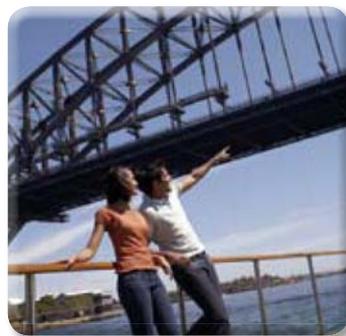
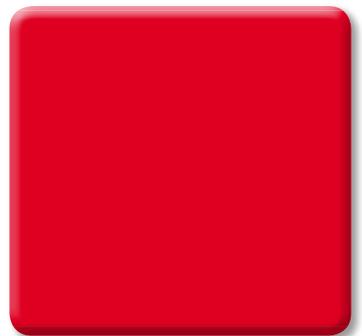
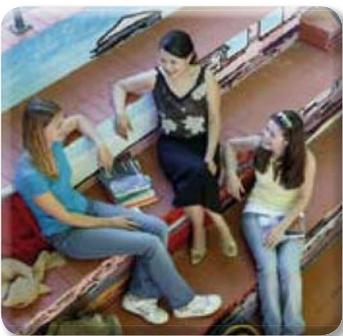


International Education Visitation Tourism Opportunities

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International Education in Australia

Australia has successfully gained a positioning as a well regarded destination for quality education and training. There were almost half a million international students in Australia on student visas in 2009, increasing 13.3 percent on 2008 figures and 17.2 percent between 2007 and 2008¹. International education is one of the relatively few service industries which remains strong through periods of social, political and economic uncertainty^{2&3} and International education now contributes \$17.2 billion in export income annually and is Australia's largest service-based export industry⁴.

Tourism Opportunities

The growth and resilience of the international student market over the past decade suggests that it offers potential opportunities for Australia's tourism industry. However the role of travel and tourism within the experiences of international students in Australia is not well understood. On this basis it is clear that the tourism and leisure industries have not maximised the full market potential. Several tourism opportunities are identified, including:

- 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 student has returned home.
- Attracting friends and relatives from their home country to visit them in Australia.

The Sustainable Tourism Cooperative Research Centre, established and supported under the Australian Government's Cooperative Research Centre Program, funded this research project to investigate these opportunities.

This summary report provides an overview of the study and its key findings. For more detailed information, download a free copy of the full report from the bookshop at: www.crctourism.com.au

¹ Australian Education International (AEI) 2010

² Weaver 2004

³ Archer & Brett 2009

⁴ AEI 2009a

Refer to the full report for full references.

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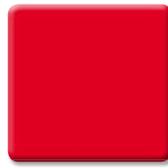
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Project Objective

The objective of this project was to conduct the first large scale tourism study of international students. It sought to profile the tourism behaviour of international students studying in Australia, and their visiting friends and relatives, to inform tourism leaders on the product and service gaps and opportunities associated with this market.

Research Approach

There were two key phases of primary data collection and analysis:

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.

Respondents

All respondents were currently studying in Australia at university, vocational education and training (VET) and English Language Intensive Courses for Overseas Students (ELICOS) institutions.

Respondent Profile

Demographics

Percent (%)

Institution type

University	89.2
VET	6.5
ELICOS	2.9
Other	1.4

State/Territory of Study

New South Wales	52.9
Queensland	33.2
Victoria	10.3
Western Australia	1.5
Northern Territory	1.1
Australian Capital Territory	0.5
South Australia	0.4
Tasmania	0.1

Anticipated length of study in Australia

Less than 3 months	2.1
4-12 months	9.9
1-2 years	36.6
3-4 years	37.7
More than 4 years	13.7

Age

18-21 years	30.0
22-25 years	41.4
26-29 years	17.8
Over 30 years	10.8

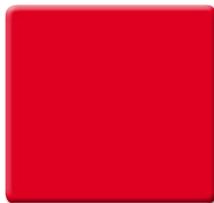
Gender

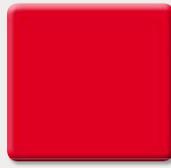
Female	54.7
Male	45.3

Nationality*

China	27.7
Malaysia	6.4
Singapore	6.3
Hong Kong	5.3
India	5.0
Indonesia	3.9
Vietnam	3.9
Canada	3.8
Republic of Korea	3.8
United States of America	3.4
Other (40+ countries)	30.5

*Refer to Appendix C in the full report for a complete list of nationalities.





Travel Behaviour

Most international students travel while studying in Australia (84.9 percent) and over half intended to travel in Australia during their next extended break. As shown in Figure 1, most of these trips are relatively short, either day trips (24.0 percent) or one to three days (38.2 percent). Sightseeing was a very popular activity for international students both in the city or town where they study and when they travelled. Shopping for pleasure was the most popular activity in the city or town where they study. When travelling away, the most popular activity was visiting natural attractions.

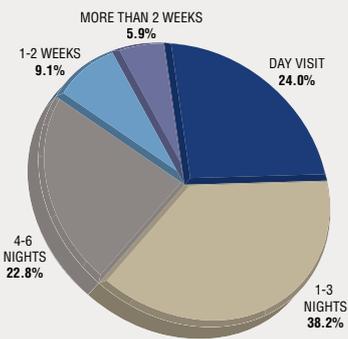


Figure 1: Length of visit on most recent trip

Car (34.7 percent) and plane (26.4 percent) are the main forms of transport used when travelling (refer to Figure 2). International students spent, on average, less than \$1,000 (84.0 percent) per trip.

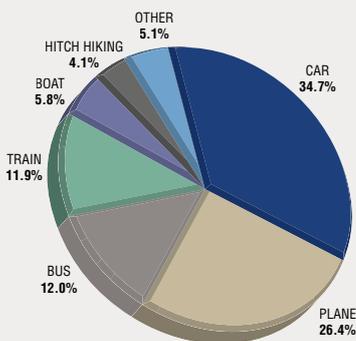


Figure 2: Mode of transport used on most recent trip

Hotel/motels (43.3 percent) and apartments (23.3 percent) are the preferred types of accommodation for international students (refer to Figure 3). Backpacker hostels were also popular, with 22 percent preferring this type of accommodation, however this was mainly confined to the non-Asian students. Perceptions of safety and cleanliness in backpacker accommodation scored lower than general accommodation, such as hotels/motels and apartments.

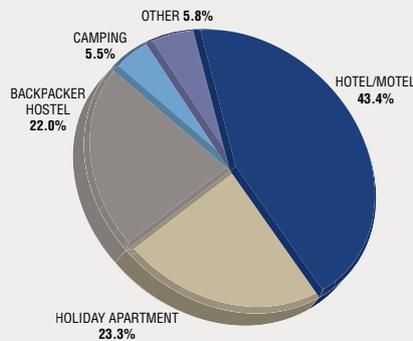


Figure 3: Preferred type of accommodation

As shown in Figure 4, most international students travel in groups, with their friends (62.4 percent), family (14.7 percent) or their partner (14.5 percent). Only 8.4 percent travel by themselves. They also tended to undertake travel and leisure activities with other international students (64.5 percent), particularly international students of the same nationality (41.9 percent).

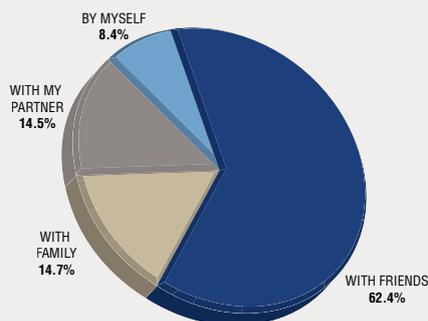


Figure 4: Travel party on most recent trip

Visiting Friends and Relatives (VFRs)

International students generate a large visiting friends and relatives market. On average, over 70 percent expected at least two or more friends and two or more family members to visit them in Australia and over half indicated that they have already had a friends and/or family visit them while studying in Australia.

Most of the international students' visiting friends and relatives stay in Australia one to two weeks (40.3 percent). However, only 36.3 percent are likely to stay in commercial accommodation. The majority stay with the international student (47.1 percent) or friends and relatives (13.8 percent). Many international student's felt that there was strongly possibility that their parents would travel to Australia to attend their graduation, particularly among Asian students.





Work, Study and Travel

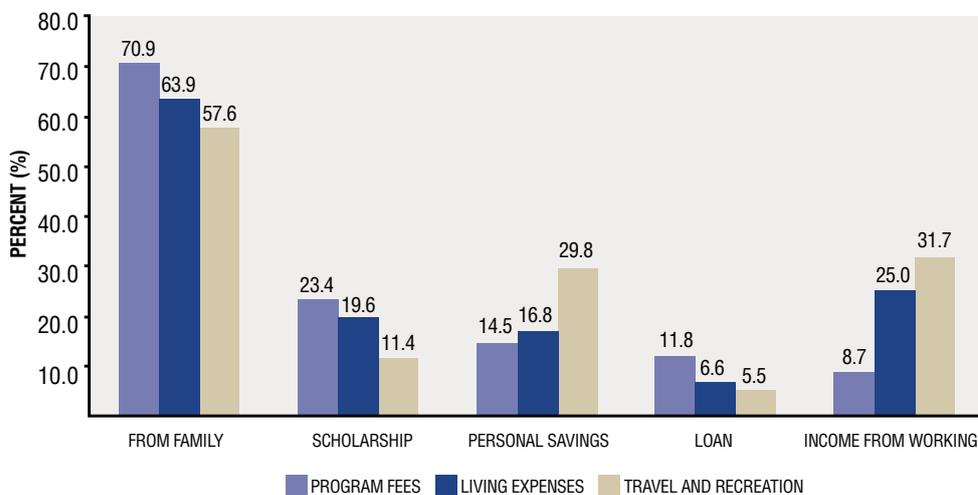


Figure 6: Sources of funding for program fees, living expenses and travel and recreation

Based on the estimates provided by the participants in this study, international students spend, on average, \$42,531 per annum while studying in Australia. Income from working only contributes \$5,419 (or 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. As shown in Figure 6, their family contribute most of the money for program fees, living expenses and travel and recreation activities, however income from working is also important to fund travel and recreation activities.

Nationality Differences

Chinese students (n = 1,414)

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 (n = 404)

Includes students from: India, Bangladesh, Pakistan and Sri Lanka.
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%).

Korean students (n=194)

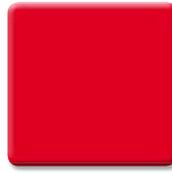
Travel party: Friends (54%) mostly other international students, both from Korea and other countries, and family (22%).
Accommodation: Hotels/motels (47%) and apartments (27%).
Trip length: Short breaks of 1-3 nights (38%) or 4-6 nights (23%).
Transport used: Plane (37%).
VFR accommodation: Stay with the student (52%).
VFR length of stay: 1-2 weeks (41%).

European students (n = 361)

Includes students from: Czech Republic, France, Germany, Hungary, Italy, Norway, Poland, Russian Federation, Slovakia, Sweden, Switzerland and United Kingdom.
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%).

North American students (n=366)

Includes students from: United States and Canada.
Travel party: Friends (57%), international and Australia students and non-students, and partner (28%).
Accommodation: Hotels (39%) and backpacker accommodation (36%).
Trip length: Short breaks of 1-3 nights (47%) and 4-6 nights (27%).
Transport used: Car (41%) and plane (34%).
VFR accommodation: Stay with the student (53%) and hotel/motel (27%).
VFR length of stay: 2-4 weeks (42%).



Conclusions and Future Actions

International students are opportunistic travellers, who tend towards day-trips and short breaks undertaken within friendship groups, mostly with other international students. VFRs market associated with international students is also important to boost international leisure visitors to Australia. Attending graduations appears to be an important motivation to travel to Australia for the parents of international students.

The Opportunity

The development of tailored products, packages and marketing campaigns to better service these markets could ignite interest in travel among international students, and increase the number of trips they take during their stay in Australia. Activities should also be implemented to motivate friends and relatives from their home country to visit the student in Australia.

Industry Action

The tourism and international education sector could both benefit by working more closely together to better facilitate positive outcomes for international students whilst also advancing the economic stimulus this market provides to the Australian economy.

Full Research Report

The full report can be downloaded for free from the bookshop at www.crctourism.com.au

Additional Consultancy Reports and Seminars

Individual reports and seminars are available utilising the data collected for this project. Please contact Sarah Gardiner s.gardiner@griffith.edu.au

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