

#### INTRODUCTION

The International Education segment in Australia and NSW has had a resurgence and is growing. According to the Department of Education and Training, there were 193,567 international students enrolled in NSW educational institutions in the year ended (YE) March 2017, up by 15.8% on 2016. NSW had the most international student enrolments in Australia, with 37.3% market share in YE March 2017. Compared to YE March 2013, the number of international student enrolments in NSW grew by 57.9%.

This snapshot provides a profile of **international visitors** who visited **New South Wales** for the purpose of **'education'** as sourced from Tourism Research Australia's International Visitor Survey.

#### VISITOR MARKET SIZE AND SHARE

In the YE March 2017, NSW received 221,400 international student visitors. They stayed 25.4 million nights and spent nearly \$3.5 billion in NSW. On average, they spent more than \$15,800 per visitor and \$138 per night in NSW. International student visitors stayed on average 115 nights in NSW with median length of stay of 95 nights.

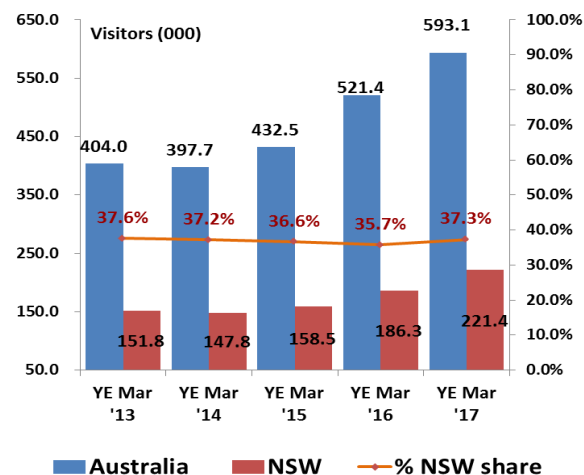
Education travel represented 5.7% of total international visitors to NSW, 28.2% of total international nights in NSW and 35.7% of total international expenditure in NSW. NSW contributed 37.3% of international student visitors in Australia, 35.7% of international student nights and 36.9% of international student expenditure.

**Table 1. International Student Visitors, Nights and Expenditure**

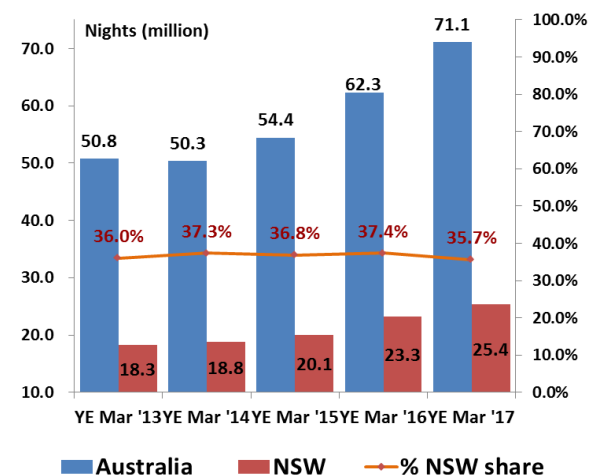
	Visitors to ('000)	Nights in (million)	Length of Stay (nights)		Total spend (\$ billion)	Spend per visitor	Spend per night
			Average	Median			
<b>NSW</b>	221.4	25.4	115	95	3.5	\$15,837	\$138
<b>Australia</b>	593.1	71.1	120	123	9.5	\$16,027	\$134

The number of international student visitors and nights to NSW increased by 18.8% and 8.9%, respectively in the YE Mar 2017, as NSW and Australia recovered from a 5-year low in student visitors in 2014. Compared to YE Mar 2013, international student visitors to NSW grew by 45.9% and international students nights in NSW grew by 38.8%.

**Chart 1. International Student Visitors to NSW**

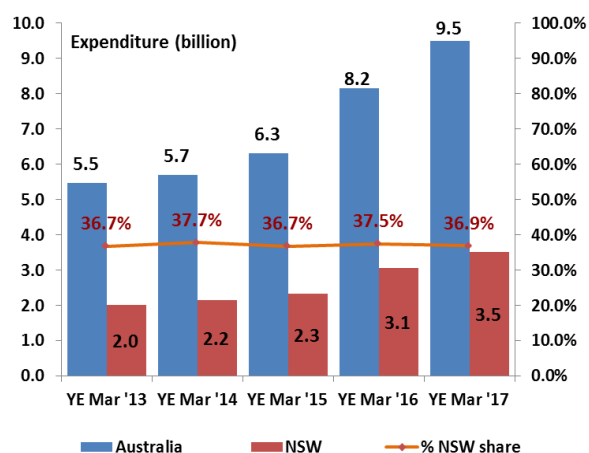


**Chart 2. International Student Nights in NSW**



## EXPENDITURE

**Chart 3. International Student Expenditure in NSW**



In the YE Mar 2017, international student expenditure in NSW increased by 14.7% on YE Mar 2016. Nearly half (48.9%) of this expenditure was spent on tuition fees.

In the last 5 years, international student visitors, nights and expenditure in NSW grew substantially by 45.9%, 38.8% and 74.5%, respectively since YE Mar 2013.

This corresponds to average annual growth of international student visitors, nights and expenditure of 9.9%, 8.5% and 14.9%, respectively.

Tuition fees have increased by 88.3% since YE Mar 2013 or an average annual growth of 17.1%. The share of tuition fees to total expenditure has grown from 44.8% in YE Mar 2013 to 48.5% in YE Mar 2017.

## TOP INTERNATIONAL SOURCE MARKETS

**Table 2. Top Source Markets for International Student Visitors to NSW**

YE Mar'17	('000)	% Share of NSW	% Share of Australia	% Growth (17 vs. 16)
China	73.2	33.1%	39.8%	29.5%
USA	16.2	7.3%	54.2%	41.5%
Japan	12.5	5.7%	36.3%	44.0%
NZ	9.8	4.4%	37.5%	5.7%
S Korea	9.7	4.4%	50.1%	29.2%
India	7.0	3.2%	33.8%	21.1%
Thailand	5.9	2.7%	40.9%	38.8%
Indonesia	5.8	2.6%	34.2%	6.1%

In the YE Mar 2017, the top 8 source markets accounted for 63.3% of international student visitors to NSW and 64.1% of international student nights in NSW.

China (33.1%) was the largest source market of international student visitors to NSW. China (38.8%) also contributed the most international student nights in NSW. The number of Chinese student visitors and nights in NSW increased by 29.5% and 16.9%, respectively on YE Mar 2016.

**Table 3. Top Source Markets for International Student Visitor Nights to NSW**

YE Mar'17	('000)	% Share of NSW	% Share of Australia	% Growth (17 vs. 16)
China	9,836.1	38.8%	38.6%	16.9%
S Korea	1,182.1	4.7%	47.0%	14.0%
Japan	1,071.9	4.2%	36.8%	48.7%
India	1,047.7	4.1%	31.7%	3.4%
Thailand	940.7	3.7%	50.4%	33.7%
Indonesia	776.7	3.1%	39.2%	0.5%
USA	707.1	2.8%	38.3%	-4.7%
HK	692.4	2.7%	27.5%	-20.2%

In the last 5 years, China has been the largest source market of international student visitors to NSW, from 25.5% share in YE Mar 2013 to 33.1% in YE Mar 2017. China is also the largest contributor of international student nights in NSW, from 33.0% share in 2013 to 38.8% in 2017.

The number of Chinese student visitors and nights in NSW in YE Mar 2017 has grown by 89.2% and 63.2%, respectively on YE Mar 2013.

**Table 4. Top Source Markets for *International Student Expenditure in NSW***

YE Mar'17	Expenditure (\$M)	% Share of NSW	Spend/visitor
China	\$1,725	49.2%	\$23,568
Korea	\$178	5.1%	\$18,316
India	\$130	3.7%	\$18,434
USA	\$120	3.4%	\$7,428
Japan	\$109	3.1%	\$8,665
Hong Kong	\$95	2.7%	\$17,431
Indonesia	\$79	2.2%	\$13,469
Singapore	\$76	2.2%	\$17,917

In the YE Mar 2017, the top 8 source markets accounted for 71.6% of international student visitor expenditure in NSW.

China ranked first for student visitor expenditure in NSW (49.2% share) and on spend per visitor (\$23,568). Chinese student visitor expenditure increased by 18.2% compared to YE Mar 2016. Chinese students spent the most on tuition fees (50%), accommodation (17%) and food and drink (12%).

In the last 5 years, Chinese student visitor spend in NSW increased by 128.7%, and their share of NSW student expenditure has grown from 37.5% in 2013 to 49.2% in YE Mar 2017.

**Table 5. Top *International Student Repeat Visitors***

YE Mar'17	Visitors ('000)	% Return 2017	% Return 2016
China	56.8	77.7%	76.6%
New Zealand	8.8	90.1%	97.1%
USA	5.9	36.7%	37.4%
Japan	5.1	40.6%	39.8%
S Korea	5.0	51.6%	63.1%
Indonesia	4.7	80.4%	71.5%
Hong Kong	4.5	83.4%	80.4%
Thailand	4.2	71.2%	75.2%

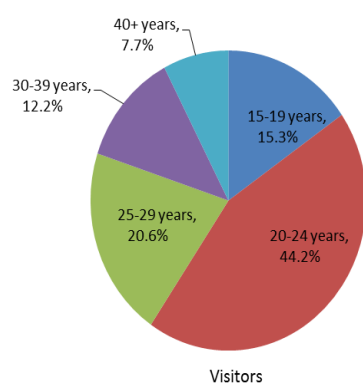
In the YE Mar 2017, the top 8 source markets accounted for 67.5% of international students who were on their return visit to Australia.

China has the most number of returning student visitors. New Zealand has the highest proportion of repeat student visitors in the YE March 2017 and YE March 2016.

In the last 5 years, the number of Chinese and US students who paid a return visit to Australia has grown by 83.2% and 70.2%, respectively on YE Mar 2013.

## AGE GROUPS

**Chart 4. Aged groups of *International Student Visitors to NSW***



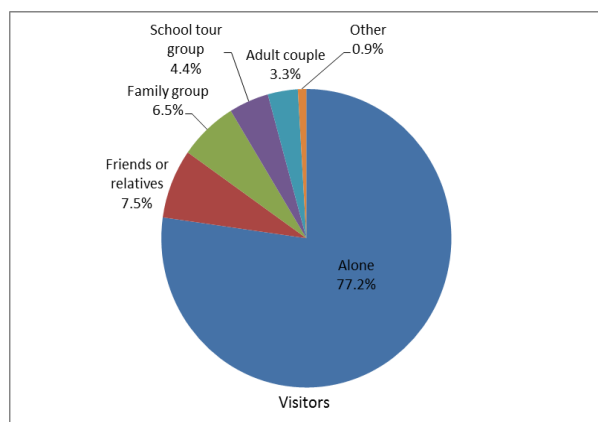
In the YE Mar 2017, the youth market (15-29 years) was the largest group of international student visitors to NSW, accounting for 80.1% of all international student visitors to NSW. The '20-24 years' age group topped the State's international youth student visitors.

Nearly 40% of the international student youth visitors to NSW were Chinese (38.3%), followed by US and Japanese student visitors (7.2% and 5.7%, respectively).

In the past 5 years, the youth market, especially those aged '20-24 years', has been the largest group of international student visitors to NSW. The number of international youth student visitors had grown by 44.9% since YE Mar 2013.

## TRAVEL PARTY

**Chart 5. Most common travel party for International Student Visitors to NSW**



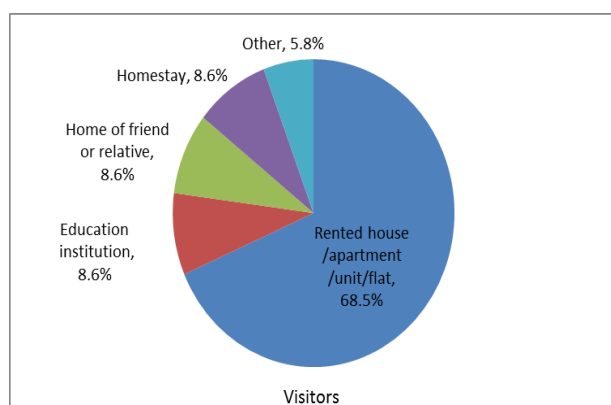
In the YE Mar 2017, travelling 'alone' was the most common travel party amongst international student visitors to NSW. These visitors increased by 11.8% on YE Mar 2016.

Chinese student visitors accounted for over one third (35.4%) of those who travelled 'alone', 29.9% of those who travelled with 'Friends or relatives', and 28.7% of those who travelled with 'Family group'.

In the past 5 years, the top 2 have remained as the most common types of travel party.

## ACCOMMODATION IN NSW

**Chart 6. Most Popular Accommodation type for International Student Visitors**



In the YE Mar 2017, 'rented house, apartment, unit or flat' (68.5%) was the most popular accommodation type used by international student visitors in NSW.

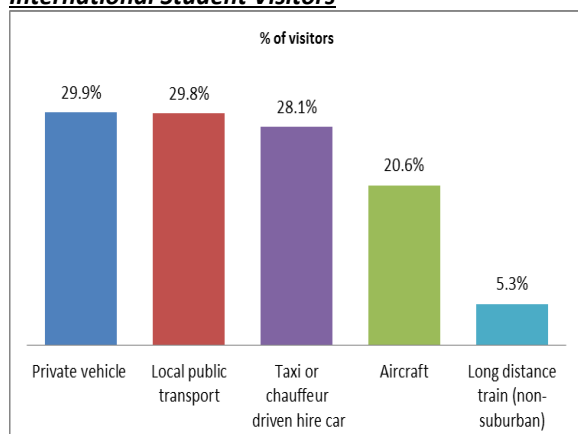
Chinese students mostly stayed in 'rented house/apartment/unit/flat' (77.2%), followed by 'homestay' (7.8%).

For Japanese student visitors, 'homestay' was the most popular accommodation type for their stay in NSW (40.5%).

In the past 5 years, 'rented house, apartment, unit or flat' has remained the most popular accommodation type in NSW by international student visitors. On average, it was used by over two thirds of international student visitors.

## TRANSPORT TO NSW

**Chart 7. Most Popular form of Transport for International Student Visitors**



In the YE Mar 2017, 'private vehicle' (29.9%) was the most popular type of transport used in NSW by international student visitors.

Chinese student visitors used taxi as their preferred transport mode, closely followed by private vehicle and local public transport.

In the past 5 years, 'Private vehicle' has remained the most popular transport used by international student visitors. On average, it was used by a third of international student visitors.

## DESTINATIONS IN NSW

**Table 6. Top Destinations in NSW for International Student Visitors**

YE Mar'17	('000)	% Share	% Growth on YE Mar'16
Sydney	198	89.4%	22.5%
Regional NSW	26.3	11.9%	-5.5%
South Coast	9.1	4.1%	-2.1%
The Hunter	7.3	3.3%	-18.7%

**Table 7. Top Destinations in NSW for International Student Visitor Nights**

YE Mar'17	('000)	% Share	% Growth on YE Mar'16
Sydney	22494.3	88.7%	8.0%
Regional NSW	2867.9	11.3%	16.7%
South Coast	1337.4	5.3%	49.7%
The Hunter	840.4	3.3%	-7.9%

In the YE Mar 2017, Sydney was the top destination in NSW in terms of international student visitor numbers (89.4%) and nights (88.7%). The number of international student visitors to Sydney increased by 22.5%, while their visitor nights grew by 8.0% on YE Mar 2016.

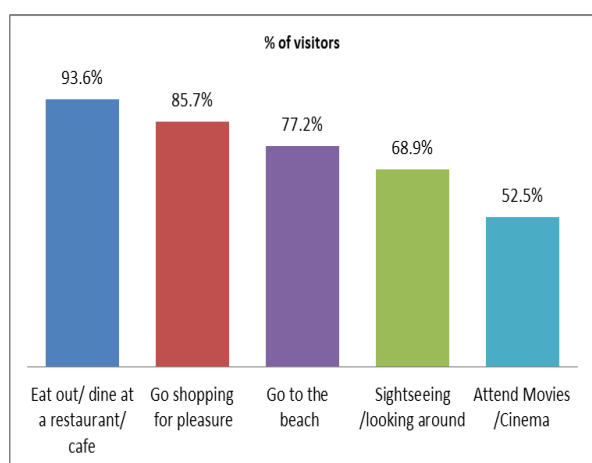
South Coast and the Hunter were the top 2 destinations in Regional NSW in terms of international student visitor numbers (4.1% and 3.3%, respectively) and nights (5.3% and 3.3%, respectively).

Sydney and South Coast were the most visited destinations for Chinese student visitors while the Hunter was most popular for Malaysian student visitors.

In the past 5 years, Sydney has been the most visited destination among international student visitors in NSW. The number of international student visitors to both Sydney and Regional NSW increased (49.0% and 22.0%, respectively).

## ACTIVITIES IN AUSTRALIA

**Chart 8. Top Activities for International Student Visitors**



In the YE Mar 2017, 'eat out, dine at a restaurant or café' (93.6%) was the most popular activity undertaken in Australia by international student visitors to NSW.

Chinese student visitors have undertaken the top 3 most popular activities in Australia: 'eating out', followed by 'going shopping' and 'going to the beach'.

For Japanese student visitors, however, 'go shopping for pleasure' was their most popular activity in Australia, followed by 'eating out'.

In the past 5 years, the top 4 activities in Australia undertaken by international student visitors to NSW have remained the same.

## MORE INFORMATION

For more information and statistics about tourism in NSW, see the *Tourism – Facts & Figures* page on the Destination NSW Corporate website at <http://www.destinationnsw.com.au/>.