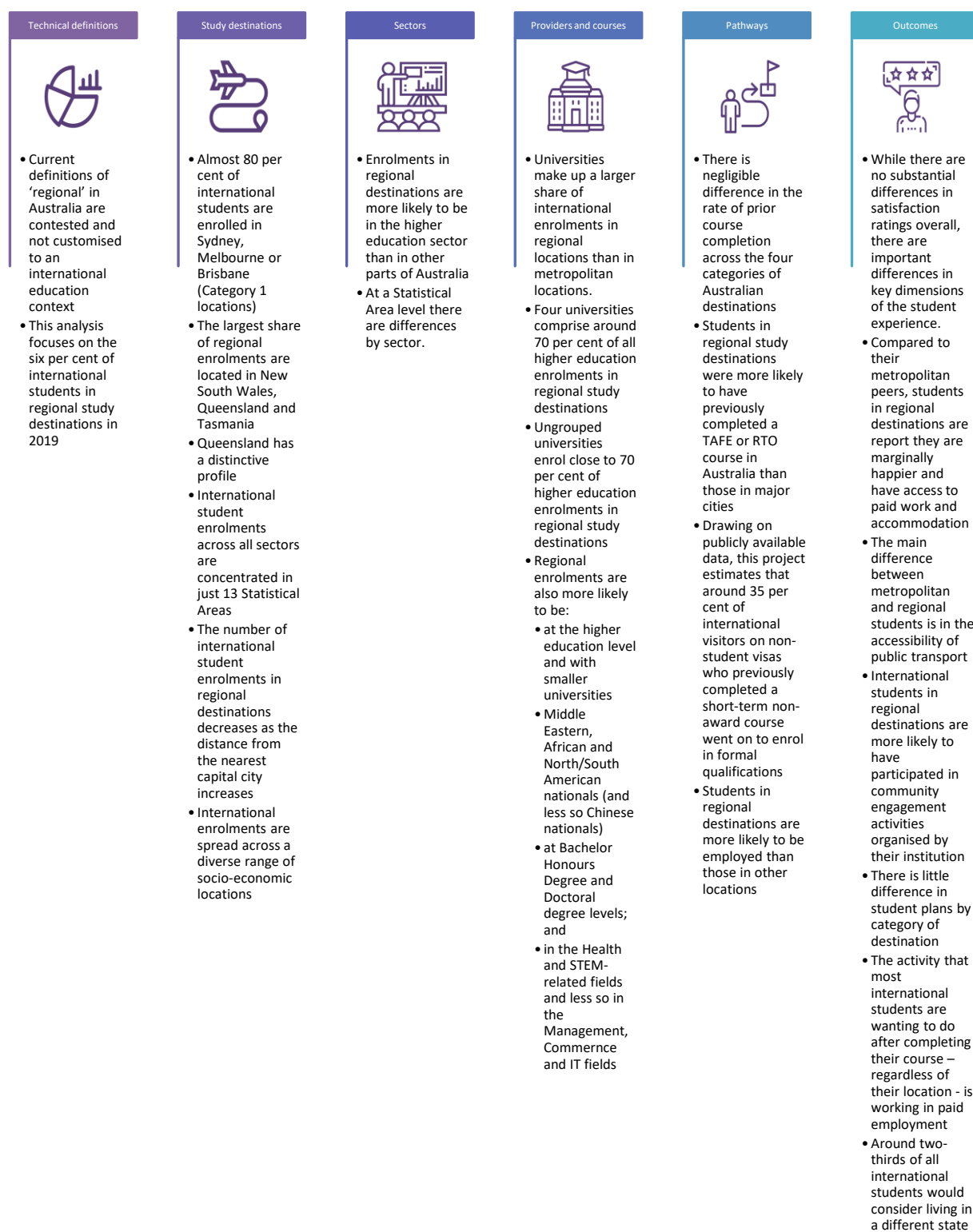


Figure 2.39: Chapter 2 - Summary of key messages

3. Case studies of regional study destinations

Findings from the quantitative analysis presented in Chapter 2 affirm that each state and territory has their own distinctive profile of international student enrolments. Within each state and territory, each destination has a different story to tell, based on a complex range of economic, social, geographic and historical factors.

To better understand these differences at the local level, this chapter presents a qualitative profile of the largest regional Level 4 Statistical Areas (Table 3.1), supported by a case study of the main university provider in the region. The chapter concludes with a set of key messages. Table 3.1 summarises the state/territory, Statistical Area, Study cluster and Case study included in the analysis.

Table 3.1: Overview of Statistical Areas within scope of analysis

State / Territory	Statistical Area (SA4)	Study cluster ⁵⁸	Case study
Tasmania	1. Hobart	1. Study Tasmania	1. University of Tasmania
	2. Launceston		
Northern Territory	3. Darwin	2. Study NT	2. Charles Darwin University
Queensland	4. Cairns	3. Study Cairns	3. James Cook University
	5. Townsville	4. Study Townsville	
	6. Sunshine Coast	5. Study Sunshine Coast	
	7. Toowoomba	6. Study Toowoomba	
	<i>Rest of regional Queensland</i>	7. Study Rockhampton	
		8. Study Whitsundays	
New South Wales	8. New England and North West (Armidale)	9. Study NSW	4. University of New England
	9. Illawarra (Wollongong)		
	10. Newcastle and Lake Macquarie		
	11. Richmond – Tweed (Byron Bay / Lismore)		
	<i>Rest of regional New South Wales</i>		
Victoria	12. Geelong	10. Study Geelong	5. Deakin University
	13. Ballarat		
	<i>Rest of regional Victoria</i>		
Western Australia	<i>Regional Western Australia⁵⁹</i>		
South Australia	<i>Regional South Australia⁶⁰</i>		

⁵⁸ It is estimated that there are more than 18 study clusters representing regions. A number of these are not-for-profit incorporated bodies that involve shared leadership from the sector, local government and state governments.

⁵⁹ There were 344 Category 3 and 4 international student enrolments in 2019.

⁶⁰ There were 112 Category 3 and 4 international student enrolments in 2019.

3.1. Tasmania

Statistical Overview - Tasmania	
Capital city	Hobart
Area	68,401 km ² (7 th)
Population (Sep 2019) ⁶¹	535,500 (6 th)
Population Density (Sep 2019) ⁶²	7.99/km ² (4 th)
Major population centres	Hobart, Launceston, Devonport, Burnie, Ulverstone
Gross State Product (\$m) (2018-19) ⁶³	\$31,819 (7 th)
Gross State Product per capita	\$59,863 (8 th)
Unemployment rate (Jan 2020) ⁶⁴	5.6% (6 th)
Three largest industries ⁶⁵	Health Care and Social Assistance 14.2% Retail Trade (10.9%) Education and Training (9.3%)

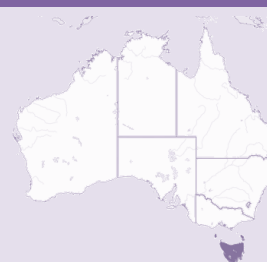


Figure 3.1:
Geographic location of Tasmania

The Study Tasmania landing page states:

‘Welcome to Tasmania – the ultimate study destination where world-class education, modern facilities, vibrant cities and a safe, island lifestyle combine to open doors to lifelong opportunities. If you’re ready to embark on an once-in-a-lifetime journey to live and study in Tasmania, you’re in the right place.’

Figure 3.2 shows responses to the question ‘Why study in Tasmania?’ The Tasmania Government website (study.tas.gov.au) currently promotes a message of ‘Study in a safe and friendly place’. The *Discover Tasmania* website (discovertasmania.com.au) currently promotes a message of ‘Come down for air’.

The screenshot displays several key messages from the Study Tasmania website:

- Home to safe and welcoming communities**
 - Tasmania is home to Hobart, Australia's safest capital city and Launceston, Australia's Not family friendly city.
 - Live a life of balance and settle down in areas small enough to feel like communities, but large enough to have the conveniences of a city at your fingertips.
- An affordable study destination**
 - Lowest cost of living of any Australian state.
 - Short and easy commutes to save time and money.
 - With a cost of living 30% cheaper than Sydney or Melbourne, you will be able/have more money to live the lifestyle you want.
- A place of beautiful landscapes and pristine wilderness**
 - Almost half of Tasmania is covered in national parks and reserves, giving you an incredible environment to explore and unwind from study.
 - Breathe the cleanest air in the world.
 - Choose from more than 1 000 mountain peaks or hundreds of kilometers of white sandy beaches.
 - Whether you live in the city, country or coast, you will never be far from the wilderness or the water.
- Vibrant lifestyle and culture**
 - Explore inspiring galleries and world class museums.
 - Experience year-round festivals celebrating music, art, sports and produce.
 - Choose from hundreds of cafes and restaurants.
 - Shop and enjoy local produce at the many local markets.
 - Live an active lifestyle with sporting clubs, world-class mountain bike and hiking trails, surf beaches and beautiful parks all over the State.
- World class facilities, teachers and education**
 - Choose from multiple prestigious research institutes in the fields of Healthcare, Medicine, Maritime science and more.
 - Experience direct industry contact and partnerships between education providers, government and business.
 - Get results – Tasmania has higher levels of employment and salary after Graduation than the national average.

Figure 3.2: Study Tasmania website

Box 3.1: Launceston City Deal

The Launceston City Deal is a ten-year plan with the aim of making Launceston one of Australia's most liveable and innovative regional cities, with growing incomes and falling levels of disadvantage.

The Australian and Tasmanian Governments and the City of Launceston are cooperating to deliver integrated investment. City Deal partners will support the University of Tasmania and the local community to deliver a new University campus connected to the Launceston CBD.

The 2019 Progress Report states that:

‘Student accommodation and active recreation facilities will create life along the spine of the precinct, which will feature a welcoming, open and vibrant University square for the whole community.’ (Launceston City Deal, 2019, p.15)



⁶¹ ABS (2019a)

⁶² ABS (2019a)

⁶³ ABS (2019b)

⁶⁴ (ABS (2020)

⁶⁵ .id (2020)

3.1.1. Statistical snapshot of international education in Tasmania

There were 14,447 international student enrolments in Tasmania in 2019. Of this group, 89.5 per cent were located at a campus in Hobart, the capital city. A further 10.3 per cent were in Launceston and North East. A small number of enrolments were also recorded in West and North West Tasmania.



Figure 3.3: Map of international higher education student enrolments in Tasmania

As a result of recent growth in the VET sector, there is an equal share of enrolments in higher education (45.4%) and VET (44.9%) courses. Around 10 per cent of enrolments were in a mix of ELICOS, Non-award and school courses. Tasmania – all of which is classified as ‘regional’ in the ASGS Remoteness Structure - differs most from the national profile of international enrolments in its share of VET enrolments, which comprises 16 percentage points more in Tasmania than it does in the national profile (Table 3.2).

Table 3.2: International student enrolments, by SA4, by 2019 (Share of Tasmania total)

State Statistical Area 4	Higher Education	VET	ELICOS	Non- award	Schools	Total
Tasmania	6,553	6,493	778	232	391	14,447
Hobart	37.0%	44.5%	4.6%	1.5%	2.0%	89.5%
Launceston and North East	8.4%	0.4%	0.8%	0.1%	0.7%	10.3%
West and North West	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Tasmania - Total	45.4%	44.9%	5.4%	1.6%	2.7%	100.0%
PP difference – National Total	-1.6%	+16.1%	-10.9%	-3.6%	0.0%	

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

Across Tasmania, there appears to have been an increase in private VET enrolments between 2017 and 2019 (Figure 3.4). At course level, the largest percentage point differences where Tasmania is *lower* than the national total are in Non AQF Award enrolments (-14.5) and Bachelor Degree (-4.4). The largest percentage point differences where Tasmania is *higher* than the national total are in Diploma (+10.5) and Advanced Diploma (+5.4).

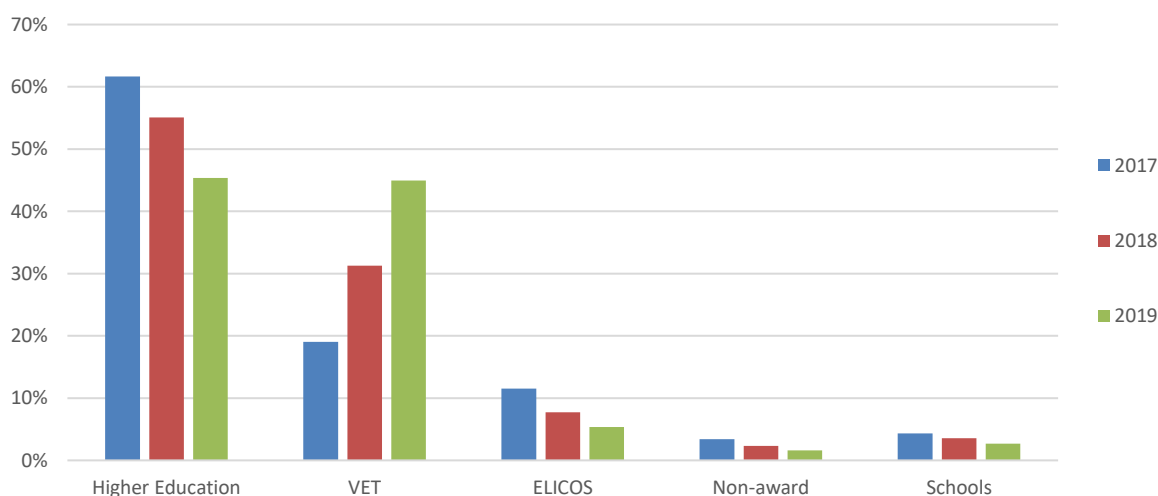


Figure 3.4: International student enrolments, by sector, 2017-2019 (Share of Tasmania total)

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

3.1.2. Case study: Learning in “A Place Unlike Any Other” at The University of Tasmania

1. The destination: Hobart

Hobart is the capital of the island state of Tasmania, which is located off the south-eastern coast of Australia. The traditional owners and custodians of the land around Hobart (nipaluna) are the Muwinina and Palawa peoples.

Hobart is well known for being a city dedicated to fine food and wine, and has a strong arts scene. It is serviced by a domestic airport and has a local bus network.



Study Tasmania promotes Tasmania as ‘unlike anywhere else - refreshing, affordable and full of adventure’, with clean air and water and a reputation for gourmet food and drink of all varieties.

2. The university: The University of Tasmania (UTAS)

The University of Tasmania was established in 1890 and is Australia’s fourth oldest university. It is Tasmania’s only university and has campuses in Hobart, Launceston, Cradle Coast and Sydney. It offers a range of undergraduate and postgraduate courses. The International Pathway offers direct entry into English preparatory courses and a suite of Foundation and Diploma programs. While it has enrolments across a range of disciplines, UTAS is internationally-recognised for niche programs in marine and Antarctic studies, agriculture and medicine.

3. The messages used to attract students

UTAS works closely with their large agent network to promote Tasmania as a study destination, providing detailed information packs, tours and agent training workshops to help familiarise agents with the benefits of living and studying in Tasmania.

The university’s website promotes Tasmania as ‘unique’; having a blend of World-Heritage forests and wildlife, as well as a vibrant city that ‘embraces the unusual’ and ‘loves imagination’. Key images on the website highlight the close links to Tasmania’s natural environment, creative arts and sense of community. For example:

‘Study outstanding courses in one of the world’s most extraordinary locations’

‘We offer great courses in an extraordinary location, and our teaching is supported by world-leading research, so you know you’re getting direct access to the best expertise.’

‘We have more reserved wilderness than any other place on the planet – and it’s right on the doorstep of our cities. Hiking, mountain biking, climbing and camping are an easy afternoon or weekend activity. And we have animals here that simply don’t exist anywhere else in the world. This place is pristine and quite simply, beautiful.’

‘But if the city is more your style, Tasmania has you covered. Our food, art and culture scene is a hot topic in tourism mags across the globe. For good reason. We have award winning festivals year round, stunning streetscapes, and a café culture that never stops.’



4. The reasons students were attracted to Hobart, UTAS and the course

ACER conducted two focus groups at UTAS as part of the case study research. A total of 11 students were interviewed from a range of countries. They represented a mixture of students studying English preparatory programs for direct entry into UTAS courses as well as current undergraduate and postgraduate students.

The first focus group featured six UTAS English Language Centre students from China, Mexico, Vietnam and Saudi Arabia. Mr T and Ms C were encouraged by their agents in China to consider studying in Tasmania for the lifestyle benefits and the extra migration points. Mr T is planning to study a Masters of Professional

Accounting after he completes his English program, and it was his agent who recommended UTAS. Mr T had only heard of Sydney, Melbourne and Adelaide before deciding to study in Tasmania. He stated that he prefers the fact it is a 'small city' as he comes from Guangzhou which is 'too big and busy'. Ms C is planning to study nursing. At present she has 'no future plans' but is worried she may be lonely when studying nursing in Tasmania as there are 'no Chinese students studying nursing here'.



Mr M from Saudi Arabia is in on a government scholarship. He originally went to study English at Monash University in Melbourne before moving to UTAS. He plans to undertake a Masters of Pharmaceutical Science but is finding the English language course 'very strict'. His agent and sponsor recommended that he study in Tasmania. Also looking to study a Masters of Pharmaceutical Science is Mr L from Vietnam. He didn't use an agent and still hasn't decided between studying his course in Melbourne (Monash) and UTAS in Tasmania. From Mexico, Ms R had always dreamed of visiting Australia. She decided to study English to improve her employability, and originally wanted to study in Brisbane, but was advised by her agent to go to Tasmania as it would be 'easier to get in'.

The second focus group interviewed five students who were studying undergraduate (2) and postgraduate (3) degrees at UTAS. They came from China, Ukraine, Africa and Singapore. This group identified family and friends as playing a major role in recommending Hobart as a study destination. Ms O from the Ukraine has family in Tasmania and felt that 'a lot of factors' influenced her decision to study an MBA in Hobart. She was originally planning to study a diploma but her visa was rejected. She was recommended to study a Master's degree and was offered a scholarship by UTAS which helped make her final decision.

Receiving a scholarship was also a motivating factor for Mr W from China and Ms B from Africa to study at UTAS. Mr W heard about Tasmania from friends and his agent in China recommended that he study his Bachelor of Science (Geology) at UTAS. When he applied he received a scholarship based on his grades which helped a lot financially. Ms B, a PhD candidate found the search for a supervisor difficult and was able to locate one at UTAS. Mr F learnt about UTAS from an education fair in his home town in Singapore. He is studying a Bachelor of Laws and chose UTAS as it 'offered straight law' compared to other Australian university's law programs. He stated that 'Sydney and Melbourne are similar to Singapore' and he 'wanted to try something different'.

5. The factors underpinning success

Students identified Tasmania's unique location as playing a part in their success so far by providing them an opportunity to study, have a slower paced life and enjoy the natural environment. Mr T states 'I can focus on study' and it has 'opened my eyes'. Ms M states that 'Hobart was more than she expected' with a 'large variety of small businesses', and 'famous for dark Mofo and MONA'. Ms C likes the 'clear air' and Ms B enjoys recreational fishing. The people are 'friendly' and interested in what students are doing in Tasmania. These are aligned with marketing messages used by UTAS staff and agents to attract students to the island.



6. The barriers and challenges

When asked about the challenges they faced living and studying in Hobart students described the lack of reasonably priced accommodation as being the major issue for studying in Hobart. Students and staff noted that there is a lack of accommodation stock due to the rise of Airbnb in Hobart and students struggle to compete for rental properties in such a tight market. A number of the students mentioned that their agent presented Hobart as a 'cheaper' option however day to day living expenses, transport and accommodation costs are now seen to be similar to other major cities. 'My agent told me Hobart is cheaper – but since last year prices have gone up – \$120 to \$180-190. Student accommodation is \$200 with bills included'. Students also pointed out a lack of adequate bus services and poor street lighting as making them 'feel unsafe' at night and limiting their ability to get around Hobart.

3.2. Northern Territory

Statistical Overview – Northern Territory	
Capital city	Darwin
Area	1,420,970 km ² (3 rd)
Population (Sep 2019) ⁶⁶	245,869 (8 th)
Population Density (Sep 2019) ⁶⁷	0.18/km ² (8 th)
Major population centres	Darwin, Palmerston, Alice Springs, Litchfield, Katherine
Gross Territorial Product (\$m) (2018-19) ⁶⁸	\$26,109[2] (8 th)
Gross Territorial Product per capita	\$106,196 (1 st)
Unemployment rate (Jan 2020) ⁶⁹	5.5% (5 th)
Three largest industries ⁷⁰	Public Administration and Safety (18.1%) Health Care and Social Assistance (11.1%) Construction (10.1%)






Figure 3.5:
Geographic location
of Northern
Territory


The Study Northern Territory website categorises information based on ‘Discover’, ‘Meet’, ‘Study’, ‘Live’ and ‘Work’. Figure 3.6 describes the benefits of studying in the Northern Territory.

There is also information on the StudyNT student ambassadors. The website states that these ambassadors ‘...promote the Territory as an ideal study destination and place to call home for international students’.

Benefits of studying in Australia's Northern Territory

- 

High quality Australian qualifications in a safe, friendly community
- 

Boost your job and career growth opportunities
- 


We are Australia's gateway to Asia and Asia's gateway to Australia

Did you also know?

WE HAVE EXCHANGE PARTNERSHIPS


Northern Territory institutions have education and research partnerships and exchange programs throughout the region including:

China, Indonesia, Japan, Papua New Guinea, Malaysia, the Philippines, India, Hong Kong, Cambodia, Nepal and Sri Lanka.




145+ COUNTRIES

Diverse and friendly international community from more than 145 different countries.




OPPORTUNITIES

The Northern Territory has many internships, work placements, casual and part-time employment opportunities.



TROPICAL

It is a unique Australian environment from tropical coast to desert, including world heritage areas and national parks.



EASIEST TO LIVE

Darwin is the smallest of Australia's major cities, making it easier to live, work and study.

Figure 3.6: StudyNT website

Box 3.2: Darwin City Deal

The Darwin City Deal is a joint initiative between the Australian Government, the Northern Territory Government and City of Darwin to design a 10-year plan for the Darwin city centre.

A ‘key commitment’ of the City Deal is ‘A new education and civic precinct, including a new Charles Darwin University city campus, ‘...will transform the city centre, attracting more international students to Darwin, boosting retail activity and bringing vibrancy to the CBD’. The City Deal Plan states that:

‘A vibrant city centre campus with residential facilities will enhance both the domestic and international student experience in Darwin and is expected to be a drawcard for the growing number of students wishing to study in Australia. It will increase opportunities for students to live, work and study in the city.’ (Darwin City Deal, 2018, p.12).

More information: <https://darwincitydeal.nt.gov.au/>



⁶⁶ ABS (2019a)

⁶⁷ ABS (2019a)

⁶⁸ ABS (2019b)

⁶⁹ (ABS (2020)

⁷⁰ .id (2020)

3.2.1. Statistical snapshot of international education in the Northern Territory

There were 3,038 enrolments in the Northern Territory in 2019. Of this group, 99.8 per cent were in Darwin, the capital city. A small number of enrolments were also recorded in Northern Territory – Outback, which includes Alice Springs.

The majority of international enrolments are in higher education (56.6%) and VET (27.7%) courses. Around 15 per cent are in a mix of ELICOS, Non-award and school courses (Table 3.3). The Northern Territory differs most from the national profile of international enrolments in its share of higher education enrolments, which comprises 9.7 more percentage points than it does in the national profile.



Figure 3.7: Map of international higher education student enrolments in the Northern Territory

Table 3.3: International student enrolments, by SA4, by 2018 (Share of Northern Territory total)

State Statistical Area 4	Higher Education	VET	ELICOS	Non- award	Schools	Total
Northern Territory	1,721	842	293	63	119	3,038
Darwin	56.6%	27.6%	9.6%	2.1%	3.8%	99.8%
Northern Territory - Outback	0.0%	0.1%	0.0%	0.0%	0.1%	0.2%
Northern Territory - Total	56.6%	27.7%	9.6%	2.1%	3.9%	100.0%
PP difference – National Total	+9.7%	-1.1%	-6.6%	-3.1%	+1.2%	

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

Like Tasmania, there also appears to have been an increase in VET enrolments between 2017 and 2019 in the Northern Territory (Figure 3.8). However, there are still around twice as many enrolments in the higher education sector as there are in VET. At course level, the largest percentage point differences where the Northern Territory is lower than the national total are in Non AQF Award enrolments (-9.7). The largest percentage point differences where the Northern Territory is higher than the national total are in Bachelor Degree (+12.3).

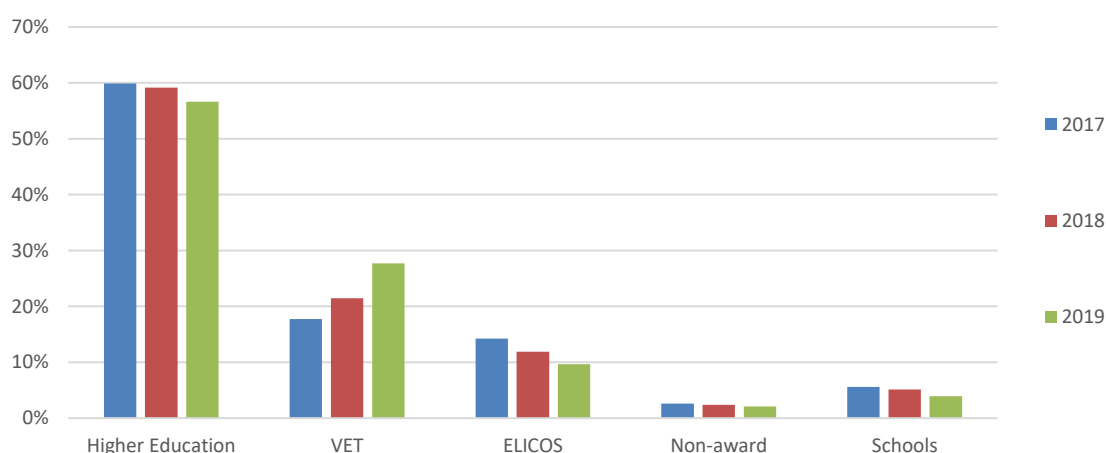


Figure 3.8: International student enrolments, by sector, 2017-2019 (Share of Northern Territory total)

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

3.2.2. Case study: Shaping a new world through social justice, sustainability, creativity and collective effort at Charles Darwin University

1. The destination: Darwin

Darwin is the capital of the Northern Territory and is located in the far north of Australia. The university describes Darwin as ‘a unique tropical city famous for its beautiful sunsets, spectacular natural scenery, cosmopolitan markets, vibrant multiculturalism, Indigenous culture, and fascinating history and engagement with Asia.’

The traditional owners and custodians of the land in and around Darwin are the Larrakia (saltwater) people. The Larrakia have a close relationship with the sea and have a long history of trade with their neighbours including Indonesia and the Tiwi peoples.

2. The university: Charles Darwin University

CDU was established in 2003 with the merger of the Northern Territory University (1989-2003), Centralian College in Alice Springs, the Northern Territory College in Katherine, and the Menzies School of Health Research.

CDU’s main campuses are found in Darwin at the Casuarina campus, the newly developed Waterfront campus in the heart of Darwin’s central business district, and the Palmerston campus a short 20 minute drive from Darwin’s central business district. It also has a small campus in Sydney.



Since the release of the university’s 2015-2025 Strategic plan, CDU has undergone rapid change as part of its commitment to internationalisation. CDU is currently involved in the revitalisation of Darwin CBD precinct as part of the \$200 million Darwin City Deal. It is the only dual sector university in the Northern Territory and has multiple campuses and study centres across the territory.

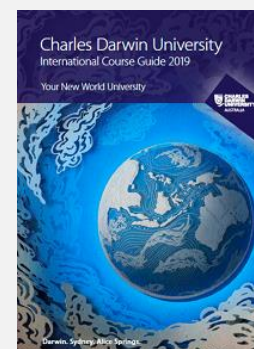
CDU offers a range of VET, undergraduate and postgraduate courses and is most well-known for its niche courses in areas such as tropical medicine and health, marine biology, disaster management and Indigenous studies. English language preparatory courses are available for international students and in 2020, CDU launched a suite of pathway programs through Charles Darwin University International College in partnership with UP Education. It has a strong focus on wellbeing and academic support across all programs.

3. The messages used to attract students

The university describes its close proximity to Asia as a major drawcard for international students who want to remain close to home. The university website states ‘Darwin is just a few hours away from most capital cities in South East Asia and just 6 hours from southern China’. As well as being close to Asia the city is also promoted as ‘unique’, ‘extra-urban’, with a ‘community feeling’.

‘Located in the remote far north of Australia, research is central to the purpose of Charles Darwin University, and closely tied to the needs of the Northern Territory and the Territory’s immediate region: Timor-Leste, Eastern Indonesia and the Arafura Sea.’

‘Charles Darwin University is a new world university built on social justice, sustainability, creativity and collective effort. As a truly international university with 2,000 international students from 55 countries, our students and staff and academic and research endeavours are globally connected and respected.’



4. The reasons students were attracted to Darwin, CDU and the course

ACER held a focus group at the Casuarina campus and spoke with 10 international students (8 PG and 2 UG). The students were from India (5), Nepal (3), Indonesia (1), and China (1) and studied a range of courses.

All students stated that they spent considerable time searching the internet and comparing Australian universities before deciding to study at CDU. Price, course requirements, family connections, work integrated learning and post study work rights were all important factors when making the decision to study at CDU. One student observed that 'Fees are way more expensive down South!'

Agents were used by all students regardless of whether they applied on-shore or off-shore during the application process. Students stated this was because it was 'very difficult' to get a student visa without an agent. Students stated that CDU wasn't well known by agents overseas and it was family or friends who first recommended it to them. Ms V from India found it difficult to get an agent in India to support her decision to study a Master of Primary Teaching. 'I Just wanted to go to CDU as I have a sister here – but 10-15 agents didn't recommend it'. She felt this was linked to 'commission rates' for agents.



Two students decided to study at CDU while visiting Darwin. Ms Z from China travelled around Australia, working in Perth, Adelaide then Darwin. While working in the childcare sector she decided to study a Bachelor of Education (Early Childhood) and was attracted by the lower IELTS requirements at CDU. She plans to work as a teacher in the Territory after she completes her degree. Mr A from Indonesia visited Darwin on a holiday and decided to study an MBA because it was 'close to his home town', had a similar climate and similar small town feeling. Mr S moved from Sydney to Darwin because he wanted to change his course from a Masters of Business to a Master of Accounting. He found that living in Sydney meant he spent a lot of his time commuting on public transport, and he found the city 'too big', too busy. He likes living in Darwin because he now has time to 'network', and 'interact' with the community.

5. The factors underpinning success

Based on their experiences so far, students identified a number of 'success factors' at CDU. These include small class sizes, close ties to industry with access to work experience opportunities, strong wellbeing and academic support programs.

These align with key marketing messages identified by staff to recruit students. Staff cite small class sizes as providing more one-on-one support for student learning, providing proactive and tailored support when they feel a student may be at-risk. Smaller cohorts also mean students are able to connect to industries in the Territory and gain practical experience and networking: 'We are small, so we can'.

Another significant factor of success identified by students were links to diaspora in Darwin. Five out of the ten students interviewed had family living in Darwin. Not only did this play a major role in the decision to study at CDU it also provided them links to the community, and better access to part-time job opportunities. Mr W from Nepal stated 'I have a brother here and he provides mental and financial support'.

6. The barriers and challenges

When asked about the challenges they faced living and studying in Darwin students described the main issue to be of a lack of adequate public transport, especially to the Casuarina campus. Students cite the lack of frequent services and a timetable that runs half hourly which makes it difficult to coordinate their journeys. According to one student 'sometimes it's faster to walk than catch the bus!' Six of the ten students own cars and prefer to drive to university. Mr B from Nepal studying a Masters of Accounting at the Waterfront campus noted that parking was very expensive and he usually pays around '\$300-400 per semester'. He also added that there is no library at present at the Waterfront campus and recommended texts often have long waiting lists in the Library. Mr B wishes there was a shuttle bus between the two campuses.

Those living in or around Casuarina campus state that there is 'no nightlife' and students who live on campus are limited for options as there are very few places open near the university at night. Eight out of ten students worked part-time but noted that it is difficult to find work due to the high numbers of backpackers and working holiday makers in Darwin, and those working at night stated that a car is essential.

3.3. Queensland

Statistical Overview - Queensland	
Capital city	Brisbane
Area	1,852,642 km ² (2 nd)
Population (Sep 2019) ⁷¹	5,115,451 (3 rd)
Population Density (Sep 2019) ⁷²	2.96/km ² (5 th)
Major population centres	Brisbane, Gold Coast, The Sunshine Coast, Townsville, Cairns, Toowoomba, Mackay, Rockhampton, Bundaberg
Gross State Product (\$m) (2018-19) ⁷³	\$357,044 (3 rd)
Gross State Product per capita	\$70,662 (5 th)
Unemployment rate (Jan 2020) ⁷⁴	5.8% (7 th)
Three largest industries ⁷⁵	<ul style="list-style-type: none"> Health Care and Social Assistance (13.0%) Retail Trade (9.9%) Education and Training (9.0%)

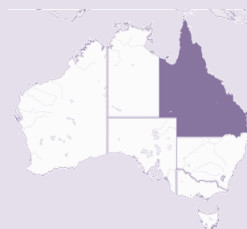


Figure 3.9:
Geographic location
of Queensland

The Study Queensland website states:

‘There are many different study centres spread throughout Queensland, each offering a **unique, high-quality** study experience. Being such a **large and diverse** place, Queensland gives you an unrivalled range of **lifestyles and environments** to choose from.

Getting around Queensland is **easy and trouble free**. Our **comprehensive transport** network and motorway system will enable you to explore Queensland and its attractions with ease.

International students choose Queensland for its reputation as **an inviting place** to live, with the streets and public spaces of cities and regional centres offering a sense of **security and freedom** not always found in other parts of the world.

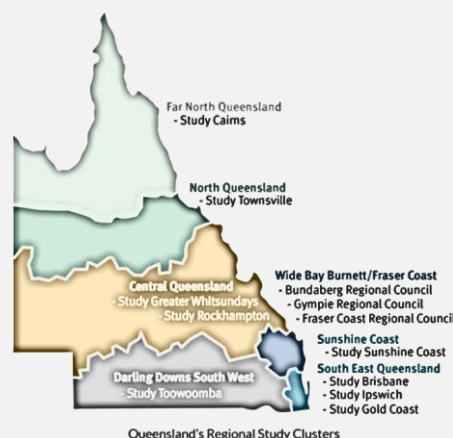
The cost of accommodation in Queensland is **relatively affordable** compared with other states in Australia. Queensland offers a **variety of accommodation** options to suit most student budgets.

Queensland is your second home where you never have to feel lost or alone.’

Box 3.3: Queensland Regional Study Clusters

Queensland’s Regional Study Clusters are a source of support and information for providers and other industry organisations. A key feature is the leadership of local government in supporting local cluster initiatives. Study Queensland has implemented a collaborative planning model that includes state wide coordination and industry wide feedback. Study Queensland works in cooperation with Regional Study Clusters and key regions in developing the Global Partnership Plan.

The *Study Queensland Positioning Framework* aims to provide ‘...new opportunities for regional study clusters and partners to leverage the Study Queensland brand and maximise opportunities to advance international education and training for their local region’ (Trade and Investment Queensland, 2020).



⁷¹ ABS (2019a)

⁷² ABS (2019a)

⁷³ ABS (2019b)

⁷⁴ (ABS (2020)

⁷⁵ .id (2020)

3.3.1. Statistical snapshot of international education in regional Queensland

There were 11,280 enrolments in regional Queensland in 2019. Of this group, the largest shares of enrolments were in the Sunshine Coast (36.5%); Cairns (23.1%); Toowoomba (18.1%) and Townsville (17.2%). A small number of enrolments were also recorded in parts of Central Queensland such as Rockhampton, Wide Bay and Mackay.

The largest share of these enrolments were in higher education (44.4%), followed by VET (23.4%), ELICOS (15.2%), and schools (12.1%). The remaining 5 per cent were in non-award courses (Table 3.4). This comparatively large share of non-higher education enrolments – partly due to its decentralised and remote population - sets Queensland regional areas apart from others in Australia. The largest difference between Queensland’s regions and the national profile is in the schools sector (+9.3).



Figure 3.10: Map of international higher education student enrolments in regional Queensland

Table 3.4: International student enrolments, by SA4, by 2019 (Share of Queensland total)

State Statistical Area 4	Higher Education	VET	ELICOS	Non- award	Schools	Total
Queensland	5,004	2,635	1,710	567	1,364	11,280
Sunshine Coast	13.6%	7.9%	7.4%	1.7%	5.8%	36.5%
Cairns	3.7%	10.3%	5.8%	0.2%	3.1%	23.1%
Toowoomba	15.9%	0.3%	0.9%	0.3%	0.6%	18.1%
Townsville	9.2%	3.5%	0.5%	2.4%	1.5%	17.2%
Other	2.0%	1.3%	0.5%	0.3%	1.1%	5.2%
Queensland - Total	44.4%	23.4%	15.2%	5.0%	12.1%	100.0%
PP difference – National Total	-2.6%	-5.5%	-1.1%	-0.1%	+9.3%	

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

Across regional Queensland, there appears to be stability in the sector breakdown since 2017, with a slight increase in higher education (Figure 3.11). At course level, the largest percentage point differences where regional Queensland is *lower* than the national total are in Master’s Degree – Coursework (-8.5). The largest percentage point differences where Queensland is *higher* than the national total is in Senior Secondary (+5.9).

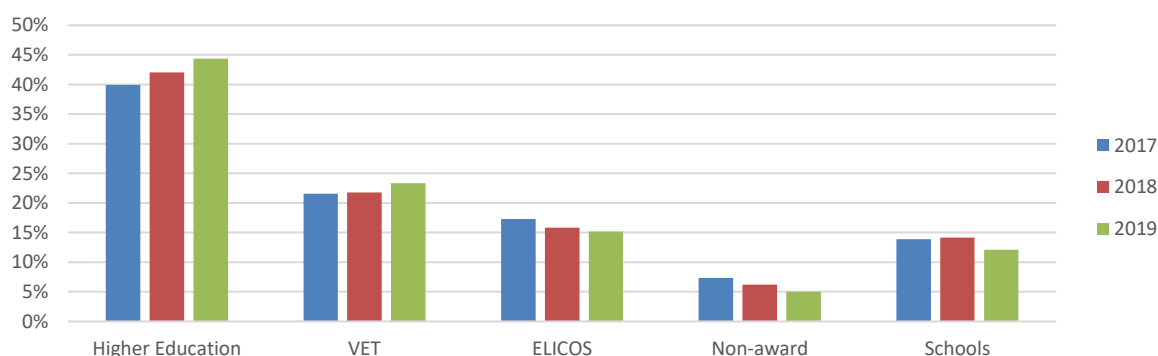


Figure 3.11: International student enrolments, by sector, 2017-2019 (Share of Queensland total)

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

3.3.2. Case study: Speciality learning in a diverse community at James Cook University

1. The destination: Townsville

Townsville is located about 1,100km from Brisbane on the tropical north-eastern coast of Queensland. It has a population of over 190,000 and is a popular tourist destination due to its close proximity to the Great Barrier Reef Marine Park, Magnetic Island and a number of national parks.

Traditional owners and custodians, the Bindal and Wulgurukaba People, are the first people to have lived in the Townsville region.

Key local industries include the Townsville port, mining, health and education services, government administration and defence. Townsville's airport has both domestic and outbound international flights daily and bus services operate within the city.

The James Cook University describes Townsville as:

'Townsville is Australia's largest tropical city and thriving coastal port. Magnetic Island and the Great Barrier Reef are on Townsville's doorstep; the savannah region and outback country towns lie to the west. Townsville is famous for an average of 320 days of sunshine per year, so there are endless opportunities to enjoy the outdoors.'

Study Townsville describes the city as having a 'laid-back tropical lifestyle' but with all the services of a big city:

'Townsville offers a dynamic lifestyle coupled with strong economic prosperity. Townsville is a thriving precinct with access to a variety of world class education facilities, leading edge health care, affordable housing, unique retailing, spectacular events and entertainment, dining precincts and a wide range of outdoor recreation options. With over 300 days of sunshine each year, Townsville's lifestyle is second to none.'

2. The university: James Cook University (JCU) Townsville

James Cook University was formed in 1961 as an annexe of the University of Queensland (UQ), and became an independent university in 1970. It has campuses in Townsville, Cairns, Brisbane and Singapore, with study centres in Mackay, Mount Isa and Thursday Island. JCU offers a number of specialist programs including public health and tropical medicine and is most well-known internationally as a world leader in environmental science. The Times Higher Education World University Rankings ranked JCU 201-250 out of nearly 1400 institutions worldwide in 2019. JCU has 26 specialised research centres and institutes and is ranked Number 1 in the world for Marine and Freshwater biology and number 2 in the world for biodiversity conservation⁷⁶.

JCU Townsville is located 13 kilometres from the city's central business district in the 'Townsville Tropical Intelligence and Health Precinct in the suburb of Douglas'. Of the 11,500 students at the Townsville campus around 1,500 are international students. The university offers a range of services including sport facilities, accommodation, library, bookshop and cafés.

Working in partnership with the newly established JCU College (owned by Nativas), JCU now offers a suite of pathways programs specifically designed for international students wishing to study in key programs in Townsville. These include English for Academic Purposes, Foundation Program, and Diplomas in Health (Nursing Pathway), Engineering, Technology and Science.



⁷⁶ CWUR 2017 Rankings: Ranked Number 2 in the world for Biodiversity Conservation. Ranked Number 1 in the world for Marine and Freshwater Biology

3. The messages used to attract students

In response to the questions – ‘Why JCU?’ JCU answers it is because of their: access to world-class academics; teachers committed to student success; develop skills in state-of-the-art facilities; gain real world experience; achieve exceptional employment outcomes; benefit from small class sizes; connect with professional networks; work anywhere in the world; support through scholarships for merit and equity; and discover great accommodation options. The International Student Course Guide states:

‘Looking to keep your options open with a quality education that ensures you are ready today for tomorrow? Are you going to be the founder of the next Apple, Virgin, Amazon or Facebook? Or someone able to use AI and machine learning at the frontier of innovation in construction, health, engineering, or science?’

Wherever you may be on your journey of discovery we are committed to you having a student experience that is life changing. An experience that may see you one moment being mentored by a world-renowned expert, working in world-class facilities and laboratories, and then heading out to visit our classrooms on the reef, in the rainforest, or in the spectacular Australian outback.’



4. The reasons students were attracted to Townsville, JCU and the course

ACER interviewed international students at the JCU campus in Townsville. These students came from Nigeria (1), India (1), The United States of America (2), Ecuador (1), Papua New Guinea (1) and Japan (1) and where undertaking a diverse range of courses.

Students reported a number of motivating factors when choosing James Cook University in Townsville. These included JCU’s world renowned programs, field work and work integrated learning opportunities, proximity to their home country, lifestyle and access the natural environment.

Three of the students interviewed were studying the Master of Science (Marine Biology) and were attracted to JCU for its reputation and world ranking in the field. These students found JCU online and were attracted to work on the world famous Great Barrier Reef. Mr X from Ecuador stated that he ‘googled JCU’ and as a professional diver ‘knew about the reef’ and saw there would be ‘a lot of opportunities’ to study in Townsville. Mr S from the east coast of America noted there was no application fee to apply unlike American universities, and he saw studying in Australia as ‘an adventure’ and wanted to be involved in world leading research. Ms F also from America, added that she liked the ‘flexible electives’ and the chance to focus on the ‘management of corals’ and dive on the reef.

Ms D from Nigeria is a medical doctor and a PhD Candidate studying health care sciences at JCU. Ms D originally applied for a Master of Public Health and Tropical Medicine in 2017 and found JCU online. She recalls ‘I didn’t know where Australia was’ but ‘I felt it was a unique MPH course’ and decided to apply. Mr G from India is studying a Master Planning and Urban Design, and didn’t want to study in a large city and originally looked at studying in Brisbane but the course he wanted wasn’t offered there. He applied to JCU Cairns and now splits his time between the Cairns and Townsville campuses as part of his course.

As an Australia Award student Mr C from PNG wanted to undertake a dual master’s of business and information technology (IT). He searched online and found his current course at JCU. He was attracted to Townsville as it is only a ‘two hour flight’ from PNG and has a large PNG diaspora. Mr K from Japan came to Australia initially to study English in Sydney. After visiting Townsville he decided to move there and pursue a Bachelor of Psychology after completing his English language course. He sated ‘People are friendly, not like Sydney’, it is a ‘nice community’ and you can ‘drive for 15 minutes and be anywhere’.



5. The factors underpinning success

Students identified a number of 'success factors' these included access to hands-on work experience, strong support services and research opportunities. These align with key marketing messages used by JCU to recruit international students.

Access to work integrated learning or field work was cited by five of the students in the case study as providing them with valuable work ready skills and experience. Mr G has the unique experience as being the only student studying his course in Cairns. He spends 15 days there a month and is 'doing a traineeship with the city council' which was arranged through his close relationship with his professors. He has a job arranged after he graduates and plans to stay in Cairns for a number of years to build up his experience as an urban planner. Ms D from Nigeria is working closely in the local community as part of her PhD research. At present, she is studying the effects of heat related stress on soldiers and is working closely on the program with defence personnel based at the army base in Townsville.

Those studying in the field of marine biology cited access to industry as being a huge benefit of the program. Mr S stated his program was providing him with unique industry based training opportunities that he couldn't get anywhere else in the world. Mr S noted that a 'guest lecturer recently handed out internships' connected to conservation work being done on the Great Barrier Reef which was a rare opportunity to gain valuable experience in the field.

Strong student support services were also mentioned as key enablers of success. Ms D from Nigeria stated that she has had 'best educational support in my life'. It has been 'mind blowing'. She was encouraged by her lecturers to pursue a PhD and found staff 'going the extra mile' to help her achieve her goals. The strong support has encouraged her to focus on moving to an academic career and she plans to go back to Nigeria to build capacity within the university sector there. For Mr S, activities like 'international café', run by the student support team at the Townsville campus, are providing a 'wonderful student culture' He states 'Alex Salvador is the man' for his interactive drumming workshops and team building exercises.



6. The barriers and challenges

When asked about the challenges they faced living and studying in Townsville students described the lack of adequate public transport services to and from campus, especially after 5pm and on the weekend. The campus doesn't currently have a shuttle bus from the city centre and the bus service runs infrequently. One student stated the bus route and limited timetable means 'it can take an hour and a half to make a journey that is 15 minutes by car'. Most students own a car. There are no inbound international flights into Townsville, making it expensive and time consuming for students to arrive from overseas. Private rental accommodation has been difficult to find and expensive since a substantial flood in 2019. Staff at JCU stated that the university had to install portables on campus after a fire in one of the residential colleges and to cope with pressure caused by the housing shortage post-flood.

Most students stated that the nightlife is limited in Townsville, especially close to campus and most eateries close early. The 'shopping centres close at 4 pm on Sunday' and food can be expensive in and around campus. Both students and staff noted that part-time employment opportunities were limited and highly competitive in Townsville due to a high unemployment rate in the city and the high volume of backpackers and working holiday makers working in the hospitality and retail sector.

3.4. New South Wales

Statistical Overview – New South Wales	
Capital city	Sydney
Area	809,444 km ² (5 th)
Population (Sep 2019) ⁷⁷	8,117,976 (1 st)
Population Density (Sep 2019) ⁷⁸	10.14/km ² (3 rd)
Major population centres	Sydney, Newcastle and Lake Macquarie, Illawarra (Wollongong), Hunter Valley, Richmond Tweed, Capital region, Mid North Coast, Central West
Gross State Product (\$m) (2018-19) ⁷⁹	\$614,409 (1 st)
Gross State Product per capita	\$76,361 (4 th)
Unemployment rate (Jan 2020) ⁸⁰	4.6% (2 nd)
Three largest industries ⁸¹	Health Care and Social Assistance (12.5%) Retail Trade (9.7%) Education and Training (8.4%)



Figure 3.12: Geographic location of NSW

The Study NSW webpage includes information under a ‘Why NSW’ banner that links to a page on ‘NSW regions’⁸². This provides detailed information on 15 of the NSW regions. For example, the Illawarra/South Coast region is described as ‘...a diverse community, defined by its coastal location and striking escarpment. The region offers exquisite natural assets, a thriving industry base and world-class educational facilities’. The 2019-20 Study NSW International Education Strategy draws on extensive consultations with the NSW international education sector. Under the strategic objective ‘Brand’, the StudyNSW Strategy is to:

‘Develop a distinct, student-facing promotional brand that leverages the iconic, international recognition of Sydney as the gateway to NSW, a state that offers an abundance of choice across both metropolitan and regional areas.’ (NSW Government, 2019, p.13)

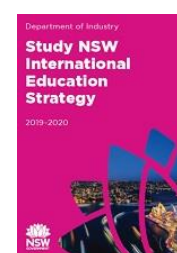


Figure 3.13: Study NSW International Education Strategy

While Newcastle and Wollongong are included on the ‘NSW regions’ section of the StudyNSW website, they are not classified as ‘regional’ in DESE reporting or for the purposes of allocating Destination Australia scholarships (see Box 3.4).

Box 3.4: When is a region ‘regional’?

A key difference between the ASGS Remoteness Structure definition of ‘regional’ used by DESE and the definition used by ACER in this report is the inclusion in the latter of Newcastle and Wollongong in New South Wales.

In 2018, a policy decision made by the NSW Government that Wollongong and Newcastle would be classified as ‘metropolitan’ for a particular purpose reignited a debate about what constituted a ‘regional’ location, and what measures and metrics should be used to make such as classification (Figure 3.13).

When is a region ‘regional’? Debate over whether Newcastle, Wollongong are in regional NSW

ABC Newsline. By Glenn Cook. Updated 9 Mar 2018, 12:51pm.

A declaration by the NSW Government that Wollongong and Newcastle are “metropolitan” areas has sparked a debate about what should be classified “regional”.

The Benjilian Government plans to quarantine the \$4.15 billion in proceeds from the sale of the Snowy Hydro Scheme for regional infrastructure outside of the state’s three biggest cities.

NSW is often cynically dismissed by some people in the bush as being an abbreviation for ‘Newcastle, Sydney and Wollongong’, and the move to exclude the cities from the funding pool is likely to be popular west of the sandstone curtain.

But now the long-running argument appears to have been settled, with Labor this week saying it would adopt the Government’s definition.



PHOTO: Alison Park is a dairy farming area 20 minutes from Wollongong classified as “metropolitan”. (ABC Newsline, Glenn Cook)

RELATED STORY: Snowy cash windfall for regional NSW

⁷⁷ ABS (2019a)

⁷⁸ ABS (2019a)

⁷⁹ ABS (2019b)

⁸⁰ ABS (2020)

⁸¹ .id (2020)

⁸² <https://www.study.sydney/why-nsw/nsw-regions>

3.4.1. Statistical snapshot of international education in regional New South Wales

There were 18,769 enrolments in regional New South Wales in 2019. Of this group, the largest shares of enrolments were in Illawarra (Wollongong) (48.1%); Newcastle and Lake Macquarie (31.5%). There were also enrolments in Richmond – Tweed (Byron Bay and Lismore) (8.6%) and New England and North West (Armidale) (7.3%). A small number of enrolments were also recorded in Bathurst, Wagga Wagga, Port Macquarie and Coffs Harbour.



Figure 3.14: Map of international higher education student enrolments in regional NSW

The largest share of these enrolments were in higher education (66%), followed by ELICOS (15.3%) and Non-award (9.8%). Compared with other states and territories, there were comparatively few enrolments in VET (7.1%) and Schools (1.8%). New South Wales differs most from the national profile of international enrolments in its share of higher education enrolments, which comprises 19 more percentage points than it does in the national profile (Table 3.5).

Table 3.5: International student enrolments, by SA4, by 2019 (Share of NSW total)

State Statistical Area 4	Higher Education	VET	ELICOS	Non- award	Schools	Total
New South Wales	12,382	1,330	2,867	1,845	345	18,769
Illawarra	35.2%	0.5%	7.2%	5.0%	0.2%	48.1%
Newcastle and Lake Macquarie	21.5%	1.5%	4.5%	4.0%	0.1%	31.5%
Richmond - Tweed	1.0%	4.5%	2.5%	0.5%	0.1%	8.6%
New England and North West	6.1%	0.0%	0.8%	0.2%	0.2%	7.3%
Other	2.2%	0.6%	0.2%	0.2%	1.3%	4.5%
NSW - Total	66.0%	7.1%	15.3%	9.8%	1.8%	100.0%
PP difference – National Total	+19.0%	-21.7%	-1.0%	+4.7%	-0.9%	

As in Queensland, there appears to be stability in the sector breakdown since 2017 in New South Wales, with a slight increase in higher education (Figure 3.15). At course level, the largest percentage point differences where regional NSW is lower than the national total are in Diploma (-8.9). The largest percentage point differences where NSW is higher than the national total are in Doctoral Degrees (+6.9).

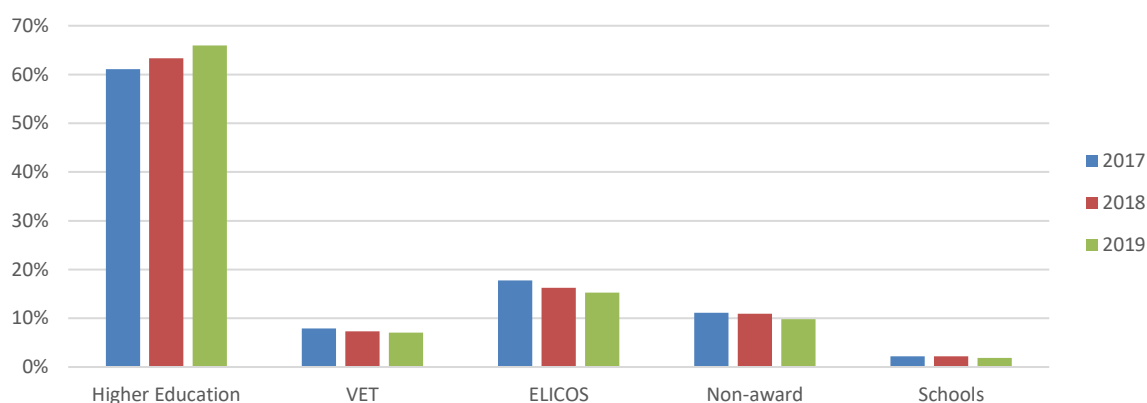


Figure 3.15: International student enrolments, by sector, 2017-2019 (Share of New South Wales total)

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

3.4.2. Case study: Bridging the ‘town and gown’ divide at The University of New England

1. The destination: Armidale

Armidale is located on the Northern Tablelands of New South Wales, approximately halfway between Sydney and Brisbane. The traditional owners of the land are the Anaiwan people. Of the 24,500 residents, around 90 per cent were born in Australia, compared to 67 per cent nationally. ‘Higher education’ represents 10 per cent of employment, compared to 1.5 per cent nationally.



The presence of four distinct seasons, unlike most of the rest of Australia, is the reason for the ‘New England’ moniker and the autumn colours are a notable feature of the city. Winters are cold with overnight temperatures dropping below -5°C with frost on the ground.

UNE describes Armidale as ‘peaceful, enjoyable and affordable’ and ‘a small, cosmopolitan city located in a picturesque rural setting surrounded by spectacular waterfalls, gorges, world-heritage national parks, cool-climate vineyards and diverse cultural heritage’. These descriptions describe ‘an affordable, quality living and learning experience in a regional Australian city’.

‘Located outside of a capital city but well serviced by transport links, Armidale offers a different Australian lifestyle experience...See kangaroos hop through the campus and enjoy the contrasting beauty of four distinct seasons. Armidale is a multicultural town that welcomes students from over 80 nations. Study here if you want to experience a truly Australian lifestyle in one of the nation's most beautiful and tranquil cities.’

2. The university: The University of New England

With a history extending back to the 1920's, UNE was the first Australian university established outside a capital city.

UNE regularly achieves high satisfaction ratings from its international graduates, including a five-star (maximum) rating for ‘Graduate Satisfaction’ and ‘Teaching Quality’ in the Good Universities Guide. UNE has ranked first in Australia for the propensity of international students to recommend UNE to their friends and family, and either first or second in Australia in the areas of technology, expert teachers, social facilities, on-arrival welcome, sporting facilities, library facilities and research.



UNE has over 20,000 enrolled domestic and international students with over 80 per cent studying their course online. There are around 1,100 international enrolments in higher education, which comprises around 5 per cent of the total UNE enrolment in 2018. The UNE 2018 Annual Report states that ‘During the reporting period, we sought to further diversify our revenue by increasing our number of international students’ (UNE, 2019, p.11).

In contrast to the majority of Australian universities, the highest enrolling source country at UNE is Nepal, followed by China, Saudi Arabia and the Philippines. Popular courses include Masters in Health, Bachelors in Management and Commerce and PhDs in Agriculture, Environment and Related Studies.

3. The messages used to attract students

The UNE website includes the following material in response to the question ‘*Why Choose UNE?*’

‘The University of New England is unique in every way. The location has no rival and the experience is world-class. [UNE] in Armidale, Australia, is a global leader in research and academic innovation. Our international students interact closely with teaching staff and enjoy being a part of a close-knit community. UNE's primary goal is to give you the knowledge and skills you need to make a difference in the world. Yet, while our focus is on the future, we are also proud of our heritage. As one of Australia's oldest universities, you can trust us to provide a high-quality learning experience...

We work hard to give you the best possible learning and research environment. If you decide to live on or near our main campus in Armidale, a regional city on the Northern Tablelands of New South Wales, you will find your second home. If you want to live in a major Australian city, our Sydney campus is an ideal choice.

Like many international students, you might decide not to study on campus at all. UNE offers many flexible and online learning options. No matter how you prefer to study, our academic and professional community will be on-hand to provide advice and support.

Come to UNE to improve your English, make lifelong friends and build a professional network. UNE is also an excellent choice if you are looking for a research centre with more than 700 PhD candidates. Our researchers are pursuing world-class fundamental and applied research in their fields. While UNE offers a range of courses and study options, you will leave here with so much more than a degree. We will help you master the skills you need to make a real difference in the world.⁸³

The material then focuses on five core messages: (1) An affordable, truly Australian lifestyle; (2) Close interaction with teaching staff; (3) Flexible and distance study options; (4) A modern English language centre; and (5) Support when you need it. UNE staff working in marketing and recruitment observed that student and parent decision-making tends to decide country first, with Australia being internationally recognised for safety, value for money and quality. After this, there are diversified priorities including study areas, location and rankings. Staff observed that students are generally attracted to the opportunity to socially connect with peers (domestic and international) and interact and engage more deeply with staff owing to the comparatively small on-campus population. They also tend to value a sense of community and belonging. This is seen as a distinctive drawcard for Armidale.

4. The reasons students were attracted to Armidale, UNE and the course

ACER spoke with 14 students in three focus groups. The students represented a diverse mix of nationalities, levels of study and research specialisations. For most students, they had little to no awareness or familiarity with Armidale prior to searching for information about UNE online and/or being provided with information by their agent. For one student, before they enrolled 'Australia meant Sydney and Melbourne (sometimes Canberra)'.

Ms A, a student from South China, has been studying a Master of Nursing Practice at UNE in Armidale for two years. She knew that she wanted to be a registered nurse. She had previously travelled in Australia and found it to be very beautiful and knew that she wanted to study. Although she has family in Queensland, and probably would have preferred to study at UQ, she received an offer at UNE first and decided to accept. She sees the course as helping her to become a Registered Nurse in Australia or moving into management back in China. She is not sure if she wants to stay in Armidale or Australia or not but does want to gain experience first and then go home. She said that the extra points for studying in a regional area did influence her decision but, as a counterbalance, noted that it is still challenging no matter where you study as you need to have good English language proficiency.

Mr B is from the Philippines and is in the final semester of his Masters in Professional Accounting. He was originally advised by his agent about the course at UNE. He already had friends in Australia and close friends in Armidale told him that UNE is a good choice. He was tossing up between Adelaide and Armidale. He has observed that Armidale is more like his home as he is not from a big city in the Philippines. His goals are to finish this semester, apply for postgraduate visa (post study work rights), work for 2-3 years, and ideally wants to stay in Australia.

⁸³ The University of New England (2019). 'Why choose UNE?' Available at: <https://www.une.edu.au/study/international/why-choose-UNE>

Ms C worked as a nurse in Southeast China for seven years. She didn't like the working atmosphere in her department so she quit her job and decided to study overseas. She heard about UNE from a friend who was themselves a recent UNE graduate. She was told prior to enrolling that the cost of living in a more 'remote' location would be lower and that the IELTS requirement lower. Her plan is to gain a post study work visa for 2-3 years. These plans depend on her English language proficiency as she plans to work as a Registered Nurse which has an IELTS 7, although it is 6.5 for entry into the course.



Ms D is a nurse from China and studying a Masters of Nursing Practice. She took the advice of her sister's family in China who told her that working in health care in Australia is a good career opportunity. She wanted to study abroad while she is still young and ideally wants to stay in Australia and become a nurse. Prior to the Masters, she completed 20 weeks at the English Language Centre, noting that the IELTS requirement is lower at UNE than other universities. She has observed that the placement component is particularly challenging. There is lots of commuting and some hospitals just can't accommodate students. Importantly, she didn't know about the placement component before starting the course. After completing the course, she plans to go to Melbourne as she has family and believes there are better job opportunities there.

Mr E is studying a Masters in Biomedical Science. Prior to enrolling at UNE, he had applied to 10+ universities. He received a conditional offer that required 36 weeks of English. He has observed that UNE is 'working as a family – they don't leave you alone'. After receiving his offer, he did some research online to learn about Armidale. He discovered that it has an airport and that Sydney and Brisbane are fairly close. Mr G is a PhD student from Bangladesh researching animal genetics and breeding (merino sheep). Australia was their first priority but did look and compare Australia to other countries. He received a scholarship for Australia, New Zealand, and Finland. He learnt that UNE is highly ranked for agriculture, and has already visited farms as part of their studies. He observed that Armidale has a very similar climate to their home country. He stated that 'my supervisor is a good geneticist – I want to be good geneticist'.

5. The factors underpinning success

Staff observed that there is a particular focus at UNE on sustainable growth and communicating 'the right message to match the right student, finding the right fit'. Students identified a number of 'success factors' based on their experiences so far. These align with UNE's marketing and promotional messaging as being characterised by quiet surroundings ('I can focus!'), beautiful scenery; accessible services ('can use the library all the time'), laid back lifestyle and sense of community ('lots of pressure on people in cities', 'very welcoming here'), a supported on campus experience ('international office provides lots of activities', 'librarians are helpful'), and cost of living ('cheaper accommodation than in Sydney/Melbourne').

Particular success factors raised include: (1) Fostering engagement on and off campus with social and cultural events; (2); Boosting awareness and familiarity of influencers and advisors; (3) Wrapping a range of supports and opportunities for engagement around students; (4) Fostering a sense of community and belonging; (5) Building English language proficiency in a unique environment.

6. The barriers and challenges

When asked what advice they would give other students thinking about studying in Armidale, students advised that 'new students need to learn to cook and drive'. The main categories of barriers and challenges include: (1) Public transport and accessibility); (2) Employment and employer engagement with international students; (3) Access to local non-UNE international student services (For some of these services, students must travel to Coffs Harbour or Newcastle. If they need to take their family, this can take multiple days and be costly); (4) Climate – Depending on what they are used to, some students remarked upon the cold climate ('very cold here') and they some were 'not used to winter blues'; (5) Availability of groceries – Some took time to adjust their eating habits and to what they saw as the high cost of fruit and vegetables. Some also perceived there to be fewer options and a lack of certain ingredients that are important ingredients in some cuisines.

3.5. Victoria

Statistical Overview - Victoria	
Capital city	Melbourne
Area	237,659 km ² (6 th)
Population (Sep 2019) ⁸⁴	6,629,870 (2 nd)
Population Density (Sep 2019) ⁸⁵	29.15/km ² (2 nd)
Major population centres	Melbourne, Geelong, Ballarat, Bendigo, Shepparton, Mildura, Warrnambool, Wodonga and the Latrobe Valley.
Gross State Product (\$m) (2018-19) ⁸⁶	\$446,079[2] (2 nd)
Gross State Product per capita	\$68,350 (6 th)
Unemployment rate (Jan 2020) ⁸⁷	5.1% (3 rd)
Three largest industries ⁸⁸	Health Care and Social Assistance (12.5%) Retail Trade (10.2%) Education and Training (8.6%)

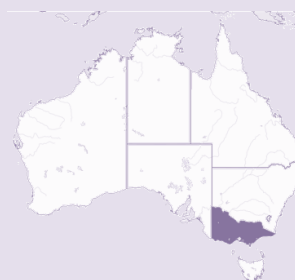


Figure 3.16: Geographic location of Victoria

The Study Melbourne website includes a section on ‘Studying in regional Victoria’. The landing page is currently branded as ‘Beyond Melbourne: Discover world-class education in Victoria’s regional centres’ (Figure 3.17). The website states that:



Figure 3.17: Study Melbourne website

‘For international students who choose to study in regional locations across Victoria, there are many scholarships available to support your studies, including Destination Australia scholarships. International graduates from a regional campus **may also be able to receive longer post-study work rights.**’

The section of the website on the Destination Australia scholarships includes the following reasons why students should consider studying in a regional area.

- ‘Studying in regional Victoria offers many benefits for students who want to live and study in Australia, including a **more relaxed and affordable student experience**. All tertiary institutions in Victoria’s regional cities offer **internationally recognised qualifications**, with research in many disciplines rated at above or well above world standard.’

Box 3.5: Study Geelong Ambassador Program

Study Geelong ambassadors help welcome international students to Geelong and help them integrate into the community and make the most of their time in Australia. They are responsible for promoting Geelong as a friendly place to learn, live and explore.

Ambassadors receive free professional development training including public speaking, leadership, networking and creating content for social media. They also help plan, promote and implement Study Geelong activities, and represent Study Geelong at functions and events



⁸⁴ ABS (2019a)

⁸⁵ ABS (2019a)

⁸⁶ ABS (2019b)

⁸⁷ (ABS (2020)

⁸⁸ .id (2020)

3.5.1. Statistical snapshot of international education in regional Victoria

There were 7,695 enrolments in regional Victoria in 2019. Of this group, the largest shares of enrolments were in Geelong (69.2%) and Ballarat (21.1%). A small number of enrolments were also recorded in smaller areas such as Mildura, Bendigo, Gippsland and Warrnambool.

The largest share of these enrolments were in higher education (74.4%), followed by VET (12.4%) and ELICOS (5.7%). Victoria differs most from the national profile of international enrolments in its share of higher education enrolments, which comprises 27.4 more percentage points than it does nationally (Table 3.6).

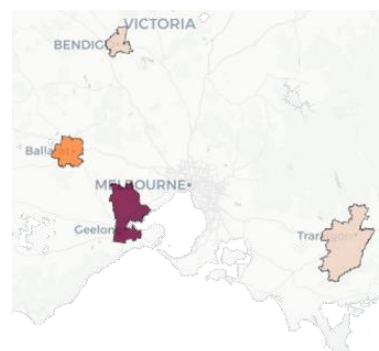


Figure 3.18: Map of international higher education student enrolments in regional Victoria

Table 3.6: International student enrolments, by SA4, by 2019 (Share of Victoria total)

State Statistical Area 4	Higher Education	VET	ELICOS	Non-award	Schools	Total
Victoria	5,722	951	437	202	383	7,695
Geelong	54.7%	6.0%	4.4%	2.0%	2.1%	69.2%
Ballarat	15.5%	4.2%	0.7%	0.3%	0.3%	21.1%
Other	4.2%	2.1%	0.5%	0.3%	2.6%	9.8%
Victoria - Total	74.4%	12.4%	5.7%	2.6%	5.0%	100.0%
PP difference – National Total	+27.4%	-16.5%	-10.6%	-2.5%	+2.2%	

Across regional Victoria, there appears to be stability in the sector breakdown (Figure 3.19), with a slight increase in the share of higher education enrolments in the last three years. At course level, the largest percentage point differences where regional Victoria is lower than the national total are in Non-AQF Award (-13.2). The largest percentage point differences where Victoria is higher than the national total are in Master's Degree Coursework (+19.3).

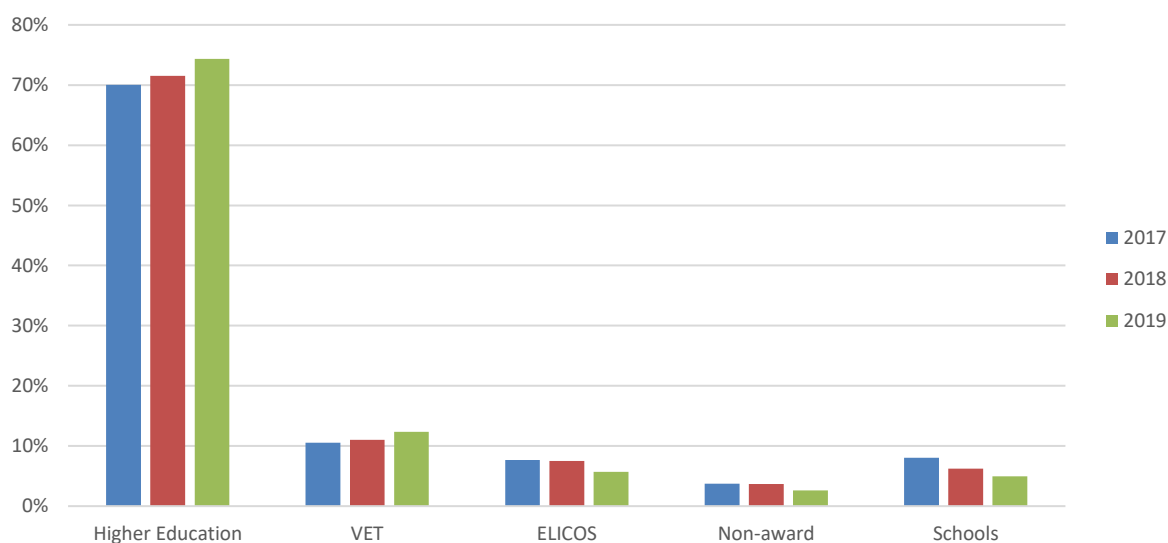


Figure 3.19: International student enrolments, by sector, 2017-2019 (Share of Victoria total)

Source: International student enrolment data supplied by the Department of Education, Skills and Employment

3.5.2. Case study: Attracting students to Deakin University

1. The destination: Geelong

Geelong is a port city located on Corio Bay and the Barwon River and is the second largest city in the state of Victoria. It is an hour from Melbourne and serviced by two international airports and train services from Melbourne. Deakin University promotes Geelong's coastal location as a major drawcard.

The traditional owners and the custodians of the land in and around Geelong and the Ballerine Peninsular are the Wathaurong. Deakin University promotes Geelong's coastal location as a major drawcard:



'Geelong sits at the start of one of the world's most beautiful coastal drives, the Great Ocean Road. Surf beaches, whale watching and the famous Twelve Apostles are on your doorstep.'

2. The university: Deakin University

Deakin University has five unique campuses located in Melbourne, Geelong, Warrnambool and the Cloud. Specialist programs include the Masters of Construction Management, Architecture, Medicine, and Teaching. Deakin University's first campus was established in Geelong Warrn Ponds in 1974. It is now the home to research, engineering and technology-related courses. It houses the Deakin Medical School, The Geelong Technology Precinct and The Elite Sports Precinct and has over 7000 students. The Geelong Waterfront campus is located on Corio Bay in the heart of the CDB and was founded in 1994. It is home to the schools of Architecture and Built Environment, Business and Law, Nursing and Midwifery, Health and Social Development and Psychology, and has over 4300 students.

Deakin University English Language Institute (DUELI) is located at the Geelong Waterfront and Burwood campuses and offers English language preparatory courses and direct entry to Deakin University and Deakin College. Deakin College offers a selection of pathways programs (Foundation, Diploma and Master Qualifying Program) into Deakin University at the Burwood, Waterfront and Warrn Ponds campuses.

3. The messages used to attract students

Deakin works closely with Study Geelong to promote Geelong as an 'education city', and 'a friendly place to learn, live, and explore'. On the Deakin University website, marketing images promoting Geelong include the natural environment and text linking it to the Great Ocean Road and famous Victorian surf beaches. Key message focus on the intersection between quality education and the local environment:

'Geelong sits at the start of one of the world's most beautiful coastal drives, the Great Ocean Road. Surf beaches, whale watching and the famous Twelve Apostles are on your doorstep.'

'Studying in regional areas does not mean a compromise on the quality of your education. Deakin's three regional campuses on the south-eastern coast of Australia each offer incredible teaching, cutting-edge facilities and a study experience that students love.'

'On campus there are heaps of outdoor areas and spacious new buildings, perfect for both socialising and studying.'

'Our Geelong Waterfront Campus is right on the seafront – in the heart of Geelong, about an hour away from Melbourne.'

'Geelong is the second-most populated urban area in Victoria (behind Melbourne), with a population of about 180,000 people.'

'Deakin Warrn Ponds Campus has incredible sports facilities – from a stadium, sports hall and courts, to a deluxe health club, complete with gym, work-out studios and group fitness classes.'

4. The reasons students were attracted to Geelong, Deakin and the course

ACER held three focus groups with different cohorts studying in Geelong. These included seven students from the Deakin University English Language Institute DUELI, three students studying pathways programs through Deakin College and four current undergraduate and postgraduate students. Students came from

nine different countries and all had researched Geelong prior to selecting Deakin. The majority used an agent to handle the paperwork. Students stated that a valuable source of information about what to expect in Geelong were the 'student stories' on Deakin University's Navigator blog.

Among the DUELI students, recommendations from family and agents had a big impact on the decision to select Geelong as a study destination. Four of the students interviewed were planning to study a Masters of Construction Management which is only available at the Geelong Waterfront Campus. Two students cited institutional links which lead them to study in Geelong such as an exchange program at Tsukuba University in Japan (English plus a semester of Sports Science) and research linkages with a university in Wuhan, China for a PhD candidate. A Nursing student from the Philippines noted that she was attracted to study in Geelong due to the availability of part-time work in the aged care sector.

Parents and extended family had a strong influence on the choice of destination for the three young students studying at Deakin College. Students stated that their parents chose Geelong because it is 'safe', 'less crowded', and 'peaceful'. Ms A from Malaysia, is studying a Diploma of Science. She stated her mother was the key decision maker, as she had studied her masters in Adelaide about '10 years ago'. Ms H stated that her mother sent both her children to study in Australia (her brother is studying at the University of South Australia) and they chose Geelong because it had the right match of subjects. Ms B from India has family living in Geelong and had attended high school in Melbourne. She plans to study nursing and her dream is to be cardiologist one day. Mr D from Brunei has a number of siblings studying internationally, including a sister at the Burwood campus. He was studying in Melbourne but moved to Geelong with the hope to study a Bachelor of Biomedical Science after his Diploma.

Advice from family and friends was also a major factor in selecting Geelong as a study destination for the group of postgraduate and undergraduate students interviewed. Ms C from the Philippines moved to Geelong to study a Bachelor of Nursing. With family in Australia, she was warned by an Aunt 'not to study in Sydney'. She decided on the Geelong Waterfront Campus as it was easier to get to than Burwood. Friends told her it was 'less competitive' to find part-time work in the health sector in Geelong and her agent informed her she could also get extra PR points towards migration. She stated she has 'no regrets'. Mr P found information about studying his desired course in Australia was 'restricted' in China. He wanted to study a Masters of Landscape Architecture and knew that there were only seven universities that offered it in Australia. He decided on Deakin but knew little about Geelong before he arrived except it had a 'quiet, slow lifestyle'. For the two PhD candidates, access to the right supervisor and department was a major factor in selecting Geelong. Ms D from Thailand noted it's been 'easy to make contacts' in her field with the support of her supervisor and she can 'focus' on her studies living in Geelong.

5. The factors underpinning success

Staff identified that they take a 'whole student' approach when promoting Deakin University to the international market. They have designed their entry requirements, course fees and course content to be uniform across the different campuses, allowing students to choose the destination that suits them. Key messaging is around a 'top-quality education' at a 'highly ranked university', 'innovative teaching', 'industry-based learning' and 'excellent graduate outcomes'.

Deakin University has been strategic about the type of course offerings available to international students in Geelong, providing English language programs at DUELI at the Waterfront Campus and a range of pathways programs through Deakin College at both campuses. It has also deliberately offered the popular Master of Construction Management only at the Waterfront campus to build international numbers in Geelong.

Students interviewed cited the high quality of teaching and learning at Deakin as contributing to their success so far. Students stated that they have found the staff to be 'supportive', 'friendly' and approachable. Mr D studying at Deakin College stated 'teachers take the time to train us'. Those studying undergraduate and postgraduate programs stated that the high 'quality' of teaching and learning, support services, relaxed 'lifestyle' and facilities have contributed to their success so far. Access to the local diaspora has also helped provided students interviewed with part-time work opportunities and a sense of belonging. Ms J states 'I have a lot of friends in the local Filipino community – Geelong is like my second home'.

Tailored support programs and industry-based learning were cited by students as providing them with valuable skills while studying. For example the DUELI leadership and Internship Program was cited by DUELI students as providing them with the opportunity to undertake paid work while gaining valuable communication and leadership skills during their studies. DUELI leaders act as mentors during orientation

programs, run weekly social activities, campus tours, and act as ambassadors for DUELI and Deakin University at community events. For other students like Ms D, access to industry, facilitated by her PhD supervisor, has expanded her professional network and improved her understanding of environmental waste management. She plans to return to Thailand use skills learnt during her studies to 'improve government policy and urban planning' in waste management.

6. The barriers and challenges

When asked about the barriers and challenges students faced living and studying in Geelong the following issues were discussed. A lack of adequate public transport services and concession fares for international students was seen as a barrier. Students stated 'the bus is not as good on weekend or late at night', 'the tickets are expensive' and 'there is no discount'. Some found finding accommodation 'harder than expected' as they needed to provide a lot of paperwork and proof of income to rent privately, some felt that the university accommodation was 'expensive'.



Some students noted that most shops and eateries close around 7-8pm in Geelong and there isn't a lot of 'cheap fresh food' markets in Geelong compared to Melbourne. Overall the student found Geelong to be safe but a number of the students stated that the streetlights weren't bright enough at night, which made them feel 'uneasy walking around at night.'

3.6. Summary of key messages

The profile of international students in regional study destinations is summarised in Figure 3.20.

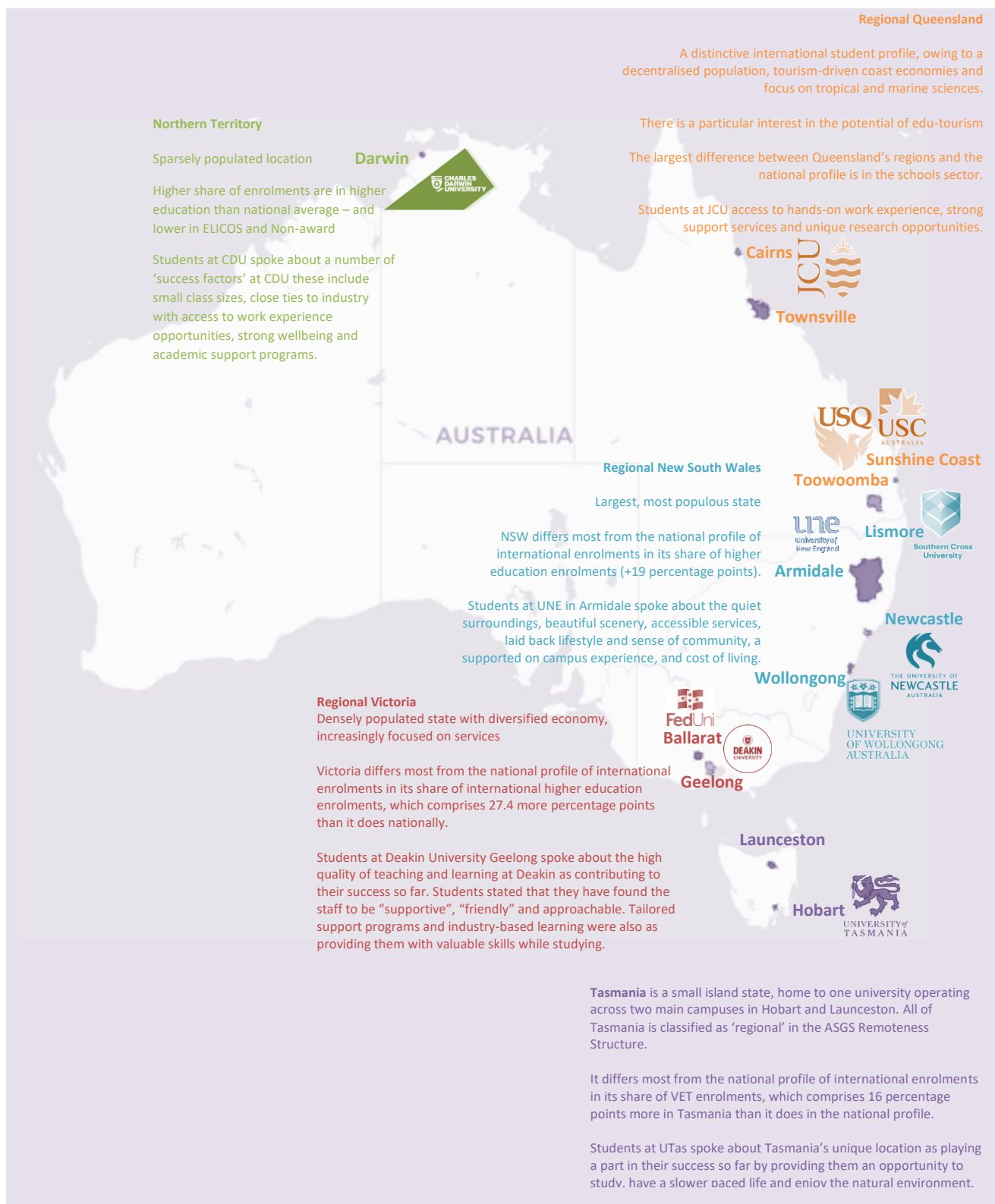


Figure 3.20: Chapter 3 - Summary of key messages

4. The decision-making process of international students in regional destinations

The chapter investigates the decision-making process of international students – prospective and current – in regional destinations to identify the pull factors attracting them to these locations and the success factors that make these strategies work in practice.

4.1. What the research literature says

Drawing on the 2019 International Student Survey (Australian edition), QS (2019b, p.10) states that:

‘...there is a clearly defined path that the typical international student takes when making a decision on where, and what, to study. Students typically decide on a course or subject to study, before deciding on a location and institution to study it in. This emphasises the importance of career outcomes in the decision-making process, with the capacity for a course to lead to a student’s chosen career among the most important factors considered when selecting a course. Institutions should consider employability and career-readiness to be key elements of their pitch to prospective international students.’

It is generally agreed that students tend to choose in order of course, country and institution (Table 4.1).

Table 4.1: Decision-making process of international students

Decision 1: Course	Decision 2: Country	Decision 3: Institution
<ul style="list-style-type: none"> • Personal interest • Employment outcomes • Affordability 	<ul style="list-style-type: none"> • International recognition • Quality of education • Home country recognition • Destination employment opportunities • Affordability 	<ul style="list-style-type: none"> • Rankings and reputation • Affordable fees • International recognition • Course structure

At a macro level, Deloitte Access Economics (2015) usefully distinguished between three categories in the process: (1) **accessibility** of Australian international education (including price, legal, and physical aspects); (2) **experience** of international learners during their study, both inside and outside the classroom; and (3) **outcomes** of international learners post-study including their educational, employment, and personal achievements. QS (2019b, p.10) offers a similar categorisation, where it was argued that the most important factors tend to relate to one of three key themes:

- **Quality** – Access to universities with strong reputations, high quality teaching, and which score well in independent rankings.
- **Affordability** – The cost of living in the area, the availability of affordable rentals or student accommodation, the ability to find paid work, and affordable tuition and access to scholarships to help offset tuition costs.
- **Hospitality** – The capacity of the university and surrounding locale to provide a safe, welcoming and nurturing environment for international students.

Recent results of surveys of international students in Australia indicate that 75 per cent of international students in Australia said that Australia was their first choice for overseas study (DET, 2019c). The 2019 QS International Student Survey (Australia edition) reported that:

‘When thinking about what concerns they might have about studying abroad, there is a clear tendency for prospective students to raise concerns which relate to their everyday life, rather than their education specifically, with cost of living, finding accommodation and employment, and safety ranking among the greatest concerns, while concerns relating to academic success, meeting their family’s expectations, and studying in English ranking comparatively lowly’ (QS, 2019b, p.11).

Overall, research into the decision-making process of international students generally agrees that international students choose to **study in Australia** because of five factors:

1. **quality** of teaching⁸⁹;
2. reputation of the **qualification**;
3. personal **safety** and security;
4. reputation of **Australia’s education system**; and
5. reputation of the education **provider** (DET, 2019c).

However, as evidenced in the project case studies, there are a range of exceptional factors that can re-order this process – and the relative influence of factors within - for students considering regional study destinations.

4.2. What industry experts say

Expert-penned lists of pull factors attracting international students to regional study destinations have common themes. The 2018 national review and consultation process informing the ‘*Growing international education in regional Australia*’ (EMCIE, 2018a) review, as well as the valuable work conducted by consultant Rob Lawrence (Lawrence, 2019a; 2019b), paint a picture of the factors that make a difference and how they play out in the decision-making process of students. This earlier work has identified a set of common themes including:

- access to a course of choice, often based around a **specialisation and course reputation**;
- a more **affordable living and studying destination**;
- the desire for a **smaller environment**, not the big city experience;
- features of the **Australian landscape** which resonate with individual values (e.g. surf, climate);
- desire to live and become immersed within an **Australian community**, often aligned with **lifestyle** considerations;
- the presence of **family and / or friends** who reside in the destination;
- desire to live and study in a **genuine and authentic environment**, often based around incidental images and impressions of Australia (e.g. fresh air, blue sky); and
- a perception that **tuition fees at regional institutions are more affordable** (Lawrence, 2019a; Lawrence, 2019b).

Industry experts, often senior leaders in the international education sector, have produced a set of pull factors built around similar these to these in various forms of media. Some of the most recent examples are included in Table 4.2.

⁸⁹ In a report titled ‘*Beyond the data: Influencing international student decision making*’ Hobsons defines ‘quality’ for international learners as: (1) the quality of the courses and the institutions; (2) the global recognition of the qualifications; and (3) improved employment outcomes, whether in Australia, at home, or in a third country (Hobsons, 2014 [now QS]).

Table 4.2: Examples of pull factors

2018 Consultation Paper: Growing International Education in Regional Australia	2018 Regional Universities Network (RUN) submission to 2018 Consultation Paper: Growing International Education in Regional Australia	In 2018, Vice Chancellor of Federation University, Helen Bartlett wrote:	In 2018, Vice Chancellor of the Sunshine Coast, Greg Hill wrote:	In 2018, Vice-Chancellor of Charles Sturt University, Andrew Vann , stated:	In 2019, Cavanagh & Burton (2019) wrote in <i>'Internationalising regional Australia: a case for change'</i>
'Regional Australia has much to offer international students, by way of a unique student experience, greater community engagement as well as inexpensive course offerings and smaller class sizes. Evidence demonstrates international student satisfaction with the living and learning experience in regional Australia consistently rates highly, and above satisfaction levels for students in metropolitan centres.'	'International students studying in the regions have high levels of satisfaction with their learning experience; exposure to the attractions of an authentic Australian regional lifestyle; a lower cost of living, less congestion and smaller campuses and class sizes than in major cities; a friendly and supportive environment which gives more opportunity to network with domestic students, lecturers and local communities to build English, career and life skills; practical degrees; regional work experience in partnership with regional industry; flexible mode of study; good quality of life; high quality teaching; excellent research in key areas of strength, including agriculture, health science, environmental science, digital health and marine science etc.; a conducive environment for study; and speciality courses.'	'A range of factors that differentiate the regional experience of international students from that of their metropolitan peers include the conducive environment for study, smaller class sizes, lower cost of living, quality of life, greater opportunity to be involved in the community and improve their English, and safety. For postgraduate international students, many of whom are accompanied by their families, the regional option can prove even more attractive.'	'International students studying at regional campuses are a boost to local economies through their expenditure, that of family and friends, and the payment of student fees... But, most importantly, international students studying in the regions record high levels of satisfaction with their learning experience, a high level of acceptance into the local community, and are exposed to the attractions of an authentic Australian regional lifestyle. These include a lower cost of living and less congestion than in major cities'	'Regionally based higher education offers supportive learning, higher teacher-student ratios, and the majority of students get the opportunity to gain industry experience throughout their degree. The regions offer access to amenities, housing affordability, a lack of traffic congestion, a range of industries and entrepreneurship opportunities. In short, they provide a safe, clean, supported and affordable base for studies.'	'...regional Australia hasn't promoted the benefits of study in a regional areas as best we could: world-standard academic programs; clean, healthy, safe and secure environment; lower cost of living and welcoming communities... Many regional campuses have a strong focus on applied research and impact. Many focus on research associated with agriculture (food security), environmental sustainability and management (e.g. water security), regional economic development and provision of key human services to ensure regional sustainability (health and culture).'

The list of pull factors attracting international students to regional study destinations can be better evidenced. There are clearly consistent themes in these lists of advantages of, and barriers to, regional study (see Box 3.6). However, here has been little replicable evidence collected and used to promote regional study and living destinations. To continue building the evidence base, this chapter addresses three research objectives:

- To develop evidence-based knowledge on **pull factors** for international students to study in Australian regional higher education institutions, including study pathway connections with metropolitan and offshore courses (Research Objective 2).
- Research Objective 4 of this project is to develop evidence-based information about **what underpins existing success** in attracting international students to study in regional areas and identifying opportunities for further expansion.

- To develop evidence-based information to enable the **development of marketing messages**, including the student decision-making process and students' reasons for choosing to study in regional areas over other options (Research Objective 5).

This project has developed a framework of pull factors based around the 7 P's of service marketing (i.e. product, price, promotions, place, people, process, physical evidence). The relative importance of the factors were subsequently tested with current international students in the Student Experience Survey (SES) and project case studies.

Box 3.6: Barriers to attracting students to the regions

While not an explicit part of the project objectives, it is important to acknowledge the barriers – real or perceived – that can make it challenging to attract international students into regional areas. These may include:

- There may be fewer institutions and courses to choose from
- There are few, if any, institutions that are among the highest ranked institutions globally, in Australia
- The institutions, because they are lower ranked, are in some way inferior, lower quality, less recognised
- A lack of employment opportunities can offset cost savings, actually making it about as affordable if not less affordable as major cities
- Additional travel costs (e.g. purchasing a car, accessing work placements, regional flights)
- Additional costs in accessing government offices when they are located outside the township/city
- The notion of 'regional' itself can have connotations feeding perception, biases, prejudices (e.g. provincial, less developed).
- Low level awareness globally of Australian destinations outside of east coast capital cities
- Less choice and fewer options in entertainment, retail, shopping (e.g. after hours, weekends)
- It may be more difficult to find suitable and affordable on-campus and off-campus accommodation (e.g. homestay)
- Semester timetables, a 20 hour work limit and early closing of retail puts restrictions on hours, jobs available
- They may be limited internships and work placement options available, leading students to travel long distances
- They may be more prone to natural disasters and environmental restrictions (e.g. floods, droughts, water restrictions)
- They may be more affected by downturns in the global economy, particularly areas reliant on tourism and short-stay visitors
- Less infrastructure (e.g. libraries, shopping centres, medical clinics, utilities) leads to fewer options
- Fewer public transport options available (e.g. train, tram, bus, ferry) leads to inaccessibility
- There are no concession fares for international students on public transport in Australia
- Where there is no/limited diaspora and community connections, students can feel lonely and isolated
- Communities and local employers may, in some instances, be unfamiliar with international students and therefore resistant
- Ongoing changes to migration settings and rules may create uncertainty

4.3. What is promoted to prospective students

Following their national consultations in 2018, the Expert Members of the Council for International Education recommended that Government:

'Adopt a nationally consistent approach to marketing and promotions through Australia's new nation brand, and use Study in Australia and other digital platforms to promote the

unique strengths and attributes of regionally-based institutions through targeted campaigns’ [EMCIE, 2018c, Rec 3.1].

In response, Austrade has developed Collaborative Marketing Framework with the objective of facilitating a nationally consistent approach to marketing and branding of Australia (Austrade, 2020a). Coordination is seen as having the potential to increase Australia’s profile, improve stakeholder engagement and amplify industry capacity amongst sector representatives.

The main public and digital interface for these efforts is the Australian Government’s Study in Australia website (www.studyinaustralia.gov.au). This is the official Australian Government website for international students, both those considering studying in Australia and those already studying in Australia (Figure 4.1).

The *Study in Australia* website currently provides the following ‘reasons to study in Australia’: (1) Discover how to be an **innovative, agile thinker**; (2) Study at **globally ranked** institutions; (3) Gain **work experience** while you study; (4) Access extensive student **support services**; (5) Live and study in **safety**; (6) **Feel welcome** in a multicultural society; (7) Make the most of **Australia’s great outdoors**; (8) Enjoy a **high standard of living**; and (9) **Employment opportunities**.

Austrade is refreshing Study in Australia to include information on Australia’s diverse study destinations. To guide this work, Austrade has created a set of strategic marketing messages that ‘...focus on promoting Australian education in a consistent way, honing in on key points of difference that appeal to an international audience’ (Austrade, 2020). The six attributes are each supported by headline statements, messages and proof points (Figure 4.2). The SIA refresh utilises the six attributes of Australian education (**diversity, employability, environment, quality, student experience and visionary**) developed in partnership with states, territories and the sector to improve consistency in marketing Australia’s international education and training value proposition.

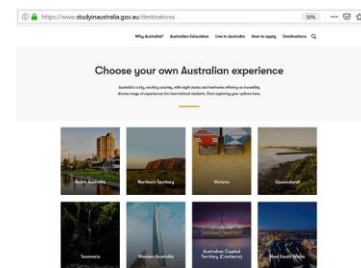


Figure 4.1: Study in Australia website

Diversity	Employability	Environment	Quality	Student experience	Visionary
<ul style="list-style-type: none"> • Headline statements • Many providers • Culturally diverse • Free to choose • Opportunity • Connected • Diverse environment • Choice of delivery <ul style="list-style-type: none"> • Promotional messages • Student diversity • Many providers • Accredited training • All levels • Research diversity • Many schools • Accommodation choice • Many nationalities • Multiple options • Student body 	<ul style="list-style-type: none"> • Headline statements • Future-focused • Job-ready • Global recognition • Ways of thinking • Networks • Work experience • Outcomes • Up-to-date <ul style="list-style-type: none"> • Promotional messages • Practical experience • Relevant skills • Work-ready • Current practice • Constant review • International support • Subject choice • Employer connections • In demand • Job events • Work skills • Up-to-date 	<ul style="list-style-type: none"> • Headline statements • Natural environment • Friendly • Liveable • Safe • Green • High standard of living • Democratic • Modern <ul style="list-style-type: none"> • Promotional messages • Vital industry • Advanced • Natural • Secure • Support • Stability • Diversity 	<ul style="list-style-type: none"> • Headline statements • Uncompromising • Influential • Well-developed • Accredited • Respected <ul style="list-style-type: none"> • Promotional messages • Global influence • Accredited • Government authority • High ranked • Reputation • High standards • Quality assured • Highly regulated • World-leading 	<ul style="list-style-type: none"> • Headline statements • Support • Protection • Constant improvement • Opportunity to work • Access to information • Scholarships <ul style="list-style-type: none"> • Promotional messages • Be supported • Welcoming • Be heard • Be protected • Experienced • Dedicated help • Constant review • Real outcomes • Here to help 	<ul style="list-style-type: none"> • Headline statements • Inventive • Collaborative • Outward-looking • Recognised • Entrepreneurial <ul style="list-style-type: none"> • Promotional messages • Global connections • World-class • Research strength • Pro-innovation • Major investment • Global links • Government funded • Internships • International Baccalaureate • Industry relevance • Research ranking • Global links • Career mobility

Figure 4.2: Strategic Messages: Promoting Study in Australia

Source: Austrade (2020). Strategic Messages: Promoting Study in Australia⁹⁰

4.3.1. Study clusters

There are more than 18 study clusters representing regions across Australia. A number of these are not-for-profit incorporated bodies that involve shared leadership from the sector, local government and state governments. Under a new nation brand, Austrade is building on these initiatives to develop marketing materials and targeted campaigns, to promote regional study destinations.

The landing page on each study cluster webpage currently uses some variation of the ‘Study-Live-Work’ trichotomy. The current website messaging includes references to studying, living and working in the destination (Table 4.3). Additional material relates to ‘play’, ‘meet’ and ‘discover’.

⁹⁰ <https://www.austrade.gov.au/Australian/Education/Services/strategic-messages>

Table 4.3: Study clusters – Study, Live, Work

Study cluster ⁹¹	Messaging	Study	Live	Work	Discover	Other
Study in Australia ⁹²	Everything you need to know to make the most of Australia's world-class student experience. Studying in Australia is a fantastic way to further your education and career prospects.					
Study Tasmania ⁹³	Unlock your future	✓	✓	✓	✓	Host
Study NT ⁹⁴	High quality Australian qualifications in a safe, friendly community Boost your job and career growth opportunities We are Australia's gateway to Asia and Asia's gateway to Australia	✓	✓	✓	✓	Meet
Study Queensland ⁹⁵	Start Here. Go Anywhere.	✓	✓			Why
Study Cairns ⁹⁶	Cairns: An education city in a tropical location	✓	✓	✓		Play
Study Townsville ⁹⁷	Study in paradise	✓	✓			
Study Sunshine Coast ⁹⁸	Study, Live, Work, Play on the Sunshine Coast	✓	✓	✓		Play
Study NSW ⁹⁹	Creative, Dynamic. Alive	Learn	✓	✓		
Study Geelong ¹⁰⁰	Your Education Journey Starts Here	✓	✓	✓	Get to know	

4.3.2. Universities

International student course guides often include detailed information on the unique attributes of each destination. An analysis of 2020 international course guides shows that these documents invariably include information, as is required by the National Code, on: (1) Description of the locations/destinations in which they are based; (2) Accommodation; (3) Cost of Living; and (4) Pathways (e.g. Academic English, Academic Skills, Diploma). Figure 4.3 summarises the general approach used to describe the institution, destination and courses.

⁹¹ It is estimated that there are more than 18 study clusters representing regions. A number of these are not-for-profit incorporated bodies that involve shared leadership from the sector, local government and state governments.

⁹² <https://www.studyinaustralia.gov.au/>

⁹³ <https://study.tas.gov.au/>

⁹⁴ <https://studynt.nt.gov.au/>

⁹⁵ <https://www.studyqueensland.qld.gov.au/>

⁹⁶ <https://www.studycairns.com.au/>

⁹⁷ <https://www.studytownsville.com.au/en/home/>

⁹⁸ <https://www.studysunshinecoast.com.au/>

⁹⁹ <https://www.study.sydney/why-nsw/nsw-regions>

¹⁰⁰ <https://thinkgeelong.com/study-geelong>

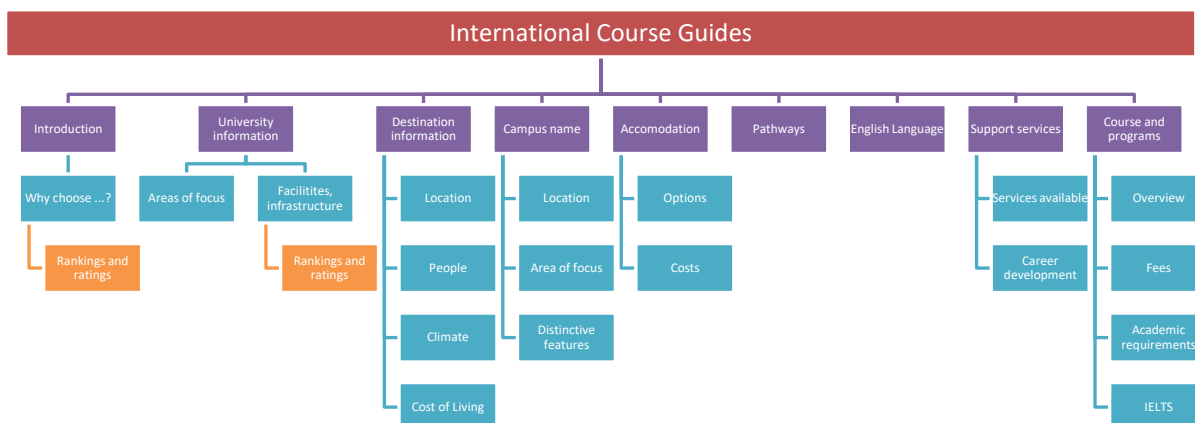


Figure 4.3: Common features of International Student Course Guides in regional study destinations
 Source: International student Course Guides published by universities in regional destinations for the 2020 Academic Year

University messaging tends to focus on a combination of the individual, the institution and the destination. Table 4.4 provides a high level summary of the key messaging from study clusters and universities in regional destinations. These are indicative of the spirit of innovative, exploration and uniqueness that is represented in the messaging.

Similarly, universities will distill the **main reasons and/or benefits of studying at their institution in a particular location.** For example, the University of New England web site¹⁰¹ asks students to *‘Consider the top 5 reasons to live and study at UNE Armidale:*

1. We have one of the lowest staff-to-student ratios among Australian universities
2. Our town welcomes students from over 80 nations
3. We are an internationally recognised research centre with over 700 PhD candidates
4. UNE's modern English Language Centre offers a direct pathway to studying here
5. With national parks and state forests right on the campus doorstep - Aussie adventure calls!



Figure 4.4: 2020 International student course guides

Table 4.4: Marketing messages used by universities, 2019-2020

University	Key message
The University of Tasmania	A Place Unlike Any Other. Study outstanding courses in one of the world’s most extraordinary locations.
The University of Newcastle	The World Needs New
The University of Wollongong	Where doors open From here to every corner
James Cook University	JCU: Ready today for tomorrow
Charles Darwin University	Your New World University
Charles Sturt University	Study with CSU
University of Southern Queensland	Discover how you can become more. On your own terms. In your own time.
The University of Queensland	Create Your Future

Source: International student Course Guides published by universities in regional destinations for the 2020 Academic Year

¹⁰¹ <https://www.une.edu.au/study/international/living-in-australia>

A deeper analysis of international student course guides reveals a common set of themes in the messaging. To build a complete picture of the factors currently in use by Australian universities, each international student course guide was analysed to identify the main thematic features. The findings of which are presented in Table 4.5.

Table 4.5: Analysis of Marketing and Promotional Material

Pull factors	Domain	Verbs to describe	Evidenced by	Services and facilities
Pull to institution	Institution	Distinguished, tradition, long history, rich history, visionary, progressive	Years since establishment of university	
		Environmentally sustainable, progressive, social justice	Accreditation	
		Institutions have international perspective, global outlook, internationally recognised / accredited programs,	Number of international partnerships	
	Teaching and research	High quality, highly-ranked, award winning, excellence,	Rankings and ratings (e.g. QILT, QS, Times/THE, ERA, GUG, ARWU)	
		More personalised academic and learning support, 'lecturers know you by name'	Smaller class sizes, staff to student ratios	
	Research	World-class, world-leading, world-renowned, future-focused, innovative, state-of-the-art, next generation, impact, ground-breaking, latest advances, pioneering, entrepreneurial, new-thinking, cutting-edge, environmentally, sustainable, modern, latest, outstanding		Centres of Excellence
	Programs (field and level)	Unique, interesting, distinctive, specialist, choice, 'living laboratories', proximity to natural environment, 'right fit', discipline-specific	Course descriptions Learning outcomes	Programs embedded in local environment, landscape, community, ecosystem Overseas study
	Programs (industry and employment)	Connected, industry relevant, industry aligned, professional experience, professional networks, exposure, experience, networks, career, practical, opportunity, possibility, job-ready, opportunity, grass-roots connections, relevant, hands-on	Graduate employment rates, Employer satisfaction	Work-Integrated Learning (WIL), Clinical placement, Practicums, Internships, Field trips Part-time and casual work
	Programs (access and pathways)	Flexible, access, pathways, direct pathway, FastTrack	IELTS score requirements Academic requirements	Academic support English Language Support (EAP) / English Language Centres (ELC) Foundation programs
	Cost of tuition	Competitive course fees, Quality on a budget, generous scholarships	Tuition fees and additional study expenses	Scholarships (university, Australian Government, Home Government, private)
Support services	Personalised, accessible, pathways, inclusive,		On-campus accommodation, inter-	

Pull factors	Domain	Verbs to describe	Evidenced by	Services and facilities
				campus bus shuttle, counselling, medical centre, childcare facilities, career services, libraries, computer labs, places of worship
	Engagement and experience	Diverse student profile, diverse perspectives, like-minded people, links with Indigenous communities, belonging, involved, build,	# of nationalities on campus	Clubs, societies, groups, associations, bookshops, hairdresser, cafes, gyms
	Student at this institution in this place	Culturally aware, globally conscious, social aware, engaged, global citizens, make a difference, make your mark, open-up, challenging, friendship, rewarding, life-changing, inspiring, grow, achieve, memories, dream, gain, confidence, horizons, independent thinkers, create, aspire, confident, embark, potential		
Pull to destination	Destination	Rich history, charm, character, interesting, located,	Indigenous history Years since British settlement	
	Cost of living	Affordable, cheaper, cost-effective, reduced	Cost of living measures	Off-campus accommodation, groceries, utilities
	Transport and access	Connected, airports, rail, buses, trains, walk, regular, options, convenience	15 minutes to..., 'only a short drive',	International airports, shuttle buses, bike paths
	People	Community, welcoming, supportive, multi-ethnic, multicultural, close-knit, relaxed, diaspora, safe, connected, belonging, comfortable	Languages spoken, country of birth	
	Lifestyle	Vibrant, thriving, bustling, buzzing, lively, dynamic, cosmopolitan, popular, liveable, healthy, active, friendly, peaceful, quiet, relaxing, breathing space, refresh, tranquil,		Festivals, markets, shopping, galleries, museums, cafes
	Geography	Mountains, oceans, wilderness, beaches, cityscapes, picturesque, World Heritage listed, coastline, natural beauty, wildlife, tropical, rugged, climate, spectacular, architecture, unspoilt, pristine	Maps Climate statistics	
	Student in place	Authentic, real-world, meaningful, adventure, explore, discover, experiences, the outdoors, native, access to truly rare experiences, use as a base, lifelong friends		Volunteering, extracurricular activities

Source: International student Course Guides published by universities in regional destinations for the 2020 Academic Year

Like universities in metropolitan areas, universities in regional destinations will often cite Australian and global rankings as a means of communicating a competitive edge and internationally-recognised standard of quality. The current QS rankings are included in Attachment 3 for reference.

4.3.3. Agents and social media

There are also a number of YouTube channels and other social media that offer advice on the advantages and disadvantages of studying in region Australia. Typically this information reinforces messaging around the core themes of cost of living, population size, diversity and lifestyle. Recently, these messages have focused on the introduction of the new regional visas, the priority visa processing, post-study work rights and additional points that accrue for migration from studying in a regional area. IDP Education Australia currently has the following information and infographic on its website:

'Lifestyle

Benefit from a quality lifestyle in a quieter, lesser populated city. There's hardly any traffic congestion, no long queues to get where you need to be, allowing you to enjoy hobbies, shopping and eating out in a more relaxed way.

Deeper sense of community

Enjoy a stronger sense of community. People are friendly and take the time to get to know one another in the community. This can help you develop confidence in your English and gain a deeper understanding of the culture and build a strong support network.

Lower cost of living

The cost of living is lower in a regional city, rent and cost of dining out are considerably lower. Enjoy being able to save extra dollars for your future in Australia.

Escape to the great outdoors

Appreciate being close to the great outdoors. Explore the nature, walking tracks and nearby beaches on weekend adventures.

Smaller class sizes

International students enjoy smaller class sizes, allowing them to build a strong network with students and teaching staff. More individualised attention is a benefit and having the opportunity to ask more detailed questions about career opportunities is also a plus.' (IDP, 2020)



Figure 4.5: IDP Education Australia Benefits of Studying in Regional Australia

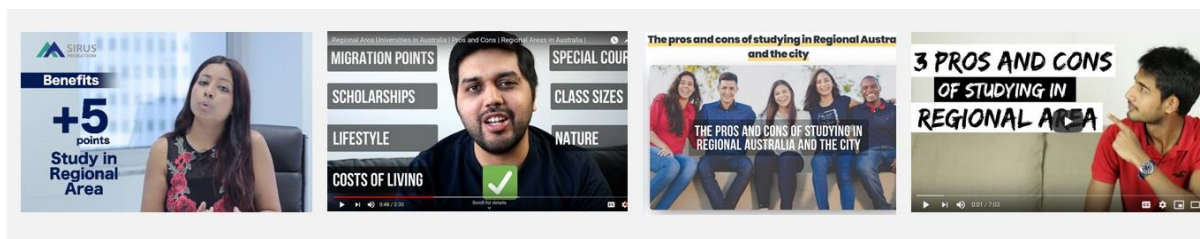


Figure 4.6: Examples of YouTube videos providing advice on study in regional Australia

4.4. What students say is important

The factors most important to all international students in Australia relate to reputation. The three factors *all* international higher education students rated most ‘important’ or ‘very important’ were:

1. the reputation of the **institution** (81.5%);
2. the reputation of the **course** (79.7%); and
3. the reputation of **Australian higher education** (79.6%).

Table 4.6 affirms the widely-accepted view that ‘reputation of the institution’¹⁰² is of particular importance to students in Category 1 (81.5%) and Category 2 (81.4%) destinations.

Table 4.6: Importance of factors in decision-making

Response	Category 1: Major Cities	Category 2: Cities	Category 3: Major Regional Centres	Category 4: Regional Centres and Other Regional Areas	Total	Regional subtotal
Cost of studying /course fees	77.8%	75.9%	81.4%	81.5%	77.7%	81.4%
The reputation of the course	79.9%	79.4%	77.5%	79.4%	79.7%	78.4%
The reputation of Australian higher education	80.1%	78.9%	77.6%	79.1%	79.6%	78.3%
The reputation of the institution	82.0%	81.4%	78.3%	78.3%	81.5%	78.3%
Cost of living	74.1%	73.5%	76.8%	79.2%	74.3%	77.9%
Personal safety considerations	78.4%	77.8%	76.9%	77.8%	78.1%	77.4%
Course entry requirements	75.8%	75.3%	74.6%	78.3%	75.8%	76.3%
My personal interests	75.4%	73.5%	72.1%	75.1%	74.8%	73.5%
Accessibility and transport options	72.5%	68.4%	69.3%	71.0%	71.4%	70.1%
The campus location	60.4%	57.0%	62.2%	63.9%	59.9%	63.0%
Connections to friends, family and social networks	61.3%	57.8%	59.1%	63.6%	60.6%	61.2%
Culture or lifestyle	61.6%	57.9%	60.2%	61.6%	60.7%	60.8%
Opinions of family or friends	51.7%	49.8%	49.7%	53.3%	51.3%	51.3%
Recommendation of an education agent	43.8%	40.6%	44.4%	42.8%	43.1%	43.7%

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Thinking about your decision on where to study, how important were each of the following factors in making that decision?’ | Percentage responding ‘Important’ or ‘Very Important’]

¹⁰² This appears to be consistent with the findings of a recent survey on graduate outcomes of international students who have previously studied in Australia (ACER, forthcoming). In that 2018 survey, respondents were asked to reflect on their decisions around their choice of institution. When asked about the most important factor influencing their choice of institution, reputational factors, whether real or perceived, were cited as the most important factor by 46 per cent of graduates. Practical factors, including availability of funding, offered a scholarship, entry requirements, program cost and institution location, were cited as the most important factor by 23 per cent of graduates.

The factors most important to international students in regional destinations relate to cost of studying (course fees) as well as reputation of the institution and course. The three factors international students in regional locations rated most ‘important’ or ‘very important’ were:

1. the cost of studying / course fees (81.4%);
2. the reputation of the course (78.4%); and
3. the reputation of the institution (78.3%) (Figure 4.6).

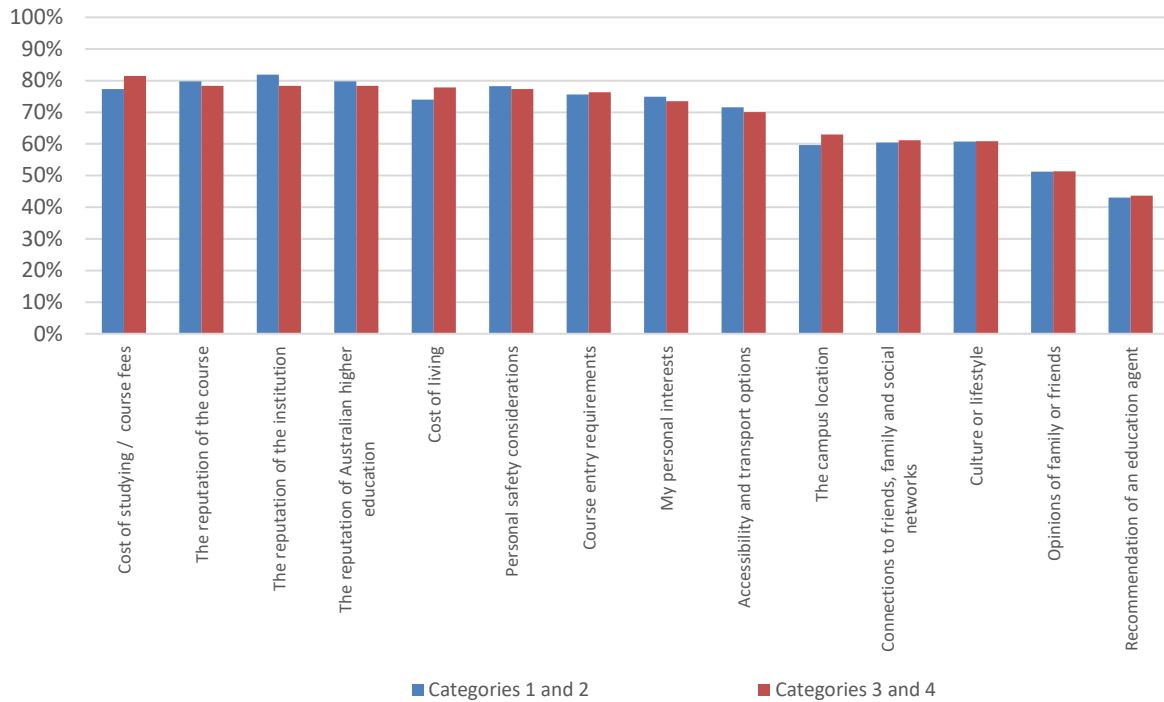


Figure 4.6: Importance of factors in decision-making – metropolitan / regional

Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Thinking about your decision on where to study, how important were each of the following factors in making that decision?’ | Percentage responding ‘Important’ or ‘Very Important’]

The factors *more* important to international students in regional destinations relate to the campus location, the cost of studying and the cost living. The three factors students rated more ‘important’ or ‘very important’ by regional students than metropolitan students were:

1. cost of studying / course fees (+4.1 points);
2. cost of living (+3.9 points); and
3. the campus location (+3.3 percentage points higher than the total);

The only other notable difference was that, while it was important overall, students in regional destinations were -3.5 percentage points *less likely* than students in metropolitan areas to consider ‘The reputation of the institution’ as ‘important’ or ‘very important’ (Figure 4.7).

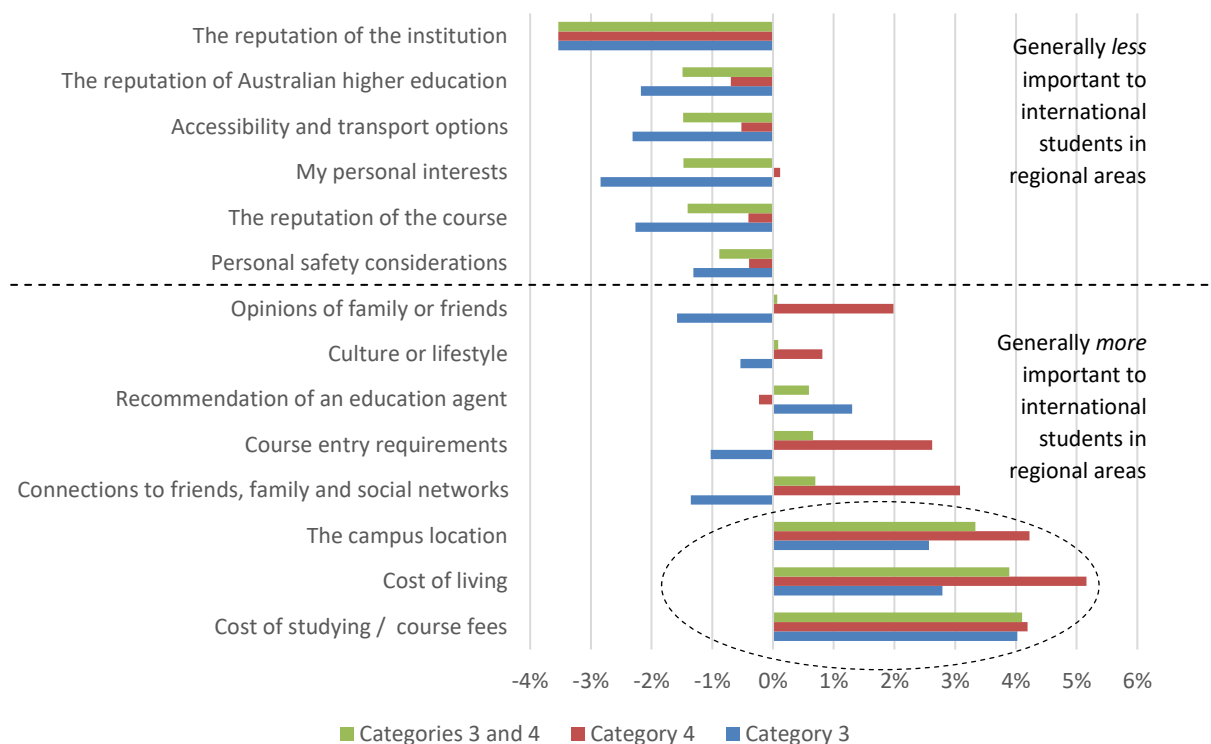


Figure 4.7: Importance of factors in decision-making - Difference between regional and metropolitan
 Source: Bespoke questions included in the 2019 Student Experience Survey (SES) | Survey question ‘Thinking about your decision on where to study, how important were each of the following factors in making that decision?’ | Percentage responding ‘Important’ or ‘Very Important’]

On the specific topic of tuition costs, benchmarking conducted for the Australian Government (StudyMove, 2018) shows on average a degree (undergraduate and postgraduate) in a regional university is 22 per cent more affordable than a comparative program in major capital city. However, as the point of comparison in that research were universities in the Regional Universities Network (RUN), a group that enrolls fewer than 15 per cent of its international students in regional areas, it is unclear how much we can actually learn about the metropolitan and regional differential from those findings. Berquist et al. (2019, p.19) refers to the following work that may provide additional insights:

‘Work to enhance the 2018 International Student Survey to capture information on the cost of studying and living in regional Australia compared to metropolitan areas was also commissioned. These research and survey findings are adding to the evidence base for study destinations looking to build their capacity to host growing numbers of international students.’

Figure 4.8 shows the tuition fees for one of the one of the most popular and ‘high-volume’ courses among international students across Australia, the Bachelor of Commerce. This clearly shows a clustering of regionally-based and/or regionally-active universities below the average tuition cost for this particular qualification.

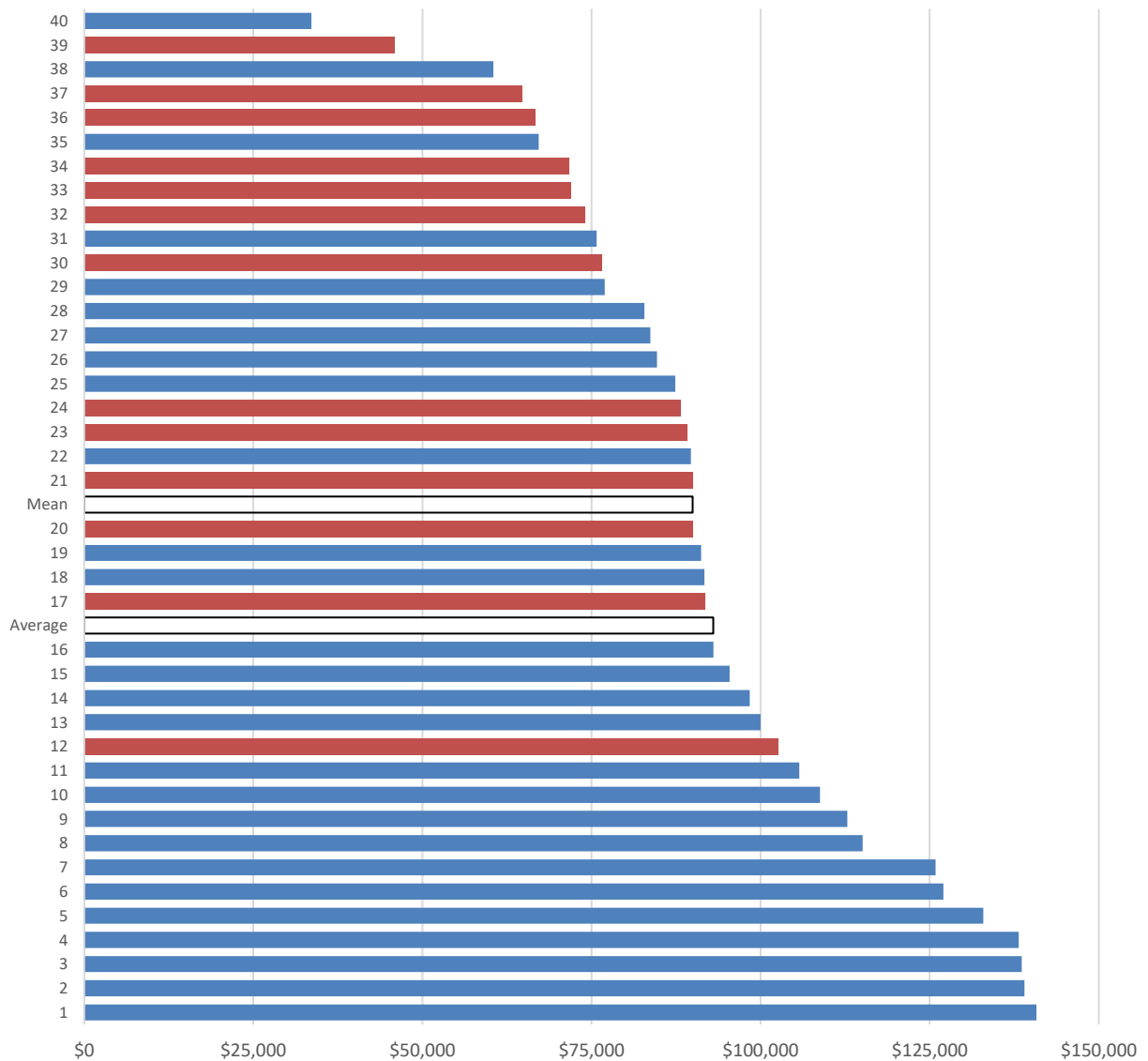


Figure 4.8: Tuition Fees - Bachelor of Commerce courses, 2019

Source: CRICOS website (<https://cricos.education.gov.au/>)

Regardless of location, students believe agent recommendations and opinions of family or friends (the people around them) are less important. For students in all destinations, ‘recommendation of an education agent’ rated the lowest influencing factor. This is interesting as 74 per cent of students now use an agent and that percentage is growing each year (DET, 2019b).

4.5. The factors underpinning successful practice

The section draws on all of the project data collections (i.e. interviews, surveys, focus groups, reviews of policy and practice) to develop a framework of the factors underpinning successful practice.

These factors have been categorised against each element of the well-established service marketing mix (Bitner & Booms, 1981). This refers to the set of actions that an organisation uses to promote its brand or product in the market. The extended marketing mix (7P's) is the combination of seven elements of marketing that aim to work together to achieve the objectives of a marketing strategy. These 7 elements are: product; price; place; promotion; people; process and physical.

Earlier projects have identified features of good practice in specific areas. For example, in 2009 Australia Education International worked with peak bodies in the higher education and VET sectors to produce a report on 'Examples of good practice in assisting international students to integrate with Australian students and the wider community' (AEI, 2009). This report seeks to provide a contemporary picture of what these factors look like in regional study destinations. The list is intended to be an illustrative, but not exhaustive, picture of current practice.

4.5.1. Product

The product refers to the educational experience (an intangible service) that satisfies the needs of prospective students and compels them to take action (request information, apply, enrol). It is not simply the course – it is the experience of studying, living and working in Australia for a period of time. Features include:

- speciality offerings that include unique experiences (e.g. access to field trips in heritage-listed sites);
- choice and range of offerings;
- smaller class sizes;
- academic and English-language pathways programs;
- offshore campuses and programs; and
- international strategic alliances that foster exchange and study abroad opportunities.

The following observations have been made of successful practices:

- Successful regional destinations and providers recognise that they can and must offer a unique proposition to international students. In addition to having smaller class sizes, higher education programs are invariably a mix of postgraduate, foundation, Study Abroad, Exchange, Bachelor programs, among others, that draw on the distinctive features of the local environment (e.g. green and blue industries, environmental sciences, public health, architecture).
- In addition to the uniqueness of the subject matters, these institutions will also offer a truly distinctive, unique, immersive on-campus educational experience. Such opportunities are often built around multi-campus, off-site experiences (e.g. study tours, field trips) to experience the natural environment in which the provider is located.
- The course is valued by prospective and current students as providing an edge in a competitive global labour market.

- The course is a strategic fit for the provider in terms of its national and international strengths and comparative advantages (it is not about simply attracting and recruiting *any* student).
- Providers develop mechanisms to regularly check what customers think of your product in terms of accessibility, engagement and satisfaction (e.g. surveys, focus groups, interviews);
- Marketing and promotion plans are based on detailed, current evidence on the needs of specific target market segments, often at a sub-country level.
- Some institutions have developed innovative product segmentation strategies between their city and regional campuses where programs are only offered at the regional campuses. This model has proven effective for Deakin University in growing cohorts of engineers (Geelong Waurin Ponds Campus) and architects (Geelong Waterfront Campus).

4.5.2. Price

The pricing element refers to the amount students (and/or their families) pay in terms of education-related expenses (tuition fees, study expenses) and living expenses (accommodation, groceries etc.). Cost of living has long been cited as an influential factor in the decision-making of international students globally (QS, 2019b). In regional areas, a comparatively low cost of living can be further offset by government, institution and/or private sector scholarships. However, there are important contextual factors that must be considered. Features include:

- competitive tuition fees;
- affordable cost of living;
- Australian Government scholarships for regional study;
- Australian Government development scholarships;
- university scholarships;
- home country scholarships; and
- third-country scholarships.

The following observations have been made of successful practices:

- Competitive price points for tuition fees as a means of positioning institutions as an alternative to major capital cities perceived as being costly and over-priced. Tuition fees set by institutions in regional study destinations are competitive and recognise their position in a crowded global market for international education – but they are not necessarily ‘cheap’. They retain value and a reputation for ‘quality on a budget’. However, the more institutions charge, the more value or quality is expected by the student. This means that institutions are constantly testing the price sensitivity of market segments to ensure fees are both attractive to students but also competitive against like-options.
- Providers offer a host of merit-based and equity-based scholarships to international students to offset the costs of study.
- In addition to the recently introduced Destination Australia scholarships, there are a number of Australian Government scholarships including the Australia Awards and HDR Scholarship - Research Training Program Scholarship (RTP). As many international students in regional areas studying at the postgraduate level and have families, these scholarships can include a relocation allowance and a cost offset for their overseas health coverage.

- Regional destinations invariably position themselves as having a lower cost of living¹⁰³. However, this is dependent on the location (and the lifestyle of the student). Providers are also bound by the requirements of the National Code¹⁰⁴ (Standard 2: Recruitment of an overseas student) which requires that prior to accepting students, they must provide ‘accommodation options and indicative costs of living in Australia’ (p.2).
- It is also important to consider that many students are not in a position to pay for their studies upfront and have taken on a considerable loan. This places considerable pressure on them to find employment during their studies to service the loan.

4.5.3. Promotion

The promotional element refers to strategies deployed to raise student and alumni awareness, knowledge and preference of a course or institution, generating new enrolments, and supporting positive word-of-mouth with trusted and relatable information and imagery. Features include:

- strategic use of onshore and offshore recruitment offices and agents;
- use of digital and traditional platforms depending on what is appropriate and effective;
- authentic and relatable imagery that aligns with student values, beliefs and aspirations; and
- strategic use of alumni to provide testimonials of what it is like to study, live and work in a particular destination.

The following observations have been made of successful practices:

- Consistent with the notion of an ‘experience’, the most effective promotions clearly communicate the benefits and advantages that a student (and their families) will obtain by studying a particular course with a particular institution in a particular location and not just the generic features of the product in isolation – it is the sum of each of the parts.
- Promotional material (web content, digital content, social media, brochures) should be easy to read and communicate *why* students should enquire for more information or enrol.
- Peer-to-peer and relatable imagery from trusted sources attract prospective students and their parents. A key feature of the marketing and promotional messaging of regional destinations is the need for an authentic and differentiated option.
- There are a number of examples where universities have used alumni and alumni networks to showcase experience living and studying a particular location. Students must see themselves – and see alignment with their own values, beliefs, and aspirations - in the material in order for it to be effective.

4.5.4. Place

The place element refers to the study destination itself and how convenient it is for students to access it - geographically, financially and academically. Features include accessibility of:

- campuses in Australia, geographically, academically and technologically;
- offshore agents;
- onshore agents; and

¹⁰³ There do not appear to be any objective and generalisable tools for calculating cost of living differences between one small-medium sized city/town and a major capital city of Australia. CRICOS registered providers are also bound by stringent regulations that mean that they must not overstate or be inaccurate in their promotion of the differential in cost of living.

¹⁰⁴ National Code of Practice for Providers of Education and Training to Overseas Students 2018

- offshore campuses

The following observations have been made of successful practices:

- Accessibility is a key factor for regional student destinations – geographic, financial, academic and technological accessibility all play a part.
- Accommodation – in terms of availability and affordability- remains a key barrier for students, both on campus and off campus. The changing nature of the rental market has meant tightening of vacancies in some regional areas, particularly with the rise of Airbnb. Institutions have focused on communicating the positive experiences of students living in an environment that best suits their needs. For some, particularly younger students, this will be on-campus where they have access to the full range of student and security services. For others (particularly those with families), an off-campus experience is often a more natural fit.
- Social barriers such as anxiety and loneliness can be reduced through strategies that boost networks/contacts (family/friend recommendations, diaspora) and on-campus engagement events and activities with domestic and international students.

4.5.5. People

The people element refers to those who actually do the work. This attribute is particularly important in the case of regional study destinations given its emphasis on welcoming, supportive and tailored support. Features include:

- capability and capacity of teaching and non-teaching personnel; and
- size and influence of alumni.

The following observations have been made of successful practices:

- Regardless of how much on-campus and off-campus engagement they have, students will inevitably make judgments – positive, neutral and negative - about their experience and support based on the people representing their education institution and community. Having the right people in the right roles is essential because they are as much a part of the experience as the courses and programs themselves.
- Regional universities pride themselves on ensuring that commencing international students are welcomed and supported early. There are strategies in place to foster mentoring, airport pickup, orientation, internships in ways that bond students – international and domestic – together in ways that enhance the student experience for all students (e.g. Study Geelong Ambassadors).
- It is important for staff to be appropriately trained in cultural awareness and working with people from diverse backgrounds.
- Safety has traditionally been an important factor for international students choosing to study in Australia. Particularly in the case of young students, parents are wanting to have trust and confidence in the people who have responsibility for their child's safety on campus, particularly after-hours.
- There are a number of projects underway that work with the broader community to raise awareness of the positive benefits of international students and facilitate employer engagement and support for international education. Regional destinations recognise that promoting and raising employer awareness and understanding of international student

employment issues (e.g. PSWR, lack of part-time jobs, student hours of availability to work) can bring considerable benefits not just to employers but to their local communities.

4.5.6. Process

The process element refers to the way in which educational services are delivered to the student.

These also include the planning, systems and evaluation strategies within organisations and destinations that – when delivered well – have a positive effect on the educational experience.

Features include:

- innovation and visionary attributes within the institutions' culture;
- student-oriented culture focused on finding the right 'fit';
- effective use of digital and traditional technologies; and
- quality, expertise and capacity of staff

The following observations have been made of successful practices:

- As in all service industries, organisations are generally rewarded for prompt replies, quick service and an overall attentive approach to the needs of customers. This builds trust and confidence. Postgraduate research students spoke repeatedly in the project case studies about how the first university to respond with a positive, actionable and encouraging response was the university they decided to choose.
- Organisations that are firmly and authentically grounded in student-centric systems and processes bound in a culture of support, access and engagement generally are rewarded by their students with high satisfaction ratings. This appears to be reflected in satisfaction ratings of students in regional student destinations where a number can point to high learner satisfaction ratings in their promotional material.
- No one institution can do this work alone. Taking a whole-of-country and whole-of-destination approach built on strategic alliances/collaborations can produce significant benefits for international education. For example, establishing educational precincts that attract, welcome and retain students in a culturally safe environment are an important element in attracting and recruiting new students (e.g. City of Darwin, City of Launceston Deals).

4.5.7. Physical evidence

The physical evidence element shows that a service - although intangible - actually happened. It helps potential students to 'see' what they are buying and makes the experience real. Features include:

- course guides and brochures;
- branded promotional materials (e.g. keyrings, USBs, pens);
- posters/banners/photos/videos;
- testamur/certificate; and
- a postgraduate thesis.

The following observations have been made of successful practices:

- Much of what is being offered is intangible in the sense that students are developing new knowledge and skills and participating in experiences. However, there are many examples of

students receiving physical tokens, mementos and other promotional material to connect them to the institution and foster a sense of pride and community.

- Regional study destinations often use this element as a differentiator from their metropolitan counterparts as they are able to point to genuinely unique landscapes and geographic features (e.g. heritage listed sites) as physical evidence of the experience being different from the alternatives. Photos, videos, blogs and so on can tell the story of the place in ways that make real the notions of 'unique' and 'distinct'.
- A number of universities spoke about the importance of agent familiarisation tours to ensure the organisations representing them offshore (and onshore) have an authentic understanding of the destination having actually experienced it for themselves.

4.6. Summary of key messages

The profile of international students in regional study destinations is summarised in Figure 4.9.

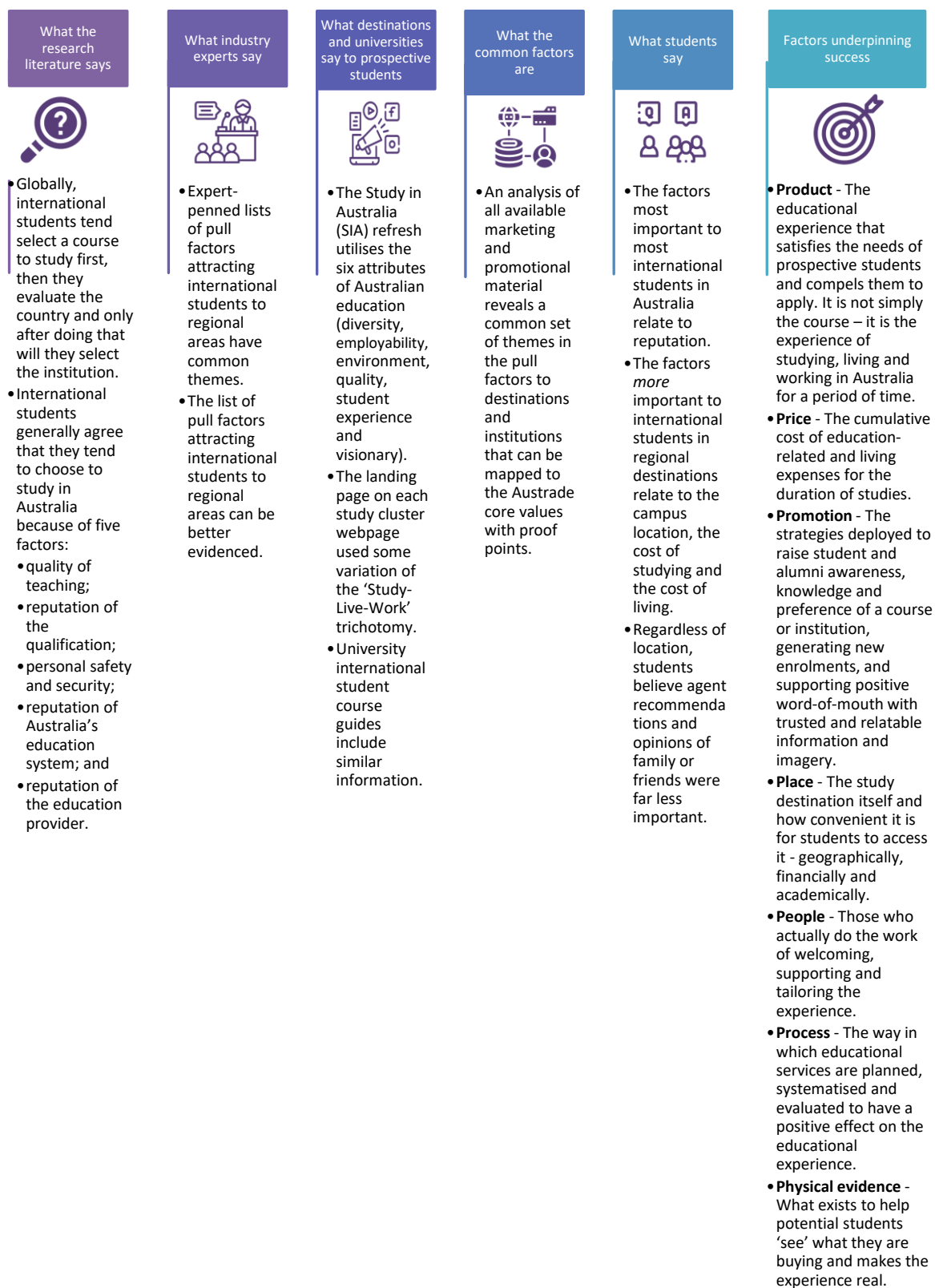


Figure 4.9: Chapter 4 - Summary of key messages

5. Conclusions and recommendations

The objective of this project was to develop the evidence base to enable **the development of marketing messages** that attract international students to regional Australia. To achieve this objective, the project has developed the evidence base on: **the profile** of international students in regional areas; the **pull factors** that attract them to study there; the **conversion rates** from short-term non-award courses into formal qualifications; and **factors underpinning success**.

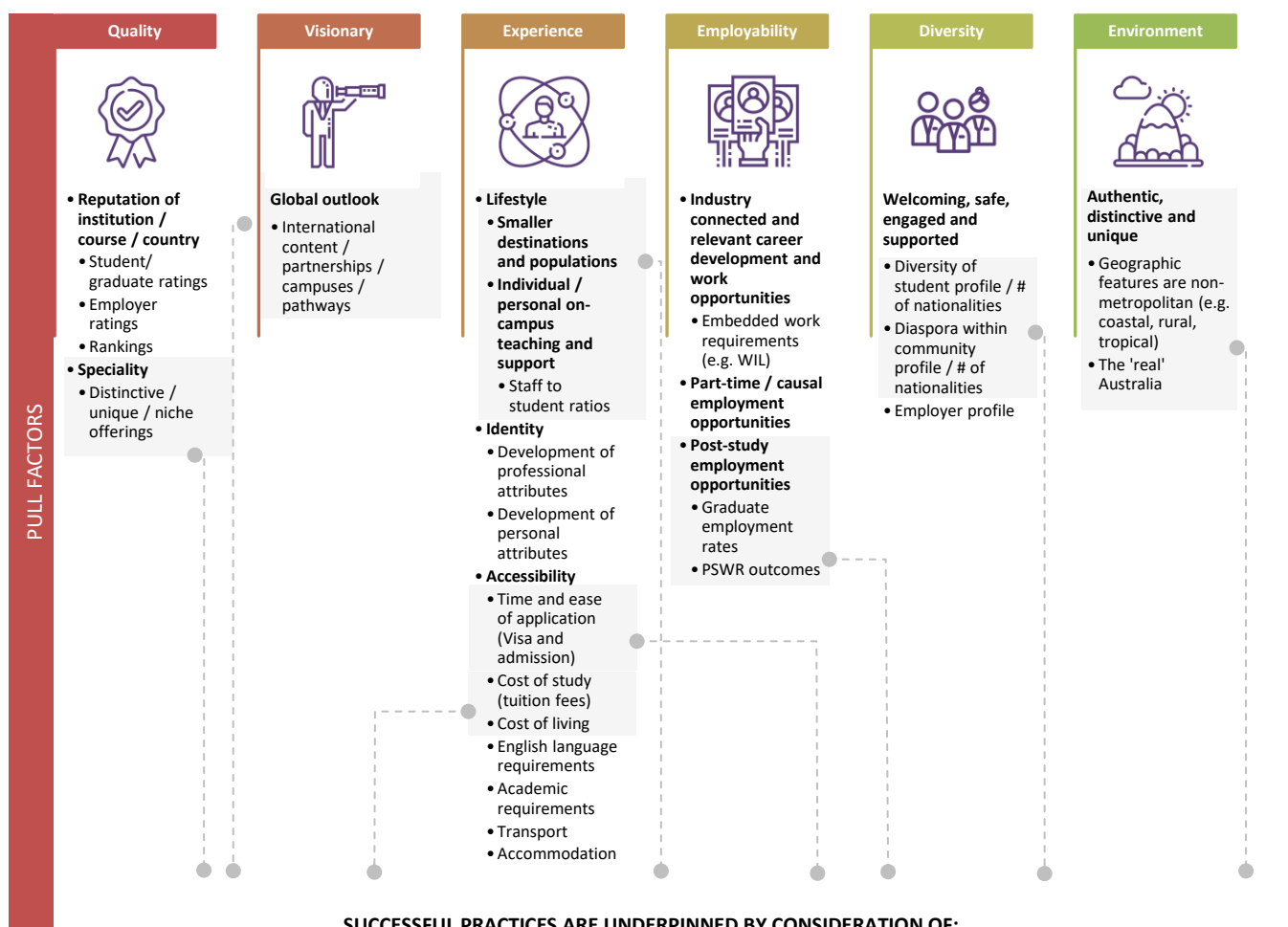
Building on earlier research and consultation, this report has collected primary data directly from current international students through survey and focus groups, as well as analysing a wide range of existing datasets on student enrolments and visas holders.

5.1. What we learn from this project

For some time, there have been views on the student profile, pull factors and features of success in relation to international education in regional Australia. This research project has built, for the first time, a national baseline of objective and replicable evidence to inform decision-making. In terms of pathways, enrolments and outcomes, there are some key points of differentiation that have implications for the development of marketing messages.

Regardless of whether they are universities, VET, ELICOS, non-award providers or schools, education providers 'lean in' to their connections to their local environment and community. Above all else, they celebrate, and are continually seeking to showcase, their distinctive strengths as providers of a quality international education experience in an increasingly competitive – and more recently uncertain - global market. Based on the evidence gathered in this project, Figure 5.1 summarise the key findings identified in the project to develop a simplified messaging framework.

CORE VALUES APPLICABLE TO ALL DESTINATIONS



SUCCESSFUL PRACTICES ARE UNDERPINNED BY CONSIDERATION OF:

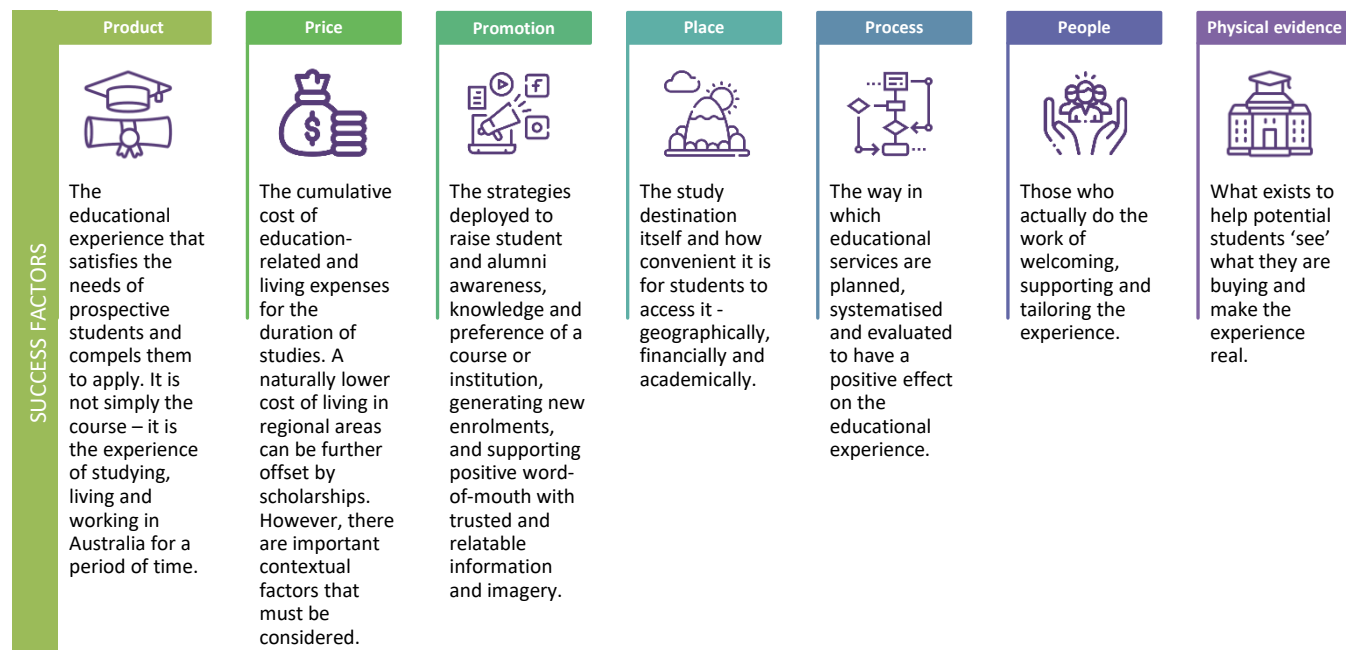


Figure 5.1: Simplified messaging framework for marketing and promoting regional study destinations

5.2. How this evidence can help further inform the development of marketing messages

In order for such a Framework to be most effectively deployed, it would ideally be one part of a feedback loop that has been designed to promote and scale-up international education in regional Australia based on objective and replicable evidence on what works.

The four main elements of such a feedback loop are shown in Figure 5.2. To conclude the report, ACER offers some examples of how the project findings can inform future work.

Each element is summarised in Figure 5.3 and detailed in the sections that follow.

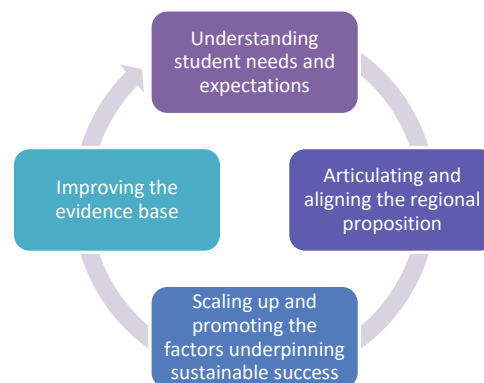


Figure 5.2: Evidence gathering for action

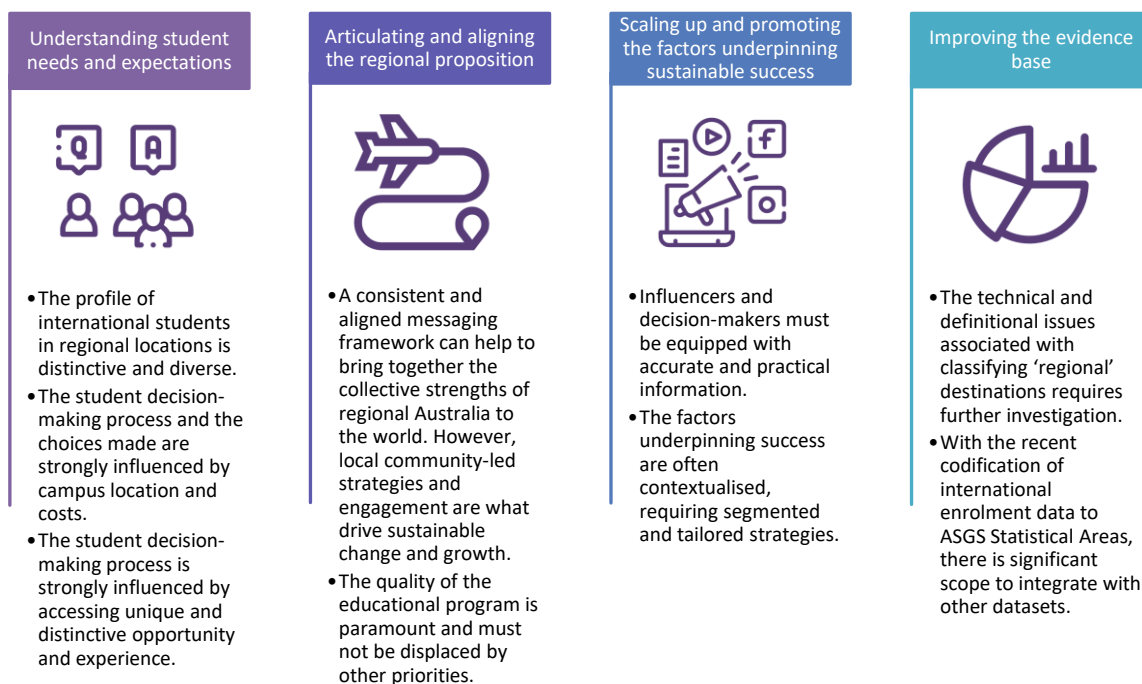


Figure 5.2: Chapter 5 - Summary of key messages

5.2.1. Understanding student needs and expectations

Product differentiation and market segmentation are critical. There is no single homogenous approach to market segmentation in international education. For regional destinations, the circumstances are often so highly contextualised and idiosyncratic, they require a carefully calibrated approach that appeals to particular demographics, nationalities, values, ideals and so on.

a. Further developing market segmentation approaches

From a supply-side, clearly any notion of a homogenous 'regional' label for destinations is unhelpful. While acknowledging there are common and collective benefits that flow to students from studying in regional Australia, approaches to market segmentation must acknowledge the key points of differentiation between each destination. As previously noted by the University of Wollongong:

'It is also important to note that each region and each regional university in Australia has its own unique and distinguishing features. Regional universities should not be lumped together as a single group, but promoted individually on the merits of what each offers, such as its programs, its links to specific industry and, possible employment outcomes.' (UoW, 2018, p.1)

From the demand-side, within source countries, there can be marked differences at a provincial and regional level that may impact the success of any particular messaging approach. This has already been recognised by the IEAA which has called for '...more detailed information on provinces and states in geographically diverse markets' (IEAA, 2019). Even then, there may be differences in the levels and fields of study that students are attracted to, particularly if the focus is in niche and specialists areas. There are a number of examples of university-led strategies that have successfully built a critical mass of international students through a strategic focus on particular industries and product differentiation (e.g. engineering at Deakin University).

The report findings show that an overwhelming percentage of international student enrolments with 'regional' institutions (main campuses are in Category 3 and 4 locations) are, in reality, based at their city campuses in Sydney, Melbourne and Brisbane (Category 1 destinations). This demonstrates the importance of granular data that that does not mask reality. Using this study as the baseline there is now the possibility of building on these types of insights to develop more sophisticated choice modelling and longitudinal studies to understand which policy levers (e.g. scholarships, PSWR, migration) and messages (e.g. employability, quality, experience, environment) actually impact the decision-making process of prospective students – offshore and onshore - and to what effect.

b. Keeping the non-student visa market in context and in proportion

The transition of students completing weeks-long 'learning' of various kinds on a non-student visa into years-long tertiary studies on a student visa is clearly an area of significant and ongoing interest. However, the study destinations where such a transition has the most potential, owing to their large tourist populations, are characterised by an over-representation of VET, ELICOS and non-award international student enrolments. The potential of these short-term visitors - having experienced Australia as 'learners' - is no doubt an attractive marketing proposition. Their experience and awareness of Australia sets them apart from other prospective students who may have limited or no knowledge of regional Australia.

In reality, the number of visitors actually making the transition in regional areas is quite small in the context of the annual commencing cohort of higher education and VET students. As a result of

COVID-19, there will likely be unprecedented negative effects on the English language market in Australia and globally. It may be more productive to think in terms of a longer-term awareness-raising strategy rather than statistical conversions of individuals, particularly given the paucity of publicly available data linking non-student visas and student visas at unit record level.

5.2.2. Articulating and aligning the value proposition

There is clearly a great deal of work already underway to articulate and align messaging with the introduction of the Collaborative Marketing Framework¹⁰⁵ (Austrade, 2020a). The evidence built in this project has purposefully sought to align the analysis to the six attributes of Australian education currently being used as part of the refresh of *Study in Australia* (Austrade, 2020b).

a. Myth-busting with clear and consistent messaging

The pull and success factors identified in this report will assist with refining messages, as well as debunking some of the persistent myths and assumptions about ‘regional’ study destinations. In response to the small number of international students currently in regional areas, the Group of Eight (2018, pp.7-8) warned of the risks of ‘inadvertent messaging’ in their submission paper to the 2018 review:

‘While this [the 3% currently in regional areas] does not mean that efforts shouldn’t be made to encourage students to have a regional experience during their time in Australia, it does indicate that any efforts to force or coerce students to do so, or any efforts that could be perceived as intended in that way, risk turning prospective international students away from studying in Australia altogether. This would be nothing short of reckless in a context in which many competitor nations are seeking to increase their own share of international student cohorts, which could easily happen at Australia’s expense.’

There are examples of student-facing messaging that appear to use the language of ‘crowded’ and ‘congested’ cities. For example, information for prospective students on the IDP Education Australia website currently comments on ‘...the reasons behind these [2019 migration and visa] changes’, stating that:

‘The government has done this to boost the economy in regional areas and increase the number of people with specialist skills. **Larger cities like Melbourne and Sydney are becoming crowded and congested**, and the changes will help to grow the population in areas not as populated.’ (IDP, 2020)

It is important that this consistent evidence-based message be promoted in ways that do not send mixed signals about the Australian Government’s policy rationale for promoting regional study destinations.

b. Developing a clear line-of-sight between the core values and the proof points for both metropolitan *and* regional study destinations

Table 5.1 provides some examples of how to build a clear and strategic line-of-sight between the core values, domains, pull factors, proof points and example messaging.

¹⁰⁵ <https://internationaleducation.gov.au/International-network/Australia/InternationalStrategy/Council%20for%20International%20Education/Documents/Collaborative%20Marketing%20Framework.pdf>

Table 5.1: Examples of evidence-based marketing messaging linked to core values

Core value	Domain	Example pull factor	Proof points	Example messaging
Experience	Accessibility	Lower cost of living	Cost of Living profiles	Study an internationally-recognised qualification of your choice without the cost of studying in a big city
Quality	Speciality	Speciality of course	Course profiles	Take field trips to World heritage-listed sites with internationally renowned experts
Environment	Distinctive, unique and authentic	Studying in a tropical/rural/coastal environment close to ocean, beaches, reefs	List of environmental features	Create lasting memories of your unique study experience in Australia

Similarly, messaging can be built around the 7 P's to ensure sufficient coverage of all elements (Table 5.2).

Table 5.2: Examples of evidence-based marketing messaging linked to 7 P's

Element	Example messaging
Product	<ul style="list-style-type: none"> - Study with a diverse international student population from all over the world - Study in the natural environment directly related to your study and research interests - Learn from internationally recognised experts in the green and blue sciences - Study at a university that receives the highest student satisfaction ratings in Australia - Study at universities that have a positive impact on their local communities and economies - Develop your English language skills on and off campus - Stand out and make your mark as an emerging researcher in your field - Develop your identity as a global citizen among a genuinely diverse student population - Develop friendships with fellow students from all corners of the world
Price	<ul style="list-style-type: none"> - Study with targeted financial assistance only offered to students in selected destinations - Graduate with an Australian degree without paying for the big city cost of living
Place	<ul style="list-style-type: none"> - Live in a city with over 250,000 people but half the population density of the big cities - Live in a city with its own airport with daily flights connecting to international airports - Live in vibrant communities where people know your name - Live a uniquely Australian experience - Experience the Australia few visitors ever see

5.2.3. Scaling up and promoting the factors that underpin success

Efforts to facilitate sustainable growth and diversification of provider, course and location choice will require a collaborative and carefully calibrated approach based on evidence of what works.

- a. Keeping an eye on *all* the drawcards that attract students to regional destinations – piecemeal approaches are unlikely to be sustainable or effective**

The 7P's of the Service Marketing Mix appears to be provide a useful framework. However, the factors underpinning success will rarely, if ever, be reliant on just one or two elements of the 7P's. Piece-meal approaches targeting one element may produce short-term increases in the number of regional enrolments. However, to date long-term and sustainable growth in regional Australia has been found to be built on two pillars: (1) A **positive student experience** of studying, living and working in Australia; and (2) **Local infrastructure, employment opportunities and strategic collaboration** to support expansion and growth.

Such an approach would ideally have coverage of the *entire* student lifecycle to consider points in time before, during and beyond their time studying in Australia. A strategy that front-loads students with incentives can only be truly successful if such incentives lead to real opportunities *for the students* during and beyond their studies.

The project survey identified affirmed the importance of VET to higher education pathways in regional areas. There are numerous examples of VET, academic preparation and English language pathways programs that already meet this need across Australia. A parallel project, also funded through the Enabling Growth and Innovation Program, on '*Growing Regional Pathways to Higher Education*', could provide valuable insights into these issues. Led by the Victorian TAFE Association, this project involves Victorian metropolitan providers partnering with regional providers to jointly deliver ELICOS and VET programs, with the aim of growth in regional international student university enrolments.

b. Fostering consistent messaging through collaboration and sectoral co-design

The evidence gathered in this project suggest that promoting a marketing message of quality (excellence and speciality), diversity and experience in unique environments can be a unifying message for all destinations. There will be exceptions where customised approaches are required. Therefore, a carefully calibrated strategy – co-designed with the international education sector - that promotes the competitive advantages of studying in a particular destination across all 7 P's is more likely to be effective and sustainable in the longer-term.

5.2.4. Improving the evidence base

Improving the overall evidence base on international education in Australia will require datasets that are more current, granular, benchmarked and focused on outcomes (IEAA, 2019). These current limitations in the overall evidence base are equally, if not, more apparent when analysing international student populations in regional areas.

a. Testing and developing definitions and indexes contextualised to international education

A fundamental barrier to developing a better understanding of how best to attract international students into regional areas is the confused, and at times contradictory, state of technical definition and classification structures in Australia. It is important to acknowledge that these are not issues unique to international education. University of Technology Sydney city and regional development expert Lee Pugalis told ABC News in 2018 that the vexed question of what should be considered regional does not have a black-and-white answer, stating that:

'Regional Australia is often referred to as everywhere beyond the state capital cities and metropolitan heartlands...However, such references that highlight what it is not tend to conceal more than they reveal, diverting attention from regional Australia's unique, highly varied and continually evolving cultural, physical and economic characteristics...The

evolution of regional Australia will continue to challenge one-size-fits-all definitions.’ (ABC News, 2018)

The implications of these confused arrangements are not limited to monitoring and reporting on patterns and trends. The application of one definition over another can have real-world consequences. For example, the instrument that determines eligibility for a Destination Australia scholarship (Regional Drawcard A) uses a different definition of ‘regional’ to the instrument that determines eligibility for post-study work rights and migration (Regional Drawcard B). As a consequence, a student wishing to study in any of the traditionally ‘regional’ areas of Wollongong, Geelong, Newcastle or the Sunshine Coast¹⁰⁶ is not eligible for a Destination Australia scholarship as these cities are classified as ‘Major Cities of Australia’ in the ASGS Remoteness Structure. These types of anomalies are occurring alongside decisions to reclassify the previously ‘major’ Australian cities of Perth and the Gold Coast as ‘regional’ for migration purposes.

If the goal is to be as precise as possible, while also building consensus on what constitutes a ‘regional’ destination for international students in Australia, a simple first step forward may be to consider what success looks like and what measures could be used to monitor and report against progress in the short, medium and longer term. With a clear understanding of what is to be achieved, a set of measures and technical classifications to monitor and track progress against these objectives can be developed.

The ASGS Remoteness Structure provides a more objective and standardised point of comparison across government data sources. However, this structure - and the underlying ARIA+ index - were built for purposes other than international education. The appropriateness of applying these particular structures, without any customisation, for the purposes of resourcing and reporting on international education in regional Australia may require further consideration. This issue has already been raised by the sector. For example, Bond University, in its submission to the 2018 national consultation process, observed that:

‘The Department of Education and Training uses the Australian Bureau of Statistics (ABS) Australian Statistical Geography Standard (ASGS) remoteness structure in its international education publications. While this may be a more objective approach, it has no practical relevance for higher education policy. Policies and decisions, that have the objective of growing international students in the regions, which are defined and targeted using the current classifications systems, take no account of the capacity of particular regions.’ (Bond University (2018, p.1)

Similarly, the University of New England stated in their submission that:

‘We would like to point out that the definition of Regional Australia adopted by the authors of the paper, being those areas other than Sydney, Melbourne and Brisbane, is too broad and non-specific. Consideration should be given to further refining this in terms of population and services. True regional areas have a population of 300,000 or less, and are often characterised by having smaller scale public transport, health services, infrastructure, and constrained employment markets.’ (University of New England, 2018, pp.3-4)

A further way forward could be in the testing and development of a new index relevant to the international education context and experience. For example, recent research by the RMIT Centre for Urban Research has developed *The Healthy Liveable Cities Liveability Index*. The index is based on

¹⁰⁶ These Statistical Areas comprise 52 per cent of international higher education enrolments in 2019 under this project’s definition

nine indicators¹⁰⁷ of liveability found to be associated with health and wellbeing outcomes across the 21 largest cities in Australia. Lead researcher Dr Lucy Gunn has said that regional cities were often missing from the conversation because national liveability data has not been available (RMIT, 2020).

A more advanced evidence base is underpinned by the use of customised indices and integrated datasets that extend beyond enrolment data into the socio-economic profiles of the communities where students are studying, living and working. This then facilitates a discussion not just of 'enrolment numbers' and 'the percentage in regional areas' but of the outcomes and opportunities available to students during and after their studies. Appendix 3 includes some examples of the types of measures that could be included in such an index.

Finally, there is potential to further standardise and integrate international student enrolment datasets relevant to this project. For example, university names do not appear to be coded to a common frame across the PRISMS (international students) and Higher Education Statistical Collections (domestic and international students). There also appear to be examples where enrolments have been coded to slightly different provider names within the PRISMS enrolment file¹⁰⁸. Attachment 2 provides further examples.

b. Linking core values, pull factors and proof points

While a number of these statements made about the benefits and advantages of studying in regional areas can be sourced directly to objective and replicable data sources, a number continue to exist as subjective and anecdotal statements. For example, statements about a 'lower cost of living' are 'likely' and 'probable' but it is difficult to quantify the difference when data are not collected and reported at detailed local levels (e.g. the cost of living is X% lower in Newcastle than in Sydney).

That is not to say that these types of statements cannot be supported with evidence in the future as data collections continue to be improved, expanded and better integrated. Ideally, the goal would be to move from statements that are *supported by limited evidence and are more subjective* to statements that are *supported by sufficient evidence and are more objective*.

In a comprehensive sweep of the available data sources, Nous Group (2018) remarks on the consistent lack of granularity and disaggregation in the various international education data collections (see Box 5.1). These data sources, which will often not be inclusive of regional provision, are routinely used in marketing and promotional material of providers, study clusters and government agencies, including the current *Strategic Messaging Framework* developed by Austrade. It is important to remember that these data sources, like global university and city rankings, can exclude regional destinations, particularly the smaller towns and communities.

¹⁰⁷ The nine indicators are: liveability, walkability, social infrastructure, transport, food, alcohol, public open space, employment and housing.

¹⁰⁸ For example, the project team identified enrolment records for:

1. 'Charles Darwin University' and 'Charles Darwin University (CDU)';
2. 'The University of Queensland' and 'The University of Queensland (UQ)'; and
3. 'The University of Sydney' and 'University of Sydney'.

Box 5.1: Data gaps

In a recent report on *'Data opportunities in international education and training'*, the Nous Group (2018, pp.31-32) makes the following observations of the various data collections used in this report on others:

- On the Commonwealth QILT survey of higher education students, **'Currently includes but does not disaggregate domestic and international students'** (p.31);
- On the QS 'Best Student Cities' rankings, [there is] **'...limited information for regional areas of Australia'** (p.31);
- On The Economist's, 'Worldwide Cost of Living Survey', [there is] **'...limited information for regional areas of Australia'** (p.32);
- On Mercer's 'MercerCost of Living Rankings', [there is] **'...limited information for regional areas of Australia'** (p.32); and
- On the Department of Home Affairs visa data (used in Section 2.4.2 of this report), **'Data can be viewed in pivot tables that are locked –no ability to easily extract data for analysis'** (p.32); and
- On the Department of Education, Skills and Employments student visa pathways data (also used in Section 2.4.2 of this report), **'Data available but not sufficiently detailed'**.

5.3. Concluding remarks and recommendations

International students have reported for many years that they believe they will receive a high-quality, internationally-recognised qualification in a safe environment when they choose to study in Australia. For regional study destinations, the value proposition is that they will receive all these benefits – as well as a range of unique, individualised and immersive experiences and post-study opportunities – at a more affordable price than what is available in other locations.

The findings of this study affirm and support these long-standing observations with new evidence collected directly from student surveys and focus groups, supported by in-depth analysis of three years of geocoded enrolment data.

Building on the findings, ACER has developed an evidence-based messaging framework. This maps the core values underpinning marketing messages to all international students (Austrade, 2020b) to the pull and success factors relevant to international students in regional destinations (see Figure 5.1). Following further testing with the sector, ACER suggests that the framework could add considerable value to the development and alignment of marketing messages.

Based on the evidence gathered in this research project, ACER makes the following five recommendations:

Understanding student needs and expectations (Section 5.2.1)

The project findings affirm cost and affordability as key drivers that differentiate the decision-making process of international students in regional study destinations from those in metropolitan cities. Using the project findings as a baseline, more objective and replicable evidence is needed to better understand and quantify how these factors – and the scholarships used to offset these concerns – impact student choice and decision-making.

Recommendation 1: That the Department, in collaboration with Austrade, continue to improve the evidence base by identifying, and ideally quantifying, the impact of policy measures to reduce the costs of study and living – foreseen and unforeseen – for various market segments¹⁰⁹.

Articulating and aligning the value proposition (Section 5.2.2)

The project has developed a framework of pull and success factors that align to the current Austrade Strategic Messaging Framework. With refinement and further testing, the Framework could be used to ensure that the benefits of regional study destinations are communicated and evidenced against a common framework.

Recommendation 2: That Austrade, in collaboration with the Department, further develop a clear and strategic line-of sight between the core values, pull factors and proof points used to attract international students to regional study destinations.

While cost and campus location are comparatively more important to students in regional areas than those in metropolitan areas, ‘reputation’ and ‘quality’ remain the key drivers overall.

Recommendation 3: That Austrade, in collaboration with the Department, maintain a consistent and authentic ‘always on’ message of quality educational services to prospective students. Such an approach would recognise that while quality is the central message, there are powerfully influential cost, employment and experiential drivers that intersect and compound to enhance the attractiveness of the regional proposition.

Scaling up and promoting the factors that underpin success (Section 5.2.3)

The project findings affirm that students in regional study destinations can struggle with gaining part-time work, accessing public transport and generally negotiating the practicalities of day-to-day life. There are a number of opportunities to improve the transition into and beyond studying, living and working in regional Australia.

Recommendation 4: That Austrade, in collaboration with the International Education Marketing Forum and the Department, further explore the potential of facilitating and incentivising community-led employer engagement programs to raise awareness of the benefits of international education and post-study work rights in regional areas.

¹⁰⁹ Such work should not be limited to courses offered by the Regional Universities Network. It should also not be limited to destinations included with the ASGS Remoteness Structure of ‘regional’ and ‘remote’ locations but include the 13 Statistical Areas included in this project.

Improving the evidence base (Section 5.2.4)

There have been significant advancements in the geocoding of international enrolment data in Australia since 2017. While the project findings affirm a number of known data gaps, they also point to opportunities in terms of data linkages and integration to enhance understanding of the relationship between international education and regional Australia at a local level.

Recommendation 5: That the Department, in collaboration with Austrade, explore the potential of developing:

- a. an index of geographic, economic, social and economic factors customised to the specific context of international education in Australia;
- b. brief and accessible community profiles that integrate geocoded international student enrolment data with existing community profiling data, in order to better understand how local socio-economic factors may act as enablers and/or barriers to the expansion of international education at a local level;
- c. data collection instruments that capture off-campus engagement, experiences and post-study intentions of onshore international students, using the 10 bespoke questions included in this project as a baseline;
- d. reporting templates that differentiate, at broad level of education, the percentage share of international students in regional study destinations; and
- e. processes to extract and report information on the pathways taken by international students on student visas based on location.

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Attachments

Attachment 1: Stakeholder consultations and university site visits

Attachment 2: University names

Attachment 3: QS World University Rankings

Attachment 4: Socio-economic metrics, ASGS Level 4 Statistical Areas

Attachment 5: International Student Enrolments (All Sectors) by Level 4 ASGS Statistical Area, 2019

Attachment 1: Stakeholder consultations and university site visits

Stakeholders

	Stakeholder	Date of interview
1	Regional Universities Network (RUN)	2 August 2019
2	International Education Association of Australia (IEAA)	2 August 2019
3	The Independent Tertiary Education Council of Australia (ITECA)	9 August 2019
4	Universities Australia (UA)	12 August 2019
5	International Education Marketing Forum (IEMF)	12 August 2019
6	Group of Eight Australia	15 August 2019
7	The Council of International Students Australia (CISA)	15 August 2019
8	Australian Universities International Director's Forum (AUIDF)	16 August 2019
9	International Development Program (IDP) Australia	23 August 2019
10	Australian Technology Network (ATN)	30 August 2019
11	Independent Higher Education Australia (IHEA)	4 September 2019
12	Innovative Research Universities (IRU)	9 October 2019
13	English Australia	3 December 2019

Universities

	University	Campus	Dates of visit
1	Deakin University	Melbourne and Geelong (Waterfront)	6,13 August 2019
2	Charles Darwin University	Darwin (Casuarina)	9-10 September 2019
3	James Cook University	Townsville	16-17 September 2019
4	The University of New England	Armidale	24 September 2019
5	The University of Tasmania	Hobart	2-3 September 2019

Attachment 2: University names

PRISMS label	HEIMS label	Abbreviations used in this report
Australian Catholic University Limited	Australian Catholic University	ACU
Australian National University	The Australian National University	ANU
Bond University	Bond University	Bond
Central Queensland University	CQUniversity	CQU
Charles Darwin University / Charles Darwin University (CDU)	Charles Darwin University	CDU
Charles Sturt University (CSU)	Charles Sturt University	CSU
Curtin University	Curtin University	Curtin
Deakin University (Deakin)	Deakin University	Deakin
Edith Cowan University	Edith Cowan University	ECU
Federation University Australia	Federation University Australia	Federation
Flinders University	Flinders University	Flinders
Griffith University	Griffith University	Griffith
James Cook University	James Cook University	JCU
La Trobe University (La Trobe)	La Trobe University	LaTrobe
Macquarie University (Macquarie)	Macquarie University	Macquarie
Monash University (Monash)	Monash University	Monash
Murdoch University (Murdoch)	Murdoch University	Murdoch
Queensland University of Technology (QUT)	Queensland University of Technology	QUT
Royal Melbourne Institute of Technology	RMIT University	RMIT
Southern Cross University (SCU)	Southern Cross University	SCU
Swinburne University of Technology	Swinburne University of Technology	Swinburne
The University of Adelaide (Adelaide)	The University of Adelaide	Adelaide
The University of Melbourne (UniMelb)	The University of Melbourne	Melbourne
The University of New South Wales (UNSW)	University of New South Wales	UNSW
The University of Newcastle (UoN)	The University of Newcastle	UNSW
The University of Notre Dame Australia	The University of Notre Dame Australia	Notre Dame
The University of Queensland / The University of Queensland (UQ)	The University of Queensland	UQ
The University of Sydney / University of Sydney	The University of Sydney	Sydney
The University of Western Australia (UWA)	The University of Western Australia	UWA
Torrens University Australia Limited	Torrens University Australia	Torrens
University of Canberra	University of Canberra	UC
University of Divinity	University of Divinity	Divinity
University of New England	The University of New England	UNE
University of South Australia (UniSA)	University of South Australia	UniSA
University of Southern Queensland	University of Southern Queensland	USQ
University of Tasmania (UTas)	University of Tasmania	Utas
University of Technology Sydney (UTS)	University of Technology Sydney	UTS
University of the Sunshine Coast	University of the Sunshine Coast	USC
University of Wollongong (UoW)	University of Wollongong	UoW
Victoria University	Victoria University	VU
Western Sydney University	Western Sydney University	UWS

[Multiple records for single university in database | PRISMS and HEIMS do not match](#)

Attachment 3: QS World University Rankings

Aus Rank	University	QS Rank 2020	QS Rank 2019	QS Rank 2018
1	Australian National University	29	24	20
2	University of Melbourne	38	39	=41
3	University of Sydney	42	42	50
4	University of New South Wales	43	45	45
5	University of Queensland	47	48	=47
6	Monash University	58	59	60
7	University of Western Australia	86	91	=93
8	University of Adelaide	106	114	=109
9	University of Technology Sydney	140	160	176
10	University of Newcastle	207	214	=224
11	University of Wollongong	212	218	232
12	Queensland University of Technology	224	244	=247
13	Curtin University	230	=250	262
14	Macquarie University	237	=250	=240
15	RMIT University	238	=250	=247
16	Deakin University	271	309	=293
17	University of South Australia	274	264	=279
18	University of Tasmania	291	287	313
19	Griffith University	320	329	=325
20	James Cook University	377	369	=367
21	Swinburne University of Technology	383	387	421-430
22	La Trobe University	400	397	360
23	Flinders University	424	478	551-600
24	Bond University	442	443	431-440
25	Western Sydney University	468	498	551-600
26	University of Canberra	484	601-650	551-600
27	Murdoch University	571-580	591-600	501-550
=28	CQUniversity	601-650	601-650	601-650
=28	Victoria University	601-650	651-700	701-750
=30	Charles Darwin University	651-700	651-700	651-700
=30	Edith Cowan University	651-700	751-800	751-800
=32	Southern Cross University	751-800	801-1000	801-1000
=32	University of Southern Queensland	751-800	751-800	751-800
=34	Australian Catholic University	801-1000	801-1000	801-1000
=34	University of New England	801-1000	801-1000	801-1000
-	Charles Sturt University	-	801-1000	801-1000
-	University of the Sunshine Coast	-	801-1000	01-100

Attachment 4: Socio-economic metrics, ASGS Level 4 Statistical Areas

This data has been sourced from 2016 Census Community Profiles published by the Australian Bureau of Statistics (ABS). Each profile contains different tables of data spanning a range of topics. ACER has selected a number of metrics for the 13 Statistical Area 4 locations that account for 95 per cent of international student enrolments in regional study destinations.

Where the value for the SA4 is higher than the national average the cell is highlighted

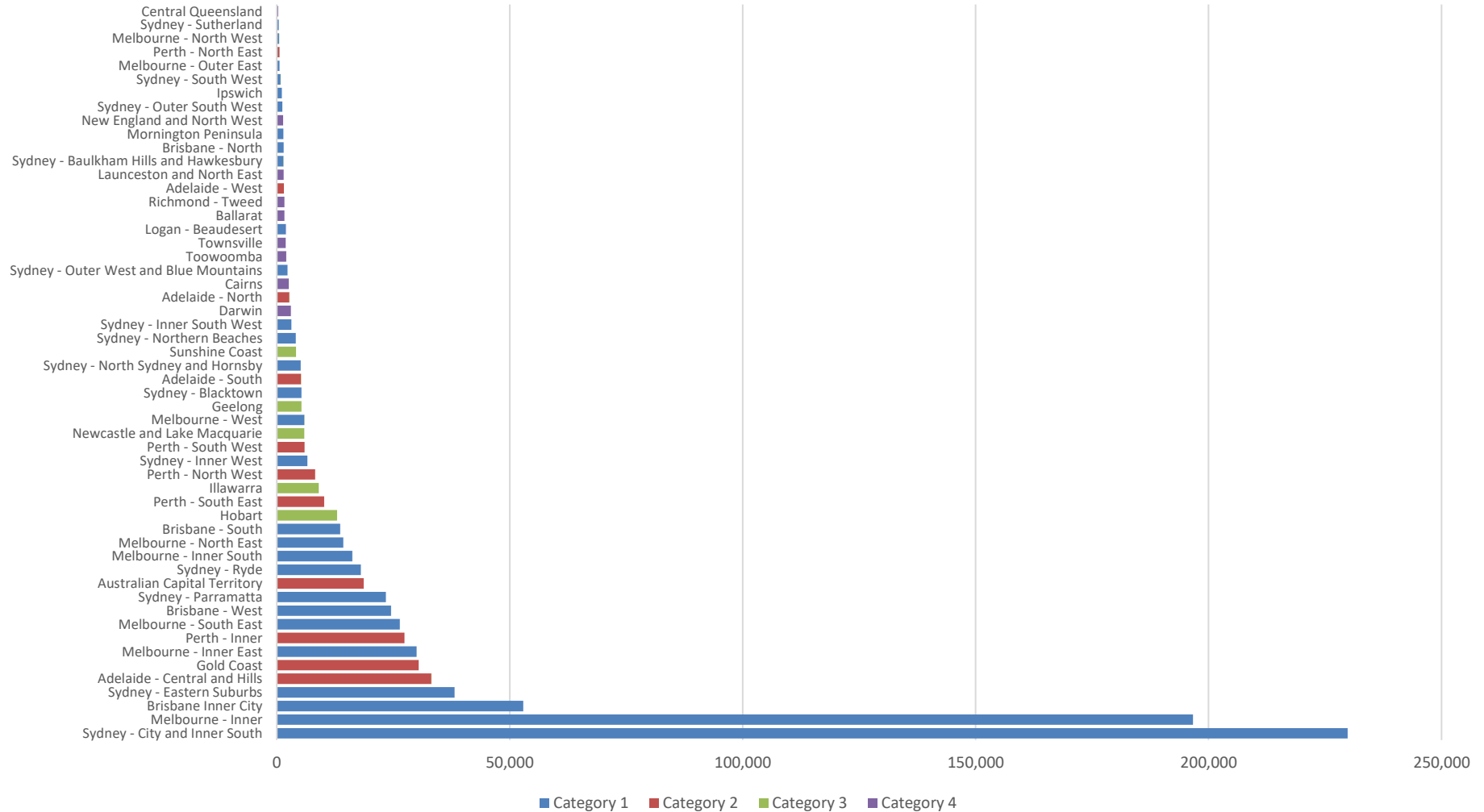
Socio-economic metrics, Statistical Area 4

	TASMANIA		NT	QUEENSLAND				NEW SOUTH WALES				VICTORIA		Australia
	Hobart	Launceston and North East	Darwin	Cairns	Sunshine Coast	Toowoomba	Townsville	Illawarra	Newcastle and Lake Macquarie	Richmond - Tweed	New England and North West	Geelong	Ballarat	
Total persons	222,356	140,484	136,828	240,190	346,522	149,512	229,031	293,494	359,106	239,604	181,555	278,929	157,485	23,401,892
Percentage of Australian population	1.0%	0.6%	0.6%	1.0%	1.5%	0.6%	1.0%	1.3%	1.5%	1.0%	0.8%	1.2%	0.7%	100.0%
Population density	131.2	7.0	43.2	11.3	112.3	66.2	2.9	190.7	412.5	23.3	1.8	63.0	15.3	3.0
% born overseas	14.7%	12.6%	29.0%	21.3%	21.2%	13.8%	13.6%	21.1%	12.3%	13.7%	7.8%	16.5%	10.7%	28.3%
% speaking other language at home	8.1%	5.1%	23.0%	12.7%	5.4%	8.1%	7.4%	15.2%	7.1%	4.6%	4.0%	10.1%	5.0%	22.3%
Median age of persons	40	43	33	39	44	37	36	39	40	46	41	40	42	38
Median total personal income (\$/weekly)	637	537	1,052	642	612	649	672	591	628	550	579	616	559	662
Median total family income (\$/weekly)	1,569	1,319	2,386	1,475	1,478	1,583	1,640	1,679	1,670	1,333	1,378	1,615	1,409	1,734

	TASMANIA		NT	QUEENSLAND				NEW SOUTH WALES				VICTORIA		
	Hobart	Launceston and North East	Darwin	Cairns	Sunshine Coast	Toowoomba	Townsville	Illawarra	Newcastle and Lake Macquarie	Richmond - Tweed	New England and North West	Geelong	Ballarat	Australia
Median total household income (\$/weekly)	1,234	1,017	2,183	1,226	1,260	1,298	1,362	1,352	1,331	1,069	1,107	1,287	1,098	1,438
Median mortgage repayment (\$/monthly)	1,402	1,260	2,200	1,597	1,777	1,560	1,668	1,950	1,733	1,600	1,309	1,560	1,300	1,755
Median rent (\$/weekly)	260	215	420	280	370	285	280	330	330	300	220	288	240	335
Average number of persons per bedroom	0.8	0.8	1.0	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.9
Average household size	2.4	2.3	2.7	2.5	2.5	2.5	2.5	2.6	2.5	2.4	2.4	2.5	2.4	2.6
% attending University or other Tertiary Institution	16.6%	11.8%	13.3%	8.6%	12.9%	14.2%	15.0%	18.1%	18.4%	9.1%	9.6%	14.3%	13.3%	16.1%
% attending VET / TAFE	6.9%	7.5%	4.4%	4.7%	5.1%	5.4%	4.8%	6.4%	6.9%	6.4%	5.5%	5.7%	4.4%	5.9%
% Unemployment	6.4%	7.6%	4.6%	7.8%	7.1%	7.0%	8.7%	6.9%	7.2%	7.0%	6.4%	6.0%	6.8%	6.9%
% Labour force participation(e)	58.0%	54.5%	68.5%	59.8%	57.3%	59.9%	62.1%	57.0%	58.5%	52.2%	55.7%	58.5%	56.3%	60.3%
% Employment to population	54.3%	50.4%	65.3%	55.1%	53.3%	55.7%	56.7%	53.1%	54.3%	48.6%	52.1%	55.0%	52.4%	56.1%
% university qualifications	21.3%	14.0%	20.4%	14.3%	17.1%	17.1%	14.2%	18.1%	18.9%	15.8%	12.9%	19.5%	17.0%	22.0%
% 15-24 unemployed	15.6%	16.6%	9.6%	15.1%	15.1%	15.1%	16.0%	15.8%	16.2%	14.7%	13.9%	13.2%	14.5%	14.9%

	TASMANIA		NT	QUEENSLAND				NEW SOUTH WALES				VICTORIA		
	Hobart	Launceston and North East	Darwin	Cairns	Sunshine Coast	Toowoomba	Townsville	Illawarra	Newcastle and Lake Macquarie	Richmond - Tweed	New England and North West	Geelong	Ballarat	Australia
% Managers and Professionals / Management and Commerce	8.1%	6.1%	8.0%	6.2%	7.3%	7.2%	6.1%	7.6%	8.0%	6.2%	6.5%	7.5%	7.1%	10.1%
% Managers and Professionals / Natural and Physical Science	1.1%	2.1%	0.8%	1.1%	0.8%	1.4%	0.7%	0.4%	0.6%	1.3%	4.1%	0.9%	1.8%	0.9%
% Managers and Professionals / University qualifications	32.1%	25.7%	26.2%	22.3%	24.4%	27.2%	25.2%	27.5%	30.1%	25.3%	23.4%	28.6%	27.4%	31.7%
% Managers and Professionals / Postgraduate qualifications	8.0%	4.7%	6.1%	3.9%	4.5%	5.9%	4.6%	7.1%	6.7%	4.6%	4.6%	5.6%	5.6%	7.8%
% Managers and Professionals	34.0%	30.4%	31.6%	29.5%	31.0%	30.4%	28.4%	31.7%	33.2%	31.6%	33.3%	32.7%	32.1%	35.2%
% Managers and Professionals / Agriculture, Forestry and Fishing	0.8%	3.2%	0.5%	2.4%	0.8%	1.7%	1.8%	0.2%	0.1%	2.7%	8.8%	0.9%	2.5%	1.4%
% travelling to work (one method)	76.0%	83.3%	75.3%	79.6%	84.5%	84.1%	82.2%	83.0%	85.1%	84.4%	81.9%	84.6%	85.3%	75.8%

Attachment 5: International Student Enrolments (All Sectors) by Level 4 ASGS Statistical Area, 2019



Source: International student enrolment data supplied by the Department of Education, Skills and Employment (250+ enrolments)