

Organisation: Department of Trade Business and Innovation (Northern Territory)

Question 1. How can government, institutions and communities better promote the valuable and unique experience of studying and living in regional Australia?

The Northern Territory Government, through StudyNT in the Department of Trade, Business and Innovation, works closely with the Commonwealth Department of Education and Training, and Austrade to promote the Territory as a study destination for international students. Team Australia promotion is valued and built upon in the Territory through the use of student ambassadors and alumni.

In June 2017 the Economic Development Framework identified international education and training (IET) as a growth sector for the Territory and established a growth target of 10 000 international students studying in the NT by 2022. A strategy to achieve this target is expected to be released by the Northern Territory Government shortly.

The Territory has recently released its masterbrand, Boundless Possible, developed through evidence based research of interstate and overseas perceptions of the NT. Boundless Possible counteracts incorrect perceptions, demonstrating the cosmopolitan, multicultural and vibrant cities and towns where not only is there plenty to do, but the activities are highly accessible because everything is close by.

StudyNT values the opportunity to participate in Austrade marketing campaigns focused on promoting study in areas of Australia outside Sydney, Melbourne and Brisbane (SMB). With regard to the use of 'regional Australia' as a descriptor of the rest of Australia, we note domestically there are many regional initiatives promoting economic, social and cultural development, promoted to Australians who understand the true value of living in these areas. However, we also note that in some countries, 'regional' has a negative connotation and using this descriptor can be detrimental to achieving the desired growth.

The impact of multicultural communities and their diplomatic corps on promoting the Territory is positive and can be further enhanced.

Question 2. What are the barriers to regional destinations and their education institutions hosting more international students?

Perceptions can be a barrier to growth in the Territory. In developing the Territory's masterbrand, Boundless Possible, the perceptions of nearly 3000 people were researched (700+ Territorians, 2000+ Australians outside the Territory, 114 local and international business leaders). The perceptions about the Territory were:

- Hot and dry
- Just desert
- Full of crime
- Nothing to do
- No opportunities
- Blokey
- Racist
- Isolated

- Tough
- Just a rock
- A bit backward
- Nothing here

In contrast, the reality about the Territory is:

- Connected
- Optimistic and proud
- Free
- Open minded
- Warm and welcoming
- Enormous opportunity
- Rich in culture
- Creative
- Quirky
- Sophisticated and cosmopolitan
- Untapped
- Filled with potential

The range of courses available at higher education and VET can be a barrier for students seeking a niche or specialised area of study where that area is not already a Territory specialisation, such as environmental studies. This barrier is being addressed by increasing the range of courses available to meet increasing demand, through both existing CRICOS providers, existing domestic providers gaining CRICOS, and new market entrants to the Territory. It is noted that growth in domestic student numbers is not expected to grow at the same rates predicted for international students and therefore ensuring an international student experience which includes interaction with Australian students will need to be monitored.

Population growth may be a barrier to IET growth elsewhere in Australia but it is not a barrier in the Territory. The Territory has the capacity to absorb significant growth in population more generally and international students in particular. Its infrastructure, from hospitals through to roads and including accommodation options, can absorb the growth whilst concurrently providing for Territorians. The Territory Government's 2018-2028 Northern Territory Population Growth Strategy provides the framework for attracting people to the Territory, and encouraging those already here to stay for the long term (https://population.nt.gov.au/__data/assets/pdf_file/0007/559384/Population-Strategy.pdf).

The Territory's economy comprises a small number of large businesses with the majority being SMEs. This provides a wealth of casual work experiences for international students during their studies and also plentiful internships. However, with few national and multinational companies located in the Territory, post-study professional opportunities are limited with larger companies but still plentiful with smaller companies.

Factors identified by students as both a barrier to and a reason for choosing to study in the Territory include:

- The weather
- Size of Darwin – with a population of 145 000 it is a small capital city
- Distance from extended family and friends located elsewhere in Australia
- The affordability of public transport is a positive but its availability is a barrier, particularly late night transport from employment to home

- Events and activities are not as plentiful as major capital cities. However, the events and activities tend to be more accessible, particularly the travel time

Boundless Possible Campaign <https://boundlesspossible.nt.gov.au/>

Question 3. How can metropolitan and regional education institutions work together to create regional study opportunities for international students in ways that benefit the students, the regional communities and the institutional partners?

Territory CRICOS institutions with campuses both in Darwin and other capital cities have noted students respond positively to VET and ELICOS courses which are accessible across two or more locations, enabling students to study at any campus at any time during their course and thus experience different parts of Australia. These flexible, multi-campus VET and ELICOS providers are relatively new to the Territory and it appears that initial student attraction to the course is via the Sydney campus website, where they then receive information and options for study in the NT, and take up the NT option. Whilst numbers are small, it may indicate an opportunity for 1+1 structured courses across jurisdictions, ie, the first year is spent in a metropolitan campus and the second year is spent at a Territory campus. This could also be an option for courses of shorter or longer duration. If the metropolitan institution does not have a Territory campus, there are opportunities for pathways and partnerships.

Question 4. What are the best ways to communicate the benefits of spending time in regional Australia to prospective international students and their parents?

The Territory has identified that providing agents with a personal experience of the Territory through a familiarisation tour is an effective, but expensive, means of promoting the benefits of studying in the NT.

Attendance at agent trade fairs and expos is also an effective and efficient means of communicating the benefits. Darwin will host ICEF-ANZA in April 2019. Securing the hosting rights combines the personal experience of the Territory and the trade fair promotion.

Virtual reality experiences are being increasingly used within the IET sector to good effect.

Word of mouth commentary on the benefits and challenges of studying in the Territory through both public and private digital channels occur organically. These channels are also being used for targeted stories promoted by the StudyNT student ambassadors and alumni. Harnessing augmented/artificial intelligence for targeted promotion of study opportunities in the Territory across multiple digital channels will be a priority in 2019/20.

Question 5. 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?

For the current Northern Territory student demographic, there does not appear to be a strong interplay between tourism and education. Tourism opportunities do not appear to be an attraction mechanism for 500 visa students, and the visiting friends and relatives segment is not as strong as elsewhere. A possible reason for this is the economic profile of students studying in the Territory are often price sensitive; students report that friends and relatives

tend not to visit.

Focusing on the interplay between education and tourism, study tours present more opportunities for the Territory. The number of study tours incorporating the Territory in their itinerary are currently small but with plans to increase numbers substantially. The recognised benefits of study tours to the Territory economy include:

- Local tourism operators
- Accommodation:
 - o Increasing occupancy rate
 - o Growing the homestay market – the current Territory operators are nascent in Darwin and not yet established outside the capital. Study tours travelling to Katherine, Alice Springs and other Territory locations will grow the homestay market
- Airline capacity, particularly for emerging seasonal routes operating in the Northern Territory Dry Season, April to October

Internal research indicates minimal pathways from study tours to 500 visa students although there is anecdotal evidence the occasional student visited the NT on a study tour and came back to study full-time. Increasing knowledge amongst the target population of potential students about study options in the Northern Territory is also an identified outcome of study tours.

Improving data collection on study tours, in a manner consistent across Australia and with a sample sufficient for the NT to draw conclusions (rather than 1% of the total sample size), will develop an evidence base to track progress.

Question 6. What role could fee structures and scholarships, education agent promotions, and changes to government policy settings play to encourage more students to study in regional Australia (e.g. migration incentives)?

Financial incentives (fees and scholarships) and promotions (to agents and directly to students) can be the purview of all levels of government and all institutions with the quantum dependent on prioritisation and capacity. However, only the Australian Government can change policy settings for visas to incentivise studying in identified areas.

The Northern Territory Government has combined a financial incentive with promotion (with assistance from Austrade in identifying that ‘scholarship’ was a key search term on the Study in Australia website) in the Study in Australia’s Northern Territory Scholarships. These scholarships are jointly funded by the Northern Territory Government and individual providers with the aim of increasing the number of students studying in the Territory and the quality of those students.

Fee structures are significant for price sensitive markets; it is noted that some providers focus on cost as an attraction mechanism whilst others focus on student yield. It is also noted that scholarships are used as a promotional and a discounting tool.

Education agents recruit 75% of international students and are therefore an integral promotional component. As the business model of agents is based on commission, counselling a student to study in a relatively unknown location takes longer to earn the commission with the corollary of agents requiring higher commissions or additional incentives to place the student in that destination.

All Australian CRICOS institutions' primary value proposition is an Australian qualification. The Territory's additional value proposition is work experience – casual whilst studying, internships, and, if holding the appropriate visa, post-study.

Internships – provide incentives to employers outside major centres to host an intern.

Growing the number of internships across Australia and particularly in locations outside major centres of international students with the objectives of:

- extending the international student experience of Australia
- providing opportunities for Australian business to benefit from the diversity of international students and
- increasing the potential of post-study working visa holders working in their area of study outside the major centres.

The Northern Territory Government has piloted Darwin-based higher education interns being hosted by employers in Alice Springs. Alice Springs currently has only a handful of international students studying VET.

The interns were very warmly received by the community (part-time jobs arranged; bicycle and scooter provided gratis) and employers.

The costs of the pilot were borne by the NTG and included:

- flights
- accommodation - students were required as part of their tenancy to continue paying rent in Darwin for the 10 weeks of the internship.

Initial interest from students for placement in Alice Springs was tempered by part-time jobs in Darwin not being held open while the student was away.

Incentives may overcome some employer's reticence to host an intern with common reasons for declining including no previous Australian work experience, English levels, and lack of citizenship.

International Student Visa and Migration Settings

Both international student visa and migration settings appear to have a significant impact on the destination chosen by international students and/or their education representatives, not only in Australia but also Australia's close competitors Canada, the UK and New Zealand. Manitoba, Canada, with similarities to the Northern Territory (extremes of temperature, relatively unknown destination, although noting the population is 1.3 million compared to the Territory's 250 000) has successfully grown its international education and training sector through a combination of incentives and visa settings.

International Student visa settings in Australia vary according to where the student's home country and which institution the student proposes to study at.

Whilst location does not affect an institutions risk rating, institutions in regional areas generally have a higher risk rating than the larger, established universities which are usually located in the major capital cities. As a result the documentary requirements placed on international students looking to study in regional institutions can be significantly higher and in some cases a barrier to obtaining a student visa.

It needs to be recognised that whilst students are required to demonstrate that they are genuine temporary entrants, many international students study in Australia with the plan of ultimately obtaining permanent residency. Changes to migration settings that either tighten or relax the requirements to be met by international students applying for permanent residency or visas that could lead to permanent residency affect the uptake of international students into Australia.

Student visa settings in Australia could be adjusted to provide a “risk rating” concession for institutions in regional Australia.

Migration settings in Australia could be adjusted to increase the duration and broaden the eligibility criteria of post-study work visas in regional Australia. This includes eligibility criteria and visa conditions demonstrating a link to regional Australia and to ensure that the applicants meet their obligation to the region.

Question 7. Is there a need for greater insights into the motivations and the experience of international students in regional areas relative to metropolitan areas, using instruments such as the International Student Barometer and/or other targeted research?

Research can be useful in promoting the Northern Territory, as demonstrated by the perceptions identified by the research underpinning the Boundless Possible masterbrand. Any research on motivations and experiences would need to differentiate the regions as they are not homogenous - either in opportunities, offerings, culture, experience or weather.

It is questionable whether the research should compare an Australian regional experience to an Australian metropolitan experience; perhaps the first piece of research is to profile students who choose a regional experience, either in Australia or elsewhere and compare this to the profile of a student choosing a big city experience anywhere in the world. The next step would be to differentiate the Australian regional experience to those in the US, UK and New Zealand to enable more targeted marketing.

Question 8. Any other comments?