

# Outcomes Report – Cairns workshop on International Education in Regional Australia

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## Overview

The Australian Government Department of Education and Training supported Study Cairns to develop and host a workshop on opportunities for international education (IE) in regional Australia. Sixty seven participants attended the workshop held on 4<sup>th</sup> November at the Pullman International in Cairns.

This one-day workshop developed strategies to enhance international students' awareness of the opportunity of studying in regional areas of Australia. It follows the launch of the National Strategy for International Education 2025 released in April 2016.

The workshop was designed as an action-focussed activity preceded by two local and state IET events held in Cairns the previous day. These included the bi-annual Qld IET Study Custer meeting and an International Student Welcome Ceremony, including a formal welcome to the city by Mayor Bob Manning. A dinner for delegates after the workshop completed the related activities.

*Figure 1 and 2 - International Student Welcome Ceremony*



Regional cluster groups, industry and education institutions from across Queensland took advantage of the two days of IET activities and were very well represented with a small interstate presence.

The Hon Warren Entsch, Federal Member for Leichhardt opened proceedings and a Welcome to Country by Gudjal Gudjal Fourmile – an elder of the Gimuy Wallaburra Yindindji people highlighted the importance of history of place to educate and enhance visitors understanding and experiences.

Figure 3 and 4 – Workshop presentations



## Presentations

Gordon Scott from Gordon Scott Consulting facilitated the workshop which commenced with a snapshot of international education in Cairns from Carol Doyle, President of Study Cairns. Mr Steve Nerlich, Director International Research and Analysis with the Australian Government Department of Education and Training presented an overview on the National Strategy for International Education 2025, (presentation attached at Appendix 1A) followed by an update on the Draft Strategy on International Education and Training to Advance Queensland delivered by Rebecca Hall, Executive Director, International Education and Training, Trade and Investment Queensland.

Three discussion papers were posted on the workshop's webpage prior to the event and were used as anchor points for discussion at the workshop.

On behalf of Prof Sandra Harding, Prof Robyn McGuiggan from James Cook University presented on ‘The Contribution of International Higher Education to Regional Economies’. She also commented on their challenges including student visa issues; barriers to further growth including minimal on-campus accommodation which is a key attractor for international students; limited public transport and its impact related to the accommodation issues; part-time work options both during and post study and the fact that our broadband network is not comparable either in speed or price with many countries from which international students originate.

John Giles’ topic of IET data challenges was popular and interactive; and was used as the basis for defining the data sets needed to establish a strong base of information for the sector.

Prof Bruce Prideaux from CQ University focussed on where students were coming from and the expectations and exit experiences of international students captured in his research.

All papers generated robust discussion. A table was initially populated with actions from the workshop and was distributed to all participants to contribute clarification, additional actions and timeframes post workshop.

Discussion paper presentations are attached at Appendix 1B.

## Outcomes

Priority themes developed early in the workshop and included:

- The need to identify and generate IET regional data relating to international students from all potential visa sources: student, working holiday and tourist
- The need for regional IET bodies to access quality IET regional data to engage and inform local government and business leaders of the economic impact of IET in regional local government areas
- The need to develop and market an identity and common message of the benefits to International students of studying in regional areas in Australia
- The benefits to the sector of a collaborative approach to national and regional issues and opportunities relating to International students including data, marketing, infrastructure, employment, and visas

The group discussed the challenges and opportunities for IE in regional Australia and prioritised the following:

### Data

Overall the workshop delegates believed there was strong anecdotal evidence to suggest that International education is growing in regional Australia yet current data does not capture the true scope and value of this sector to local and regional economies.

In particular, the numbers of non-student visa holders (Tourist and Working Holidaymaker) numbers participating in short medium and longer term study are considered to be very strong in the regions but are unquantifiable as no reliable data is available. Also not captured is data on the number of students that progress from studying short or medium term on a Tourist or Working Holidaymaker Visa to long term study on a Student Visa.

Lack of regional IET data also provides challenges for regional IET bodies, educational institutions and other key stakeholders to engage with local government, business leaders and potential investors on the true economic impact of the IET sector within regions.

Participants acknowledged that there was a need to define precisely what data was required for governments and other stakeholders to support a request for the provision of this data from the relevant sources. The workshop group agreed to actions to define regional data sets as a Priority Action and to provide these as a matter of urgency.

Data sources identified at the workshop and post workshop via the Priority Action table include:

- Australian Government
  - Department of Education and Training International Research and Analysis Unit - PRISMS
  - Austrade - Market Information
  - Department of Immigration and Border Protection - Study in Australia Statistics
  - Tourism Research Authority - International Visitor Survey
  - Australian Bureau of Statistics publication Survey of International Trade in Services

- Queensland Government
  - International Education and Training Unit
  - Department of Education and Training
  - DTSB
  - Tourism and Events Queensland
  - Queensland Treasury
- Local Government
- International Education and Training Providers
- English Australia - Market and Industry Intelligence
- Other service providers (e.g. tourism)
- I-graduate - International Student Barometer
- Use of specialist consultants

Training for study cluster members to be able to interpret and better use the data was raised.

#### Collaboration

The data discussion highlighted further opportunities available for the regions to collaborate to use this data for other priorities including:

- identifying industry trends
- informing strategies
- understanding the customer base
- driving marketing campaigns
- to secure funding

The workshop supported the development and implementation of a data sharing hub to collate available data specifically for international education.

There was general agreement that this workshop was beneficial as an opportunity for regions to meet and share good practice, as were other annual events such as the Annual IET Summit in Queensland.

Workshop participants also discussed the benefits of developing a regional action plan to actively pursue the opportunities and challenges raised in this workshop. Queensland have a model that includes regional funding opportunities through the Regional Partnership Plan and Regional Partnership Fund.

Collaboration between agencies to provide a holistic approach to the international education sector; a specific value proposition underpinning a clear identity and subsequent promotion, hard and soft support infrastructure for students including transport, quality accommodation and employment options; and the range of entry and participation requirements (visa related) were the main challenges experienced by all regional clusters.



*Figure 5 Delegates in interactive session*

## Marketing

It was felt by those attending the workshop that International students view the experience of living and studying in regions as being iconically Australian, ie more than just another global city experience.

Opportunities existed for investment partnerships to include regional study clusters in National and State IET and Tourism marketing campaigns to further develop and market regional identity, creating an awareness for International students of Australia's regional features and benefits

A point of difference to regional Australia is that it has worked closely with the tourism sector for many years to create and market short duration study tour packages. These can include study or research at Education facilities, plus educational trips to tourism operators, farmstay and homestay accommodation. School groups visit regularly from Asia, Europe and USA and with increasing frequency from China and Japan. ELICOS courses are prevalent with tourist and working holiday visa holders.

These study tour groups are recognised as an important part of the IET sector in the regions, creating opportunities during and after their stay to promote pathway options for students to return for longer term study. As an outcome of the workshop, the group resolved to continue to develop study packages for regional area experiences and explore options for the Visiting Friends & Relatives (VFR) market.

Workshop participants discussed opportunities that exist for incentives linked with tourism strategies; increasing market awareness and share from USA, Europe, Asia, South America and Scandinavian countries; increases in vocational education for international students to support aspects of regional development and increasing engagement with the school sector.

To more effectively align with Goal 2 of the National Strategy, educated representation of regional areas by offshore agents was discussed. A range of suggested actions presented including increased representation by regional clusters on trade missions (for which Austrade support and grants would be imperative); educating government staff and tourism representatives in other countries to the benefits and characteristics of regional study destinations; and developing direct relationships to build business.

## Infrastructure

Participants also recognised the challenges of addressing infrastructure deficiencies and committed to collaboration with other sectors seeking similar outcomes. The specific needs of international students encompassed: reasonably priced public transport, alternative transport options; attractors for international students including affordable and quality controlled accommodation; access to health services and safety, and employment options both paid and unpaid. The two highest priority infrastructure needs across all clusters were public transport and suitable accommodation options.

A quality badging concept was discussed which could provide an accreditation (similar to Aussie Host) for accommodation providers, and a campaign to attract and educate 'home hosting' families to meet the needs of IE students.

## Employment

Employment for international students while in Australia was discussed in terms of working holidays to support current and future training, and exposure to Australian culture and workplaces. Some employers and the Australian public view international students as 'taking jobs from Australians', however the rich relationships and understanding that can flow from working arrangements was highlighted as well as the strong personal and professional development (of all staff) presented solid arguments for engaging International students.

The option of volunteer work was also raised as many students appear to be willing to learn and impart cultural knowledge on a voluntary basis. Examples included an international student studying at post graduate level working here to develop and apply knowledge, then returning to country of origin to establish a business which recruited Australians.

It was agreed that community engagement was crucial to promote the value of international students to the region.

Workshop participants also noted that transition from international student to Australian resident could be improved and discussed the potential to coordinate a joint representation outlining the visa challenges and possible steps towards solutions.

Also discussed was the need for a dedicated campaign to promote the economic and cultural benefits of employing IE students or providing work experience, work integrated learning or internship options.

## Visas

There were visa issues discussed that are not experienced Australia-wide which impact on regional areas. The large cohort of PNG students in the Cairns region across all education levels from schools to University was given as a key example. The State representatives on Commonwealth, States and Territories Working Group was the best mechanism to bring industry views to the attention of the Australian Government. Opportunities existed for regional incentives for International Student Visas from targeted source countries.

## Summary and Actions

The Cairns workshop on International Education in Regional Australia enhanced connections and a sharing of knowledge between the study cluster groups, the education institutions, Federal, State and local government departments as well as industry groups representing students, tourism, accommodation and support services.

Synergies and opportunities to collaborate were revealed through small group work and general discussion. Several objectives were identified as Priorities for Action:

- Data
- Collaboration
- Marketing
- Infrastructure
- Employment
- Visas

## Direct results from Workshop

### Collection of regional data

Actions relating to the data discussion implemented post workshop include a 4-stage data project:

Stage 1 - collating current regional data

Stage 2 - including available working holiday and tourism data

Stage 3 - identifying gaps in data collected

Stage 4 - defining a nationally acceptable data set for regional Australian International education and distributing this on a regular basis.

Access to reliable regional data would enable regional cluster groups, education institutions and other interested parties to:

- advocate for funding and IET support services with Local Government
- apply for incentives linked with State and National IET strategies
- apply for incentives linked with Tourism marketing strategies
- identify opportunities for increasing market awareness
- identify trends and opportunities in global markets

### Pilot Study Commenced

As a direct result of this workshop, the Australian Department of Education and Training and Training and Investment Queensland are working with Study Cairns and Study Gold Coast to pilot a data definition and collection project. Data sets for the region will draw from sources including PRISMS and English Australia data (for ELICOS students). The potential for the Department to engage with Austrade for data on 'other learners' via the International Visitors Survey was also discussed.

### Proposed establishment of a Data Sharing Hub

It was proposed by the Queensland government participants that all states and territories could provide equal funds to support the development and implementation of a data-sharing hub. This would include the establishment of a research and data management body specifically for international education needs.

### Priority Action Table

The action table initiated at the workshop has since been distributed to delegates and enhanced. The following table takes up the themes as presented above providing additional detail as to the specific owners of actions and timeframes where possible.

Key priorities were:

- 1) data collection and analysis for the purposes of business development and effective marketing; and
- 2) advocacy for the fast tracking of infrastructure support based on economic contribution;
- 3) opportunities for collaboration from business development through to new campaigns;
- 4) a compliance framework to ensure quality experience for international students in education, accommodation and work experiences.

### Conclusion

The success of this workshop reflects the interest and desire within the international education sector to collaborate with government and across all its sub sectors from education and training providers to tourism operators and support services to continue to develop international education in regional Australia. There is a desire for regional study clusters to work amongst each other and with capital city destinations to share and refer students for a more comprehensive cultural and educative immersion experience in Australia.

## Priorities for Action – from Cairns workshop

Theme	Action	Who	Timeframe
<b>Data</b>	<b>Identify and/or generate IET regional data utilising standard geographic boundaries</b>	Study Clusters Study Queensland Commonwealth DET Regional education institutions Tourism Research Authority	Stage 1: Immediate post workshop
	<b>Stage 1:</b> Current regional student data at LGA level		
	<b>Stage 2:</b> working holiday and tourism data sourced from TRA & English Australia	TIQ to source TRA data; DET to source English Australia data	Stage 2: by February 2017
	<b>Stage 3:</b> Identify gaps in data collected in Stages 1 & 2	Study clusters, regional institutions and edu-tourism providers	Stage 3: March 2017 (to align with local and State govt grant funding applications)
	<b>Stage 4:</b> Define nationally acceptable data set for regional Australia and distribute on quarterly basis	DET and study clusters	June 2017
	Facilitate training for regional IET groups in data interpretation and use.	State International Education bodies	2017 and ongoing
<b>Collaboration</b>	Develop and implement a data sharing hub	State International Education bodies for development; and All providers and tourism operators to contribute data	June 2017
	Regional cluster groups to share good practice (Example: Annual IET Summit Qld)	Study clusters and IE representatives nationally	2017 and ongoing annually
	Develop regional action plans (similar to Qld model), eg: <ul style="list-style-type: none"> <li>Partnership Plan</li> <li>Partnership Fund</li> </ul>	State International Education bodies	ongoing

<b>Marketing Campaign</b>	Develop a regional identity and message to create awareness for International students of Australia's regional features and benefits	Futures Unlimited, Australian Tourism Authority; State International Education bodies; State Tourism Authorities	Ongoing
	Promote opportunities for investment partnerships to include regional study clusters in National and State marketing campaigns	Regional study clusters State and Federal IET representative bodies	ongoing
	Continue to develop study packages for regional area experiences.	Clusters tourism state tourism bodies & future unlimited.	Ongoing – link to collaboration for clusters with experience (Study Cairns) to share with those embarking on this activity
	Continue to explore options Visiting Friends & Relatives market	Clusters tourism state tourism bodies & future unlimited.	
<b>Infrastructure</b>	Engage with State and Local governments to advocate for <ul style="list-style-type: none"> <li>• Access to public transport concessions.</li> </ul>	Study cluster State government	May 2017 and ongoing (budget cycles)
	<i>Enlist TIQ to lobby for bicycles purchased for students and visitors to alleviate public transport issues in regions</i>	<i>Qld only: TIQ, TEQ, tourism operators and study clusters</i>	2017
	Advocate for accommodation standards for International students (to include a quality badging concept for home hosting model and an infrastructure planning and investment model ie Defence Housing)	Study clusters State and local government bodies Accommodation providers	Commence early 2017
	Advocate for effective communication and technology infrastructure so students are adequately connected while studying	Federal, State and local government bodies	ongoing

<b>Employment</b>	Seek information from NFPs regarding opportunities in community work and engage with universities to negotiate work integrated learning and work experience opportunities to be built into curriculum for 2018	Education providers Federal and State government	in 2017
	Seek information from industry/ employers re opportunities for work/experience and engage with education providers (also includes work integrated learning)	Employer representative groups, Chambers of Commerce, Education providers, Study clusters	2017
	Seek clarification regarding compliance for Fair Work and WHS with State and Commonwealth governments in regards to work integrated learning	Education providers Federal and State government	2017
	Representative bodies to connect students with exporters and industry around parameters for working in Australia to gain cross cultural experiences in business and tourism	TIQ Austrade Education agents	2017
<b>Visas</b>	Bring regional industry issues to attention of Australian Government	IETAG, IETU and stakeholder ministers	2017 and ongoing
	Investigate potential for regional incentives for international student visas	Study clusters, State government	2017 and ongoing

## National Strategy for International Education 2025

Pillar 1 Strengthening the fundamentals	Pillar 2 Making transformative partnerships	Pillar 3 Competing globally
<p><b>Goal 1:</b> Building on a world-class education, training and research system</p> <p><b>Goal 2:</b> Delivering the best possible student experience</p> <p><b>Goal 3:</b> Providing effective quality assurance and regulation</p>	<p><b>Goal 4:</b> Strengthening partnerships at home</p> <p><b>Goal 5:</b> Strengthening partnerships abroad</p> <p><b>Goal 6:</b> Enhancing mobility</p> <p><b>Goal 7:</b> Building lasting connections with alumni</p>	<p><b>Goal 8:</b> Promoting our excellence</p> <p><b>Goal 9:</b> Embracing opportunities to grow international education</p>



## Implementing the National Strategy

- Council for International Education
- \$12 million over four years
- Working collaboratively with States and Territories
- Strengthening our evidence base.

### Goal 1



Building on a **world-class** education, training and research system

### Goal 2



Delivering the best possible **student experience**

### Goal 3



Providing effective **quality assurance and regulation**

Goals 4 & 5



Goal 6



Goal 7



Goal 8



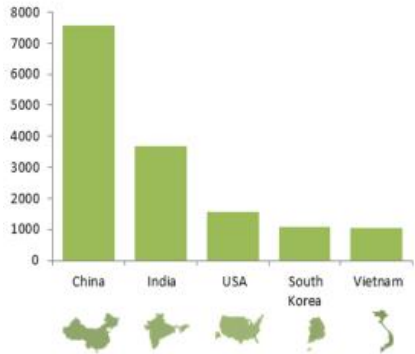
Goal 9



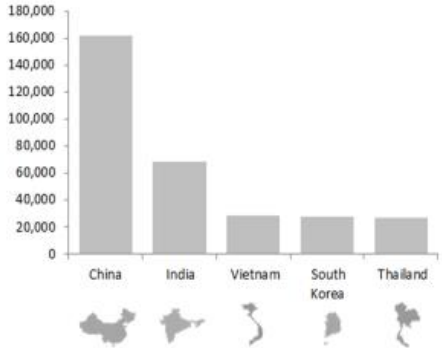


On this basis, 5% of international students are studying at regional campuses across Australia

**TOP FIVE SOURCE COUNTRIES**



REGIONAL AREAS



METROPOLITAN AREAS

## Key Contacts: International Education

Department of Education and Training  
[esie.education.gov.au](http://esie.education.gov.au)  
Email: [ies@education.gov.au](mailto:ies@education.gov.au)

Austrade  
[www.austrade.gov.au/AIE2025](http://www.austrade.gov.au/AIE2025)  
Twitter: @Austrade\_Ed #AIE2025

Department of Foreign Affairs and Trade  
[globalalumni.gov.au](http://globalalumni.gov.au)  
LinkedIn: Australia Global Alumni  
Email: [globalalumni@dfat.gov.au](mailto:globalalumni@dfat.gov.au)

Department of Immigration and Border Protection  
[www.border.gov.au/Busi/Educ](http://www.border.gov.au/Busi/Educ)  
Email: [future.directions@border.gov.au](mailto:future.directions@border.gov.au)

## Appendix 1B – Cairns region international student enrolment data.

Following the workshop, the Australian Government Department of Education and Training provided a regional-level data set for Cairns based on a set of CRICOS providers agreed to represent the full extent of the region. The data below is for the period January - October 2016.

### Enrolments by sector

Sector	YTD Enrolments
ELICOS/Non-award	707
Higher Education	422
Schools	369
VET	1057
<b>Grand Total</b>	<b>2555</b>

### Enrolments by level of study

Level of Study	YTD Enrolments
Advanced Diploma	76
Bachelor Degree	239
Certificate I	1
Certificate II	45
Certificate III	111
Certificate IV	220
Diploma	623
Doctoral Degree	47
Graduate Certificate	11
Junior Secondary Studies	130
Masters Degree (Coursework)	103
Masters Degree (Research)	3
Non AQF Award	707
Primary School Studies	67
Senior Secondary Certificate	172
<b>Grand Total</b>	<b>2555</b>

### Enrolments by broad field of study

Field of study	YTD Enrolments
Dual Qualification	12
Agriculture, Environmental and Related Studies	81
Architecture and Building	4
Education	22
Engineering and Related Technologies	47
Food, Hospitality and Personal Services	60
Health	113
Information Technology	48
Management and Commerce	948
Mixed Field Programmes	439
Natural and Physical Sciences	43
Society and Culture	738
<b>Grand Total</b>	<b>2555</b>

### Enrolments by nationality

Nationality	YTD Enrolments	Nationality	YTD Enrolments
Argentina	<5	Latvia	<5
Austria	8	Lithuania	<5
Bangladesh	<5	Luxembourg	10
Belgium	18	Macau	<5
Brazil	65	Malaysia	10
Cambodia	<5	Mexico	<5
Canada	76	Myanmar	<5
Chad	<5	Nepal	8
Chile	20	Netherlands	15
China	91	Nigeria	<5
Colombia	40	Norway	24
Congo, Democratic Republic of	5	Pakistan	<5
Congo, Republic of	<5	Papua New Guinea	353
Croatia	<5	Paraguay	<5
Czech Republic	85	Peru	<5
Denmark	7	Philippines	39
Ecuador	<5	Poland	5
Egypt	<5	Portugal	<5
Estonia	8	Romania	<5
Ethiopia	5	Russian Federation	<5
Finland	<5	Saudi Arabia	<5
Former Yugoslav Republic of Macedonia	<5	Singapore	<5
France	49	Slovakia	18
Germany	76	Solomon Islands	<5
Ghana	<5	South Africa	12
Greece	<5	Spain	23
Guatemala	<5	Sri Lanka	<5
Honduras	<5	Sweden	5
Hong Kong	44	Switzerland	28
Hungary	19	Taiwan	134
India	242	Thailand	31
Indonesia	5	Turkey	<5
Iraq	<5	Ukraine	<5
Ireland	7	United Kingdom	59
Italy	125	USA	68
Japan	291	Venezuela	9
Kenya	<5	Vietnam	27
Korea, Republic of (South)	326	Zambia	<5
		<b>Grand Total</b>	<b>2555</b>

## Cairns – Year to Date Enrolments 2016

### Top Nationalities by Sector

ELICOS/Non-award	YTD Enrolments
Japan	160
Korea, Republic of (South)	58
Taiwan	47
Czech Republic	44
Brazil	42
Other	356
<b>Grand Total</b>	<b>707</b>

Higher Education	YTD Enrolments
India	119
Papua New Guinea	68
Canada	66
China	23
United States of America	22
Other	124
<b>Grand Total</b>	<b>422</b>

Schools	YTD Enrolments
Papua New Guinea	159
Germany	55
Italy	41
China	35
Japan	14
Other	65
<b>Grand Total</b>	<b>369</b>

VET	YTD Enrolments
Korea, Republic of (South)	256
Papua New Guinea	122
Japan	116
India	111
Taiwan	85
Other	367
<b>Grand Total</b>	<b>1057</b>

## Appendix 1C – Discussion Paper presentations – James Cook University.

### **The Contribution of International Higher Education to Regional Economies** **Facilitated by Australia’s Universities**

The value of international education to the Australian economy has been widely discussed in recent years, with the ABS valuing exports from international education for 2014-15 at \$18.8 billion and Australia’s third largest export<sup>1</sup>. A recent report commissioned by the Australia Government indicates that international education contributes an additional \$935 million in export revenue through education related expenses by those on a non-student visa studying English language courses; tourism expenditure by visiting friends and relatives (VFR) who come to Australia to visit an international student; revenue from offshore campuses; and revenue from international students undertaking study tours at Australian public schools<sup>2</sup>.

International education is Queensland’s fourth largest export sector at \$2.9 billion in 2015, and Queensland’s second largest service export behind the tourism industry<sup>3</sup>. Averaging growth of 6.3 per cent per annum over the past ten years, Queensland holds 16 per cent share of Australia’s total market<sup>4</sup>. The international education sector export revenue supported 21,474 Full Time Equivalent (FTE) employees in Queensland and over 130,700 FTE employees nationally in 2014-15<sup>5</sup>.

Approximately five per cent of Australian international student enrolments are based in regional areas, compared with Queensland which has 10 per cent of students studying outside of the greater Brisbane and Gold Coast regions<sup>6</sup>. In 2015, Tropical North Queensland was the third highest performer in the State, behind Brisbane and the Gold Coast, with 409,700 student visitor nights (or 3.8 per cent of the state total), over \$103 million in economic contribution to the economy and supporting over 820 FTE employees (Table 1)<sup>7</sup>.

*Table one: Economic Contribution of International Education to Tropical North Queensland in 2015*

	<b>Tropical North QLD total added value (\$M)</b>	<b>QLD total added value (\$M)</b>	<b>Tropical North QLD total employment (FTE)</b>	<b>QLD total employment (FTE)</b>
<b>Economic contribution of student related expenditure</b>	101.6	2,252	807	18,651
<b>Economic contribution of VFR expenditure</b>	1.8	11	21	120

<sup>1</sup> Deloitte Access Economics, 2015, *Value of International Education to Australia*, Australian Government, Canberra.

<sup>2</sup> Ibid.

<sup>3</sup> Deloitte Access Economics, 2016, *The opportunity and imperative for Queensland’s education and training sector*, Trade and Investment Queensland, Brisbane.

<sup>4</sup> Ibid.

<sup>5</sup> Deloitte Access Economics, 2015, *Value of International Education to Australia*, Australian Government, Canberra.

<sup>6</sup> Ibid

<sup>7</sup> Deloitte Access Economics, 2016, *The opportunity and imperative for Queensland’s education and training sector*, Trade and Investment Queensland, Brisbane.

James Cook University (JCU) is committed to supporting our local communities in northern Queensland and across the tropics to ensure they are equipped to engage in the global economic context and have real access to knowledge, skills and research to create sustainable and stable futures. In 2015 JCU had 22,159 students, 5069 staff members; and, three main campuses in Cairns, Singapore and Townsville. International students make up 14% of students at our Australian tropical campuses. Of these, in the Cairns region JCU had 2,470 domestic students; 373 international students; and 1,275 employees.

In addition to the economic benefits being realized by Tropical North Queensland, there are a broad range of social and cultural benefits that stem from international education, particularly in regional areas:

- Through interacting with international students, domestic students are exposed to different cultures and ways of thinking. This supports the development of more 'global citizens' and can develop lasting relationships and networks with far reaching benefits, including longer term trade and diplomatic relationships.
- International education builds the cultural diversity of our communities and can contribute to more inclusive and culturally rich society.
- International education provides a strong platform for leveraging Australia's global reputation, particularly in research and sharing knowledge. JCU has developed a global reputation as a leader in research and education in the tropics. JCU has had a leading role in the *State of the Tropics* project, which has brought together leading research institutions from across the world. This project has received international attention, including the United Nations declaring 29 June as the International Day of the Tropics.

In understanding the contribution that international education makes to the economy and the social fabric of society, it is easy to understand the increased global competition for international students.

The world over, recent years have seen governments and education institutions investing heavily to increase international student numbers. Domestically, there has been a strong focus by state/territory and the Australian Government to develop policy frameworks to guide decision making and support growth across the sector. France, Germany, Japan and Canada, who together with the US, UK and Australia comprise more than half the global market, with all of these countries actively targeting international education as a means to not only reinvigorate their economies, but to restructure their industrial bases.

JCU student Rismita Sari is an international PhD student with the College of Marine & Environmental Sciences at the Cairns campus.

Rismita is an active member of the JCU Cairns campus and is committed to sharing her culture with the local Cairns community. Rismita is involved in running a weekly Indonesian radio program on Cairns 89.1FM, and in 2015, Rismita and her fellow students took part in the Global Village event, sharing their culture with community members, including free Indonesian food such as gado-gado, rujak, perkedel and bakwan.

Rismita is a wonderful example of how international students positively impact on the learning experience of domestic students and to our local community.

Further, emerging players like China, Malaysia and Chile are investing in the expansion of their international education services, especially in the higher education sector. They are directly targeting existing markets by developing and delivering higher education courses that are taught in English. As with any maturing industry, competition is increasing at local, national and international levels. These countries are actively pursuing offshore delivery, as are many Australian institutions.

In responding to the increased competition globally, maintaining and building Australia's share of the international education market will require development and maintenance of a sustainable competitive advantage.

This will include maintaining our reputation for quality institutions, professional tuition and assured personal safety, and building on the characteristics of Australian international education offering that are unique to us such as the unique offerings living and studying in regional areas.

While there is increased competition for international students both in Australia and from education institutions globally, there are significant opportunities to grow international education in regional Australia. This is particularly true for our Tropical North Queensland region, which is already a leader in international education within regional Australia.

There are also a number of challenges that face government, providers and broader stakeholders in Australia to fully realise these opportunities, such as:

- alignment of immigration policy with international education student recruitment strategies, particularly in emerging markets;
- changing perceptions of studying in regional areas as opposed to metropolitan areas; and
- high costs of developing brand recognition, particularly at an institutional or regional level.

Promoting and leveraging the unique student experience and the strengths of universities in regional areas of Australia are key in overcoming these challenges. Regional universities have considerable research strengths in fields such as tropical health, agriculture and marine science, such as JCU which is globally recognised as an education leader in the tropics. Further, the close knit communities in regional Australia can provide cultural and social immersion opportunities that are no longer available in larger metropolitan areas.

# **Building International Education in regional Australia**

**Cairns Workshop**

**November 2016**

**Cairns Case Study**

**Regional Challenges: The Data Challenge**

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# 1 Introduction

The purpose of this paper is to contribute to the examination of the Cairns Case Study with particular attention to the regional challenges.

This will be addressed within a strategic planning/strategic marketing framework that essentially asks the following questions:

1. Where are we now (environmental scan)?
2. Where do we want to get (objectives)?
3. How to get there (strategies, actions, etc.), and
4. How do we know we have achieved our objectives (monitoring)?

The data needed to help us know where we are now and that needed to monitor movement towards achievement of objectives is the main focus of this paper.

It is directly relevant to the situation in Cairns but is also relevant to every other region in Australia that is seeking to increase its number, market share and economic impact from international education.

Without current and reliable data at the regional level it is difficult to see how the objectives for regional study organisations that are promoted in the Commonwealth International Education Strategy and the draft Strategy for Queensland can be achieved.

## 2 Background

### 2.1 My experience

For nearly 15 years I have been addressing the issue of sub-state or regional international education issues for Queensland regions mainly in assessing numbers of students by sector and their economic impacts.

In the early stage the initiative came from the regions themselves, mainly those regions with more international students such as Gold Coast and Brisbane. More recently Trade and Investment Queensland (TIQ) has taken the initiative and commissioned assessments for all the major regions in Queensland.

The major projects that required grappling with the methodology and statistical concepts in getting a good as measures as possible for sub-state/regional areas have included:

- Gold Coast City Council, 2002;
- Brisbane City Council, 2004;
- Gold Coast City Council, 2005;
- Brisbane City Council, 2005;
- Gold Coast City Council, 2007;
- Study Gold Coast, 2013;
- Study Brisbane, 2013;
- Trade and Investment Queensland, 2014, for all major regions, and
- Trade and Investment Queensland, 2015, employment effects for all regions.

## 3 Background

### 3.1 Policy framework

#### 3.1.1 Commonwealth

The Commonwealth National strategy states:

*Whilst the majority of international students study in metropolitan areas, there are significant opportunities for growth in regional Australia. Education institutions in regional Australia provide considerable research strengths, especially in agriculture, marine science and tropical medicine. Study opportunities in regional Australia can provide tremendous experiences for international students, with tight-knit communities and often plenty of hands-on experience.*

*In turn, regional communities that have embraced international students have benefited through improved cultural understanding and international connections, helping them reach out to the world.*

**Action 9.2:** Promoting opportunities in regional Australia

*Although international students have traditionally gravitated towards major cities, there are often significant advantages in choosing a regional Australian education experience. International student satisfaction with the living and learning experience in regional Australia consistently rates highly. These ratings are based on lower living costs, greater access to accommodation and work opportunities, closer interaction with the local community, and access to Australia's natural environment. Many of Australia's top areas of research strengths are located in regional Australia. These include agriculture, marine science and tropical medicine.*

*We will promote the positive benefits to the student and the wider community of education in regional Australia. We will also promote excellence in regional disciplines to attract international students and researchers.*

*Australia will attract more international students to regional communities by promoting internationally the excellence and the advantages of education, training and research in regional Australia.*

There is virtually no data in the Commonwealth strategy, but a minimal amount is provided in the report by Deloitte Access Economics (2016), *The Value of International Education to Australia*.

### 3.1.2 Queensland

The draft Queensland strategy deals in much greater detail with the regions. It provides more data and a coherent set of objectives, strategies and action. References include:

*STRENGTHENING OUR REGIONS Increase the contribution of international education and training to regional economies and ensure that Queensland offers the most diverse, comprehensive and unique offerings to international students.*

*Proposing Regional implementation plans*

*A defining feature of Queensland's international education and training industry is the way the industry's activities are dispersed around the regions.*

*Central implementation and coordination of the strategy across industry and regions.*

*If the proportion of international student related expenditure benefiting regional Queensland remains the same, the Deloitte Access Economics 'business as usual' scenario projects student related expenditure (outside Brisbane) to rise from \$937 million in 2015 to \$1.5 billion in 2026.*

### 3.1.3 Regional

In states other than Queensland and to a much lesser degree NSW (for example Newcastle, Wollongong, Lismore/Tweed), the vast majority of international students are located in the capital cities. In Victoria, SA and WA nearly all international students are located in the capital cities. Accordingly the degree of strategic direction varies enormously between regions.

Even in Queensland, the resources, local government commitment and coherence of regional study organisations varies greatly.

The initiative of the Queensland Government in the Draft Strategic Plan is to be applauded.

This paper raises a major issue that needs to be addressed to enable a more systematic strategic planning and marketing approach, and that is to address the data deficiencies at the regional level.

Through this approach, both Regions and Queensland will benefit.

## 4 Current information base

### 4.1 National and State

National and State based international student information from the Commonwealth is generally very good. In contrast the regional or any sub state data has historically been limited apart from periodic initiatives of some of the larger Queensland regions and the recent work by TIQ.

The Commonwealth Department of Education and Training now provides a visualisation map of total enrolments by sector and nationality indicated by circle sizes based on enrolments and subject to privacy constraints.<sup>8</sup> Data is not available. The CRICOS providers can be identified. The current state of data provision is summarized in the table below.

**Comparison of National, State Regional International Education Data Sets**

	National	State	Regional
Regular/Quarterly			Visualisation
Comprehensive			
Standard geographies linked to ABS classifications			
Consistent definitions			
Cross classifications			
Nationality			Visualisation
Sector			Visualisation
Duration of course			
Can select fields			

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<sup>8</sup> For details see: <https://internationaleducation.gov.au/research/DataVisualisations/Pages/Student-locations.aspx>

## 4.2 Regional

### 4.2.1 Current Status

With the exception of initiatives from over the past 10-15 years by Study Brisbane/Brisbane City Council, Study Gold Coast/Gold Coast City Council and more recently by TIQ on behalf of all major Queensland regions there has been no systematic approach to data collection of students or their economic impacts.

Where studies have been done they have used available Australian Education International (AEI) data, definitions and concepts but when this data was not available from AEI, direct surveys of educational providers were undertaken, but again using AEI definitions and concepts.<sup>9</sup> There is some information (generally total students) that is published by the universities and sometimes this is on a campus basis. NCVER has provided some TAFE (but not private VET) data in the past on a fee for service basis.

### 4.2.2 Regional Information

In June 2016, the Department of Education and Training published a Research Snapshot on Study Locations of International Students 2015.

There are a number of issues in this data from the regional perspective, notably:

- Regions are not based on standard ABS geographical standards (ABS ASGC), and therefore it is either not possible or extremely hard to tie the student data to other ABS data related sets such as other education sectors, employment, construction activity and other economic activities;
- The regions, based on Australian Tourism's Tourist Regions, are inconsistent, for example Gold Coast is included as part of the capital city area and is thus not identifiable despite having the greatest number of international students in a non capital city area in Queensland;
- Odd situations arise in that the Sunshine Coast is identified as a region but the Gold Coast is not; Geelong is identified as a region (75km from Melbourne) but Gold Coast is not (79km from Brisbane);

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<sup>9</sup> AEI refers to data from the Department of Education and Training

- Toowoomba (or Darling Downs) as a region is not identified as the Department asserts that it is part of the Darling Downs (correct) but that the Darling Downs is also in NSW (incorrect) therefore Toowoomba cannot be identified as a region;
- The location of a significant number of students is listed as “Unidentified”;
- Without a precise understanding of the Tourism based regions, there are cities with an international student presence but most people would not know into which Tourist region their city was located, and
- Where there is funding from local Councils for international education, the Councils often require reports on KPIs to ensure that they are getting value for money and the geographic classification system used does not provide that level of knowledge.

The Department of Education and Training’s Student Location Visualisation web site addresses some of these issues by providing the detail as outlined in 4.1 above, notably an indication of the number, nationality and sector of international students.

#### 4.2.3 Assessment of information base

The initiatives from some regional study organisations and TIQ have provided a limited set of information on regional information on numbers of international students and their economic impacts.

In the past, the services on international education provided by the International Education area of the Department of Education and Training and those by the ABS have not served regional study organisations well. However, the Department of Education and Training has indicated that it now has the capacity to differentiate between regional and non-regional areas where there is agreement on definitions and other criteria. It is up to regions to define their needs.

It is not possible to implement the valid regional objectives of the Commonwealth Strategy or that of Queensland strategy unless regional study organisations are much better served.

# 5 Ideal regional information set

## 5.1 Consultation needed

The first step is to consult with regional study organisations so there is a good understanding of the following:

- The frequency of data;
- The needs of the regional Study organisations;
- The requirements of sponsoring local Councils, such as for KPIs;
- The ABS and other geographical constructs;
- The scope, coverage and definitions of Commonwealth international education data sets;
- Other data sets that may have particular relevance at the regional level such as that from Tourism Australia Study Tour data, Universities statistics, VET data from NCVER and ABS schools data;
- Relationship between enrolment data and students;
- The common uses and abuses of the data, and
- Other data sets that may be relevant to assessing the economic impact of international students such as services exports, construction (residential and other construction that can be attributed to international education), employment, etc.

## 4.1 The data set

An outcome of the case study on Cairns and of the Workshop should be to develop a data set that meets the needs of the regional study organisations within a framework established at State level.

Unless this is done there is the risk of no data on which to develop regional strategies, inconsistent definitions, ad hoc approaches and the waste of resources.

Matters to consider include:

- Frequency (quarterly, annual);
- Geographic standards (ABS or Tourism Australia regions)
- Geographic scale (city, region, local government area);
- Data set (country, sector, duration, etc.);
- Other data sets such as Tourism Australia Study Tours, ABS, NCVET VET data, University Statistics; Schools data, etc., and
- Understanding of limits of data;

The case for the regions' and state's data needs then has to be made to the International Education area of the Department of Education and to ensure needs are met.

Then if your wishes are granted, the regions need the capacity, either on their own account, or as part of a TIQ statewide initiative, to properly interpret and then act on the data to build their strategic and marketing plans and to develop effective monitoring systems.



# Demand for tertiary education in the international youth market

Professor Bruce Prideaux  
CQU  
Cairns Campus

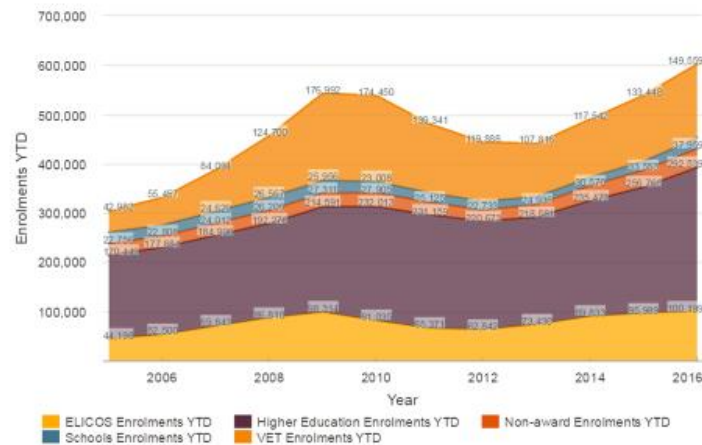
## A Reality Check: Knowledge is Power

The latest advice from the International Education Association Australia indicates that:

- Non-English speaking destinations are increasing in popularity
- International schools in Asia have massive increases in enrolments
- There is an expanding field of providers, products and online provision
- There is a growth in gap year Certificate and ELICOS overseas enrolment



## AUSTRALIA'S ENROLMENT TRENDS



Filtered by: Sector All, State All, and Nationality All

Source: Orbis (Austrade), YTD July 2016



## Cairns vs the Metros

- Location is a plus and a minus
- Metropolitan cities have a honey pot effect much like the Gold Coast and Schoolies – regional towns find it difficult to attract students seeking a big city ‘honey pot’ experience
- Metropolitan cities have the ‘big name’ famous Universities
- Complaints that immersion experiences are sometimes difficult to find in campuses that have large numbers of overseas students of the same nationality
- Cairns is able to offer an environmental ‘honeypot’ experience and cultural immersion opportunities



## Customer Focus Needed

- Cairns has a number of comparative advantages but transforming these into a competitive advantage requires ongoing monitoring of the student experience, understanding of what our competitors are offering and constant refreshing of course content and delivery methods
- This requires ongoing research at the student level, the employer level and at the competing destination level
- The key to long-term success is the quality of the student experience. What we can do for the student must come *before* what the student can do for us!



## The Hard Questions

- First cut through the 'wonderful' location hype and ask what can Cairns offer that will equip students with qualifications that will earn them a living?
- Second, what are the opportunities to offer a quality student experience that is academically competitive?
- Third, how can location add to the student experience that differentiates Cairns from our competitors?
- Fourth, does Cairns offer a value-for-money experience?



## Opportunities

- Offering gap year experiences at TAFE level
- Offering semester length student experiences
- Study abroad
- University level intensives for credit as part of a holiday experience
- Full program enrolments based on specialist programs offered by Cairns based universities
- Life long learning is likely to create new markets
- Specialist courses targeted at international students



## What is Required

- A detailed understanding of student needs, detailed understanding of employer needs and innovation in teaching
- Understand of international trends and potential impacts
- Networking of providers to provide pathways between programs
- Detailed and ongoing research at regional level
- Effective marketing strategies
- Advocacy at local, state and federal levels – what are the top 5 issues?
- **Emphasis on the student**
- **Emphasis on quality**

