

RESEARCH BRIEF



International Education Visitation – Tourism Opportunities

BACKGROUND

Australia has positioned itself as a highly regarded destination for quality education and training, and international education is a significant service export industry for Australia. Nearly half a million international students studied in Australia in 2008, contributing nearly \$14 billion in export income to the economy and growing at an average annual rate of over 16% in the past 10 years.¹ It is also one of the few service industries which remains strong despite the global economic downturn.

Whilst it is important to note that education is the key interest which brings students here, aggregate expenditure data indicates that export education visitors look set to contribute more expenditure than leisure visitors² to the Australian economy.

Little is known about the specific engagement of this important segment with the tourism and leisure industry. Importantly, as longer stay visitors, it is likely education based visitors' regional and local travel, leisure activities, and shopping patterns vary from leisure visitors.

International students may be significant advocates for travel to Australia including regional travel, generating travel to Australia via family visits, referral travel from family and friends in their country of origin, together with their own repeat visitation to Australia once returning home.

In summary, the international education tourism sector provides a great opportunity for the Australian tourism industry to better understand and to target the travel potential of the students, together with their families and friends who travel to Australia to visit them.

PROJECT METHODOLOGY

STCRC suggested a mixed methods approach, in order to achieve the following project aims:

1. Compile a brief literature review of any existing research in this area.
2. Define what is meant by an 'international student', with sensitivity to proposed definitional (WTO) and data gathering (ABS) changes.
3. Scope the market to include:
 - size of the market
 - analysis of length of time stayed
 - country of origin
 - varying characteristics

¹ Australian Education International (AEI) - Department of Education, Employment and Workplace Relations (DEEWR),

² Tourism Research Australia "International Visitors to Australia – December 2008"

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4. Evaluate the range of diverse activities / engagements with the tourism industry
(also, do some sectors of the industry benefit from international tourists whilst others miss out)
5. Review the accommodation options available
(this may be in halls of residence, apartments or private homes; do they enter into rental agreements, do they prefer serviced apartments, how much do they expend, what are the advantages and disadvantages of each, which option do they prefer)
6. Working arrangements / employment patterns
(are the students interested in working; is this a financial necessity; how many work; what sort of roles do they fill; how many aim to seek full time employment at the end of their studies; do they intend to remain in the city in which they studied)
7. Who or what motivates and influences an international student?
(e.g. peers, family, educational institutions, travel guides etc; does this occur prior to their arrival in Australia or after; why have they selected Australia to further their study; what are their perceptions and expectations towards travel opportunities prior to arriving in Australia and how does this change once they are here)
8. Travel Behaviour
(what resources do students use to source information about travel opportunities in Australia (e.g. educational institutions, Internet, family, friends in Australia, friends at home, guide books, travel agencies etc) and how do they eventually book that travel; which modes of travel do they prefer (bus, hire car/rent-a-van, own car, flights); there may also be significant variance in visitor behaviour between countries and / or regions of origin)
9. Barriers to Travel
(what are the barriers that students face to travelling in Australia e.g. money, lack of time, work commitments, cultural)
10. Visiting Friends and Relatives
(when are they most likely to visit; what activities do they undertake; are they likely to travel as a family / friend group; where are they most likely to travel to; how do they book this travel)
11. Regional Dispersal
(including an understanding of the market share of international education visitors for each state and territory and competitive strengths and weaknesses by education sector)
12. Visas and immigration issues
(need to consider both student and non student visa study in Australia i.e. visiting students may travel on a tourist visa)

PROJECT PURPOSE AND OBJECTIVES

The purpose of this project is to report on the tourism and travel activities which the various types of international students and their families undertake within Australia. The project should build upon research already carried out by TRA and AEI into international education by making it tourism specific.

Varying levels of engagement / interaction with tourism sub-sectors and experiences may result from length of study (e.g. short courses; certificate and diplomas; and multiple year degrees). It would also be useful to consider the activities of those students that visit Australia to study, but do not necessarily travel on traditional student visas, e.g. professional development or study tours, these 'students' may be more likely to have tourism activities in mind when they travel here, but may be more difficult to define.

The objective of this project is to develop the opportunities for the tourism industry provided by the international education sector. If possible visitors should be clustered into various travel types / styles, depending on like characteristics, so that the research might help shape future marketing and product development. It is anticipated that the outcome from the research will be a better understanding of the activities and needs of this specific segment of visitation to Australia.

For further information please contact STCRC Director of Research, Prof David Simmons

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REQUEST FOR PROPOSALS

The STCRC invites researchers from partner universities to submit a 'Request for Proposal' to complete this STCRC research project. Please complete your Request for Proposal on ResearchMaster³ via the [STCRC website](#) – refer to "Request for STCRC Research Grant: Guidelines for Application". Each Research Proposal should specify the following:

Research Team: detail all participants to be actively involved in the project. The STCRC anticipates a multidisciplinary research team.

Research Partners: list industry or technical partners that will contribute to, or provide advice to, the research.

Methodology: outline and justify the research plan and methods. Be specific and detailed, and clearly identify the steps involved in achieving the outcomes proposed. List the phases for the project and describe what each phase will achieve.

Budget: detail expected budget including a breakdown of salaries, travel costs, operating costs and other.

Milestones and timeline: describe and detail the major stages/milestones of the project showing the expected completion date for each milestone, and the achievement criteria for verifying that milestones have been reached.

Final reports: the STCRC requires two final reports:

1. The first report is to be a Technical Report and should present all details involved in the project from research design through to recommendations;
2. The second report is to be tailored for tourism end-users and must emphasise the practical implications and recommendations from the study's findings. The STCRC Publishing Team can assist with this if required.

PROJECT TIMING

Research Proposals are required by 24 June 2009. It is expected that:

- The successful research team will be appointed by 30 June 2009
- Progress reports will be required December 2009 and June 2010.
- We anticipate that the project will be completed no later than 31 March 2010.

³ ResearchMaster is the STCRC's project management system.