

23 August 2019

**Study Gold Coast response to
The Inquiry into migration in regional Australia**

In response to the Inquiry into migration in regional Australia, Study Gold Coast agrees that for the sustainability of the international education sector in Australia, growth needs to occur outside of cities that have a dominant share of Australia's international education market. In 2018, Sydney and Melbourne captured over two thirds of international student visa holders in Australia. In comparison, the Gold Coast secured only 4% (Department of Education) of all international student enrolments in the same year. This demonstrates the importance of implementing policies to support growth in regional cities across Australia.

Study Gold Coast advocates that for the purposes of this Inquiry into migration in regional Australia, the City of Gold Coast should be considered regional and Study Gold Coast has focused its submission on the below key elements:

- National and international best practice strategies to encourage people to settle and stay in regional areas;
- Strategies to develop regional skilled migration;
- Strategies to develop regional humanitarian migration; and
- Key local, state and federal initiatives for successful regional settlement outcomes.

As a regional destination the Gold Coast is an example of a city which has a small share of Australia's international education enrolments but with strong local government support, is well prepared to sustainably grow student enrolments. This will see the benefits realised across industries and the community driving further economic growth for the city.

Sustainable regional growth can only occur if destinations are equipped to support positive student experience and positive graduate outcomes through alignment and collaboration with industry. This will enhance the reputation of the destination's education and training sector and as a result see ongoing student enrolments stemming from student networks, cultural groups and siblings due to the influence of word of mouth marketing.

In summary through this response to the Inquiry, Study Gold Coast aims to illustrate that we:

- Endorse growth outside of capital cities which have a dominant share of Australia's international education market.
- Endorse support from the government, to provide more support to regional cities such as the Gold Coast.
- Encourage a considered approach to growing regional destinations to ensure the Australian education brand is not harmed.
- The Gold Coast has been unfairly classified as a Metro City.

Study Clusters to support growth outside of capital cities

The government can support the regions and metropolitan areas outside of the major capital cities by supporting and investing in Study Clusters to ensure there are enough services available relating to student support, experience and employability, which in turn supports the destination to ensure it provides meaningful student experiences. Further, Study Clusters can promote the economic value of the industry in order to expand the region's talent pool, attract more employers and add depth to the region's social fabric, which creates a more attractive environment for a student. Illustrating the key strengths of industries in the destination and their alignment with the education and training sector, should support promotion of studying in regional Australia.

As a result of the destination management described above, Study Clusters in collaboration with institutions and government, can undertake marketing to promote the value of studying in the destination and how the services and facilities complement the education and training institutions within that destination. It is also important to illustrate other destination factors such as affordability which on the Gold Coast comes at considerably lower cost than the major capital cities with rent being 40% less than Sydney.

Study Gold Coast is a good example of the collaboration required to effectively promote the value of studying in a city outside of the major capital cities. It is currently investing in international education and training through its Education Strategy 2016-2024. The strategy focuses on attracting international students, including from India and China, which are currently underrepresented on the Gold Coast in terms of state share and national market share. For example, in 2018 the Gold Coast recorded just under 5,000 Chinese students and just over 1,900 Indian students, while Melbourne recorded almost 80,000 Chinese students and 40,000 Indian students (Department of Education). Importantly, what is valued by each student market varies significantly, and needs to be taken into consideration when promoting the value of regional Australia.

Collaboration with State and Local Government bodies

When considering regional attractiveness more broadly, significance should also be placed on the providers being in the appropriate geographical industry context rather than international students making choices on capital cities versus regional. For this reason, Study Gold Coast collaborates with state government bodies like Study Queensland, Department of State Development, Health and Knowledge Precinct and Regional Development Australia to refine its unique offering as a region and articulate the value of each study destination across Queensland.

The role of the federal government is to ensure there is a coordinated national approach to promoting Australia as an education destination, rather than highlighting key cities such as Melbourne or Sydney. Some of the barriers to regional destinations and their education institutions hosting more international students may include connectivity—physical and digital, a disconnect from social life typically associated with metropolitan areas, work prospects both during and post-study, access to food and cultural networks and the perception of the quality of regional study compared to study in a capital city.

However, the barriers noted above vary significantly depending on the region and each destination needs to be considered in context of the surrounding industries. As an example, the Gold Coast's tourism and hospitality industry provides numerous job opportunities for students both part-time whilst studying and in the long term.

This reiterates the importance of bodies such as Study Gold Coast in developing strategies to support the destination to realise its advantages as a region which enables them to better promote the value offered by non-capital cities. By working closely with local government, local industry and the providers, Study Gold Coast actively invests in reducing the barriers described to support the providers and the city to host more students. The providers' teaching capabilities, capacity and expertise to deliver to international education and training markets also needs to be factored in. For this reason, Study Gold Coast undertook a comprehensive consultation period to understand the pain points of providers and develop an international attraction strategy that takes these into account. The government should aim to support each destination outside the capital cities to undertake this work as a key step towards growing regional international student numbers.

Collaborative partnerships within the education sector to enhance opportunities

Collaborative partnerships would certainly enhance opportunities for international students. Partnerships between regional and metropolitan education providers could be better utilised to create pathways and study opportunities in regional locations. Ideally, institutions in different destinations would work together to inform the best choice for the student based on their study interests and career goals, rather than base their decisions on whether they are located in a capital versus regional city. This could be particularly significant in promoting specialist and niche courses delivered in regional areas. Partnerships with local business and industry to deliver mutually beneficial work integrated learning and job opportunities for international students should also be further explored to ensure a sustainable approach to growing international education in the regions.

Study Clusters could be the enabler to build a platform that could facilitate and drive the collaborative partnerships that would lead to regional study opportunities for international students. Study Gold Coast has implemented a partnership fund which is designed for the Gold Coast's education and training sector to partner with industry stakeholders in delivering innovative and sustainable projects to contribute to the sustainable growth of the Gold Coast's education and training sector. Further, Study Gold Coast has taken advantage of the Study Queensland partnership fund, which supports collaboration between regional destinations across Queensland and this model could be further explored.

Positive student experience to drive sustainable growth

Lived student experience and positive post-graduate outcomes is critical to ensuring sustainable growth of an education destination. Word of mouth marketing (physical or through digital platforms) is highly effective in communicating the benefits of studying in a destination or at an institution. The experience of current students and alumni cannot be underestimated as a key driver of student numbers, which means investing in the student experience (including support services and industry partnerships) is the first step to ensuring sustainable growth.

A host destination needs to be equipped with the right services and relevant industries to ensure a student has a positive experience, has greater likelihood of post-study employment and is therefore likely to recommend it. Importantly, a positive student experience or graduate outcome will support the students to stay in that destination, and once settled encourage ongoing growth with visiting family and relatives, siblings undertaking study in the same location and continued word of mouth promotion by the student.

Study Gold Coast has recognised the importance of current students as influencers and as a result invests significantly in city-assets such as the Gold Coast Student Hub, the Student Ambassador program and free Career Development services. Further, the organisation is driving industry connectivity for students, so they are able to build meaningful networks and are potentially retained on the Gold Coast in purposeful careers. The development of these services and programs should see the Gold Coast's small share of only 4% of all international enrolments in Australia, grow into a larger share supporting the government's vision to grow international education in regional Australia.

Genuine stories and information about the support services and growth of industry should also be packaged together in destination marketing materials to be utilised by key influencers such as agents. The agents will then be better equipped to promote the destination to the students and parents by fully understanding the opportunities provided by cities outside of the capital cities, and not solely recommending the institution in isolation. Further, they will focus on recommending a destination that is the right fit for a student based on their study interests and career goals rather than focussing on whether the destination is a capital or regional city.

Collaboration between the education and tourism sectors

Collaboration between government, providers and industry bodies such as tourism peak bodies, could provide significant opportunity for the education and training sector. The value of the tourism industry for international students includes employment opportunities both part-time while studying and long-term, encourages visiting family and relatives, and supports a balanced student lifestyle.

Study Gold Coast sees the tourism industry as an important way to provide accessible and flexible work options for students and supports collaboration through career development services, hosting industry networking events and supporting access to employability opportunities in the tourism sector through an employability program. Importantly, the government needs to capitalise on the interplay between tourism and education by looking at ways to make education tourism a genuine education experience, rather than perpetuating the perception that regional destinations are tourism destinations. Edutourism and study tours initiated by the tourism industry are consistently giving the perception that the destination is one where a student would return for a holiday. Study Gold Coast works closely with key partners who ensure that the study tour offering includes university and registered training organisation site visits, a visit to the Gold Coast Student Hub to inform them of pathway opportunities, and visits to businesses and key employers on the Gold Coast. This collaboration between the two industries is critical to increasing the likelihood that students who have had these kinds of short-term experiences return to the destination for long-term study. Study Gold Coast recognises the value of collaboration between the two sectors and welcomes any support from the government to enhance this collaboration through

investment in targeted strategies. For example, other Edutourism courses which are specific to the context and industries available in the region such as marine wildlife, are highly valuable, and will assist in promoting the quality of the education and training sector.

When considering promoting regional strengths it is important to provide the student market with the benefits they seek. As noted, the enrolments from China are currently under-represented in regional areas and Study Gold Coast is aware that Chinese students seek a more metropolitan experience. This market has different perceptions of the interplay between tourism and education, in comparison to markets such as those from South America. This needs to be taken into consideration when articulating the strengths of the interplay and promoting its value to key markets. Appointing a lead agency to develop a market strategy that leverages the individual site strengths and attracts students on that basis is key in achieving the best outcomes for all stakeholders.

Scholarships and migration incentives

Cost and value for money is a prominent deciding factor on study location for international students, hence the availability of scholarships and migration incentives would certainly assist in encouraging more international students to consider options outside of major cities. To avoid a drain on other larger cities a mapped and linked industry or outcome focus would be needed to support student satisfaction that leads to long-term growth.

This however needs to be supported with information and an awareness campaign to highlight options and to combat challenges such as perceptions of education quality and the availability of both part-time and post-study employment opportunities in areas outside of the major capital cities.

The federal government could also support this further by contributing to Study Clusters to manage the scholarships and initiatives committed to fostering international student participation and business activities in regions.

Understanding the potential risks for future growth of the industry

Should a regional policy be implemented, it should be considered that a potential risk is posed for the future growth of the 30-billion-dollar export industry. Without proper consideration of its impacts on the student experience and student employability, there may be an impact on Australia's desirability as a destination for international education and training. Our greatest competitors remain NZ, Canada, the UK and the US, and any policy which students perceive to be one that forces them to a destination which does not support their graduate outcomes, could lead to further growth for these competitors.

Further research into the motivations and experiences of international students in regional areas relative to metropolitan areas would certainly be welcomed and would provide a better understanding of student perception and decision making in this space. It could also provide insight into the perceived barriers of studying in regional Australia. Data collected would be beneficial in the development of funding proposals to support incentives and to develop well informed campaigns to promote regional Australia to prospective international students. It would also support better decision making by local economies

by identifying trends in-line with currency fluctuations and other factors which are ordinarily considered when developing strategies for economic growth.

There may also be a need to better understand the industries and services surrounding the regional providers, so that their willingness, capability and capacity to grow is taken into consideration in conjunction with student and provider opinions.

Regional Gold Coast Business Case

Attached is a Regional Gold Coast Business Case. In relation to the impacts on international education, the changes proposed relate to the Temporary Graduate visa (subclass 485), which are designed to attract students to regional areas post-study or for study. For the purposes of this policy, the Gold Coast has been classified as Metro, along with Sydney, Melbourne, Brisbane and Perth. The cities classed as regional include Adelaide, Canberra, Wollongong, Newcastle and Tasmania.

The appropriate reclassification of the Gold Coast as a regional centre for the Temporary Graduate visa (subclass 485) would be beneficial to Australian international student numbers and be supportive of Queensland and the Gold Coast's education sector ambitions. Accordingly, it is strongly recommended that for the purposes of the international student visa system, a concession be provided to the Gold Coast over three years to be reviewed annually.

Thank you for your consideration.