



Student Growth Plan 2005 – 2010

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Introduction

Strengthening the education sector and attracting greater numbers of students will enable the City to foster innovation, harness knowledge and enliven the central area. The provision of education in itself provides economic, social and cultural stimuli and the skills and knowledge developed will help drive the economic well being of the State.

By creating the conditions for student growth in the City the Council will support the targets of the State Government for increased participation rates in formal education, building the research capability and skilled workforce needed for a robust, adaptable and competitive economy and high quality of life.

In recent times the growing overseas market of full fee-paying students has had a major impact. *'International students in Australia come from over 200 countries. Between 1994 and 2001, the number of international students more than doubled from 93,722 to 190,606. The international sector in Australia is diverse with students across all areas of education including English language schools, vocational education and training and higher education.'*¹

Increasingly, students and their families are choosing Adelaide for the quality of education offerings and lifestyle. No other inner city area in Australia can boast two world class Universities, a major TAFE campus, highly regarded public and private schools and the myriad of other private providers in the central activity area - the City itself acts as the campus for student life. Couple this with a safe and attractive living environment, nestled within the City's Park Lands together with favourable migration status, and Adelaide is well positioned as a desirable student destination.

Maintaining growth, meeting Council's student population growth targets and fully realising the potential presented by the City's unique advantages is challenging and requires significant effort.

Developed in consultation with State Government and major education institutions, the Student Growth Plan together with the Growth Plans for Residential, Workforce and Visitor populations and other supporting strategies reinforcing quality of life and sustainability set out the means by which the Council intends to pursue its vision for the City.

The Growth Plans will be implemented through the annual corporate business planning, budgeting and capital works programs of Council.

¹ The Hon Dr Brendan Nelson MP, Minister for Education, Science and Training, *Engaging the World Through Education, Ministerial Statement on the Internationalisation of Australian Education and Training*, October 2003

Context - Strategic Management Plan 2004-07

The Council's Strategic Management Plan 2004-2007, building on the New Directions statements first adopted in 2001, sets the following vision :-

"The City of Adelaide, as the Capital City of South Australia, will be a vibrant and populous central place for work, study, leisure and living invigorating the cultural, commercial, educational and community life of the State."

Increasing the number and mix of people in the City centre to an optimum level to sustain activity and vitality is essential to achieving the vision. Additional residents, workers, students and visitors will make a wider range of services, facilities and attractions viable, creating a more vibrant City with a stronger community and cultural life and a more robust, innovative economy. It will also directly support the aim of the SA Strategic Plan to increase the State's population to 2 million by 2050, as against the projected decline from the current 1.5 million.

The Council's primary strategy therefore is to:

"Increase the number of people living, visiting, working and learning in the city to an optimum sustainable level."

The concentration of university and further education campuses around North Terrace together with the wide range of schools and training providers throughout the City, and the profusion of opportunities for informal learning, establish a strong foundation for Adelaide as a City of education and learning. This will be increasingly important for success in developing industries and services based on knowledge and in providing the workforce skills needed for targeted growth in key sectors of the State economy.

Growing numbers of students will contribute greatly to the vibrancy of Adelaide as a place of interaction and ideas. Location of institutions in the City maximises accessibility for students, minimising the need for travel by car and helping achieve a more sustainable metropolitan form. The concentration of institutions, student accommodation, services and leisure facilities will help generate an intensity of activity all in easy walking distance within the City.



The Council's support for student growth will also contribute towards the following targets set in the Strategic Plan for South Australia:

- Double South Australia's share of overseas students within 10 years. (Target 1.14)
- Have based in South Australia either the headquarters or a major node of at least 40% of all existing Cooperative Research Centres, Major National Research Facilities and Centres of Excellence within 5 years. (Target 4.8)

- Improve the connections between educational institutions and industry to enhance creativity and innovation. (Target 4.10)
- Increase the percentage of students completing Year 12 or its equivalent to 90% within 10 years. (Target 6.13)
- Increase the proportion of the South Australian labour force with non-school qualifications from 50.7% in 2002 to 55% within 10 years. (Target 6.15)
- Exceed the national average for University participation within 10 years. (Target 6.16)
- Continue to exceed the national average for TAFE participation. (Target 6.17)

Council's Strategic Management Plan 2004-2007 sets specific targets and desired qualities for the City in relation to students and learning:

“ By 2006 Adelaide will have at least 58,000 students in institutional learning.

• By 2010 Adelaide will have at least 66,000 students in institutional learning.

Qualities sought for the City by the year 2010

- *Students locally and from regional SA, interstate and overseas are attracted to the range of education and training opportunities offered in the City and recognise Adelaide as an excellent place for study with a strong character and identity as a ‘university City’ especially around North Terrace.*
- *Growth has been generated by expansion of existing facilities and also by establishment of new education providers, including language schools attracting increased numbers of overseas students.*
- *The training and re-training needs of a changing workforce have also created substantial growth in part-time courses.*
- *Participation rates of local students in senior secondary and tertiary education and vocational training are at least at national standards. By fostering the conditions to support knowledge based work and lifestyles, the City supports this increased engagement in learning. Strong linkages between City educational institutions and employers have established a wide range of flexible training options geared to meet both personal and workplace needs for those entering the workforce and for workers at all stages of career development.*
- *Well-developed support services, and a good supply of student accommodation, ensure that students are well integrated into the life of the City. The influx of students has made the City more vibrant, adding to the cultural mix and supporting specialist businesses catering to their needs.*
- *The City itself and its cultural institutions and festivals provide rich informal learning opportunities for all. In the City's Park Lands, streets and public spaces information plaques tell of cultural and historic significance and public artworks, performances, celebrations and events provide shared cultural experiences.”*

The target of at least 66,000 students in institutional learning is measured by a count of students enrolled in an educational institution which conducts Australian Qualifications Framework (AQF) recognised courses, is a primary or secondary school or offers South Australian Certificate of Education (SACE) courses. This includes the Universities, TAFE, schools (public and private) and registered private providers of VET courses.

However there are also over 20,000 ‘students’ enrolled at some time in the year at institutions not providing recognised courses (particularly WEA and the University of the Third Age). Mostly these are short, personal interest courses, although many of their short courses also build practical work skills. This sector is a vital element in building a culture of lifelong learning and the people attending also add to visitor activity and spending in the City. They are also recognised in this Growth Plan and it is proposed that the following additional paragraph be added to the “qualities sought for the City by the year 2010” in the student growth section of the Strategic Management Plan:

- *Lifelong learning is an important part of City life with institutions offering special interest courses and informal skills training, such as the WEA and the University of the Third Age, attracting around 30,000 enrolments through the year in addition to the 66,000 students in formal institutional learning.*

Current Progress

Adelaide City Council, like most other Australian local government authorities, has had only a very limited role in development of the education sector. The Council currently provides funding and support to Education Adelaide to market Adelaide as a destination for international students and operates the Destination Adelaide web site to attract and support rural and interstate students. In addition, the City Classroom located at the new Grote Street Library and Community Centre complements Council's Schools Interaction and Adelaide Unplugged programs which help promote the City's learning environment.

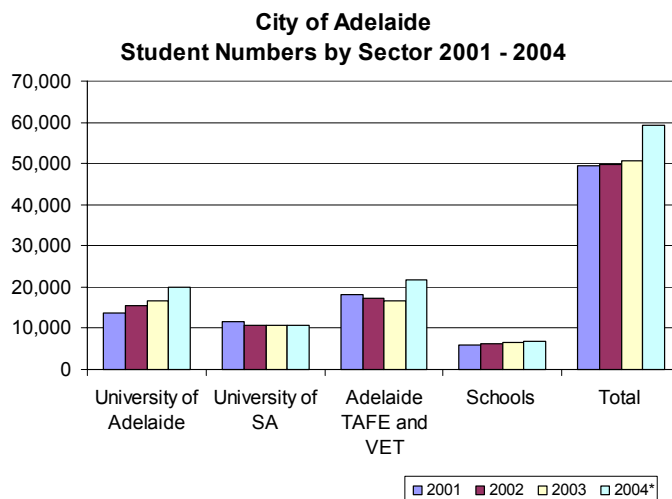
Performance against the 2004-05 milestones set by the Council for student growth is outlined below, together with the milestones targeted for 2005-06.

Achievement of Milestones for 2004/05	Milestones targeted for 2005/06
<ul style="list-style-type: none"> • Growth trend at least maintained in City student numbers. <i>Growth maintained.</i> • Destination Adelaide website maintained with at least 4,000 hits. <i>Website maintained and hits achieved.</i> • Funding support and active involvement maintained with Education Adelaide and growth in overseas student numbers maintained. <i>Council funding and involvement maintained and overseas student growth maintained.</i> • At least one opportunity for education use of under-used floor space identified and implemented. <i>University of Ballarat and University Senior College have taken up unused space in Charles St off Rundle Mall.</i> • 'City Classroom' in the Grote Street Library and Community Centre in use as a facility for visiting school classes. <i>City Classroom available since September 2004 with use increasing to over 300 student visits in June 2005.</i> • At least one additional institution / campus committed to locate in the City. <i>Carnegie Mellon University – Heinz School of Public Policy and Management committed to Torrens Building in Victoria Square in 2006.</i> 	<ul style="list-style-type: none"> • Growth trend at least maintained in City student numbers. • Provide ongoing financial support for Education Adelaide with growth in overseas student numbers sustained. • Implement three initiatives to support student growth. • Increase the number of students visiting the 'City Classroom' and increase visits to the Destination Adelaide website. • Provide support to the State government initiative to establish a campus in the City for Carnegie Mellon University.

This Growth Plan marks a more proactive role for the Council in facilitating student growth in the City. The Council does not have a role as a direct service provider in the education sector but can do much to provide a supportive environment, to facilitate desirable projects and to advocate for change where it is required.

The Challenge

The Council's target is to increase the number of students enrolled in institutional learning in the City from the 2001 estimate of 50,000 students to 66,000 students by the year 2010. The most recent count, for enrolments over the 2004 academic year, was 59,000 students. This was a more comprehensive survey than previously undertaken including City enrolments at a fuller listing of private registered training organisations (RTOs) providing recognised vocational training courses. (The data collection approach is outlined in appendix 1).



Source : Council surveys of Institutions and 2005 survey by Australian Institute for Social Research

Note: 2004 figures for the University of Adelaide include continuing education and Bradford College enrolments and 2004 VET figures include fuller listing of private RTOs

This still leaves an ambitious target of some 7,000 additional students in institutions providing recognised courses in the City by 2010.

Overall growth in student numbers is being slowed by a decline in the number of school leavers in the local population resulting from falling birth rates over the past 20 years and the ageing of the South Australian population. ABS projections for the 15 – 19 year old cohort across Australia show South Australia as the mainland State with the expected highest decline in the proportion of young people who would normally be the mainstay of further education enrolments.

In consultation for this Growth Plan many education institutions outlined their own plans for growth. They consider that, in an increasingly competitive environment, sustained growth to achieve the Council's target will require focused support for educational institutions to:

1. help increase the capacity of institutions to provide additional student places,
2. effectively market the City as a preferred place to study, and
3. ensure that there are effective student support programs to ensure that the demand is there to fill these places.

Continuing and expanding strategic partnerships are required between Council and the other education stakeholders (State Government, Federal Government, educational institutions, private education providers, Education Adelaide, private businesses). There will be opportunities for Council to influence and support their plans for 2010 and beyond, thereby facilitating growth of the overall education industry within the City.

The City's Universities

Adelaide is quite unique in Australia with two of the State's three universities located within the City. Within the tertiary sector, South Australian universities are worth more than \$1 billion each year – this includes about 25 per cent of South Australia's research and development expenditure that indicates a major contribution to the State's overall development emanating from the City universities.²

Research undertaken by Swinburne University demonstrates that universities contribute to regions through four main avenues:

- Universities earn income, spend that income and attract students who also spend. This has direct and multiplier or flow-on effects.
- Universities undertake research and development that could be focussed on regional issues and/or have commercial application.
- Universities educate the labour force. This in turn can assist in attracting industry to a region and assist in the cultural and social development of the region.
- Universities can contribute to the social and cultural life of the region. They provide infrastructure, fulfil community service obligations and provide community volunteers.³

Closure of the University of South Australia's Underdale campus has resulted in the transfer of at least 1,000 students to its two City campuses in 2005.



University of South Australia –
City East campus expansion.

Opening of the new Ballarat University Campus in Rundle Mall in 2005 (in association with the International Institute of Business and Information Technology), together with the proposed Carnegie Mellon affiliated and Le Cordon Bleu campuses, if successfully located in the City, will also increase student numbers.

The Commonwealth Government's regulation of the Higher Education Contribution Scheme (HECS) has a major impact on the course offerings of universities. Out of the 24,883 new higher education places allocated nationally to 2008, 1,471 will be allocated to South Australia (5.9%). Within each State, a consultation/negotiation and competitive bidding process is used to allocate the places to individual institutions.

Recent reports indicate that about 1,400 students in South Australia have been unable to access university places because of HECS quotas⁴. Rising HECS fees and the increased availability of full fee-paying places, for both local and overseas students, will affect the number of students (particularly domestic students) attracted to university education.

²Tony Baker, Megan Lloyd and David Gibb, *South Australia – Horizons Beyond*, Wakefield Press, Adelaide, 1998

³www.id.swin.edu.au/crd/sutl.htm in reference to, Swinburne University, *The Economic Impact of Swinburne University of Technology on the Shire of Yarra Ranges*,

⁴Laura Anderson, *1400 Miss Out on Degree Courses*, The Advertiser, Saturday June 11 2005, p9

The relatively low number of funded places for South Australia is a major concern and the Council will take an advocacy role seeking to increase this allocation and improve the prospects of City based institutions in attracting more funded places.

TAFE and Vocational Training

A competitive and growing South Australian economy depends largely on the capacity of the education and training system to develop the necessary skills in the workforce. In the current strong economic climate significant shortages of skilled workers are becoming apparent. The need for flexible and direct work skills training is being addressed primarily through the TAFE system and an expanding network of private registered training organisations (RTOs). In 2004 there were nearly 22,000 students enrolled in this sector in the City. There were also 793 apprentices and 2,023 trainees employed in contracts of training based in the City. Of these, 28 apprentices and 103 trainees also lived in the City⁵.



TAFE 2005 Advertisement

Factors driving growth and new approaches to training delivery in the sector include:

- Shortages of skilled and experienced labour as baby-boom generation retires from the workforce, or cuts back working hours. This requires a different balance between training young people for work and the retraining needs of existing and older workers. A 'lifelong learning' approach is needed recognising the need to update and maintain relevant skills and knowledge throughout one's working life.
- The growing importance of knowledge as a driver of business development means that workers are needed with the ability to handle new literacy demands, to adapt to innovation and to apply new technologies effectively.
- The typical worker's career path is becoming less linear and increasingly complex, with more workers in part-time and contract employment, creating different training needs.
- The particular training needs of Indigenous people, young people, people from diverse cultures and people with a disability among others are increasingly being identified and addressed.⁶
- Involving industry more fully in the education sector could help address skill shortages via such initiatives as direct industry input into curriculum development and opening up more opportunities for work experience and on-site training.

⁵ Department of Further Education, Employment, Science and Technology

⁶ Adapted from - Tom Karmel; Current directions in Australia's vocational education and training system; National Centre For Vocational Education Research, October 2004

Data from the National Centre for Vocational Education Research shows that while young people are the mainstay of formal education in Australia, the older age groups are more likely to be enrolled in the VET sector. Supporting the VET sector enables a greater number of people to access further education and keep their skills relevant for the needs of the workforce.

Lifelong Learning – ‘Informal’ Education

Lifelong learning is not only about vocational skills training and retraining through courses leading to recognised qualifications at different stages in one’s working life. Demand for informal skills training courses and non-vocational courses for personal satisfaction and interest as a leisure activity is also growing as more people lead lifestyles in which some form of learning is the norm.

The largest providers of such courses in the City are the WEA with over 20,000 enrolments in its short courses in the City through the year, and the University of the Third Age with around 800 enrolments.

Some courses, such as the City heritage walks run by the WEA, directly engage people in learning about the City. Some provide valuable workforce skills, though without giving a formal qualification. All courses help build a culture of lifelong learning and attract people to the City, especially those who are no longer involved in formal education but who still wish to learn new skills and interests. This adds to the level of visitor activity and enriches Adelaide as an ‘Education and Learning City’.

Schools

In 2004 the City’s ten schools (public and private primary and high schools) accounted for over 6,700 students enrolled in recognised learning in the City. Growth in recent years in this sector has been assisted by new specialist year 11 and 12 institutions being established and growing (Eynesbury College and University Senior College), and the re-opening of Sturt Street Community School.

Several schools (public and private) report that they are at full capacity and have established waiting lists. For some schools the strong demand is partly fuelled by parents who are not resident but work in the City and seek to have their children enrolled in institutions close to where they work. Some increased demand has come from increasing numbers of overseas student enrolments.

It is anticipated that as resident and worker numbers increase in the City demand for schooling will also increase. Many schools already report plans to expand their student numbers. Some are constrained by difficulty in finding suitable premises in which to expand.

International Students

Some of the additional growth targeted in student numbers will potentially be met by increases in the number of full fee-paying international students. The South Australian Strategic Plan has set a target to double South Australia’s share of overseas students within 10 years, and most will be studying at institutions in the City.

Successful development of the international education sector will have significant impacts, including:

- The direct generation of income from export of education services as well as flow-on demand to other sectors such as housing, retail, transport and tourism.
- Creating additional critical mass for our universities, TAFE institutes and schools. By leveraging the income from full fee-paying international students, we will be able to support improved educational infrastructure and services for local students.

- Attracting more international students to South Australia's universities, which will also help address some of the State's population issues.
- Creating a network of valuable commercial and cultural contacts when students studying in South Australia return to their homeland.

The value of international students to the Australian economy in 2002 was approximately \$5 billion, making it Australia's third largest service export.⁷ International students are enrolled in most levels of education from secondary schooling to Universities with a growing number attracted to short term English courses. In 2002 an estimated 37,000 students undertook short English language courses in Australia while travelling on a tourist visa, working holiday maker visa or other non-student visa.

Several factors highlight the potential for continued growth in the international student market. The world's population is projected to grow by 1.5 billion over the next two decades. Taken together with rising per capita income, population growth will lead to increased participation at all levels of education. China, for example, estimates it will have a shortfall of over one million teachers and 100,000 academics by 2005.⁸

The Federal Government has made some efforts to consider linking overseas aid with skilling of people from supported countries. If this eventuates this may be an avenue to further consider special programs to attract people from developing countries in receipt of assistance to Adelaide's universities.

In 2004 South Australia had 15,345 (4.75%) of Australia's 322,776 international students. About 10,000 of these were counted in City institutions (ie around 17% of all City students). Through the coordinated marketing effort of Education Adelaide and the efforts of the institutions, South Australia is currently out-performing the rest of Australia in its rate of growth in attracting more students. In 2004, student enrolments were up by about 14% in South Australia, compared with just about 6.5% nationally.

Overseas Student Enrolments by Sector, SA and Australia – 2003 - 2004

Sector	SA			Australia		
	2003	2004	% Change 2003-04	2003	2004	% Change 2003-04
Higher Ed	6,507	7,894	21.32%	136,252	151,798	11.41%
VET	1,621	1,611	-0.62%	57,326	57,348	0.04%
Schools	1,738	1,910	9.90%	26,799	28,003	4.49%
ELICOS	2,266	2,296	1.32%	60,930	61,649	1.18%
"Other"*	1,335	1,634	22.40%	22,017	23,978	8.91%
TOTAL	13,467	15,345	13.95%	303,324	322,776	6.41%

Source: Table 14a, AEI Market Information Package, February 2004

Note: "Other" denotes Foundation Studies / Non-Award

The figures available so far for 2005 are equally encouraging, showing growth in South Australia well ahead of the national average.

Education Adelaide expects enrolments to remain strong for Adelaide in 2005 as increasing numbers of overseas students are attracted by the affordability of Adelaide in comparison to traditional study destinations like Melbourne and Sydney. Council in partnership with the State Government, through Education Adelaide, aggressively promotes the quality of Adelaide's education system combined with

⁷ The Hon Dr Brendan Nelson MP, Minister for Education, Science and Training, *Engaging the World Through Education, Ministerial Statement on the Internationalisation of Australian Education and Training*, October 2003

⁸ The Hon Dr Brendan Nelson MP, Minister for Education, Science and Training Op Cit

affordability, the ease to get around the city, the relaxed lifestyle and relative security. The strength of the Australian dollar is making many international students increasingly price sensitive, working to the advantage of more affordable destinations like Adelaide.



Recent changes in immigration criteria provide an advantage to South Australia and Adelaide in attracting and keeping overseas students. The Commonwealth Department of Immigration and Multicultural and Indigenous Affairs (DIMIA) has made it easier for overseas students studying in South Australia, including Adelaide, to apply for permanent migration.

Under DIMIA rules, recent graduate overseas students who have gained an Australian degree, diploma or trade qualification while in Australia studying at a South Australian educational institution may receive these benefits:

- Exemption from the requirement for recent work experience.
- Extra points for an Australian qualification.
- An additional 5 points for having studied and resided in South Australia.

Some overseas student graduates are able to remain in Australia following completion of their formal study and apply for a skilled independent regional visa allowing permanent residence without the need to return to their home country as was previously the case. Recognising the potential benefits derived from overseas student migration, the South Australian Government will consider sponsoring overseas students in some visa categories. Schemes which support these migration programs will enhance the perception of the City as a desirable study destination.

However, having attracted overseas students to Adelaide, it is essential that their experience while here is positive. Many international students indicate that there is insufficient community support and integration in Adelaide, with some students therefore feeling lonely and isolated. *“Recent research shows international students can spend their years in Adelaide without once being invited into an Adelaide home. They struggle to crack the tight-knit circles of the local social scene.”*⁹ This impedes the effectiveness of strategies designed to stimulate student immersion, word of mouth referral and endorsement.¹⁰ Council can play a role in community engagement and can help with student support programs to improve this situation.

⁹ Independent Weekly; *Students Fly In To Be Frozen Out*: Rosemary Cadden, March 13-19, 2005 edition , p5

¹⁰ Prospect Research and Marketing, *2004 Brand Test: Quantitative Results*, Education Adelaide 2004

Students in the Life of the City

Students are a catalyst for future growth and development of the City. Many students also live in the City and many work in the City. All, to a greater or lesser extent, also contribute to the level of 'visitor' activity as users of the City's shops, services, cafes, bars and recreation places.

Students as Residents

Availability of good affordable student accommodation close to the City campuses and the amenities of the city centre is an important factor in Adelaide's ability to attract students and develop as an 'education city'. The 2001 ABS Census recorded just over 4,000 of the City's resident population as enrolled in study at some level, including over 800 students living in the residential colleges in North Adelaide.

With tightening of the rental housing market in the City as demand has strengthened (especially with growing demand from overseas students), the Universities and developers have responded and several significant student housing developments have either been recently completed or are planned for completion in the near future.

Notable projects bringing students into the heart of the City include the Unihouse Rundle Mall conversion opened in 2001, Tobin House and East West Apartments on North Terrace and the 400 place University of Adelaide Village on Grote Street which will be fully occupied in 2006. Managed student apartments are also available as part of the mix in recent private developments including the CITI townhouses off Grote Street, Bent apartments in the East End and Edge townhouses in the West End. The UV apartments conversion currently in progress at 25 King William Street will also be managed for student accommodation, while a number of other significant projects have approval but have not yet commenced.



Students in Citi
Townhouses off
Grote Street.

The Residential Growth Plan adopted by Council in November 2004 includes an action to:
“Collaborate with the tertiary education sector to make the city desirable to live, work and study for interstate and overseas students, incorporate student housing in re-development of suitable Council strategic sites and assess possible ways of further assisting development of a student housing program by the universities.”

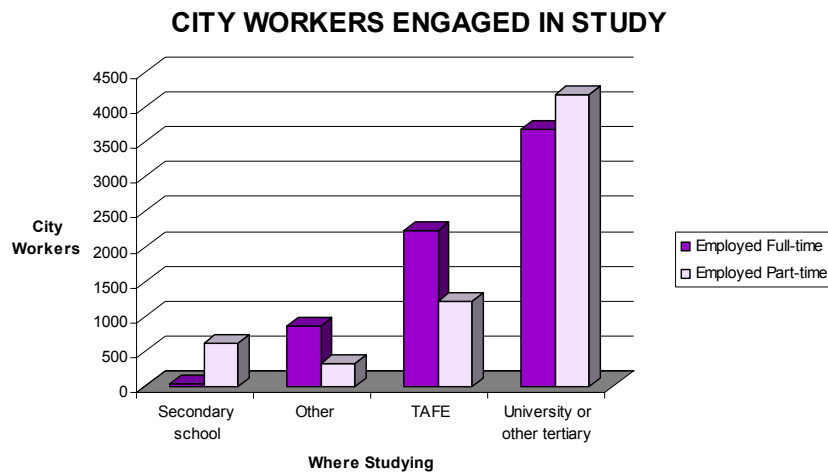
The most direct Council intervention is through its Strategic Property Portfolio. Stage 2 of re-development of the Council's Vaughan – Palais site will provide accommodation for some 200 students on North Terrace. A substantial component of student housing is also intended for re-development of the Council's Bus Station and Balfours sites.

The Residential Growth Plan also includes an action to “support opportunities for conversion of under-used older commercial floorspace for apartments.” This will seek opportunities to facilitate conversion for student accommodation as well as other forms of occupancy.

Students as City Workers

The ABS 2001 Census workforce profile for the City showed that over 13,000 of the City’s 93,000 workers were also engaged in study of some kind. This included students at City institutions working part time to help support their way through their studies as well as City workers engaged in part time study to improve their skills and qualifications. The Census also showed that over 6,000 City workers were employed in the education sector

There is a close inter-relationship between the commercial and educational sectors in developing the necessary skills base for an innovative, competitive and growing economy. Council initiatives through the Workforce Growth Plan adopted in May 2005 will seek to strengthen this relationship, especially through the business development programs of Enterprise Adelaide.



Source: ABS 2001 Census – City of Adelaide Workforce Profile

Students as City Visitors

A large student population adds greatly to the vitality and interest of any city. They add to street life and patronise cafes, bars, shops and entertainment places, creating new opportunities for businesses to meet their needs.

Council’s User Segmentation Studies provide some detail on the time students spend in the City and how much they spend.

The surveys found that regardless of how many hours actually studied, casual, part time and full time students all visit the City approximately the same number of times per week (averaging around 4 times each per week). Similarly the surveys found little variation in spending patterns regardless of the average number of hours per week spent in the City for study.

While fewer students are in the City on Saturdays, the surveys found that this was the day on which they spent the most money there (excluding rent and payments to education institutions). This suggests that their student involvement also encourages them to visit the City at other times, leading to a wider engagement in City life.



The survey data also confirms that students living in the City on average will spend more per week than those from inner suburbs or outer metropolitan areas

Many school students visit the City's institutions through class excursions, particularly the Zoological Gardens, the SA Museum, Botanic Gardens, Art Gallery and Migration Museum. These visits help familiarise young people with the city centre, so that they can feel more confident returning independently as visitors and later as students in further education. The Council's City Classroom facility in the Grote Street Library and Community Centre provides a useful base for school groups enabling them to see and learn more about the City on their visits.

On an informal basis many school students meet up in the City, especially in Rundle Mall after school on a Friday afternoon. Older students are also attracted to the City's nightlife and the convenience of a central location to meet people. 98% of students report feeling safe in the City during the day including 70% who feel very safe. However of the 91% of students who are sometimes in the City at night only 58% feel safe¹¹ indicating an important area by which student experiences of the City may be improved.

Integration of Students in City Life

The City's ability to attract more students will, in part, depend on the degree to which students are adequately supported in their endeavours and are able to succeed and enjoy their time in Adelaide. Research from the Council's Customer Satisfaction surveys suggests that student support services could be better. Consultation with educational institutions in developing this Growth Plan also confirms that improved support services are a vital element in strengthening participation rates in formal education and attracting students to Adelaide as a desirable study destination.

Ongoing research is required to better understand the role of students in the life of the City and to monitor the trends identified in the Growth Plan.

¹¹ Adelaide City Council *Adelaide City Users Segmentation Study 2003 – Preliminary Analysis*: Corporate Strategic Planning October 2003

The Approach

Meeting the student growth target will require significant effort on the part of the Council, State Government and education institutions. An ageing population, increasing costs of education and competition from other cities present the major challenges to student growth.

Council's unique role in developing innovative and effective programs and in facilitating coordinated action is well regarded and important if student numbers are to continue to increase. Consultation with State Government and education institutions in developing this Growth Plan has shown strong support for the approach outlined here.

Intervention will be necessary to:

- Attract and facilitate start up of new educational institutions in the City,
- Expand the capacity for growth of existing institutions,
- Promote Adelaide as an 'Education and Learning City' and a dynamic and creative location for students and,
- Provide infrastructure and services which support students and engage them in City life.

Many of the proposed actions will deliver benefits across more than one of these areas. Driving these interventions will require a dedicated resource which will develop specific programs and give effect to partnerships with the education institutions and State Government.

Council Interventions

Strategic partnerships between Council and other education stakeholders (State Government, Federal Government, educational institutions, private education providers, Education Adelaide and employers) will help to determine their plans for 2010 and beyond, and identify opportunities for Council to support and facilitate growth of the overall education industry within the City.

In developing approaches, it needs to be recognised that students can not be treated as a homogenous group and there are different ways to define the various student markets. For example, students can be considered by their place of origin (metro Adelaide, rural South Australia, interstate and overseas), by the education sector (primary school, high school, VET sector, university, private or public) and/or by demographic profile (age, degree of disability, cultural background, sex, socio-economic background etc). The demands and limitations of the groups overlap in several areas, but are significantly different in others, and require specific approaches based on the particular intervention being considered.

Initiatives will facilitate both **supply** and **demand** of education in each market to create a total of 66,000 student places and ensure demand from students to fill these places. The proposed approach targets the sectors of highest demand.

The Student Growth Plan seeks to stimulate additional growth in student numbers, beyond what the market would otherwise deliver, through intervention in three major program areas;

Increased Supply

- **Fostering New and Existing Institutional Growth**

Increased Demand

- **Promoting Adelaide as an Education and Learning City**
- **Engaging Students in City Life**

Fostering New and Existing Institutional Growth

Expanding existing City institutions and attracting new institutions to the City brings with it many advantages. Aside from the positive multiplier effect on spending from the influx of more people into the City, other benefits include:

- a wider and deeper pool of skilled people to fill skill needs in established and emerging industries,
- flow on effects of greater demand for student accommodation in the City,
- a strengthening of Adelaide's brand as an Education and Learning City and,
- a more vibrant City as a result of more young people studying locally.

Increasing the number of places available to prospective students is vital in growing the student population numbers in the City. By working with State government in **attracting new institutions and expanding existing institutions**, Council will both achieve student growth and raise the profile of the City as a desirable education destination. Preference will be given to those institutions which demonstrate the ability to attract the greatest numbers of full time students.

The key initiatives proposed to facilitate institutional growth focus on **attracting new institutions** and conducting and making available research regarding student demand and other environmental conditions.

Council intervention to **attract new institutions** and assist existing ones to grow is a very direct approach to institutional growth. Working with State Government in the development of specific attraction packages and in negotiating with individual institutions ensures the most effective and cost efficient approach. Council can assist by providing technical and planning advice to potential institutions, planning and / or undertaking public realm improvements, identifying suitable sites (especially underused City floor space) and providing promotional support.

The State Government also provides various incentives to education institutions and Council will work closely with relevant State agencies to ensure a close alignment of support packages. While Council's focus is on attracting students to the City, the State Government has complementary priorities such as addressing skill shortages, building niche markets or industries and pursuing educational agendas consistent with the South Australian Strategic Plan. Consideration will be given to all sectors including schools, international schools, registered training organisations (VET sector) and universities. While it is expected that the greatest growth is likely to occur in the tertiary sector, support will be developed on an individualised basis.



Torrens Building – location for Carnegie Mellon – Heinz School of Public Policy and Administration.

In proactively promoting this institutional attraction, Council aims to accelerate interest from institutions who may not otherwise consider the City to be the most desirable destination for expansion or relocation.

In line with Council's direction to attract new educational institutions to the City, an approach should be made to Flinders University. This approach could include development of a joint feasibility study between Adelaide City Council and Flinders University, to examine which courses would be best suited to a central City location and consider all logistical issues. Other support that could be

provided includes identification of appropriate City campus buildings and facilitation of appropriate infrastructure. The development of a Flinders University presence or campus in the City is considered an important initiative, and should be pursued with vigour.

Facilitating the use of underused floor space for institutional growth assists the institutions and supports the City's ongoing property development. This is increasingly important as the growth in premium office floor space continues over the next few years and firms seek to upgrade out of C and D grade accommodation. Council can assist by understanding the particular requirements of institutions and identifying sites which may meet these. This requires a proactive relationship with the education sector and individual institutions and ongoing understanding of the factors which will impact on the City's property market.

Institutional growth complements Council's Workforce Growth Plan by attracting additional academics, student support officers and administrative staff into the City. This growth is also able to address the skill requirements of the industry sectors in the state and will further boost student and workforce numbers.

New institutions that may move to the City include further schools of the Carnegie Mellon affiliate (following establishment of the Heinz School of Public Policy and Administration in Victoria Square), and Le Cordon Bleu which has made steps to locate a campus in the City. The University of Ballarat (in association with the International Institute of Business and Information Technology) has already established a new campus in the City and has plans to expand.



The University of Ballarat and University Senior College have both taken up floorspace above Rundle Mall.

As new institutions are attracted it is important that an overall view of developing education in the City is maintained. Research from other cities indicates that cooperative approaches can greatly enhance the relationship of educational institutions with the City while also providing practical learning opportunities for students. Council will continue to support the **Adelaide Education Precinct Strategy Group**, which comprises representatives from the major City institutions, Council and State Government, in considering ways to enhance collaborative efforts. This group has given consideration to the actions outlined in this Plan and proposed ways to work together.

Much of the expansion in new institutions is premised on continuing strong demand from overseas students. Understanding this, and domestic student demand, is vital if institutions are to make informed decision as to their future plans. To support this, a **program of ongoing research** is proposed. Building on Council's current research activities, this program will extend the understanding of the student markets and other environmental factors which influence student growth.

Increasing the capacity of institutions will in part rely on **increasing the number of Commonwealth funded HECS places** in universities in the City. Council will work in conjunction with the State Government and the education institutions to advocate for such an increase. Increasing HECS places will assist in an equitable share of places being made available to enhance educational

capacity in the areas which have demonstrated long term excellence in education. This is opposed to a simplistic population based formula which may not address the potential for overseas enrolments or consider the need to build smaller population areas capacities as a part of nation building.

Approximately 97% of HECS funded Post Graduate Research positions within the City campuses of Adelaide University and University of South Australia were filled as of April 2005. However, on-going monitoring of this situation would be prudent, as many students within research fields such as bioscience and engineering are being recruited on healthy salaries as undergraduates and there may be opportunities to increase take-up of research positions.

Promoting Adelaide as an Education and Learning City

In attracting students from overseas, rural South Australia, interstate and the broader metropolitan area, the City is competing against other cities around Australia and other localities in South Australia. Recognising different market segments is critical for marketing to be effective (refer to Outline of Marketing Approach in Appendix 4).

Adelaide suffers from low awareness levels in key overseas markets and many prospective and current students perceive Adelaide to be small, quiet and dull. Council can best address this perception in a coordinated manner through **ongoing support for Education Adelaide** as the primary organisation for marketing into these areas. While Education Adelaide seeks to attract students to South Australia, Council's efforts will also be separately directed to complementing this by attracting people to the City. Consistent with Council's general marketing, and in partnership with the major institutions and State Government, Council is able to focus attention on promotion of the vibrant qualities of the City and its relative safety.

Promotion approaches that target prospective students from metropolitan Adelaide, rural South Australia and interstate will convey similar messages and require a particular focus on local media and networks. Council's 'You Are Here', and proposed follow up campaigns, will emphasise the value of the education sector to the City and the State and highlight the wealth of choices available in the City for prospective students. Council will assertively promote the City's advantages to the various market segments.

Supporting these approaches will be the development of an **Education and Learning City web portal**. The redevelopment of Council's overall web presence offers an opportunity to tightly integrate this with other Council information. This builds on Council's Destination Adelaide web presence which targets students from rural South Australia. Internet based delivery of information is increasingly important and state of the art developments in this area highlight the City as a dynamic and progressive destination.

To effectively compete in the education market which is increasingly influenced by rapid developments in the use of technology, Council can further improve internet access by continuing to **support the provision of digital infrastructure**. Opportunities in this field are constantly changing and keeping abreast of opportunities is important. The Citylan network for example, provides a unique competitive advantage for the City. Increasing the number of wireless 'hot spots' of this network could provide far greater coverage and ensure that all City based education providers and students living in the City can take advantage of this service.

This will allow greater coverage of the university campuses and will also improve coverage to student housing areas. The Citylan network for example, does not currently provide adequate coverage for several proposed student housing areas including University of Adelaide housing in Grote Street and Morphett Street. Such investment by Council can also be used as leverage to attract further private, State Government and educational institution investment which could greatly increase student and institutional access to digital infrastructure.

Council can also assist the training and re-training needs of a changing workforce through the **development of a City based Registered Training Organisations Forum**. Growth of knowledge based industries in the City requires changing skills in the workforce which drives additional training demand. The Workforce Growth Plan highlights the need to work in partnership with other organisations, training providers and firms to encourage the development of skills and training within the workplace.

The Forum will consider issues such as possible co-location and shared resources and measures to better link with industry. This sector is likely to be one of the major growth areas as State and Federal Governments continue to promote vocational training as an important aspect of lifelong learning. It is anticipated that the Forum will assist in institutional growth and could help attract courses to the City which may not otherwise come here.

Engaging Students in City Life

Research indicates that many students, particularly overseas students, do not feel part of the Adelaide community. If students are feeling alienated or alone, this can negatively impact perceptions, and consequently impede recommendations, referrals and endorsement.

Having access to relevant and comprehensive information will assist students and their families to access appropriate courses and services. Council can facilitate **establishment of a multi-institutional One Stop Shop for students and their families** by participating in a feasibility study in conjunction with other stakeholders. The City's major institutions and State Government have indicated their initial interest in such a facility which would provide a central City location for information about accommodation, education and training options, opportunities for further study, careers counselling, visa and immigration, entertainment, etc. The One Stop Shop could also be the catalyst for the development of programs either jointly developed by the institutions or operated on their behalf. The Department of Further Education Employment Science and Technology would be the best placed agency to establish and operate the facility and initial officer level discussions have been encouraging. **The Council's role would be as a facilitator, not as an operator or major provider of funds.**

Council can also support the various education institutions by conducting or partnering in **research to better understand students as a part of City life**. A current research project being conducted by the University of Adelaide in partnership with Council, which will test the hypothesis that a high level of engagement between resident students and other residents is of mutual benefit and adds life and vitality to a community, has commenced and may indicate the need for ongoing research in this area.

Attracting students and their families to the City is partly dependent on them viewing Adelaide as an inviting and safe place. This is especially important for those who might not have extensive previous experience of the City - those from rural areas, interstate and overseas in particular. Council can, as a part of the Council's community engagement and community safety approaches, develop activities which facilitate engagement between students, City residents, workers and visitors.

In many ways, the presence of students in the City on any given day is a very useful indicator of the contribution students make to City vitality. Further research will also be undertaken to better determine average daily student numbers (as against total numbers enrolled) and to further investigate how much time students spend in the City purely for study and how much time they spend engaged in other activities. This will help build a better understanding of the respective involvement of full-time, part-time and casual students in the wider life of the City enabling better targeting of the Council's initiatives.

A range of other Council activities will help make the City a more appealing place for students. **Council's Youth Policy and Action Plan** in particular has programs and activities targeted to young people broadly and students more particularly. The ongoing development of these initiatives will enliven the City, making it a more desirable study destination.

A Framework for Student Growth – Key Actions

Fostering New and Existing Institutional Growth

The following actions are proposed to:

- Increase the number of places available for students and actual enrolments in institutional learning in the City.
- Facilitate the attraction of new institutions and expansion of existing institutions.
- Establish partnerships with agencies to maximise support for potential new institutions interested in locating to Adelaide.
- Identify barriers to growth of existing institutions.
- Establish partnerships with Commonwealth and State Government to maximise support for existing institutions to expand in the City.

Actions

- 1.1 Work with the State Government to target identified educational niches in the South Australian market. Develop individualised support measures and marketing approaches to attract new institutions and assist expansion of existing institutions to address these (including attraction of a Flinders University campus to the City).
- 1.2 Support the establishment and growth of Carnegie Mellon University campuses in the City.
- 1.3 Research locational and other needs of new or existing institutions and assist in addressing these - including consideration of conversion of suitable underutilised older office buildings for use by institutions.
- 1.4 Undertake relevant research on student demand and preferences and make this available to institutions.
- 1.5 Continue support for the Adelaide Education Precinct Strategy Group which comprises representatives from the major City institutions, Council and State Government and is considering ways in which to enhance collaborative efforts.
- 1.6 In conjunction with State Government and education institutions advocate for increased Commonwealth funded HECS places being made available to the City's universities.
- 1.7 Investigate opportunities to partner with the State Government in developing schemes which provide HECS fee relief for tertiary students and which encourage them to stay in South Australia.

Promoting Adelaide as an Education and Learning City

The following actions are proposed to:

- Promote Adelaide as an 'Education and Learning City' showcasing the value of the students and education institutions in the City.
- Promote the value of a skilled workforce and the benefits of further training for employees in conjunction with initiatives of the Workforce Growth Plan,
- Increase the profile of the City as a desirable student destination to potential overseas, interstate and rural students.
- Increase the profile of the City as a viable and attractive destination for new institutions.

Actions

- 2.1 In partnership with State Government and other institutions, promote the educational and lifestyle benefits of the City to current and prospective students, their families and the wider community;
 - Coordinate promotion to international students in key international markets by maintaining financial support to Education Adelaide.
 - Develop specific promotion approaches for prospective students from metropolitan Adelaide, rural South Australia and interstate.

- Develop an 'Education and Learning City' web portal as a part of the Council's redeveloped web presence in order to provide a comprehensive profile of learning options and information on City entertainment, accommodation, recreational and cultural activities.
- 2.2 Provide ongoing support for activities which foster a learning and innovation culture in the City and promote Adelaide as a creative City through support for initiatives such as the Thinkers in Residence Program, sponsorship for the Festival of Ideas and financial support for the Australian Innovation Festival.
- 2.3 Support the State Government to maintain membership of the International Association of Educating Cities and maximise benefits arising from Adelaide's involvement.
- 2.4 In conjunction with relevant institutions and the State Government assist in conducting a major international education conference in 2006.
- 2.5 Support the further development of digital infrastructure to increase wireless coverage of the City's educational institutions, student accommodation and significant entertainment precincts. As part of this initiative, facilitate seamless integration of the local area networks of the universities and major institutions.
- 2.6 Develop a City Registered Training Organisations Forum as an avenue to facilitate closer links between these institutions and industry.

Engaging Students in City Life

The following actions are proposed to;

- Ensure that students have their needs met and have an enjoyable Adelaide experience while studying in Adelaide.
- Increase the rate of students staying on in the City as workers and/or residents past their period of study.
- Increase the word of mouth desirability of Adelaide and increase the amount of repeat and new business from students from metropolitan Adelaide, rural South Australia, interstate and overseas.

Actions

- 3.1 Subject to the outcomes of a feasibility study support establishment by an appropriate State agency of a multi-institutional One Stop Shop which will provide information for prospective students and their families on education and training offerings, career development, accommodation and entertainment, (and visa and immigration information for overseas students) with referral to appropriate agencies.
- 3.2 Continue to develop programs under the Youth Policy and Action Plan supporting new and visiting students so that their experience of the unique learning, recreational and cultural opportunities of the City may influence their future study decisions. Programs include the annual welcome party for students, City Classroom, Adelaide Unplugged and the Destination Adelaide website.
- 3.3 Conduct or partner in research to better understand the contribution students make to the life of the City. This includes, in partnership with the University of Adelaide, completing research to test the hypothesis that a high level of engagement between resident students and other residents is of mutual benefit and adds life and vitality to a community. Links to urban form and density will also be investigated.
- 3.4 Undertake further research to determine average daily student numbers in the City and investigate the relationship between hours/days of study and wider engagement in City life.
- 3.5 As part of the Council's community engagement and community safety programs, develop activities which facilitate engagement between students, residents, workers and visitors.
- 3.6 Lobby to have special interest educational facilities, such as the Investigator Science Centre, located in the City.

Supporting Actions

Growth in student numbers in the City will be affected by a range of Council strategies, policies and programs. In particular, this Growth Plan should be read in conjunction with the Growth Plans for workers, residents and visitors since each set of initiatives complements the others in creating the desired future of the City.

The **Workforce Growth Plan** adopted by Council in May 2005 outlines ways in which education and the nurturing of talent will provide economic stimuli and increase workforce numbers. Students are often employed while studying and seek meaningful careers once study is completed. The Plan includes actions to retain graduates and post-graduates and support their business aspirations. It also will see Council work in partnership with others to encourage work force skill development and promotion of education and training to assist in acquiring and retaining skilled staff. The education sector is in itself a major employer in the City and growth in this sector will support workforce development as well as student population growth.

The **Residential Growth Plan** adopted by Council in November 2004 addresses student accommodation needs through support for the university housing programs and use of the Council's strategic land bank to incorporate elements of student housing in re-development. There is also great potential to provide City rental housing for working students, including research students, through the Adelaide Affordable Housing Venture as it extends its stock of accommodation. In particular, Council has identified student housing options within the Balfour/Franklin Street Bus Station and the Vaughan - Palais developments.

The **Visitor Growth Plan**, currently in preparation, will focus the Council's actions to attract people to shop and spend leisure time in the City. This will also create the conditions to encourage students to stay on and do more, engaging more fully in City life.

The **City Arts and Living Culture Strategy** adopted by Council in December 2002 sets out a range of actions to develop a smart, innovative, vibrant and inclusive City. Linking the education institutions more closely with the creative industries will provide expanded, real opportunities for students and those industries to work together. Continuing Council support for festivals and events enlivens the City and adds to an exciting and vibrant environment attractive to students.

Sustained activity with numbers of people visible on the streets also contributes to an increased perception of safety in the community. Safety is a major consideration for students and their families in choosing educational destinations. Adelaide is widely recognised as a safe City and Council's **Community Safety Strategy** adopted in August 2003 is seeking designation as a 'Safe Community' by the World Health Organisation.

Young people are more likely to engage in a city which seeks their point of view and supports their needs and desires. Council's **Youth Policy and Action Plan** outlines an approach to facilitate this. Although many of the activities detailed in the Plan are targeted to benefit young people in general, students will be significantly advantaged. Facilitating the development of a healthy night economy, providing opportunities for cultural expression and an exciting atmosphere will attract and retain young people in the City. Marketing approaches designed to reach young people can be targeted to students and increase their desire to participate in city life.

Council's proposed **Social Development Strategy** will provide a broad approach for community engagement. Many people from different cultural backgrounds, people with disabilities and those from disadvantaged backgrounds seek study as a pathway to improve their position and reach their full potential. A city that offers a supportive environment and promotes active citizenship can enable their involvement in study.

Measures of Progress

Student Growth Plan			
Key Measure:	Frequency:	Description:	Source:
Number of education institutions, capacity and student enrolments in the City.	Annual.	Survey of institutions once a year - this is able to capture the previous year's full enrolments. This data relies on completion by the institutions. Data on full time equivalent numbers is gathered where possible.	Council survey of institutions
Supporting Measures:	Frequency:	Description:	Source:
Number of students enrolled in institutions providing non-recognised courses.	Annual	Survey of institutions once a year - this is able to capture the previous year's full enrolments. This data relies on completion by the institutions.	Council survey of institutions
Number of overseas students in SA, country of origin and share of national total.	Six monthly with major annual report.	Detailed count of overseas students enrolled in institutions. Annual count allows for more accurate assessment of overseas students in City based institutions.	Education Adelaide and Australian Education International statistics
Number of domestic student places, post-graduate student enrolments in the City and participation rates in further education.	Annual.	HECS and fee paying offered by City universities and other institutions are counted as a part of this survey which gives a good indication of Commonwealth Government policy regarding places for South Australia.	Council survey of institutions - From University annual statistics and ABS data.
Number of students that live and work in the City	Annual	Captures those residents who study in the City and those that study and work in the City.	From Residential Segmentation Study.
Number of trainees and apprenticeships with City employers.	Annual.	An annual count of apprentices and trainees in City sites which can translate to increased enrolments in City education institutions.	From Dept of Further Education, Employment, Science and Technology.
Student satisfaction with support services available.	Annual.	Provides an assessment of the level of satisfaction students have with general City services. This assists in planning and monitoring services.	From City User Segmentation study.
Daily average student numbers in the City and average hours spent in the City for study and other activities.	Annual	Refinement of City User Segmentation surveys to ask frequency of visits for study, hours spent for study and hours for other activities in the City.	From City User Segmentation Study.

Program Measures

In addition to the more generic measures which appear above, each program within this Growth Plan will have its own measures. Measurement tools will be developed to ensure that the following impacts can be counted:

- Number of additional places made available as a result of institutional growth and attraction program.
- Number of new institutions attracted to the City and existing institutions which expand as a result of a growth and attraction program.

- Conduct the 2005 Regional International Education Seminar in conjunction with the State Government.
- Increased digital wireless network coverage to include major campuses and student housing areas.
- Percentage change in stated desirability of Adelaide as a study destination by overseas students.

Appendix 1 – Counts of Student Numbers

Enrolment numbers have been collected from the main City educational institutions consistently since 2001. In 2005, as part of the preparation of this Growth Plan, a more detailed survey of student enrolments for 2004 was commissioned from the Australian Institute for Social Research at the University of Adelaide.¹² This captured more detailed information on the number of institutions in the City, the number of students, capacity, courses, projections for growth/shrinkage and contact details.

The project team contacted every identified educational institution in the City on a list of educational institutions provided from the Council's records by email, letter and telephone or face to face interview. In many cases institutions were followed up several times to gain the data. In most cases contactees were directed to an online data collection form (or presented with a hard copy to fill in) which requested information on the following:

- Name of organisation
- An address set (street, mail, website and email);
- Contact details
- Business and trading names
- Types of Institution (tertiary, VET, ELICOS secondary, adult education, private interest)
- Courses offered within the Australian Qualifications Framework
- 2004 annual total enrolment by male by female of international students studying at campuses in the Adelaide City Council area
- 2004 annual total enrolment by internal by external by mixed mode by male by female of domestic students studying at campuses in the Adelaide City Council area
- Plans or goals for expanding the number of international and domestic students

For the purposes of consistency with the Council's baseline 2001 data and the target of 66,000 students in institutional learning by 2010, '*students in institutional learning*' is measured by a count of students enrolled in an educational institution which conducts Australian Qualifications Framework (AQF) recognised courses, is a primary or secondary school or offers South Australian Certificate of Education (SACE) courses. This includes the Universities, TAFE, schools (public and private) and registered private providers of VET courses.

Institutions Counted by Sector

Institution	Number	Institution	Number
Tertiary / Higher Education institution	10	Registered Training Organisation	31
VET institution	20	Secondary School	10
Adult education	17	Primary School	6
ELICOS	7	Other	14

Qualifications Offered by City Education Institutions

Qualifications offered	No.	Qualifications offered	No.
SACE	13	Bachelor Degree	2
Certificate I	20	Graduate Certificate	5
Certificate II	23	Graduate Diploma	7
Certificate III	26	Masters Degree (Coursework)	4

¹² John Spoehr, Lou Wilson and Robyn McLean; Op Cit

Qualifications offered	No.	Qualifications offered	No.
Certificate IV	32	Doctoral Degree (Coursework)	2
Diploma (VET)	25	Masters Degree (Research)	2
Advanced Diploma (VET)	13	Doctoral Degree (Research)	3
Diploma (University)	5	Other qualifications	10
Associate Degree	1		

A small number of institutions also offered "Foundation to Higher Education" courses at campuses in the City of Adelaide. These are courses which prepare students for entry to Higher Education degrees.

Professional and continuing education courses (for example WEA) have been captured for the first time recording 22,568 enrolments in 2004.¹³ Enrolments in these institutions will be counted separately as a supporting measure arising from this Plan and enrolments are expected to rise steadily to around 30,000 by 2010.

STUDENT NUMBERS				
	2001	2002	2003	2004*
University of Adelaide	13,851	15,458	16,721	19,853
University of SA	11,549	10,671	10,721	10,820
Adelaide TAFE and VET	18,107	17,272	16,639	21,849
Schools	5,890	6,369	6,574	6,718
Total	49,397	49,770	50,655	59,240
Total non - recognised institutions				22,568

Source : Council surveys of Institutions and survey by Australian Institute for Social Research.

Note: 2004 figures for the University of Adelaide figures from 2004 include continuing education and Bradford College enrolments and 2004 VET figures include fuller listing of private RTOs

Within these counts, students are recorded if they are enrolled in any institution which provides recognised educational courses in the City - as such, many students are not full time and not enrolled throughout the entire year. Some are in short courses and others are engaged in study programs which are mixed between on-campus and off-campus activities. Only the universities keep reliable data which would translate the total number of students into full time equivalent numbers.

¹³ John Spoehr, Lou Wilson & Robyn McLean; *The Population of Students in the City of Adelaide Preliminary Report*, Australian Institute for Social Research, February 2005 – incorporating additional data June 2005

Information on the number of students studying in the City of Adelaide in 2004 was collected from the following institutions¹⁴:

Institutions counted from 1999 - 2004	
The University of Adelaide	St Aloysius College
UniSA	Christian Brothers College
TAFESA Adelaide City Campus	Pulteney Grammar School
North Adelaide Primary School	St Marys Dominican College
Gilles Street Primary School	University Senior College
Sturt Street Community School (re-opened 2004)	Adelaide Legal and Commercial College
Christian Brothers Primary School	Muirden & Stones Business Studies Centre
Adelaide High School	SA Institute of Business and Technology
St Dominics Priory Inc	Centre for Applied Linguistics in the University of SA.
Eynesbury College	Prides Business College (now ceased operation)
Muirden College Ltd	
Institutions offering recognised courses included for the first time in 2004	
Adelaide Convention Centre	Lucy Morice Kindergarten
Allstaff Training Consultants	Media Make Up Academy & Agency
Ausdance Sa	Mighty Good Talent School
Australian Institute of Management	Natural Health Academy of Australia
Barker Kindergarten	Nunkuwarrin Yunti of SA
Barkuma inc	Pathways Training & Placements Pty Ltd
BJ Network Consulting Australia	Real Estate Training College
Bradford College	Radio Adelaide
Challenge Recruitment Ltd	Retail Industry Training and Advisory Services
Clip Joint School of Hairdressing	SA Career Consultants
Colour Cosmetics Academy	SA Health Education Centre
Community Arts Network South Australia	SAE College
Dancecraft Studios	Securities Institute
Eword trading as Electus	South Australian School of English
Friendly Society Medical Association	Terry Simpson Studios
Gibaran Business School	The English College of Adelaide
Heather Langton Academy of Beauty	The Law Society of South Australia
Hotel and Liquor Trades Training School	Training Education Systems SA
Hudson	Training Synergies Australia
Kathryn Dean School of Media & Performing Arts	UnitingCare Wesley Adelaide Inc
Kaylene Kranz & Associates	Vocational Language Learning Centre
LM Training Specialists	Workright Australia
Institutions offering non-recognised courses and included in supporting measures	
Finesse Model Agency	SA Adelaide Language Centre
Grey Ward Children's Centre	The Speakers Studio
Jarrah HR Consulting	University of the Third Age, Adelaide, Inc.
Kumon Australia & New Zealand	WEA Adult Learning
Leigh Warren & Dancers	

¹⁴ John Spoehr, Lou Wilson & Robyn McLean Op Cit

Appendix 2 - SWOT Analysis

A SWOT analysis was conducted to best capture the range of issues impacting on student growth and from this the best approach for Council was determined.

SWOT Analysis of the City's Ability to Grow Student Numbers.

Strengths	Weaknesses
<ul style="list-style-type: none"> ○ Unique position of having two universities within the central activity area of a capital city. ○ TAFE institute within central activity area. ○ Over 70 other RTO's in the City. ○ Quality public and private schools ○ Relatively safe City. ○ Recognised as having a high standard of living and excellent quality of life. ○ Tolerant and accepting City with diverse cultures. ○ World class cultural institutions and 'cultural boulevard'. ○ World class wireless digital network. ○ Easily accessible – hub for public transport and accessible from interstate rail and airport. ○ Existing and growing range of affordable and relatively high quality student housing options. ○ Affordable living costs when compared to other Australian and overseas cities. 	<ul style="list-style-type: none"> ○ Ageing population with shrinking proportion of 15 – 19 year olds in SA and resultant pressure on demand for tertiary education places. ○ Relatively small economy and reasonably narrow industry base. ○ Perception that City is dull. ○ Considered a default or secondary destination for international students after other Australian cities. ○ International students often report not being accepted into Adelaide community.
<p>Areas to focus on</p> <p>In analysing the strengths, weaknesses, opportunities and threats the following areas will be the focus of Council activity;</p> <ul style="list-style-type: none"> ○ Improve supply of educational places for students by - <ul style="list-style-type: none"> ○ New and existing institutional growth – with an emphasis on those institutions which can best attract international students. ○ Improve demand for educational places by – <ul style="list-style-type: none"> ○ Promoting Adelaide as an Education and Learning City by continuing support for Education Adelaide, developing a web presence and improving digital infrastructure. ○ Improving support for students and their families by conducting a feasibility study for a 'One Stop Shop' for student support and develop initiatives which will improve the perception of safety in the City. 	
Opportunities	Threats
<ul style="list-style-type: none"> ○ Students (whether casual, part-time or fulltime) come to the City about 4 times per week. ○ Students spend over \$100 million per annum. ○ Favourable visa and migration status. ○ Commonwealth and State Government focus on international students. ○ Commonwealth and State Government focus on lifelong learning ○ Buoyant economy and employment opportunities (characterised by winning of defence force contract). ○ New international university planned to open in 2006. 	<ul style="list-style-type: none"> ○ Potential loss of favourable visa and migration status in the future. ○ Competition from other cities for international students. ○ Perception that international students 'take' places from local students. ○ Ability to cope with unlikely events e.g. SARS and major terrorism. ○ Rising costs of education, especially tertiary education.

Appendix 3 - Major Program Targets and Assumptions

The 2004 count of students enrolled in institutional learning in the City is around 59,000. An additional 7,000 students will be required to meet the Council target of 66,000 by 2010.

Expansion of existing, and attraction of new, education institutions will further increase student numbers. The actions outlined in this Growth Plan will facilitate growth in the following areas:

- **Growth in the existing major tertiary institutions in line with their strategic plans.** The University of South Australia and Adelaide University are planning for growth in the order of 2,600 students up to 2008.
 - The University of South Australia has also brought in an additional total of around 1,100 students into the City in 2005 as a result of the relocation of courses from the Underdale Campus to the redeveloped City West Campus.
- **Potential growth in new institutions establishing in the City.** Institutions with known plans to locate and/or expand in the City include Ballarat University, the Carnegie Mellon University affiliate and Le Cordon Bleu City campus. By 2010 these institutions together have the potential to bring in around 3,500 additional students. Attraction of other new institutions would add further potential growth.
- **Growth in the VET sector** including Adelaide TAFE. The State Government has identified growth in this sector and skilling of the workforce as major targets in the South Australian Strategic Plan. By 2010 within the City, student numbers in this sector could reasonably be expected to increase by around 2,000 by 2010.
- **English Language and Foundation Studies courses for overseas students.** An essential element in attracting growing numbers of overseas students to tertiary education in Adelaide is the availability of English Language courses in the ELICOS sector and Foundation Courses preparing students for University. Potential growth in this sector is similarly estimated conservatively at around 1,000 additional students.
- **The schools sector** is expected to experience steady although relatively unspectacular growth. Increases in student numbers at the Sturt Street Primary School and potential growth at Adelaide High School will contribute up to an extra 200 students by 2010.

This growth in supply of places in educational institutions in the City would more than meet the target of 66,000 students by 2010. However **such growth will only be realised if demand for these places is generated and maintained.** The proposed demand side actions of this Growth Plan to market Adelaide as an 'Education and Learning City' and establish effective student support programs are therefore an essential element of this Growth Plan.

Achievement of the targets detailed above is also contingent upon a range of other factors and assumes:

- A continued increasing demand by overseas students for education in Australia.
- State and economic growth remaining relatively strong to generate demand for training and retraining of the workforce.
- Increases in HECS fees and the general cost of education do not disproportionately negatively effect student enrolments.
- Achievement of Council's workforce, visitor and resident targets as drivers of demand for student places.
- Student places in new institutions are not at the expense of existing places.

- No restricting externalities (for example major terrorism, SARS outbreak etc) which may negatively affect international student numbers.

While not forming part of the target of 66,000 students by 2010, growth is also expected in the informal Continuing Education and Lifelong Learning sector. Short courses addressing changing skills requirements in the workforce and recreational courses in fields of interest such as foreign languages, cookery, art appreciation etc represent a major field of potential growth, conservatively estimated at generating at least 3,000 additional students in the City by 2010.

Fostering New and Existing Institutional Growth

This program will focus on attracting South Australian, interstate and overseas education institutions that have a demonstrated interest and capacity for expansion. Council will work with the State Government to develop a prospectus which clearly outlines Adelaide's competitive advantage in education and particularly in attracting overseas students. Preference will be given to those institutions which can best deliver full time study places. Given recent figures confirming South Australia's recent success in attracting overseas students and the State's advantageous migration status other institutions will be attracted to the City if this can be matched with their own expansion plans.

Promotion activities will support this approach and it is intended that the primary target for promotion will be those institutions which are able to expand or new institutions which may be attracted to the City. The focus will be on expanding supply of places available and supporting these institutions in their endeavours to adequately fill places. Council can facilitate this by proactively targeting institutions domestically and overseas and providing promotional material on the attractiveness of the City environment for students and the competitive advantages of the City.

Care will need to be taken to ensure that courses offered by the new institutions complement the strengths of the current institutions. Criteria for targeting new institutions therefore will be developed which focus on filling educational gaps and extending the educational offerings in the City. Council, along with the State Government, will identify these gaps and seek out institutions with particular strengths in these areas. Approaches to individual institutions will be made with the particular method of approach being determined in conjunction with State Government.

Attraction and Support

Council support measures to attract new institutions will be identified. They would also potentially be available for existing institutions seeking to expand course offerings and increase student numbers. Operating guidelines will be developed for this program which will clearly outline criteria for Council support.

Attraction measures will include planning and technical assistance and help in the identification of suitable sites (especially underutilised or vacant spaces). In addition Council will package and make available research information which details the level of student demand and other environmental factors which may influence locational decision-making by institutions.

Consideration will also be given to infrastructure support for new facilities, especially where underutilised or vacant spaces are to be used. Such contributions could cover costs associated with data cabling, public realm improvements and other activities considered appropriate to Council's role and the intent of this Growth Plan. Contributions will vary depending on the number of new students to be attracted and the prospects for future expansion.

Preference will be given to tertiary institutions and full time courses. However other education sectors and courses can be offered similar support where prospects for attraction or growth become evident.

Key Aims	<ul style="list-style-type: none"> • Increase the number of places available for students and actual enrolments in institutional learning in the city. • Facilitate the attraction of new, and expansion of existing, institutions. • Establish partnerships with agencies to maximise support for potential new institutions interested in locating to Adelaide. • Identify barriers to growth of existing institutions. • Establish partnerships with Commonwealth and State Government to maximise support for existing institutions to expand in the City.
Target Groups	Educational Institutions – primarily Tertiary
Other Agency Involvement Sought	<ul style="list-style-type: none"> • State Government • Capital City Committee • Schooling sectors • Universities • Private education providers • Commonwealth Government
ACC Funds required per annum	Attraction and Growth Program - \$200,000 plus support for Carnegie Mellon in 2006 and future years as necessary. Research - \$20,000
Total ACC funds to 2010	Attraction and growth Program- \$1,000,000 Research - \$100,000

Promoting Adelaide as an Education and Learning City

Promotion is also required to target students and their families by ensuring that institutions and overseas student recruitment agents have material available to focus attention on the City's attributes (refer to Outline of Marketing Plan in Appendix 4). Council will also directly provide similar material to students via existing Council activities and the development of well targeted programs such as instituting an Education and Learning Web Portal linked to Council's web-site.

Education and Learning Web Portal

As Council updates its web presence a new portal will be developed which will showcase the City as a desirable education destination. The focus will be on promoting the unique advantages of the City, such as;

- Two major university campuses and a major TAFE campus located in the City with the pool of educational talent, facilities and opportunities that come with this;
- The relative safety of the City, especially when compared with other capital cities and overseas destinations;
- The favourable migration and streamlined visa processes that South Australia has which are unique in the Australian context;
- A vibrant and active lifestyle complemented by unique attractors such as the North Terrace cultural boulevard, the Park Lands and a host of entertainment opportunities;
- The Citylan network with world class wireless network capabilities; and,
- A supportive and dynamic Council working in partnership with State Government and the institutions toward ensuring institutions are successful and students are well supported and able to enjoy their City experience.

A major focus will be tertiary institutions and potential students from overseas, interstate, rural and metropolitan South Australia. Activities which target potential institutions and students in other educational sectors will also be developed.

Education Adelaide

Ongoing support for Education Adelaide in partnership with State Government and major education institutions will;

- Develop a destination brand and inform key overseas markets on its attributes.

- Provide up to date information to the education industry.
- Provide information to the community, raising the profile of the value of the education sector, as well as work to encourage a community supportive of international students.

Council will continue to play an active part in decision making and influencing Education Adelaide. In particular Education Adelaide should continue to develop materials and processes that highlight the unique qualities of the City and attract overseas students in growing numbers to City based education institutions.

Digital Infrastructure

This program will highlight Adelaide's competitive advantage in digital infrastructure. It may assist in the expansion of infrastructure such as the unique Citylan wireless network and facilitate greater use of wireless technology. In supporting expansion of infrastructure Council will help increase the number of wireless 'hot spots' which will have direct benefit to educational institutions in reducing costs associated with expansion or start up. Local area networks provided by the universities (and possibly other education institutions) will be seamlessly integrated into the available infrastructure to allow students the most convenient access to important information. Council will facilitate discussions with the universities, in the first instance, to ensure such integration occurs.

Council will also provide technical and logistical support and advice to ensure a smooth roll out of digital infrastructure and to provide the greatest possible coverage of desirable locations such as student housing throughout the City. Ongoing promotion of the scale and benefits of this improved infrastructure will be undertaken in conjunction with Council's general marketing program. It will also be promoted through the prospectus designed to attract new institutions, highlighting the potential start up cost savings of having such infrastructure in place.

Key Aims	<ul style="list-style-type: none"> • Promote Adelaide as an 'Education and Learning City' showcasing the value of the students and education institutions in the City. • Promote the value of a skilled workforce and the benefits of further training for employees in conjunction with initiatives of the Workforce Growth Plan, • Increase the profile of the City as a desirable student destination to potential overseas, interstate and rural students. • Increase the profile of the City as a viable destination for new institutions.
Target Groups	<ul style="list-style-type: none"> • Students and potential students • Educational Institutions (especially potential new institutions)
Other Agency Involvement Sought	<ul style="list-style-type: none"> • State Government • Capital City Committee • Schooling sectors • Universities • Private sector technology providers/suppliers • Private education providers • Commonwealth Government
ACC Funds required per annum	Education and Learning Web Portal - \$20,000 (1 st year) \$10,000 per annum thereafter Education Adelaide - \$200,000 Digital Infrastructure Expansion- \$70,000 (one off cost)
Total ACC funds to 2010	Education and Learning Web Portal - \$70,000 Education Adelaide - \$1,000,000 Digital Infrastructure Expansion - \$70,000 (one off cost)

Student Support

One Stop Shop

Council will support the establishment of a multi-institutional one stop shop which is designed to:

- Assist local, interstate and overseas students and their families to make educational choices particularly in choosing further VET and tertiary learning opportunities.
- Improve student's experience of the City and thereby increase the prospects of word of mouth referral.

It is intended to provide information, programs and referral for prospective and existing students and their families including:

- learning opportunities in the City,
- recreational and cultural activities eg. City Beach,
- immigration information,
- careers advice,
- professional/business mentor program and,
- accommodation options.

A feasibility study will determine the scope, operational requirements, location and costs of the initiative. The City's major institutions and State Government (particularly the Department of Further Education, Employment, Science and Technology) have indicated their initial interest. **The project would be led and run by the most appropriate State agency with the Council's role limited to facilitation and promotion.**

Located centrally in the City within easy access of the major institutions, the facility would provide information in a variety of forms. Web based access, brochures and other promotional material, institutional prospectuses and specially designed materials will be actively promoted. It could also be a catalyst for graduate recruitment and provide access for private sector recruitment agencies thereby attracting private sector support. Such support could extend to the development of programs (such as a business mentor program) either jointly developed with the institutions or operated on their behalf.

Key Aims	<ul style="list-style-type: none"> • Support students that they have their needs met and have an enjoyable Adelaide experience while studying here. • Increase the rate of take up of City based educational offerings. • Increase the rate of students staying on in the City as workers and/or residents past their period of study. • Increase the word of mouth desirability of Adelaide and increase the amount of repeat and new business.
Target Groups	<ul style="list-style-type: none"> • Students and potential students and their families • Educational Institutions (especially potential new institutions)
Other Agency Involvement Sought	<ul style="list-style-type: none"> • State Government • Capital City Committee • Schooling sectors • Universities • Private education providers • Commonwealth Government
ACC Funds required per annum	Multi institutional one stop shop - Feasibility Study- \$40,000 (one off for 2005/06)
Total ACC funds to 2010	Multi institutional one stop shop - \$40,000 (one off)

Appendix 4 – Outline of Marketing Approach

Council will focus its marketing efforts for students and their families on providing information to others who will undertake direct promotion. In this way promotion targeting students and their families will ensure that institutions and others, such as overseas student recruitment agents, have material available to focus attention on the City's attributes. Council will also directly provide similar material to students via existing Council activities and the development of well targeted programs such as instituting an Education and Learning Web Portal linked to Council's web-site.

Targeting institutions for growth and/or attraction is likely to be more directly from Council although this will depend on individual cases. In some cases it will be more beneficial to assist the State Government in their efforts and in influencing the approaches they may make (such as in the current example of attracting the Carnegie Mellon affiliate to the City).

Marketing Approach		
Students and their families		
Target Market	Key Messages	Responsible Agency
International students and their families	<p>While outlining the benefits of the State, ensure that institutions and overseas student recruitment agents have material available to focus attention on the City's attributes;</p> <ul style="list-style-type: none"> ○ The relative safety of the City, especially when compared with other capital cities and overseas destinations. ○ The favourable migration and streamlined visa processes that South Australia has which are unique in the Australian context. ○ The City's vibrant and active lifestyle complemented by unique attractors such as the North Terrace cultural boulevard, the Park Lands and a host of entertainment opportunities. ○ The relative affordability/value of living in Adelaide when compared to other Australian and overseas options. ○ The range of affordable and high quality accommodation options available in the City. ○ The buoyant labour market and new opportunities for semi-skilled and high skilled 'knowledge economy' employment. 	Education Adelaide
Interstate and rural students and their families	<ul style="list-style-type: none"> ○ Two major university campuses and a major TAFE campus located in the City with the pool of educational talent, facilities and opportunities that comes with this. ○ The City's vibrant and active lifestyle complemented by unique attractors such as the North Terrace cultural boulevard, the Park Lands and a host of entertainment opportunities. ○ The relative affordability/value of living in Adelaide compared to other Australian and overseas options. ○ The range of affordable and high quality accommodation options available in the City. ○ The buoyant labour market and new opportunities for semi-skilled and high skilled 'knowledge economy' employment. 	Council in conjunction with State Government and Education Institutions

Local students and their families	<ul style="list-style-type: none"> ○ Two major university campuses and a major TAFE campus located in the City with the pool of educational talent, facilities and opportunities that comes with this. ○ The City's vibrant and active lifestyle complemented by unique attractors such as the North Terrace cultural boulevard, the Park Lands and a host of entertainment opportunities. 	Council in conjunction with State Government and Education Institutions
Education Institutions		
Target Market	Key Messages	Responsible Agency
Institutions which target international students	<ul style="list-style-type: none"> ○ A supportive and dynamic Council working in partnership with State Government and the institutions toward ensuring institutions are successful and students are well supported and able to enjoy their City experience. ○ The City's network with world class wireless network capabilities. ○ Recent increases in international student numbers with growth double that of other Australian cities. ○ The possibility of attracting incentives as a part of Council and State Government programs. ○ The relative safety of the City, especially when compared with other capital cities and overseas destinations. ○ The favourable migration and streamlined visa processes that South Australia has which are unique in the Australian context. ○ The City's vibrant and active lifestyle complemented by unique attractors such as the North Terrace cultural boulevard, the Park Lands and a host of entertainment opportunities. ○ The relative affordability/value of living in Adelaide when compared to other Australian and overseas options. ○ The range of affordable and high quality accommodation options available in the City. ○ The buoyant labour market and new opportunities for semi-skilled and high skilled 'knowledge economy' employment. 	Council in conjunction with State Government and Education Institutions
Other institutions	<ul style="list-style-type: none"> ○ A supportive and dynamic Council working in partnership with State Government and the institutions toward ensuring institutions are successful and students are well supported and able to enjoy their City experience. ○ The relative affordability/value of living in Adelaide when compared to other Australian and overseas options. ○ The buoyant labour market and new opportunities for semi-skilled and high skilled 'knowledge economy' employment. 	Council in conjunction with State Government and Education Institutions