

Australian Government  
Austrade

TOURISM RESEARCH AUSTRALIA

Tourism & Short Term Education Visitors

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### Overview

- › Australia's Tourism Performance
- › Education's Contribution to Tourism
- › Insights on Visitors who undertook a Course (IVS Supplementary Survey)

Tourism 2020  
Division of government services, supporting Australia's tourism priorities

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### Tourism Performance<sup>^</sup>

- 7.2 m international tourists (up 10%)
- Record arrivals 13 of top 20 markets
- Australia's top markets are:
  - › NZ (1.2m visitors up 4%)
  - › China (1.1m visitors up 23%)
  - › UK (665,000 up 6%)
  - › USA (619,000 up 14%)
  - › Singapore (373,000 up 15%)
- Expenditure \$38.1b (up 14%)

\*TRA International Visitor Survey (Year Ending June 2016)

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### Spend by Top 5 Markets<sup>^</sup>

Market	Spend (\$b)	Percentage (%)
China	\$8.9b	23.4%
UK	\$3.8b	10.1%
USA	\$3.6b	9.5%
NZ	\$2.7b	7.0%
Japan	\$1.5b	4.0%

\*TRA International Visitor Survey (Year Ending June 2016)

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### International Tourism Only Part of the Picture<sup>^</sup>

- **\$59 billion** in domestic overnight expenditure (up 6%)
- **\$20 billion** in domestic day trip expenditure (up 7%)
- **\$117 billion** in Total Tourism Expenditure (domestic and international)

Category	Percentage (%)
Domestic Overnight Expenditure	41%
Domestic Day Trips	17%
International Tourism	42%

\*TRA National Visitor Survey (Year Ending June 2016)

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### International Visitor Survey

- Tourism – defined as short term visitors, those international visitors with a stay in Australia of less than 12 months
- Defined as per the United Nations World Tourism Organisation (UNWTO) definition
- All countries report tourism under this framework

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**S(1)** May mention that this definition includes Education visitors/Students  
Steven-Matthews (Canberra), 13/10/2016

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### International Visitor Survey




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### Passenger Card




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### What do education visitors contribute to Tourism Numbers<sup>^</sup>




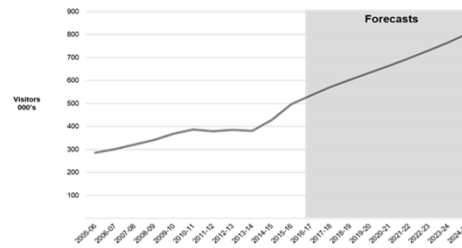
- 475,000 visitors with **main purpose** for visit 'education' (up 14% year on year)
- \$9.3 billion (up 23% year on year)
- They stay longer averaging 132 nights compared to the overall average of 34 nights

\* International Visitor Survey Year June 2016

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### What's the Predicted Growth?


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### What other benefits are there?



- Students also attract their visiting friends and relatives (VFR)
- These VFRs spend \$2.8 billion
- Student Ambassadors: Those visiting students have higher levels of satisfaction with aspects of their trip



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### Education Visitors where are they from?




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**S(2)** Tweaked the notes here  
Steven-Matthews (Canberra), 13/10/2016

## Slide 9

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**S(3)** Av Nights for Education is fine, as is All visitors Av nights (34), but you could say All OTHER visitors is 27 nights.  
Steven-Matthews (Canberra), 13/10/2016

## Slide 10

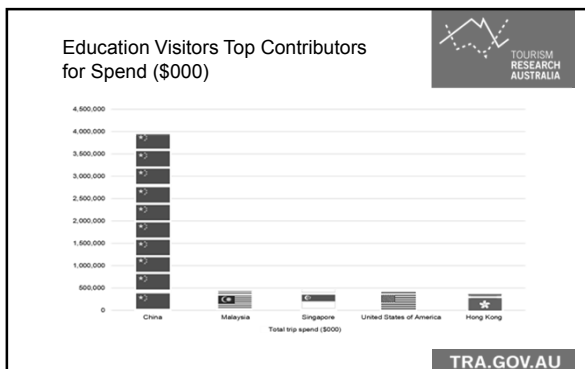
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**S(4)** Check with George on this one  
Steven-Matthews (Canberra), 13/10/2016

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**S(6)** Steven-Matthews (Canberra), 13/10/2016



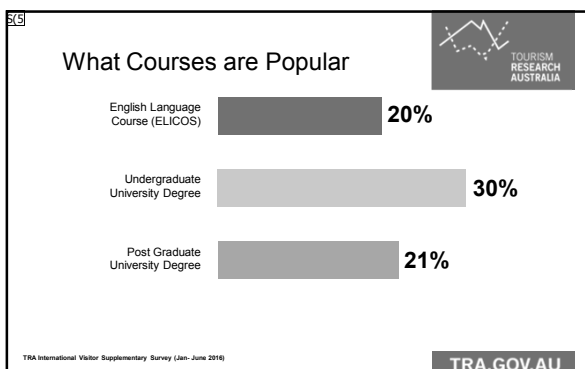
### International Visitor Study Supplementary

- We asked Visitors if they did a course or study while on this trip
- 2,600 responses to date (January – June 2016)
- Expect 5,000 responses over 12 months

**Q109a** I now have some questions about education.

Have you undertaken any kind of course or study while you were on this trip in Australia?  
 Yes 1  
 No 2 → **Q.110a**  
 Don't know 9 → **Q.110a**

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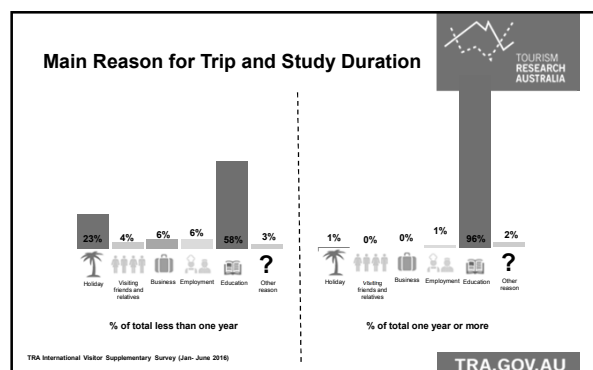
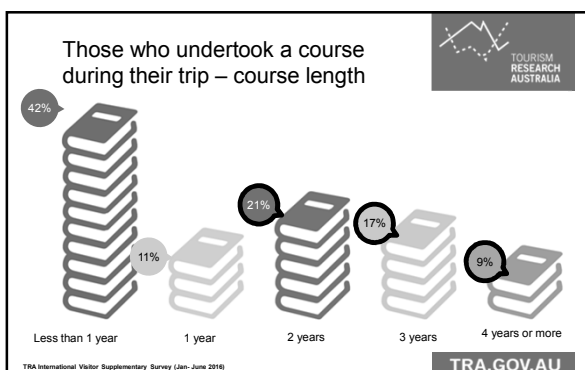


### Accommodation

- Overall 71% of nights were spent in rental accommodation
- For post and under graduates only 10% of nights were spent in educational institution accommodation

TRA International Visitor Supplementary Survey (Jan- June 2016)

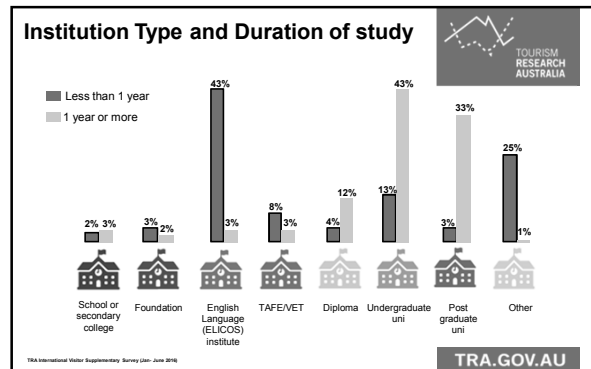
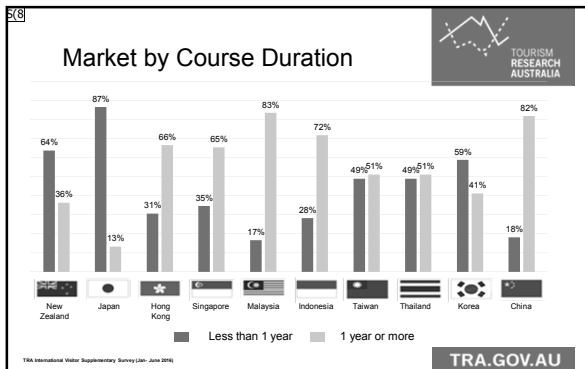
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- S(5** If they ask for numbers let them know that until we get a full year it would not be "correct" to release them  
Steven-Matthews (Canberra), 13/10/2016



- ### What other courses do they do?
- Barista
  - Bartending and responsible service of alcohol
  - Construction white card
  - Internship bio-medicine
  - Chemical pathology
  - Diving, scuba
  - Marine archaeology
  - Institute of corrosion, insulation etc.
- 
- TRA International Visitor Supplementary Survey (Jan- June 2016) **TRA.GOV.AU**

- ### What other training/courses do they do?
- Guitar building
  - Helicopter safety
  - Baking/cookery
  - Oxygen safety and design
  - Ultrasound training
  - Clinical toxins training
  - Bridging courses for nurses
  - Cricket bat manufacturing
  - Jewellery making
  - Sports nutrition
- 
- TRA International Visitor Supplementary Survey (Jan- June 2016) **TRA.GOV.AU**

- ### Those who study for less than 1 year
- Behave like tourists
  - More likely to visit regional locations and islands
  - Are more likely to participate in active outdoor, regional and cultural activities
- 
- TRA International Visitor Supplementary Survey (Jan- June 2016) **TRA.GOV.AU**

- ### Those who study for 1 year or more
- Are more likely to behave like locals
  - Participate in fishing, cycling, golf, play sports, beach, snow sports, movies, shopping for pleasure
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- TRA International Visitor Supplementary Survey (Jan- June 2016) **TRA.GOV.AU**

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**S(8)** Redid the numbers  
Steven-Matthews (Canberra), 13/10/2016

## Slide 21

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**S(9)** Threw in a piccie  
Steven-Matthews (Canberra), 13/10/2016



Thank you  
Questions

