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INTERNATIONAL EDUCATION – TOURISM OPPORTUNITIES

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Overview

- **International education in Australia**
- **Research approach**
- **Key findings:**
 - **International student travel behaviour**
 - **Visiting friends and relatives (VFR)**
 - **Nationality profiles**
- **Conclusions and future actions**



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International Education in Australia

- **2.8 million international students globally**
- **Almost 500,000 international students studying in Australia**

Sector	International Student Numbers by Sector			Annual Growth by Sector	
	2007	2008	2009	2007 to 2008	2008 to 2009
Higher education	168,052	176,161	196,007	4.8%	12.2%
VET	107,066	151,258	189,021	41.3%	25.9%
ELICOS	92,890	115,128	119,960	23.9%	4.2%
Schools	26,602	28,515	33,364	7.2%	-2.8%
Other	27,256	31,035	27,257	13.9%	7.1%
Total	370,238^a	435,263^a	491,565^a	17.6%	13.3%

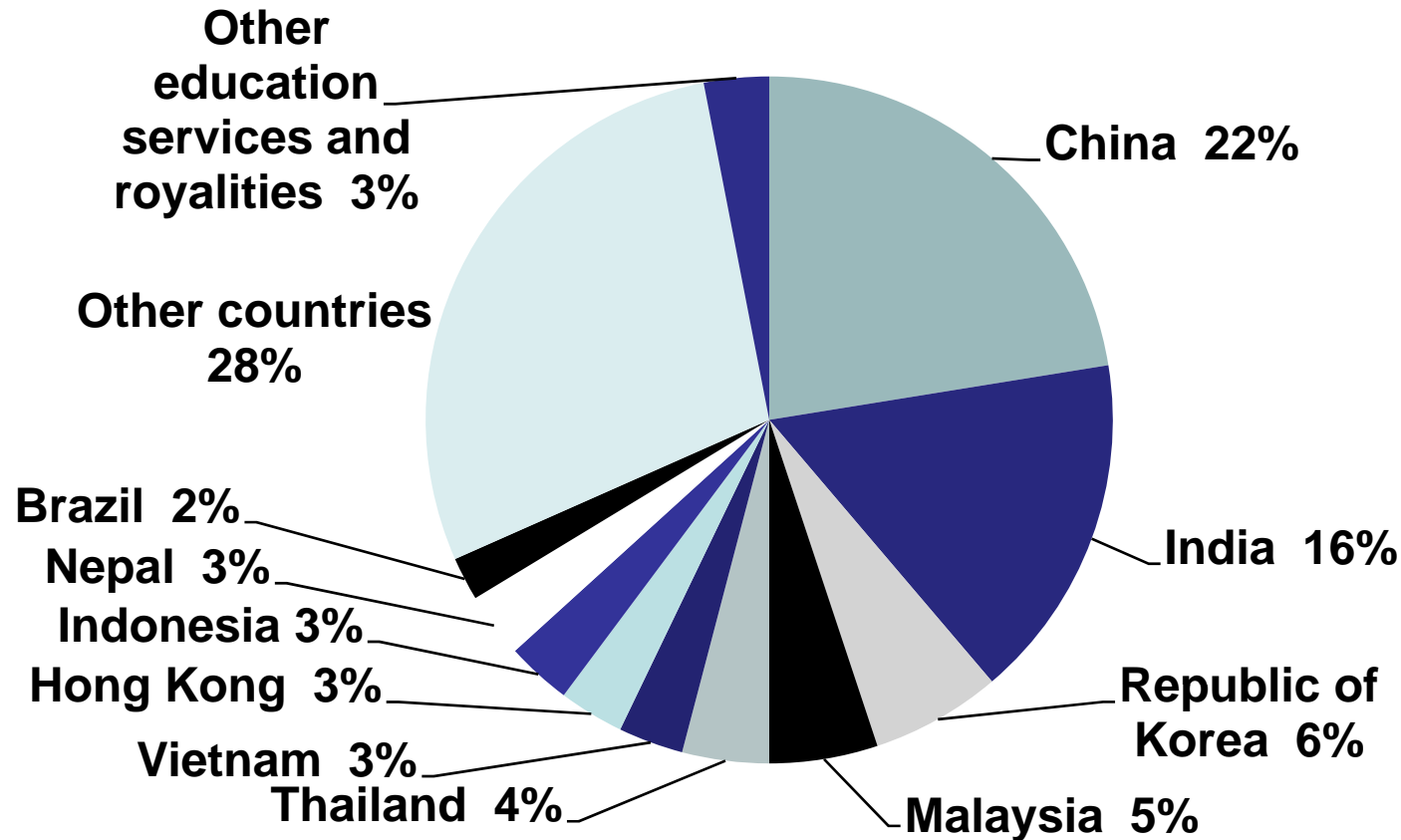
Source: AEI 2010 & 2009b.

^a The total is less than the sum of its components as individual students can undertake study in more than one sector during the year.



Market Significance

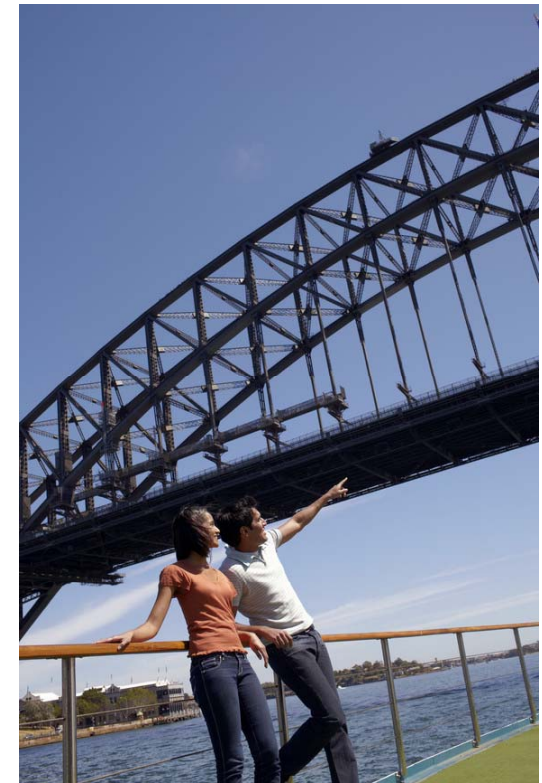
- Australia's largest service-based export industry .
- Growth: \$9.1 billion in 2004/50 to \$17.2 billion in 2008/09.





Tourism Opportunities

- **Motivating international students to travel prior to, during and on completion of their studies.**
- **Recruiting international students as advocates who encourage others to travel to Australia.**
- **Future repeat visits to Australia once the international students has returned home.**
- **Attracting friends and relatives from their home country to visit them in Australia.**



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The Project

- **Profile the tourism behaviour of international students studying in Australia, and their visiting friends and relatives (VFRs).**
- **Inform tourism leaders on the product and service gaps and opportunities associated with this market.**



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The Approach

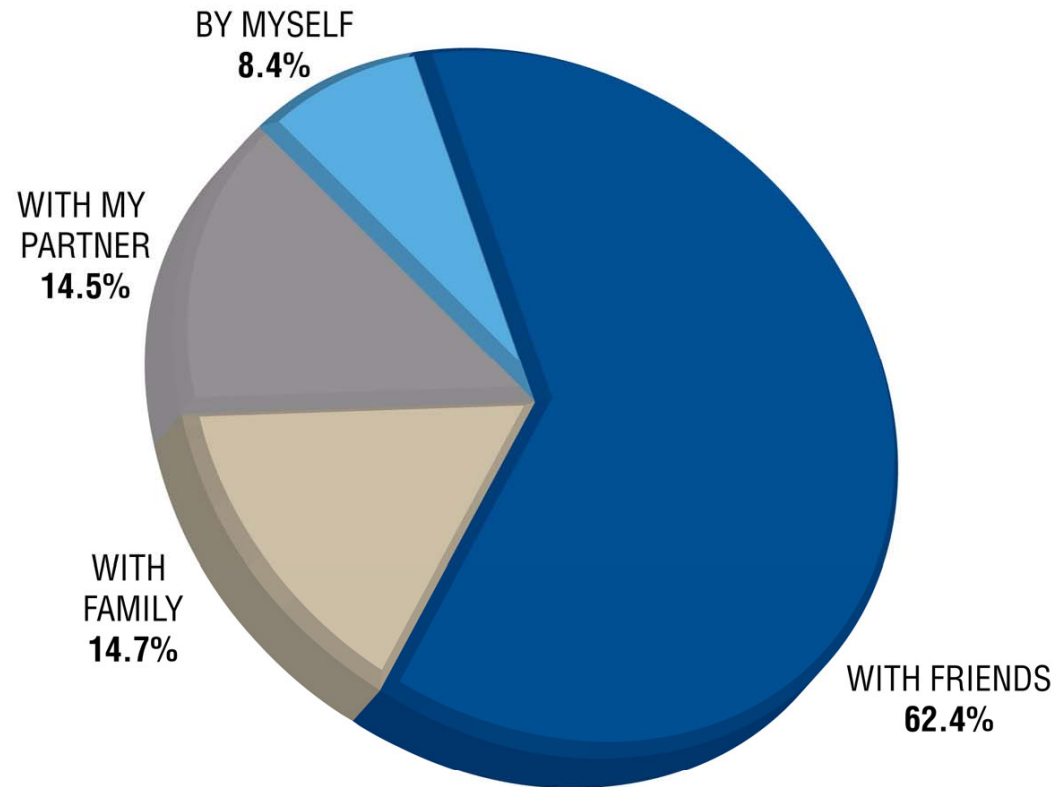
- **Phase 1: Interviews with key industry representatives and focus groups with international students from around Australia.**
- **Phase 2: A large scale national online survey of international students studying in Australia that generated 5,991 responses.**



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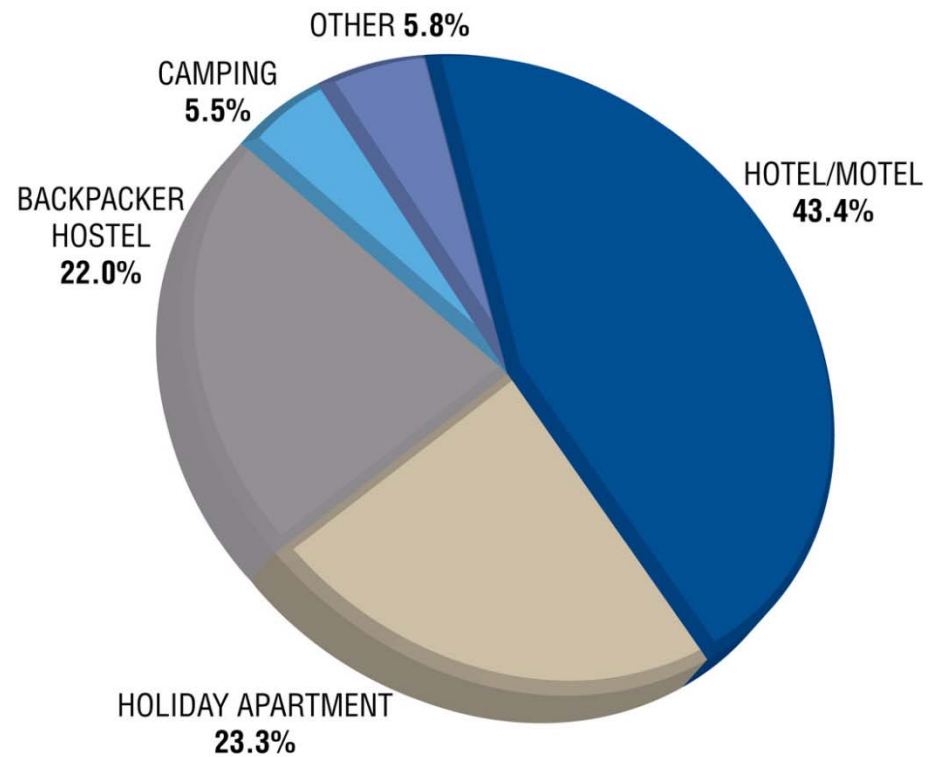


Leisure Companions



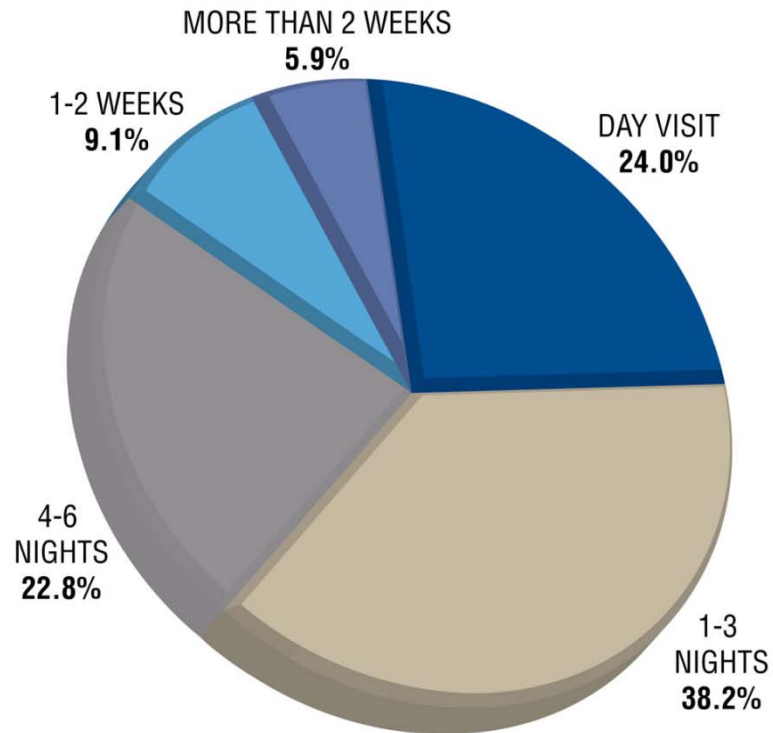


Preferred Accommodation



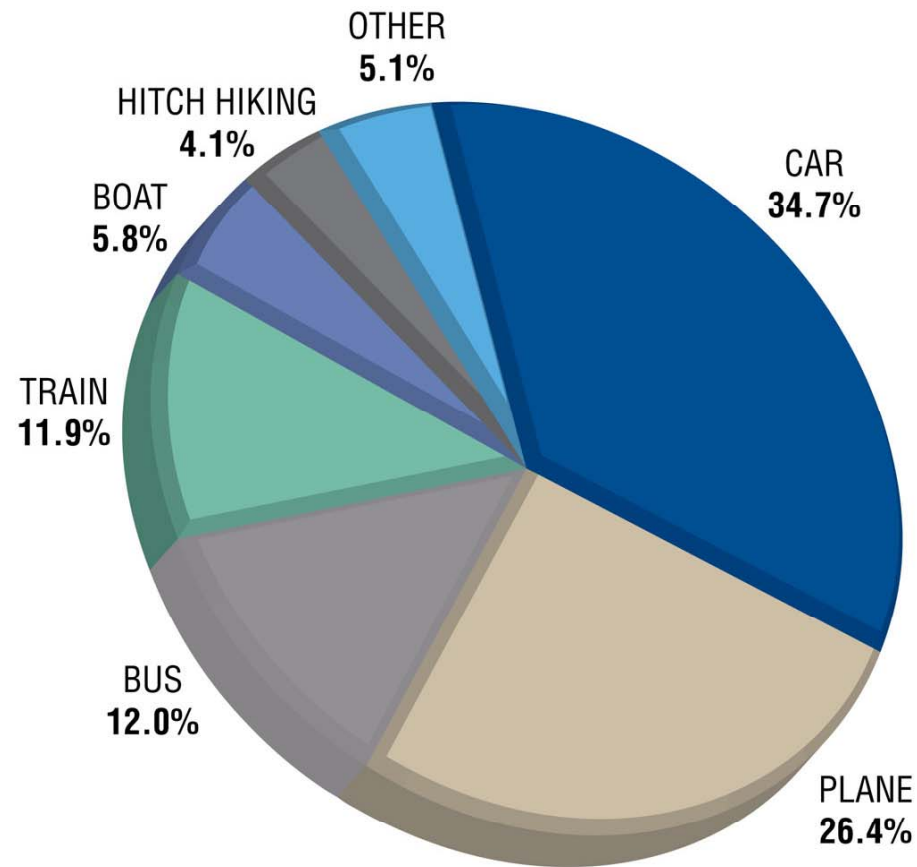


Length of Visit on Most Recent Trip



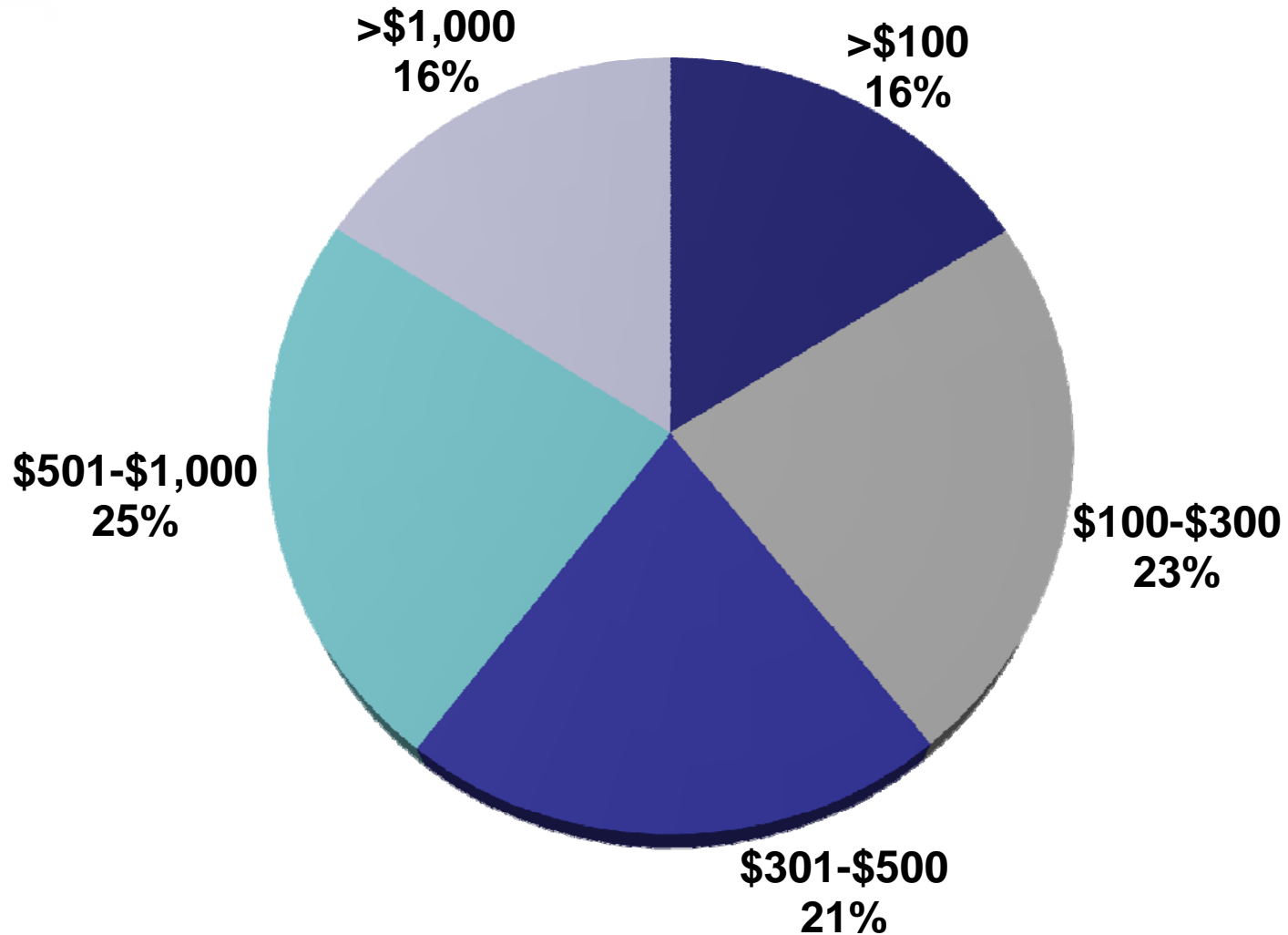


Mode of Transport on Most Recent Trip



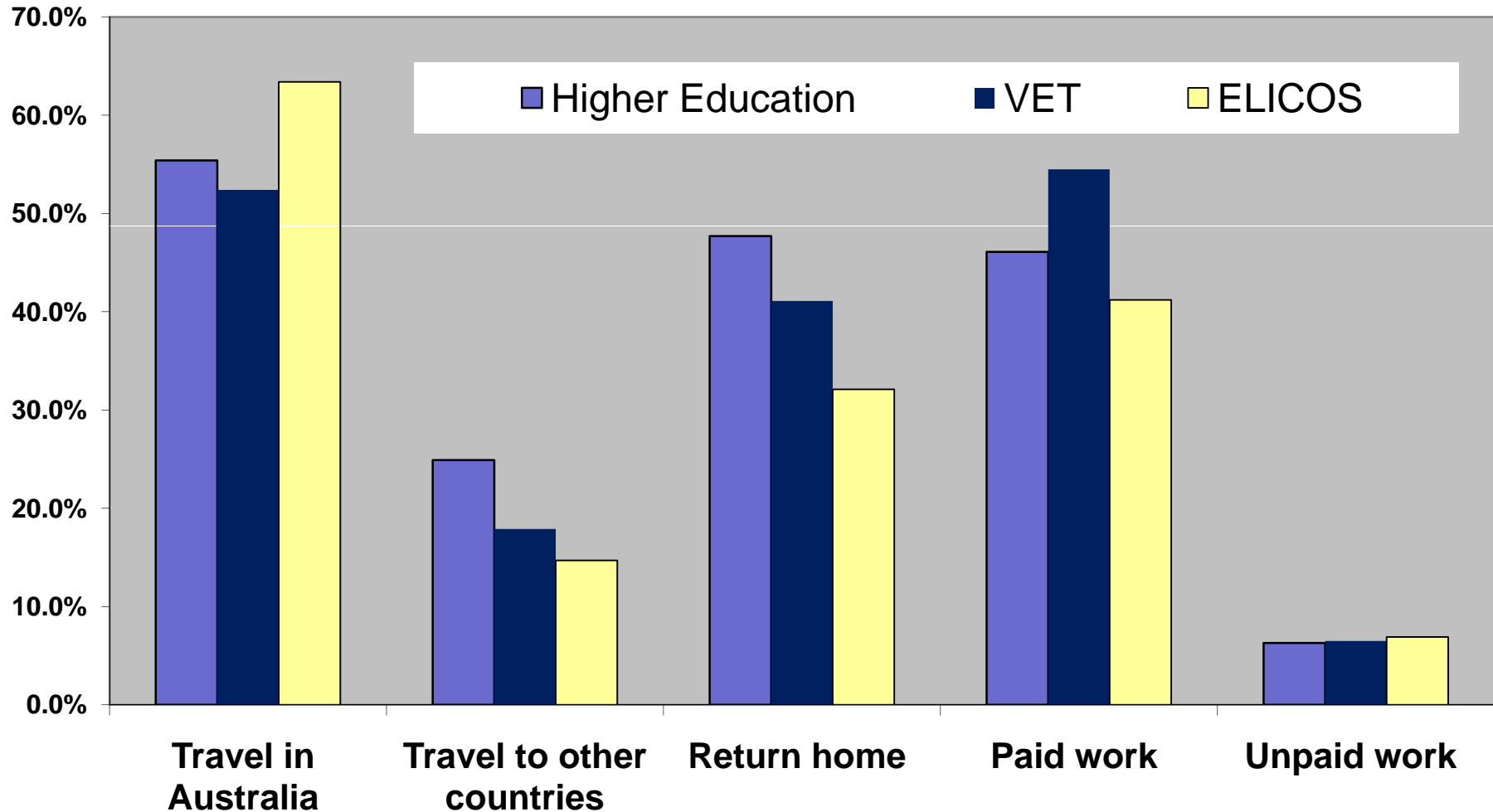


Expenditure on Most Recent Trip





Plans for Upcoming Vacation Period





Barriers to Travel

1. **Concerns about money**
2. **Study commitments**
3. **Lack of time**
4. **No student travel discounts**
5. **Work commitments**
6. **No student travel packages**
7. **Safety and security concerns**



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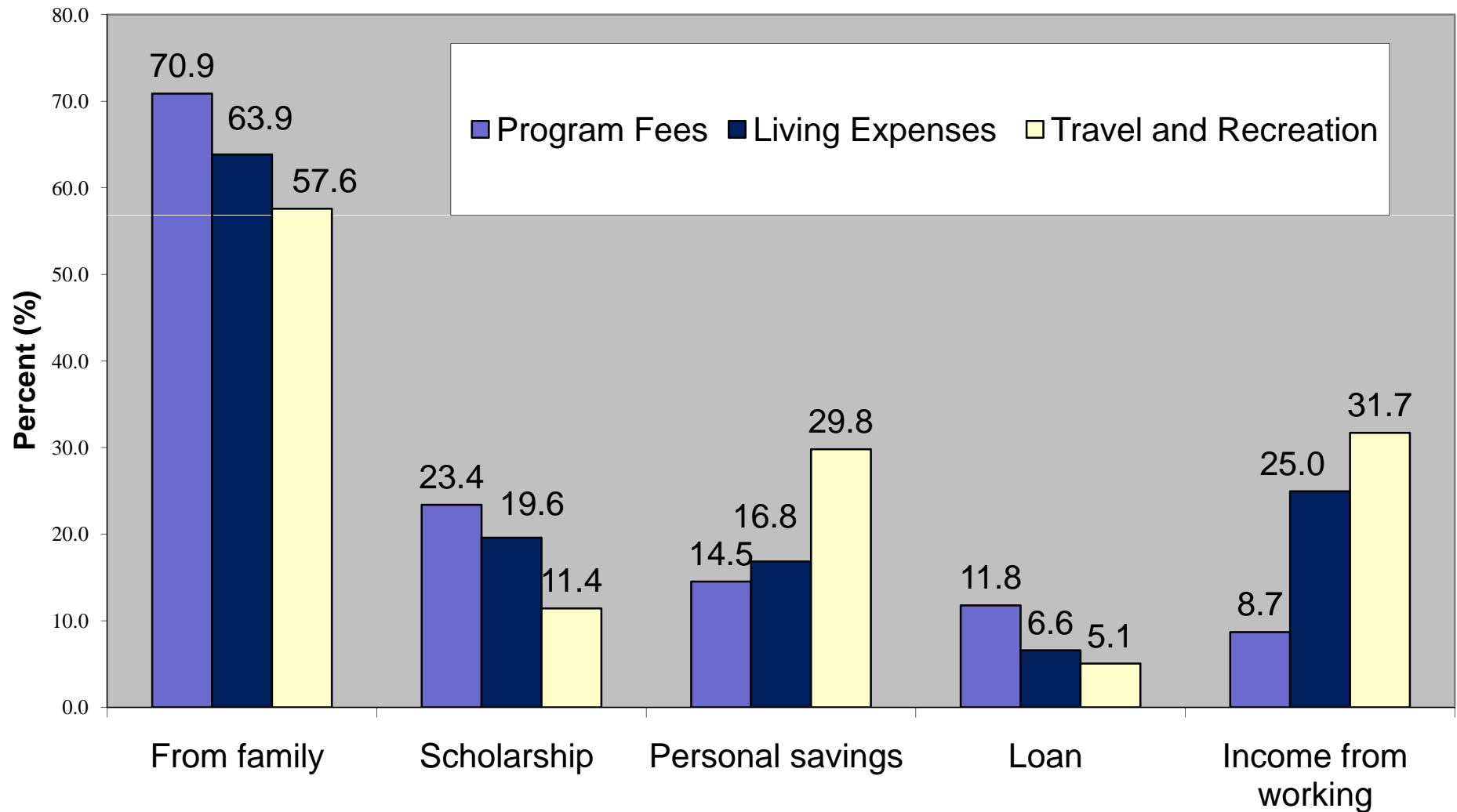


Expenditure in Australia

- **Based on these estimates, on average, international students spend \$42,531 per annum while studying in Australia.**
- **Of this amount, income from working was estimated at \$5,419 per year. Working income therefore contributed an estimated 12.7 percent to their total annual expenditure.**
- **The balance of average annual expenditure of \$37,112 is assumed to be funded principally from savings and from family sources, and therefore viewed as export dollars.**



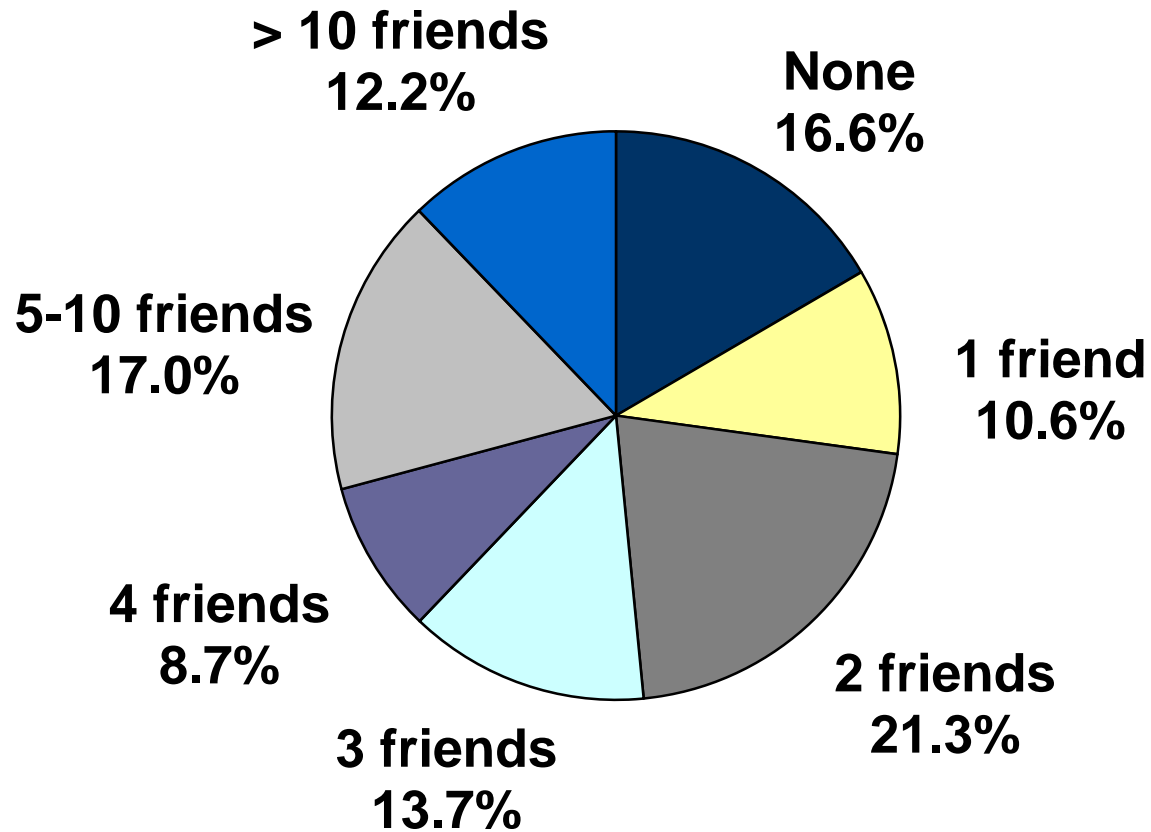
Study, Living and Travel





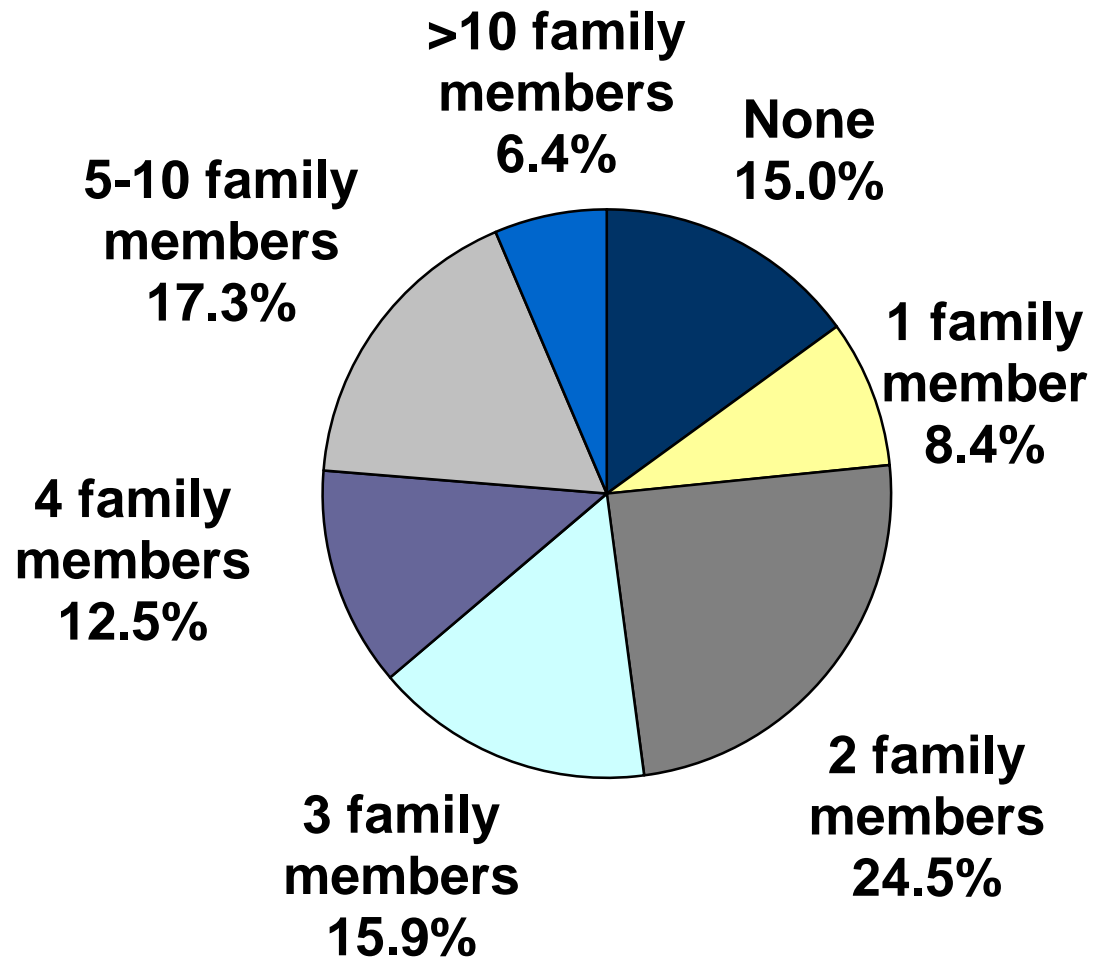
Friends Intending to Visit Australia

Percent





Family Intending to Visit Australia





Chinese Students

- **Travel party: Friends (75%), mostly other Chinese students.**
- **Accommodation: Hotels/motels (48%) or apartments (28%).**
- **Trip length: Short breaks (34%) and day-trips (29%).**
- **Transport used: Car (26%) and bus (23%).**
- **VFR accommodation: Hotel/motel (38%) or with the international student (37%).**
- **VFR length of stay: 1-2 weeks (40%).**



Indian Students

- **Travel party: Friends (62%), mostly other international students, and family (19%).**
- **Accommodation: Prefer hotels/motels (38%), apartments (23%) and backpacker accommodation (21%).**
- **Trip length: Short breaks (40%) and day-trips (34%).**
- **Transport used: Car (53%).**
- **VFR accommodation: With the international student (48%) or friends and relatives (30%).**
- **VFR length of stay: 2-4 weeks (29%) and more than 1 month (39%).**



European Students

- **Travel party: Friends (55%), who are not students or international students of other nationalities, or partner (28%).**
- **Accommodation: Backpackers (39%).**
- **Trip length: Short breaks of 1-3 nights (43%) and 4-6 nights (21%).**
- **Transport used: Car (34%) and plane (29%).**
- **VFR accommodation: Stay with the student (58%).**
- **VFR length of stay: More than 2 weeks (70%).**



Conclusions & Future Actions

- **International students are opportunistic travellers, who tend towards day-trips and short breaks undertaken within friendship groups, mostly with other international students.**
- **Importance of VFRs market associated with international students.**
- **Tailored products, packages and marketing campaigns.**
- **The tourism and international education sector could both benefit by working more closely together.**

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Full research report: www.crctourism.com.au

Additional consultancy reports and seminars
contact Sarah Gardiner: s.gardiner@griffith.edu.au

Thank you!

Questions?