Tourism & Short Term Education Visitors

Overview

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

Overview

Australia’s Tourism Performance

Tourism Performance

- 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%)

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Spend by Top 5 Markets

- USA $33.6b (8.9%)
- UK $5.6b (1.5%)
- China $4.0b (1.1%)
- Japan $3.3b (0.9%)
- France $3.1b (0.8%)

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
May mention that this definition includes Education visitors/Students
Steven-Matthews (Canberra), 13/10/2016
International Visitor Survey

What do education visitors contribute to Tourism Numbers:

- 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

What's the Predicted Growth?

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

Education Visitors where are they from?
Tweaked the notes here

Av Nights for Education is fine, as is All visitors Av nights (34), but you could say All OTHER visitors is 27 nights.

Check with George on this one

Steven-Matthews (Canberra), 13/10/2016
Education Visitors Top Contributors for Spend ($000)

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
- No
- Don’t know

Q.110a

What Courses are Popular

- English Language Course (ELICOS) 20%
- Undergraduate University Degree 30%
- Post Graduate University Degree 21%

TRA International Visitor Supplementary Survey (Jan- June 2016)

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)

Those who undertook a course during their trip – course length

- Less than 1 year 11%
- 1 year 8%
- 2 years 15%
- 3 years 11%
- 4 years or more 20%

TRA International Visitor Supplementary Survey (Jan- June 2016)

Main Reason for Trip and Study Duration

TRA International Visitor Supplementary Survey (Jan- June 2016)
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
Market by Course Duration

New Zealand  Japan Hong Kong  Singapore  Malaysia  Indonesia  Taiwan  Thailand  Korea  China

Less than 1 year 1 year or more

TRA International Visitor Supplementary Survey (Jan-June 2016)

Institution Type and Duration of study

TRA International Visitor Supplementary Survey (Jan-June 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)

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)

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)

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

TRA International Visitor Supplementary Survey (Jan-June 2016)
Slide 19

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

Slide 21

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

Questions