

Tasmanian Global Education Growth Strategy





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Message from the Minister

In recognition of the significant cultural, social and economic benefits of attracting students to our state, the Tasmanian Government has committed to a global education growth strategy. This strategy focuses on increasing the number of students from outside Tasmania who choose to study through Tasmanian education providers.

International education contributes nearly \$20 billion annually to the national economy, making it one of Australia's largest export earners. It is a significant sector in the Tasmanian economy, providing \$211 million in goods and services export revenue in 2015-2016, making it Tasmania's fourth largest export earner.

The Tasmanian Global Education Growth Strategy is unique in that it explicitly recognises the opportunity to attract interstate as well as international students to Tasmania.

All students who come to study in the state represent a benefit that goes far beyond the education and training sector.

- They are stimulators of economic, social, and cultural activity.
- They are enablers of the visitor economy.
- They are ambassadors for Tasmania in their home state or country.
- They help to provide a cultural dimension that benefits Tasmanian students and institutions.

The Tasmanian Government is committed to hosting a truly global education hub in Tasmania. The Government already invests substantially in education and the release of this strategy is a further commitment from the government to the sector.

In 2016, in addition to the \$110 million investment in education infrastructure in schools, colleges and TasTAFE – the largest education capital program ever made by a State Government to support Tasmanian students – the Tasmanian Government announced a commitment of \$75 million dollars to the University of Tasmania's \$300 million northern expansion project.





Tasmania has a special relationship with the University of Tasmania, which is in the unique position as the sole university in the state and is the largest provider to international and interstate students in Tasmania.

In recognition of this, the State Government and the University of Tasmania are committed to growing Tasmania's international education sector through the *Making the Future* partnership agreement.

The vocational education and training (VET) sector, led by TasTAFE, schools (government and independent) and colleges also attract international and interstate students to Tasmania and have strong opportunities for growth.

This strategy also brings to life the commitment under our T2I Visitor Economy Strategy to work with the tourism and the education and training sectors to develop a collaborative approach to increasing visitation to the state.

I am optimistic about the potential for increasing the number of students coming to Tasmania to drive growth in the state and enhance our cultural and social diversity.

I am proud to release the Tasmanian Global Education Growth Strategy, which provides a framework for a coordinated approach to growing the sector and sharing the benefits of global engagement opportunities.

Matthew Groom MP

Minister for State Growth

Introduction: The Tasmanian Global Education Growth Strategy

The strategy seeks to position the sector for international student growth, and also seeks to attract students from other Australian states to Tasmania.

The Tasmanian Global Education Growth Strategy aims to ensure Tasmania can respond to global educational opportunities, using Tasmania's quality brand to encourage more students to come and experience what Tasmania has to offer. It recognises the increased mobility of students, nationally and internationally. All visiting students, whether from interstate or overseas, have a positive impact on Tasmania, culturally, socially and economically. The strategy's goals and actions will drive increased student numbers from outside Tasmania, nationally and internationally.

The strategy is premised on Tasmania's quality education system and its world-class institutions. It builds on a shared vision of a Tasmanian global education and training sector that drives economic growth and reflects Tasmania's natural advantages and reputation for high quality.

The strategy defines six goals and associated actions to achieve this vision, as well as roles and responsibilities for key government departments and agencies.

Through the release of the strategy, the Tasmanian Government is showing its commitment to grow the sector by facilitating a focused, collaborative response to developing opportunities. The education sector will be highlighted as an integral part of the strong, quality Tasmanian brand.

¹ Australian Government Department of Education and Training, Research Snapshot, Nov 2016, retrieved December 2016 from www.internationaleducation.gov.au/research/research-snapshots/pages/default.aspx

² P Frappell, (2016), Tasmania's Visiting Student Economy, Report for the Department of State Growth.

Why a global education growth strategy?

International education's contribution to Tasmania is important. It is a significant contributor to the Tasmanian economy, providing \$211 million in goods and services export revenue in 2015-2016, making it Tasmania's fourth largest source of export income¹.

Visiting students have a broad economic and social impact on the community. They provide direct and indirect benefits to the state by enhancing cultural diversity, attracting visiting friends and relatives (VFRs), bringing a global perspective to research, creating international linkages and increasing global understanding. For other fast growing sectors such as tourism and hospitality, they also provide an entrepreneurial and diverse part-time workforce. They are a potential pool of skilled migrants to Tasmania and, as graduates, are powerful ambassadors for Tasmania wherever their future may take them².



Figure 1. Contribution of visiting students to Tasmania



Tasmania's overseas student numbers have been growing – but at a slower pace than Australia's, and below Tasmania's population share. Although Tasmania has 2.1 per cent of Australia's population, it attracts less than 1 per cent of international students studying in Australia³.

The Tasmanian Government acknowledges that investment and support is critical to grow and enhance the opportunities for education providers and students who choose to study in the state.

The strategy aligns with Tasmania's *Population Growth Strategy*, the *Tasmanian Visitor Economy Strategy 2015-2020* and the *Tasmanian Multicultural Policy 2014*.

It is one of five objectives of the *Making the Future* partnership agreement with the University of Tasmania. More broadly, it builds on Tasmania's brand as a great place to live, work, study and visit.

Through the strengthening of partnerships locally, nationally and internationally the Tasmanian Global Education Growth Strategy aims to benefit all stakeholders including local education providers, overseas partners, key industries and the many students who will become future Tasmanian alumni, and ambassadors, for the state.

³ Saul Eslake (December 2016) *International Education in Tasmania*, draft report for the Department of State Growth.



Why Tasmania?

The State Government and business community strongly value the growing international and interstate education sector. Tasmanian education providers from all sectors have a record of delivering excellent educational outcomes. They are committed to ensuring course content continues to be relevant to meet the needs of industry and students, and can be delivered through a variety of mediums and locations.

Education providers are working together to encourage more seamless transition across the sub-sectors so that students can commence in Tasmania's schools and move to and between vocational education and the University of Tasmania to further their study.

This will continue to enhance Tasmania as a desirable destination for students from other Australian states and overseas countries

I was only young when I came to Australia from Brazil and was fortunate enough to complete my secondary and tertiary education in Tasmania. From school to university the education that I was given here was of the highest of levels.

Dr Leonardo Cordova, Brazil

The University of Tasmania is classed within the top two per cent of universities worldwide⁴ and has received numerous awards for excellence in teaching. In 2015 alone, six University of Tasmania academics were given citations in the prestigious Australian Awards for University Teaching – the highest number for any Australian university.

This recognition emphasises the high calibre of education offered across the breadth of academic disciplines and is indicative of the quality of education in the state.

Tasmania has several key attributes to attract students and set it apart from other education destinations.

4 ShanghaiRanking Consultancy Academic Ranking of World Universities (ARWU) 2016. Many in the field consider the ARWU the most influential international ranking of universities.

Not only does it provide an exceptional education experience from its education providers, it also offers friendly and welcoming communities, a high degree of personal safety, scenic natural environment, a reputation for high quality products and services and access to international transport linkages.

Through the 'Goals and Actions' outlined in the Tasmanian Global Education Growth Strategy, the Tasmanian Government is committed to ensuring the study experience in Tasmania is one that all visiting students will remember as being safe, supportive, and inclusive, and one that they will recommend to others to come and experience for themselves.

Tasmania has an enviable lifestyle that is celebrated across the globe. Ensuring that international and interstate students have the best possible experience is vital to the ongoing health, promotion, and growth of the sector.



Governance

The Department of State Growth will lead a coordinated and collaborative approach to the implementation of the Tasmanian Global Education Growth Strategy, drawing also on the expertise of government agencies including the Department of Education, Tourism Tasmania and TasTAFE, the University of Tasmania, independent schools, private providers and industry participants.

Governance arrangements will facilitate partnerships and information sharing.

A new Global Education Advisory Group will provide advice to the Department of State Growth on the planning, marketing and implementation of initiatives to collectively position Tasmania's unique product and service offerings that can be delivered locally, nationally and overseas.

The newly established Global Education Advisory Group will conduct an annual review of progress against the six goals of the strategy. This Group will include representatives from government schools, independent schools, private Registered Training Organisations (RTO), TasTAFE, the University of Tasmania and wider industry to provide a coordinated approach to the delivery of the strategy.



Tasmanian Global Education Growth Strategy

Vision, A Tasmanian global education and training sector that drives economic growth and reflects Tasmania's natural advantages and reputation for high quality.

Goal 1: Market Tasmania as a study destination

- Adapt and leverage the Tasmanian brand as a key asset by which education and training providers can highlight their unique strengths nationally and internationally, implemented through an annual marketing plan developed through consultation with all stakeholders and supported by targeted market research.
- Facilitate cross-sector international education marketing, promotion, and partnerships in key markets, including leveraging brand ambassadors.

Goal 2: Strengthen quality industry partnerships and pathways

- In partnership with the University of Tasmania, lead the development of work integrated learning opportunities by piloting innovative models for both the public sector and industry.
- Facilitate strengthened pathways between education and training providers within Tasmania.

Goal 3: Enhance student experience

- Provide a student welfare hotline, along with skilled migration assistance, to international students and graduates in Tasmania.
- Work with education and training providers and students to identify and resolve issues that may adversely affect the student experience.
- Promote and support recognition of student, staff and community achievement in, and contribution to, international education.

Goal 4: Develop connected communities

- Support community and local government initiatives to welcome and integrate international students into local community life.
- Through international sister-school arrangements, foster opportunities for outbound mobility and international engagement for Tasmanian students and teachers.

Goal 5: Supporting ongoing investment by the sector

- Facilitate opportunities for investment into education facilities and supporting infrastructure by the private sector and Australian Government.
- Continue to co-invest in strategic institutional assets with the University of Tasmania.

Goal 6: Deepen connections with the global alumni network

- Support initiatives to develop and promote a global alumni network, including through trade missions

Vision

Our vision is for a Tasmanian global education and training sector that drives economic growth and reflects Tasmania's natural advantages and reputation for high quality.

Purpose

We aim to:

- leverage the Tasmanian brand as a key asset for education and training institutions to promote their unique strengths
- support global education as a standalone sector and as an enabler for a vibrant visitor economy, global industry connections and cultural diversity
- create opportunities for innovative partnerships that respond to the needs of stakeholders, including industry, community and students
- provide visiting students with a supporting and welcoming community in which to gain world-recognised qualifications.

I chose to study in Tasmania, Australia because the education system is much more organised and specialised, especially in terms of my achievements being recognised internationally. Tasmania is an excellent place to study because it is less stressful and the people are open and friendly.

*Tri Ha, Vietnam,
Student at Elizabeth College*



Goals and actions

Goal I: Leverage Tasmania's brand as a study destination

We will leverage Tasmania's brand to attract students and their family and friends to the state by highlighting our high-quality education, training, world-class research capability and global reach and promoting Tasmania's environment and liveability advantages.

Tasmania is rich in natural and cultural heritage, fresh produce and great food and has a vibrant art culture. It is also a respected place to study and has welcomed students from other Australian states and overseas for many decades.

Tasmania offers a quality education system and experience. Its small size, existing national and international partnerships and reputation for quality mean that it can respond to new initiatives and create opportunities, especially in its areas of unique expertise.

The international education and tourism sectors are strongly interlinked. Many visitors to Tasmania have later chosen to send their children to study here, while many visiting students attract their family and friends to the state.

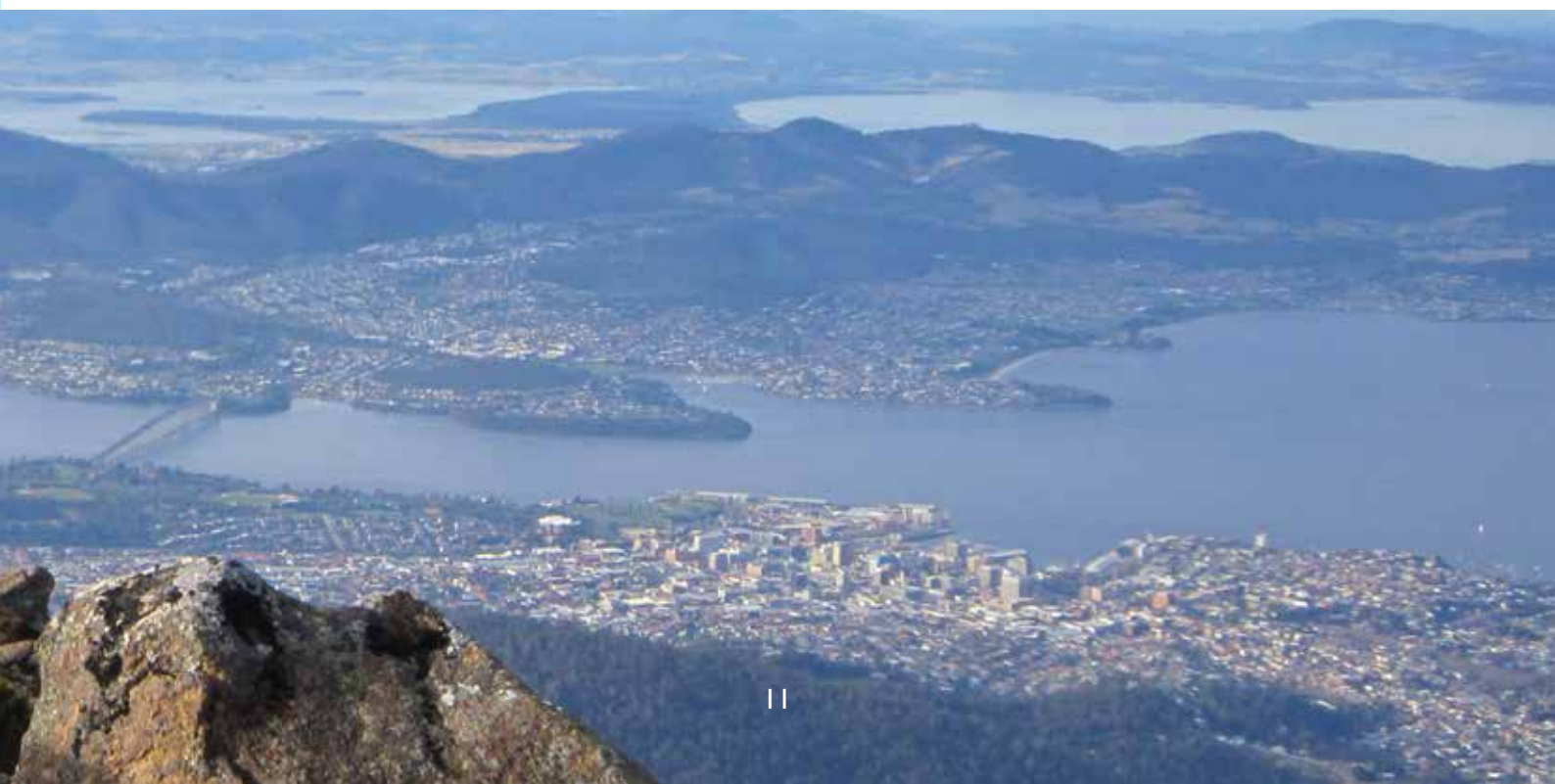
A distinctive education brand, as an extension of the existing Tasmanian brand, will provide a shared narrative across the education and training sector and will enable a more collaborative and coordinated approach to marketing Tasmania's educational opportunities.

Action I.1

- Leverage the Tasmanian brand as a key asset from which education and training providers can highlight their unique strengths nationally and internationally, implemented through an annual marketing plan developed through consultation with key stakeholders and supported by targeted market research.

Action I.2

- Facilitate cross-sector international education marketing, promotion, and partnerships in key markets, including leveraging brand ambassadors such as Ricky Ponting.



Goal 2: Strengthen industry partnerships and pathways

We will support and develop industry partnerships and pathways that are globally responsive, meet demand for industry engagement and attract increased numbers of students to Tasmania.

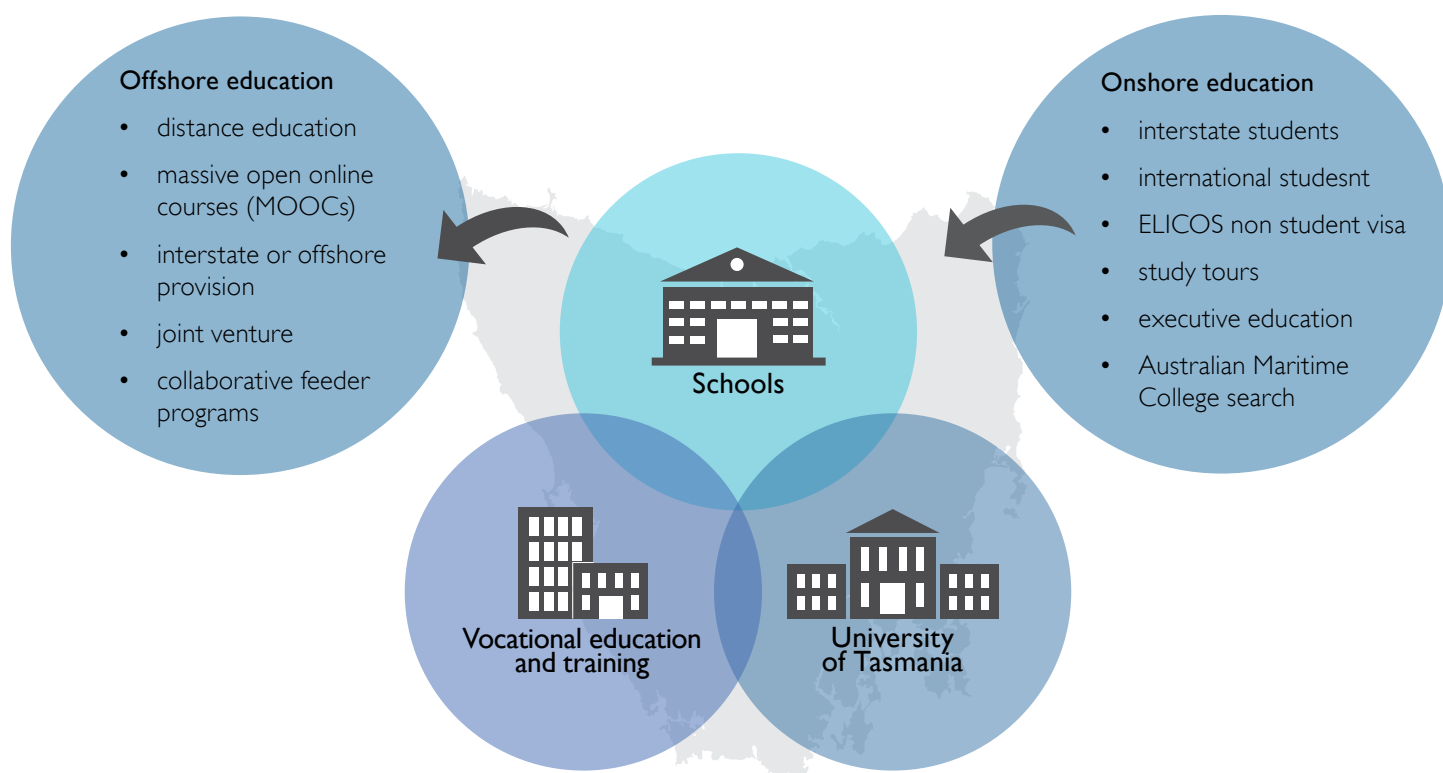
Employability is a key factor in attracting students to a study destination. Amid growing global competition, students are rightly focused on where their qualification can take them.

Tasmania's education providers are going through some of the greatest transformations that the sector has experienced to reshape the future of education and training, ensuring it will be relevant and responsive to future global industry and community needs.

New ways of thinking and different approaches to work integrated learning, life and leadership experiences will increase employability and position graduates from Tasmania's education sector with a broad range of skills and attributes that will be attractive to employers for the jobs of the future.

Some visiting students enjoy Tasmania so much they transition between education sub-sectors to undertake further courses, and there is further opportunity to support student mobility and migration (see Figure 2).

Figure 2. Student mobility⁵



⁵ P Frappell, (2016), Tasmania's Visiting Student Economy, a report for the Department of State Growth.



The Tasmanian Government will support education and training providers to work together to encourage seamless transition across the sub-sectors so that students can commence in Tasmania's schools, and move to and between, vocational education and the University of Tasmania to further their study.

This will continue to make Tasmania a desirable destination for students from other Australian states and overseas.

Action 2.1

- In partnership with the University of Tasmania, lead the development of work integrated learning opportunities by piloting innovative models for both the public sector and industry.

Action 2.2

- Facilitate strengthened pathways between education and training providers within Tasmania.



Goal 3: Enhance student experience

We will support an enhanced student experience for those who choose any length of study in Tasmania, ensuring their experience reflects our quality and distinctiveness.

International students are very satisfied with their educational experience and aspects of their lived experience in Tasmania, including safety, cost of living and natural environment⁶.

But Tasmania needs to provide greater opportunities for social engagement and employment to meet growing international demand⁷.

With increasing competition in the global education sector, it is important that Tasmania offers an experience that meets the expectations of students and their families.

⁶ Institute of Social Change, University of Tasmania Understanding the International Student Education and Pathway Experience, a report for the Department of State Growth (2016).

⁷ Institute of Social Change, University of Tasmania Understanding the International Student Education and Pathway Experience, a report for the Department of State Growth (2016).

Many students already have such a positive experience that they choose to stay and live permanently in the state through the skilled migration program.

Those who return home often maintain a deep connection with Tasmania through travel, trade, investment and encouraging friends and relatives to visit.

Action 3.1

- Provide ongoing skilled migration assistance targeted to international students and graduates in Tasmania.

Action 3.2

- Work with education and training providers and students to identify and resolve issues that may adversely affect the student experience.

Action 3.3

- Promote and support recognition of student, staff and community achievement in, and contribution to, international education.

Goal 4: Develop connected communities

We will assist Tasmanian communities to provide a safe, welcoming and supportive environment for all those students living away from home.

A globally-oriented education and training sector with cultural, linguistic and religious diversity enriches the Tasmanian community and is a key asset for the state, economically and socially.

How we treat visiting students is important for developing the vision outlined in the *Tasmanian Multicultural Policy 2014* of a strong, confident and inclusive society.

Not only do visiting students bring diversity, they also enhance trade and investment opportunities over time through global and commercial connections.

Homestays are an important part of the international student experience, and increasing the availability of accommodation is essential as student numbers grow.

Building awareness of the benefits of homestays can encourage more Tasmanians to participate in the program.

Tasmania also needs to foster opportunities for Tasmanian students to study overseas, to provide its students with cross-cultural experience and demonstrate to other countries that we value the experience in their country as much as we value students coming to Tasmania.

Action 4.1

- Support community and local government initiatives to welcome and integrate international students into local community life.

Action 4.2

- Through international sister-school arrangements, foster opportunities for outbound mobility and international engagement for Tasmanian students and teachers.



Goal 5: Support ongoing investment by the sector

We will support ongoing public and private investment in the global education sector and related infrastructure as a key enabler of economic growth.

Students considering options for overseas study take into account a range of factors, including course offerings, accommodation options and other support services.

The Tasmanian Government has made significant co-investments with the University of Tasmania over many years, for example the Menzies Institute for Medical Research, the Institute of Marine and Antarctic Studies (IMAS), the Tasmanian Institute of Agriculture (TIA) and the Asia Institute.

The Tasmanian Government is supporting investment in new facilities such as expanded campuses in Burnie and Launceston.

The government can also play an important role in facilitating other investment to ensure the appropriate infrastructure is in place to position Tasmania as a global education destination to students, such as quality, affordable, flexible and accessible student accommodation.

Tasmania also needs to be open to the introduction of new high-quality products and training providers that are relevant and attractive to both international and domestic students, and where current providers do not service the market.

Action 5.1

- Facilitate opportunities for investment into education facilities and supporting infrastructure by the private sector and Australian Government.

Action 5.2

- Continue to assess opportunities to co-invest in strategic institutional assets with the University of Tasmania, TasTAFE and Government schools as appropriate.





Goal 6: Deepen connections with the global alumni network

We will promote a connected and engaged Tasmanian alumni network that will include all students who undertake an educational experience in Tasmania.

Alumni achievements reflect well on an institution and all of their fellow alumni.

Alumni can be key agents for international trade, investment and cultural exchange.

Success stories also help promote Tasmania's brand of excellence in education and training, and encourage others to follow in their footsteps.

Staying in touch with Tasmanian alumni allows education and training providers to be aware of their achievements, and to build a strong community of shared experience.

Action 6.1

- Support initiatives to develop and promote a global alumni network, including through trade missions.

Tasmania's current education and training offering

Both local and visiting students recognise Tasmania for its high standard of teaching and support. Visiting students come to study at our schools, vocational colleges and at the University of Tasmania, and to take advantage of Tasmania's safe and friendly culture, world-renowned natural environment, modern and friendly cities, high-quality food, lower costs of living, and a healthy lifestyle in an English-speaking community.

Tasmania has been a destination of choice for students from interstate as well as countries in Asia, Europe and North and South America for over 60 years, since the University of Tasmania welcomed students from across Southeast Asia under the original Colombo Plan scholarship program. Many of the Colombo Plan students maintain strong Tasmanian connections and have sent their own children to study in Tasmania.

Tasmanian education and training providers have a record of global achievement and are committed to ensuring course content continues to be relevant to students and industry, and can be delivered in a variety of ways in Tasmania, in mainland Australia and overseas.

Tasmania has a friendly community and provides an environment in which international students integrate with local students.

Tasmanian institutions provide students with quality personalised support and services, easy access to teachers and lecturers, and small class sizes so students have the best opportunity to use and develop their English skills by being immersed in a modern Australian community.

Tasmania has particular strengths in agriculture, marine, Antarctic research, mining and tourism.

The Tasmanian Government understands the importance of these sectors, and supports deep relationships between industry and research and educational institutions in the state through joint-venture partnerships such as the Tasmanian Institute of Agriculture (TIA), and support for the Menzies Institute for Medical Research and the Institute of Marine and Antarctic Studies (IMAS).

These organisations provide opportunities to attract students to the state whether to undertake vocational education and training (VET), undergraduate or postgraduate courses at the University of Tasmania or doctoral research programs affiliated with the best universities around the world.

I would recommend studying in Tasmania to other students. Tasmania offers attractive tuition, living cost and environment, comparing having study life in England, US and Mainland in Australia.

*Yoshi, Japan,
Student at TasTAFE and University of Tasmania*

Reception International Services



University of Tasmania

The University of Tasmania is the only university in the state and is a major driving force for the growth of international education here. It is fundamental to maintaining Tasmania's international reputation for quality education.

It ranks among Australia's finest in teaching and research and has a long history of hosting international students and researchers. Its internationally significant research institutes and centres are drawcards for a community of scientists. It also extends its educational offerings interstate and to the world, through provision of programs in partnership with overseas institutions and through distance learning.

The university's vision is to bring campus life into the cities of Hobart, Launceston and Burnie (for example, through expanded campuses in Launceston and Burnie, the IMAS waterfront headquarters, the Academy of Creative Industries and Performance Arts and a new residential development in Hobart).

This means a greater alignment and linkages between academics, students, industry and the wider public. Inevitably, these investments will also strengthen Tasmania's appeal as a destination for interstate and international students.

Vocational training

TasTAFE is the only public provider of vocational education and training (VET) in Tasmania and the largest registered training organisation in the state. It delivers training to over 28 000 students each year.

TasTAFE offers more than 370 nationally accredited and industry-endorsed qualifications from Certificate I to Advanced Diploma level, short courses and vocational education programs at 13 campus locations across Tasmania.

TasTAFE has long history and strong reputation in international education and has been hosting international students from over 30 countries since the late 1980s.

TasTAFE also provides courses through partnership with overseas vocational colleges and commercial training to businesses and industry nationally and internationally in countries including Thailand, China, Kuwait and the Philippines.

Training is delivered by highly qualified expert teachers who have both industry and teaching qualifications and experience.

Tasmania also has a number of high-quality independent Registered Training Organisations (RTOs) with an active interest in developing their international education business as a growth opportunity.

They cover training areas as broad as hospitality, flight training and leadership.

The Department of State Growth is collaborating with the Tasmanian Branch of the Australian Council for Private Education and Training and individual RTOs to facilitate international growth opportunities.

When I was researching where to study, I found that TasTAFE are well-known for preparing students for opportunities within industry.

It is not just based on theory.

*Jaspreet, India,
Student at TasTAFE*





Schools

Tasmanian Government schools have been enrolling international students since the early 1980s. International students are enrolled across six colleges, eight high schools and six primary schools.

The school sector grew 24 per cent from 2015 to 2016 compared with national growth of 20 per cent. Top source countries for the Tasmanian school sector are China, Korea, Brazil, Hong Kong and Germany.

Government schools offer a Study Abroad Program and short-term study tours for overseas students. The Study Abroad program is highly flexible and offers students full immersion into a Tasmanian school in any year from 7-12 for period from two weeks to one year.

Short-term study tours provide groups of students with the opportunity to experience Australian culture through a combination of study, educational excursions, and sight-seeing.

Study tours are organised by education agents and schools, and can be customised based on the desired activities, number of students and tour duration.

Eleven independent schools are registered to deliver services to international students. Tasmanian independent schools are among the oldest and most prestigious in Australia. They provide a high-quality product with outstanding academic programs and comprehensive curriculum.

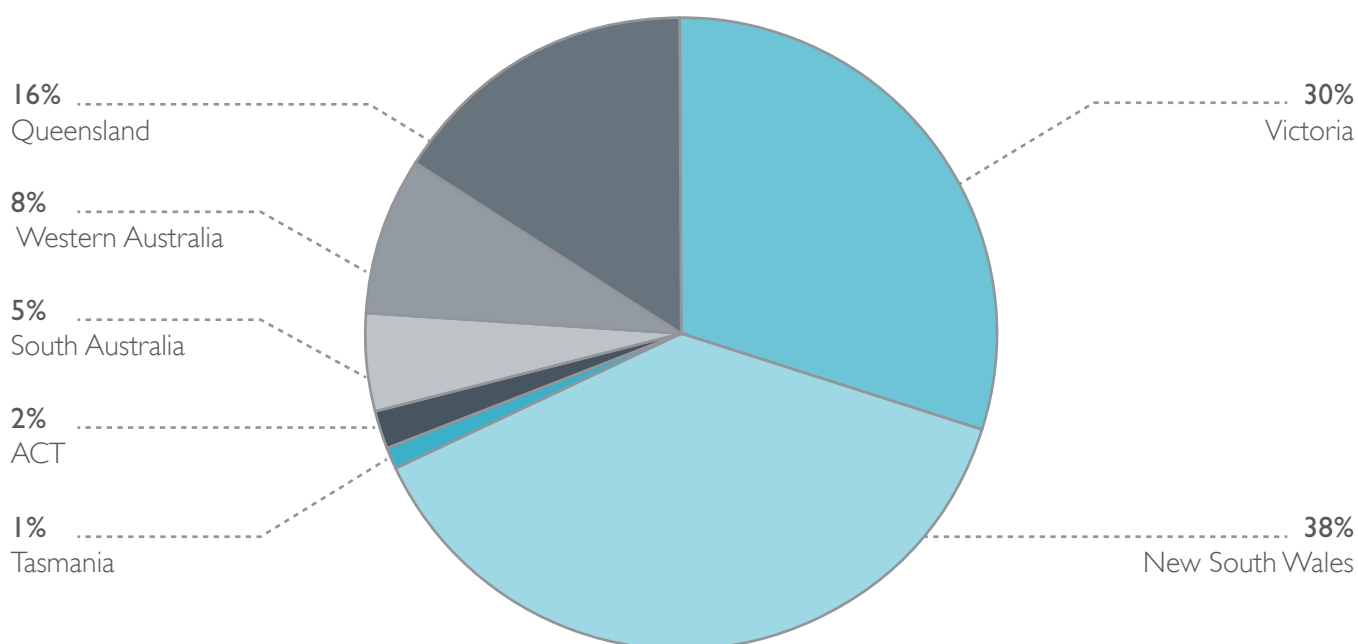
Independent schools provide both single-sex and co-educational education and offer boarding or homestay options and look for international students from a wide range of source countries.

The value of the sector

International education is the third largest export for Australia and supports over 130 000 jobs nationally⁸.

Tasmania currently attracts less than one per cent of international students coming to Australia to study. New South Wales and Victoria capture the largest share⁹.

Figure 3. Share of total Australian onshore enrolments in 2015¹⁰



Deloitte Access Economics has estimated that in 2014-2015 international students contributed around \$18.2 billion to the Australian economy, or between 0.3 per cent and 1.4 per cent to the GSP of each state, and employed between 0.3 per cent and 1.5 per cent of the states' workforces (in full time equivalent terms).

International education contributes approximately 1.4 per cent of gross domestic product in Victoria. In Tasmania, the contribution is approximately 0.9 per cent¹¹. There is considerable potential to increase this figure.

International education has been Victoria's largest service export industry for over 10 years and has overtaken tourism as the highest export services industry in New South Wales. The sector is Queensland's second-biggest service export and South Australia's fifth-biggest export.

The total revenue in 2015 to Tasmania from expenditure by visiting students (international and interstate) in all sectors within the state on tuition fees, accommodation and living costs and other goods and services totalled \$211 million¹². Students also attract visiting friends and relatives as tourists¹³.

⁸ Australian Department of Education and Training www.internationaleducation.gov.au/research/research-snapshots/pages/default.aspx

⁹ Saul Eslake, (December 2016), *International Education in Tasmania*, draft report for the Department of State Growth.

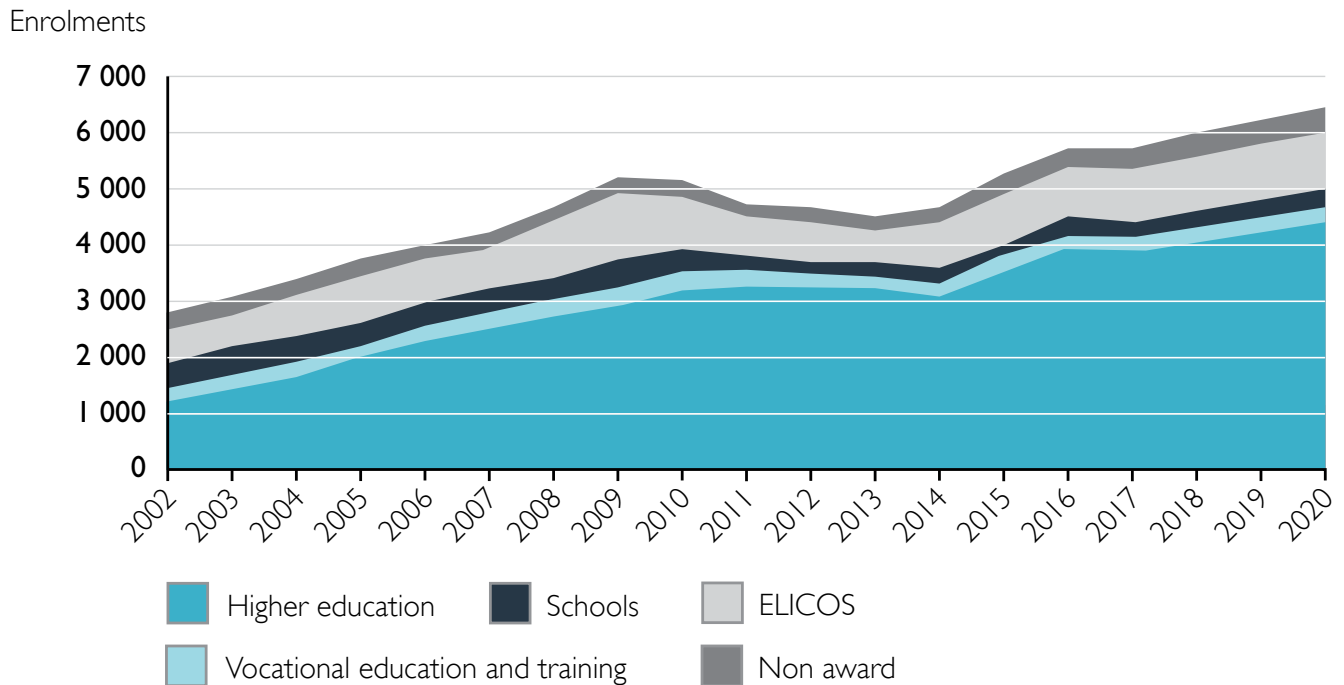
¹⁰ Australian Education International Retrieved December 2016 from (www.internationaleducation.gov.au/research/international-student-data/pages/default.aspx)

¹¹ Deloitte Access Economics (2016), *Value of International Education to Australia*.

¹² Australian Government Department of Education and Training, Research Snapshot, Nov 2016, retrieved Dec 2016 from www.internationaleducation.gov.au/research/research-snapshots/pages/default.aspx

¹³ P Frappell, (2016), *Tasmania's Visiting Student Economy*, a report for the Department of State Growth.

Figure 4. Enrolments by sector – Tasmania



In 2015, the University of Tasmania accounted for 72 per cent of all visiting students, with those undertaking English Language Intensive Courses for Overseas Students (ELICOS) making up a further 11 per cent.

The international school and VET sectors are relatively small in Tasmania (between four and six per cent)¹⁴, but have the capability and appetite to grow.

Government schools and TasTAFE have a statutory role to educate Tasmanians, but they have also been active in attracting non-Tasmanian students and in provision of some courses overseas.

¹⁴ 2015 numbers. From P Frappell, (2016), Tasmania's Visiting Student Economy, a report for the Department of State Growth, 2016.

The University of Tasmania provides amazing opportunities for learning and I got a job in my chosen career as soon as I graduated

*Audrey Lau, Malaysia,
Student at University of Tasmania*



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