Organisation: Independent International Education Consultants.

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

The principle is 'plan for success'. Success is primarily that of the international student, then fellow students, the education provider and the local community. Success for the international student is initially graduation or completion of the course of study. Subsequent success will reference the student's next choice, whether that is further education, seeking employment in Australia or elsewhere, or migrating to a regional Australian community. While it is important to recognise employment, migration, or tourism related intentions, the core business is the educational enterprise, maintaining and building Australia's reputation for quality education and the success of graduates.

Government
• Australia's regional diversity is a core strength and differentiator, not a 3.1% minority pursuit. In a mature market, students seek a unique experience, grounded in quality teaching and a sense of agency, of engagement in both campus life and the local community.

• Education and training are fundamental to regional growth. The range of recent reports in Australia on regional and northern growth reference education and training, but for the most part miss the centrality of education services to attracting and retaining a young population. The role of international education in regional Australia is barely acknowledged, and if acknowledged, it is from a financial aspect, understating the social and community benefits. Government departments need to work across their specific roles and work together to encourage the regional growth agenda with a common emphasis on education.

• More thought needs to be given to the definition of 'region' for data collection and for marketing purposes. For example the Gold Coast and Logan Corridor together have a greater population and education infrastructure than Canberra, equivalent to the capital cities normally grouped as metropolitan. While Hobart, Launceston and Darwin are regional, they are in a different position to Newcastle and Wollongong, as the latter benefit from proximity to Sydney. Similarly Deakin Geelong is regional but part of 'greater Melbourne'. While acknowledging this debate is difficult to resolve, we suggest a three-tier classification is required to progress aspects of this inquiry.

• Each region is different. Hence, encourage differential incentives by region. Recognise the core role played by education providers and the multiplying potential of international student numbers where the regional experience is demonstrated to 'deliver the promise', successful education outcomes supported by the community.

• Data is required in order to map progression routes within and between providers, across regions and metro locations and to home and third countries.

Institutions
• Club together at the regional level. There is a tendency for regional providers to regard the competition firstly as 'next door', secondly 'in the capital cities/ interstate'; rather than overseas. The challenge is to increase the total number of students nationally so that all sectors and providers share the benefits. This requires greater cooperation, in particular to

identify pathways that play to regional strengths.

• Providers to bring the communities with them, beginning with the schools.

• Pay particular attention to the student from their initial interest to the end of their first semester (or first few weeks on a short course). You may have to convince the local agent and student's family as well as the student that this is a sensible choice. There is culture shock transferring from an Asian regional city of 3 million to an Australian regional town, and the effect this has on students is not well appreciated. Students seem to take time to adjust and understand the nuances of regional living, before embracing the lifestyle.

Communities
• Club together at the regional level, working with institutions.

• If the local community does not understand the rationale firstly for education and training, secondly for the international component of that education and training, then progress is thwarted.

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

Identify distinct regional student cohorts and then consider specific regional match(es): The cohorts we identify are:
• Group A: those students seeking employment and possibly residency
o Group A1: students intent on building a career (short term residency)
o Group A2: students primarily interested in migration

• Group B: those students not seeking post-study employment or residency
o the 'knowledge is the destination' group, seeking distinctive courses and lifestyle choices

• Group C: the education pathways group
o students considering their immediate future education options.

Identification of cohorts invites consideration of different regional strengths:
• Group A will be attracted to destinations with either or both of employment and migration incentives. Current destination examples include Hobart and Darwin.

• Group B are likely to be seeking a particular program, e.g. veterinary science (UQ Gatton) or marine science (JCU Townsville). School students are also represented in this group, broadening their education and thinking about the future. VET students may also select a particular course, for example in agriculture or tourism and hospitality with relevant practical experience.

• Group C may be attracted to a regional destination where there is a nexus across sectors. For example, a prospective tourism and hospitality student selecting a Cairns English language college with a view to further study in VET or HE. Group C includes ELICOS, schools, VET and HE, with an emphasis on the early stages of the pathway.

This segmentation is indicative only. The intent is to illustrate that consideration of international education for regional Australia is a conversation about niche marketing which

targets specific prospective student groups with clear messages about particular destinations. Start with the students, not the region's self-perception. It is also a reminder that each regional provider and community has to determine its unique strengths and a strategy to provide a platform for student success.

• Language is a barrier. 'Regional' in this Australian conversation is broadly understood, although the number and complexity of definitions attest to degrees of regionality and remoteness. 'Regional' may have very different connotations in another country or another language. Not only is there a lack of awareness among agents, parents and students of the benefits of a regional education, the language of 'regional' can be a disincentive. Develop a compelling narrative that centres on the education first, then the region. From a university campus perspective, this plays to institutional research strengths. For a career in marine science, veterinary science, oenology, mining engineering and other fields the place to go is (this campus in this town) to experience your career from the outset. That argument can be developed for local industry affiliated training as well as pathways. The second part of the strategy is to reference the many advantages of the regional location, the welcoming community, smaller class sizes, amenity, networking and so on.

• This approach does not preclude a range of course offerings. The intent is to assert the status of each university, and of TAFE systems, private providers and schools. To illustrate, a student may attend JCU to study a generic business program not marine science, but the fact that JCU is a world leader in a particular discipline area(s) is very important to that student. Beige is not an attractive descriptor for any university.

• A barrier is a lack of awareness of positives and advantages, as well as a national tendency to put the region before the education and conflate tourism with education in the messaging (further comments below at Question 5).

• A less obvious but very real barrier is local competition between education providers, and the corresponding lack of coordination and collaboration required to develop their own regional project(s).

• Underplayed connections and interdependencies in regional ecosystems: education (all types and levels), employment, enterprise, regional development and migration also need to be addressed.

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?

Is this the right question? Does the question then lead us astray? The outcome is less about persuading potential Sydney students to select Wollongong or Darwin and more about encouraging students with personal confidence, with agency, to make a conscious decision to choose a regional destination.

• That caveat aside, the remote and regional campuses of metropolitan universities are in a position to develop pathways from metropolitan to regional and vice versa. But do we need to engineer these pathways? Queensland's 'Start Here. Go Anywhere' message is sufficient, fit for purpose. Prospective students will work this out. Whether for further study or for employment, study in one state does not preclude progression to another. This is a message

that could be conveyed at the national level.

• Attracting students to regional campuses is not at the expense of metropolitan enrolments. The purpose is to reach out to students with new and interesting options, to promote the diverse and specialised range of courses and experiences that are available in regional Australia.

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

Before communicating the benefits of spending time in regional Australia it is necessary to determine these benefits using an evidence base. Between 2006 and 2017 the respondents Will Archer and Kevin Brett manged the International Student Barometer internationally and in Australia. This included producing data sets of the student experience that differentiate and enabled comparison between regional and metropolitan Australia as reported to the Australian Government Department of Education and Training. These data have been disaggregated and analysed on behalf of various state government departments and the RUN network, with findings reported in various workshops and forums. The consistent finding is that the international student experience in regional Australia is as positive as for metropolitan students, and in certain respects scores higher. Our tentative conclusion is that this is less a function of 'regionality' than what we know about effective teaching and learning, in particular smaller class sizes, better access to teaching staff and resources, and the sense of community on a smaller campus. Living in a town where their hosts recognise that quality of life and prosperity is contingent on international as well as domestic students is an advantage. It will be important to determine the key messages around the benefits of the regional campus experience from the perspective of student academic and subsequent career success.

Once evidence-based benefits have been identified, the best way to communicate is word of mouth, to influence the influencers. This includes:

o government to government at the federal, state and local level (local, for example, through sister city relationships and strategies that include identification of regions/provinces that may align in some way with what a particular Australian campus has to offer)
o education provider level through teaching, research and training relationships as well as industry training links
o students, parents and agents require reassurance and evidence (case studies and personal stories)
o agents in particular need to understand the benefits, and also that the intent of the regional education strategy is to identify a wider range of students, so that investment in this market is a sensible commercial strategy. The ICEF Agents' workshop in Darwin, in April 2019, is an opportunity to address agents on the regional campus option.

• Social media are just that … media. They are not the message nor the communicator. Social media is important in a student to student or alumni to student transaction, not an institution to student transaction.

• Official government websites are important as students use DET, Home Affairs, state departmental and provider websites to check the facts, and triangulate data. Analysis of mobility drivers for prospective regional students suggest these students are careful

researchers, who are aware that they may be taking a risk with a 'different' or 'novel' destination. It is likely that their decision has been less influenced by agents than by word of mouth and family in country. Nationally consistent evidence-based information on official websites will support regional campus enrolment. This has to be replicated at the local level. Analysis of the websites of education towns often shows an incoherent and unconvincing rationale for selecting that education destination.

• Rankings have become currencies of reputation, but not justifiably so. In a complex crowded world of choice and opportunity, they offer simple lists for prospective students and their parents. They may be used to advantage as evidence that a particular regional campus is integral to the rankings and reputation of a university. However the prospective regional student is probably not looking at rankings, understanding that high ranked universities are of a different order to what they seek.

• For the regional agenda emphasise not just the riches of education but the richness. Not the mass production line of 'gravy training' but real-world personal experience, adventures and voyages of discovery: the call of the path less well trod. By this we do not mean tourism but the attraction of steering away from the obvious conveyor belts of international education. This argument plays to student agency. The student prepared to try an alternative education destination and who has invested in this decision is seeking to engage with the local community. Regional alumni and current regional students want to participate in promoting their experience. It is in their interest to assist their provider to build an international profile, so that their qualification is known and accepted.

• We would use this opportunity to flag that much about attracting international students to regional Australia is immediately relevant to domestic students. It would be timely to consider domestic recruitment to regional Australia and look to synergies between these two intertwined projects.

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?

Students do not enrol at Bond University or Griffith Gold Coast for the surf, nor do students choose CDU for the crocodiles. Ipswich is not an international tourist destination. The interplay between tourism and education is overstated and is primarily relevant to a younger cohort and specific locations. It is imperative to recognise the number of regional schools, the number of regional campuses of university, VET and ELICOS providers, and the necessity to disaggregate national data to report enrolment by campus, rather than by institution. There are hundreds of regional campus experiences, and few of these are in international tourist destinations.

• The family decision to invest $100,000 or more so that a family member can gain an internationally recognised qualification is a different process to a decision to take a holiday. There is a national tendency to conflate tourism with and this has to be interrogated. It is also useful to look at the lessons learnt by other countries as they have tried then dropped their unsuccessful tourism-based strategies.

• That deep concern aside, there are certain tourism/education opportunities, particularly for the under 18 age cohort, the backpacker/ working holiday market and a segment of mature

learners. The relationship between education and tourism is relevant in certain regions but is one element in a more complex picture.

• Hence, there is and should be a wider question. The regional ecosystem or biosphere encompasses international education, tourism, employment, skilled migration and regional development. To capitalise on the relationship it is necessary to understand where there are connections between providers (tourism and education) and also the associated policy settings. It is necessary to map the value and establish:
o what proportion of students had previously visited as tourists or heard from others who had?
o what proportion of students engage in tourism while studying in any region?
o what proportion of tourists would consider returning to study?
o what proportion of each would recommend tourism or study to others?

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)?

The risk in addressing migration is that Australia's reputation as an education destination becomes dulled. Considerable analysis needs to be undertaken in any project that emphasises migration over education, because of the reputational risk issue. Formal, analytical risk analysis is warranted, along with research on experience elsewhere, in particular New Zealand and Canada.

• Direct and indirect incentivisation could work. One note of caution: incentivisation of agents would not result in success unless there was a substantive, sustainable and defensible rationale for them to recommend a regional destination. Promotions to education agents, if they involved the investment of time more than brand spend, might work.

• Scholarships and fee structures do work as incentives. If a student can complete a degree of comparable value at a regional location at a lower cost than a metropolitan location then overlay preferable employment opportunities that is attractive (see Q7 response re price elasticity and reputation). A significant proportion of internationally mobile students and their parents are capable or recognising the value of a 'real' education in a regional context above a 'refined' course of study in a metro cosmopolitan location; in particular the value of associated practical experience and opportunities for professional practice in a regional context.

• There are multiple dimensions of influence here: relevance/reputation and cost/value/return on investment. A trial for regional government to consider:

o regional grants or scholarship schemes
o incentives / discounts for regional progression
o in parallel with narrowly-targeted migration incentives, but most importantly
o at the same time, bringing all sectors of education together, plus employment and enterprise and tourism and government departments.
o then replicate this at the local regional level: in Ipswich and Albury Wodonga or Broome or Katherine.

• Whatever the aspirational or resulting target, regional growth can be increased if a second

dimension is addressed: prospective students who have no explicit migration driver. There is an identifiable student group who are looking for employment advantage and career acceleration. Certain regions deliver more opportunities for early career progression and greater responsibility. All this with the quality stamp of Australian education and professional experience.

• The regions can be spring-boards for students' careers. Returning to the migration agenda, a proportion of students may be convinced to change their minds, to put down roots in that region. While long term regional employment in education, healthcare, local business/industry, public service, tourism or hospitality might not have been their intention prior to making the big step to start there, it can be an intended outcome for the region. Focus on the quality of the education, community engagement and post -graduation work rights, and introduce the migration option along the way.

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?

Australia is yet to capitalise on an unrealised asset by exploring the regional campus opportunity. This will require refining our understanding of why students select a regional international destination and then identifying the actions to be taken to stimulate a nascent student demand. There is a significant gap in Australia's international education data because reporting is by institution, without reference to the physical location of the student. An education provider with, say, 11 campuses has multiple metropolitan and regional student locations. Until we have a realistic understanding of just how many regional education locations (all sectors) there are in Australia, and the current enrolment of those that host international students on a regular basis, it is difficult to implement a national, regional strategy. (We acknowledge that data will need to be aggregated by sector and state/ territory and that certain 'work arounds' may be required to preserve provider confidentiality). Addressing this data gap will precede any other surveys, so that consistent reporting process is in place.

• It is useful to elevate the discussion beyond education. Consider regional development agendas in Australia and find comparators around the world. Map the interfaces between federal and regional government departments, employers and educators. Identify good/best practice. Benchmark regional development strategies and practice in comparable markets and aspirational comparators.

• The international student may have similar financial concerns to the wider group but the motivations for international study, the personal drivers, will be very different. Many of those likely to be attracted to a regional destination will be more independently-minded than those who enrol in metro and suburban locations. It will be interesting to gain insights into their experience and motivations, consistent with research ethics and Australian Privacy Principles.

• Lower costs of study and living may be a point of differentiation in the regions but will rarely be a motivator for international study. A method to resolve this is to research regional factors in the context of price elasticity v reputation.

• It is necessary to join the dots between tourism, education, progression (pathways),

employment, enterprise and communities, to survey the ecosystem not the 'student customer'. Other factors to consider include:

o Understand parental motivations and intentions.
o Secondary education as a means to a local end, an Australian pathway or an international finishing school?
o Could the adventurers as tourists be challenged to return to study?
o Having studied in regional Australia, could regional employment opportunities - explicitly coordinated with education – become an attraction to the 50%+ of students for whom migration was not a motivator?

Over some 30 years Australian government, institutions and communities have been successful in positioning Australia as a leading provider of international education. The above comments consider elements that have enabled success and benefitted major metropolitan cities. In responding to the Expert Members we reflect from our perspective of the student barometer over time, AUIDF and related initiatives conducted on behalf of education providers across Australia and elsewhere. We also drew on observations of other countries including the USA, UK, New Zealand and Canada, which have been successful in recruiting students to regional areas. Thank you for the opportunity to comment on this project of national significance.

Question 8. Any other comments?

Over some 30 years Australian government, institutions and communities have been successful in positioning Australia as a leading provider of international education. The above comments consider elements that have enabled success and benefitted major metropolitan cities. In responding to the Expert Members we reflect from our perspective of the student barometer over time, AUIDF and related research initiatives conducted on behalf of education providers across Australia and elsewhere. We also drew on observations of other countries including the USA, UK, New Zealand and Canada, which have been successful in recruiting students to regional areas.

Thank you for the opportunity to comment on this project of national significance.

Will Archer and Kevin Brett

Narooma, regional Australia