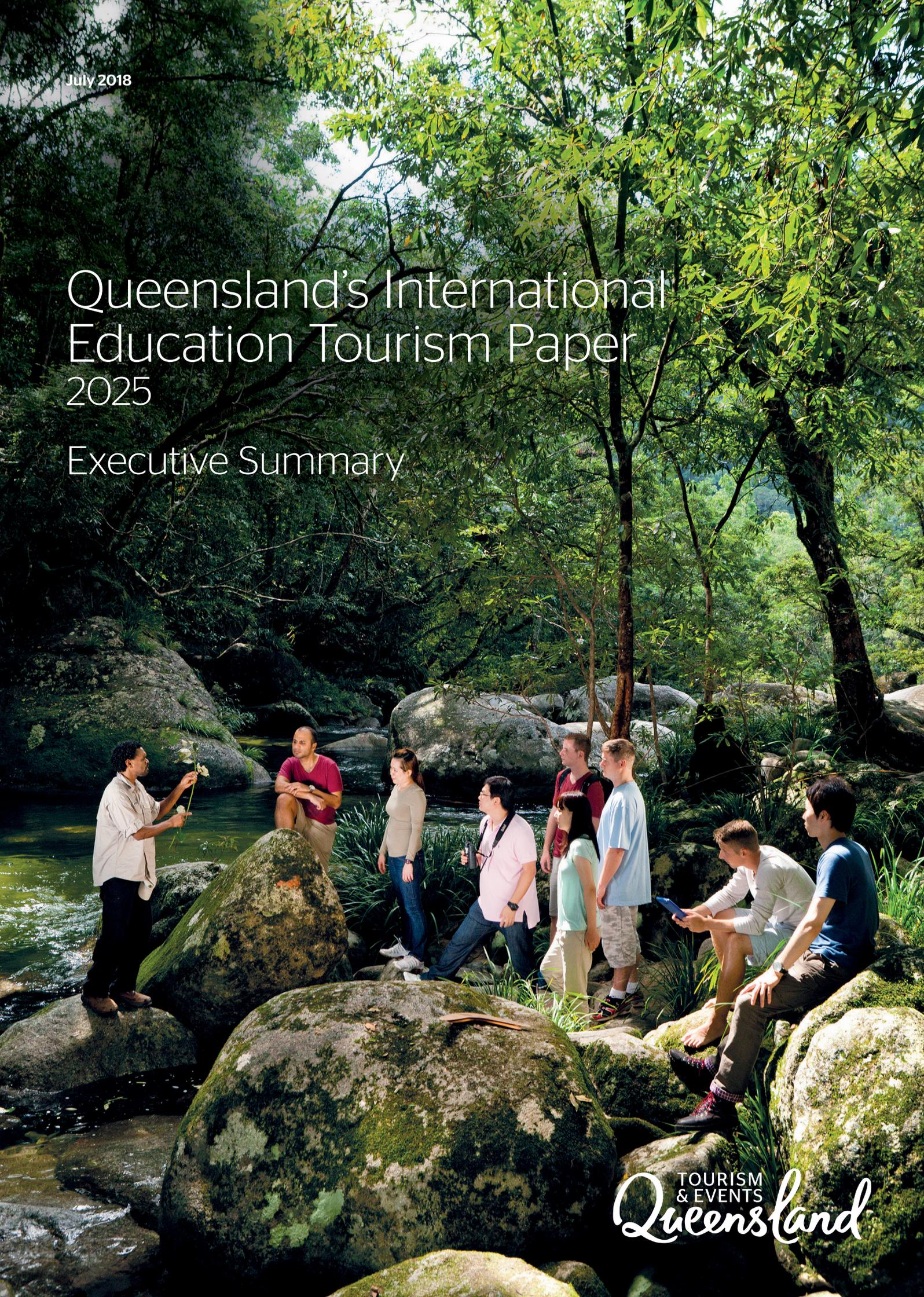


July 2018

Queensland's International Education Tourism Paper 2025

Executive Summary



International education is a high value market to Queensland's tourism and events industry due to international students' length of stay, spend and the part they play in encouraging visiting friends and relatives (VFR) to Queensland. International students are also instrumental in attracting the State's youth market.

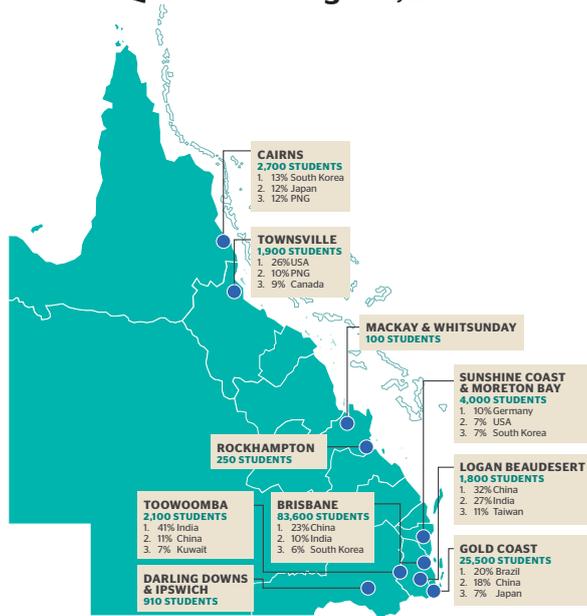
Tourism and Events Queensland (TEQ) has developed *Queensland International Education 2018-2025* (the Paper) to guide tourism's role in marketing Queensland and its destinations to the international education market. The Paper will assist TEQ in maximising growth of the State's tourism and events industry through increased visitation and overnight visitor expenditure (OVE).

The Paper supports *Study Queensland's Strategy to Advance Queensland 2016-2026*, the whole of government strategy to grow international education and training in Queensland. TEQ's remit is to promote Queensland and the relevant destinations as a leading tourism destination to international students in the State and across Australia and to their VFR, in partnership with the Study Queensland and other stakeholders under the *Study Queensland* brand. TEQ adds value to the marketing to international students and promotes the 'Best of Queensland' experiences appropriate to this market.

Dispersal of International Students across Queensland

International students from a variety of origins live and study throughout Queensland's regions, contributing significant economic benefit across the State (see Figure below)¹

Figure 1: Number of International Students, Export Revenue and Top Origins by Queensland Regions, 2017



¹ Trade and Investment Queensland, 2017 International Student Enrolments by Region, Data Provided by the Australian Department of Education

² International education market and international education and training market are used interchangeably throughout the Paper

* The TRA definition does not capture all international students in Australia. An international student who completes a three-year degree without leaving Australia, for example, is not defined as an international education visitor in the survey. TRA does provide data including activity participation rates, age and visitation by friends and family of the student.

International student data provided by the Australian Government includes commencements and enrolments. Commencements are defined as the number of new students enrolling and commencing in a particular course, while enrolments are the number of students studying a course. These figures differ as a student can commence study and be enrolled in more than one course of study at the same time, and thus be represented several times.

Who Are International Education Visitors?

For the purposes of this Paper, the international education market² is grouped into students and the VFR who choose to travel in Queensland either to visit the student or travel with them during their time here. The students are a diverse cohort that can be defined based on international education and training (IET) sector or their purpose of travel.

Broadly, international education and training visitors are students who come from overseas to study in Australia, generally for Higher Education (HE), Vocational and Education Training (VET), ELICOS (English Language Intensive Courses for Overseas Students), non-award study or schools.

International education and training visitors include:

-  **Higher Education (HE):** Students studying at a university in long term courses (3+ years) in either on-shore or off-shore facilities
-  **Vocational Education and Training (VET):** These courses aim to equip students with know-how skills and/or competences required by occupations or by the labour market
-  **ELICOS:** Students visiting Australia to study English as a second language
-  **Non-award or Professional Development:** Undertake formalised visit to Australia to build skills and capacity in a professional area (e.g. internships)
-  **Schools:** Study in Queensland's primary and secondary schools
-  **Study Tours:** School groups visiting Australia to undertake period of formal learning along with leisure experiences
-  **Work and Holiday Visa Holders:** Young visa holders who are allowed to study under their visa requirements for up to four months
-  **Edu-tourism:** University cohorts participating in education and tourism experiences that provided practical learnings.

International education visitors are defined by Tourism Research Australia (TRA), through the International Visitor Survey, as visitors who have been in Australia for less than one continuous year, and who self-identify as visiting Australia for education purposes.*

Australia's International Education Market



EDUCATION IS THE
3rd largest export
FOR AUSTRALIA*

624,000 IET STUDENTS
IN JULY 2017[◇]

LARGEST SOURCE
COUNTRIES*

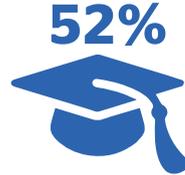
CHINA 30% **INDIA 11%**



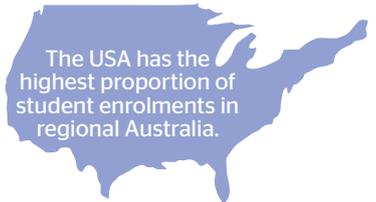
INTERNATIONAL
EDUCATION IS WORTH
\$30.8 billion
TO THE AUSTRALIAN
ECONOMY*



and supports over
130,000 JOBS



52%
OVER HALF
OF IET STUDENTS IN
REGIONAL AUSTRALIA
ENROLLED IN **HIGHER**
EDUCATION COURSES*



The USA has the
highest proportion of
student enrolments in
regional Australia.

*Although, by volume, the top origins for
student enrolments in regional Australia
are from China and India**

Queensland's International Education Market

INTERNATIONAL
EDUCATION IS WORTH
\$4.4 billion
TO THE QUEENSLAND
ECONOMY*



123,737
IET STUDENTS IN JULY 2017[†]

HIGHER EDUCATION 37% MAKE UP THE MAJORITY
VET 27% & ELICOS 25% OF INTERNATIONAL
ENROLMENTS[‡]

QUEENSLAND REGIONS

that feature in the TOP 10 highest regional
IET enrolments in Australia[‡]:

CAIRNS
TOOWOOMBA
TOWNSVILLE



one in twenty three

INTERNATIONAL VISITORS TO QUEENSLAND
WERE EDUCATION VISITORS*

16%
were visited
by family*



10%
were visited
by friends*

THE MAJORITY OF AGE GROUPS ARE*:

62% **15-24 YEARS**

24% **25-34 YEARS**

14% **35+ YEARS**



CHINA IS THE TOP
SOURCE COUNTRY
FOR SCHOOLS,
ELICOS AND HIGHER
EDUCATION SECTORS[‡]



BRAZIL IS THE TOP
SOURCE COUNTRY
FOR INTERNATIONAL
VET STUDENTS[‡]

* Australian Government Department of Education and Training, Australia International Education, 2016

† Australian Government Department of Education and Training, Research Snapshot, Study locations of international students across Australia in 2016, published August 2017

‡ Australian Government Department of Education and Training, International Student Data January – December 2017

§ Queensland Government, Study Queensland, IET Market Intelligence, Data as of December 2017, Published March 2018

* Tourism Research Australia (TRA), Year Ending December 2017

Stakeholders in the Student Lifecycle

TEQ has a role in attracting students and their visiting friends and relatives to travel to and in Queensland.

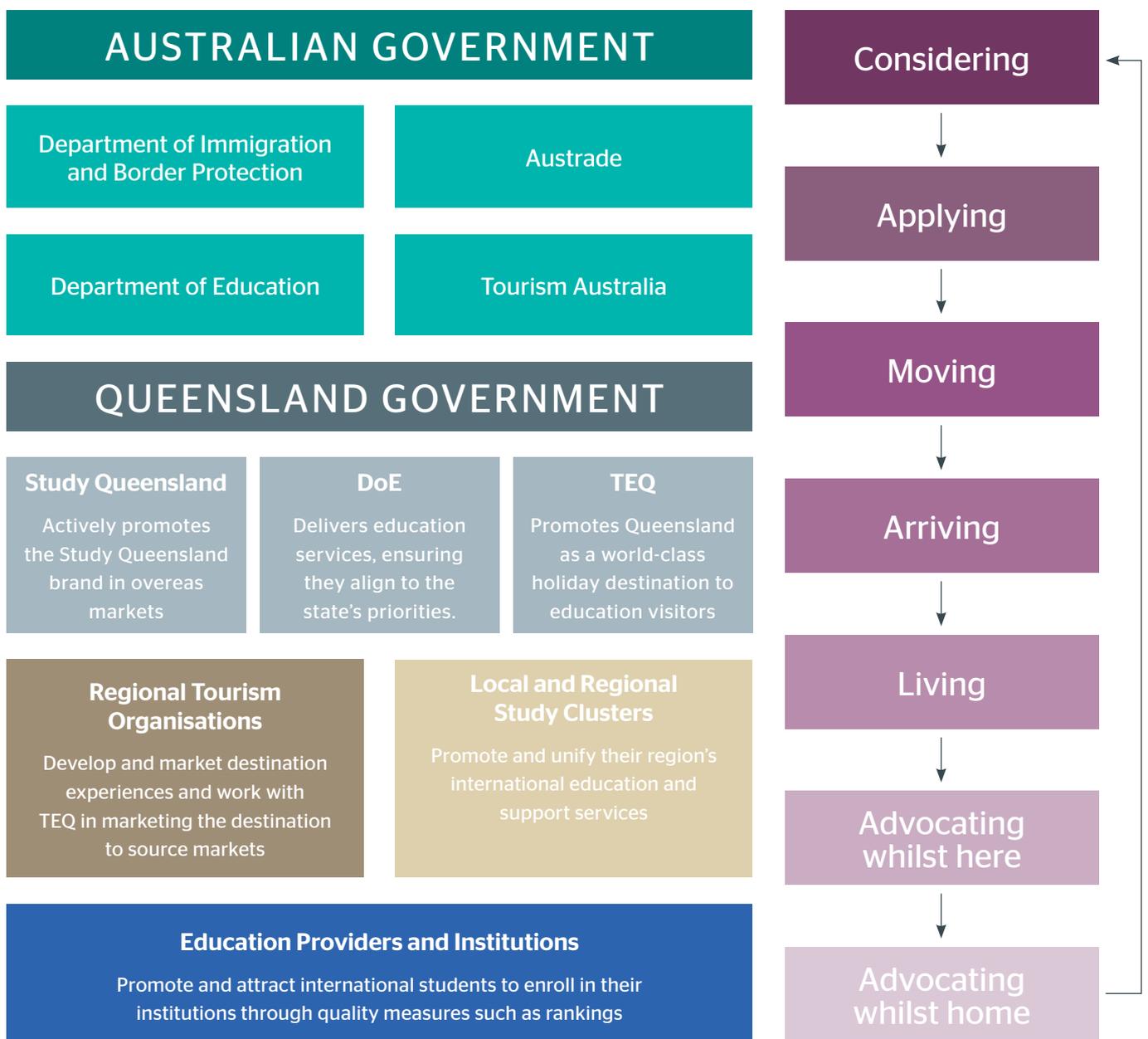
TEQ has an important role in promoting Queensland as a holiday destination to international students and their VFR, while the education providers have the lead role in attracting students to study in Queensland.

Key partners for TEQ include Queensland's RTOs, the study cluster groups for each Queensland destination, Study Queensland, Queensland Department of Education and Training, Tourism Australia, Australian government entities, Destination

NSW, Visit Victoria, and Queensland's tourism industry and operators. Included in these partnerships is working with TIQ to deliver *Study Queensland's Strategy to Advance Queensland 2016-2026* and its strategic imperatives of promoting Queensland internationally, strengthening Queensland's regions, and connecting the industry.

These education and tourism stakeholders are involved at different touch points in the lifecycle of international students, from the considering stage through to advocacy and therefore have an influence on the decisions and perceptions of students (see Figure 2).

Figure 2: Strategic Context and the International Student Lifecycle



TEQ Strategic Goals and Priorities

TEQ OBJECTIVES

Attract visitors to Queensland, generating overnight visitor expenditure (OVE)

Contribute to the Queensland economy

Enhance the profile of Queensland

Foster community pride in Queensland

TEQ Strategic Directions: Leverage the tourism potential of the International Education network

Relevant TEQ Strategic Directions for International Education:

Deliver targeted consumer marketing into key international student markets

Encourage trade engagement to increase consumer awareness and encourage conversion

Strengthen aviation access and strategic partnerships

Foster the development of high quality Queensland experiences

Attract international student visitors to experience the best events in Queensland

TEQ International Education Goal: Attract more international students and their friends and relatives to holiday in Queensland

TEQ Objective 1

Leverage Queensland's assets and lifestyle to be a crucial part of the international student experience

TEQ Objective 2

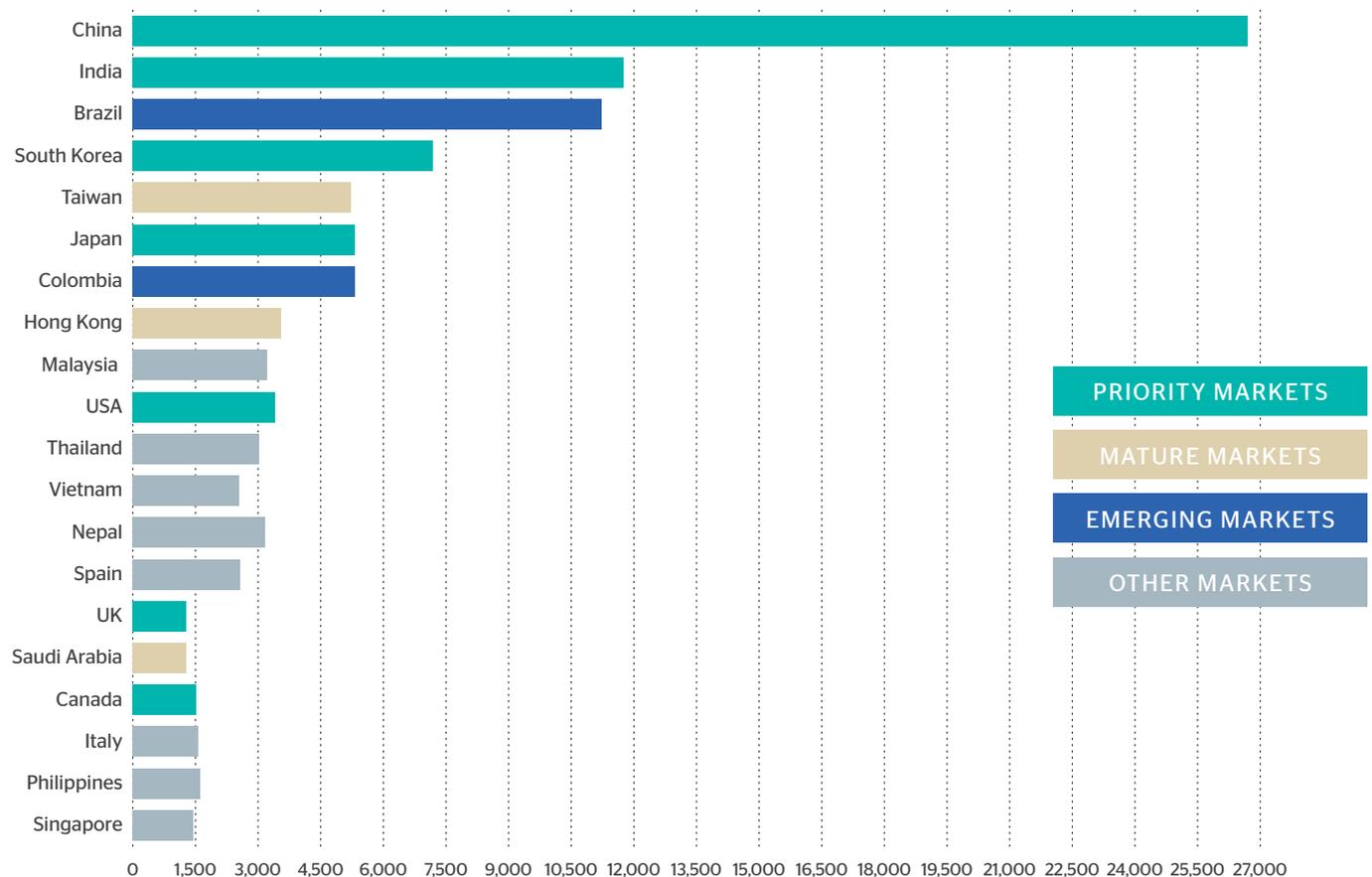
Entice International Domestic Students in NSW and Victoria to book a holiday in Queensland

TEQ Objective 3

Encourage international students to travel to Queensland with their visiting friends and relatives, with a focus on graduation periods.

The following graph depicts Queensland's top 20 international education origins or source markets across all IET sectors (See Figure 3). The market classifications are based on the combination of TEQ's priority markets and IET sector priority markets.

Figure 3: Queensland's Top 20 International Student Origins³



³ Queensland Government, Study Queensland, IET Market Intelligence, Data as of December 2017, Published March 2018

The Opportunities

The high-value profile of international students, in terms of both their length of stay (higher education), spend (study tour accommodation and activities), and their role in encouraging visiting friends and relatives to Queensland, mean that international

students are an important market for Queensland's tourism industry to engage with. International students also play a fundamental role in the State's youth market attraction.

Partnerships	Work, support and collaborate with key partnerships and stakeholders who also work towards building, promoting and supporting the international education market in Australia, including to continue to work with Study Queensland through TEQ's membership of the Regional Community of Practice.
International Students	Support and collaborate on joint projects with Study Queensland, the regional study clusters, Queensland's RTOs and the tourism industry to identify and promote the appeal of Australia, particularly Queensland as a study and leisure destination. This will be done both in market through a strong collaboration between TEQ's International Directors and TIQ's in-market trade staff.
Orientations	In partnership with education institutions, use O-Week to showcase and introduce Queensland's remarkable experiences to new international students, with campaigns and collateral to encourage them to start thinking about where and when to travel in Queensland.
Alumni	<p>Work alongside Study Queensland, international institutions and the regional study clusters to ensure alumni are promoting Queensland and Australia as an idyllic place to study, as well as for the lifestyle, unique experiences and natural attractions. "Studying in Australia provides the perfect opportunity to increase your level of education and qualifications, but to also encounter world-class experiences while doing so."</p> <p>Partner with the TIQ trade staff and the TEQ International Directors to inform alumni of changes to Queensland's leisure offering.</p>
Graduation and VFR	<p>Encourage the VFR of those studying in NSW and Victoria to travel to Queensland for a leisure experience before or after the graduation ceremony.</p> <p>Undertake promotional and tactical activity in NSW and Victoria and within Queensland to highlight leisure experiences that encourage international students to bring their friends and family to Queensland when they graduate and/or when on study breaks. This allows students to share their experiences of studying in Australia, helps to relieve home sickness and create lifelong memories.</p>
Work and Holiday Visa Holders	Continue to work Study Queensland and the Study Clusters to promote Queensland as an ideal destination to not only travel and visit, but also to study, enabling Work and Holiday Visa holders to make the most out of their stay in Australia. These visa holders offer a 'pool' of young people who are visiting Australia and are eligible to undertake short courses to enhance their experience.
Edu-tourism / Study Tours	<p>Work with Study Queensland and stakeholders to increase the appeal of Queensland as a practical and immersive destination, offering students extraordinary educational experiences they cannot have at home.</p> <p>Focus on trends across the world as syllabus' changes in origin countries. The Japanese Government for example, is moving away from the all-written English language approach by 2020 to more aural and oral assessments. The demand for quality English experiences will continue to grow in demand as students, parents and teachers seek study tours and school excursions that offer this experience.</p>
Experience Development	TEQ to promote Queensland's 'Best of' products and services that deliver experiences sought after by international students.