

THE ECONOMIC IMPACT OF OVERSEAS STUDENTS ON TOURISM IN VICTORIA

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EXECUTIVE SUMMARY

Victoria University together with Tourism Victoria conducted a research project titled The Impact of Overseas Students on tourism in Victoria. The main aim of the study was to find out about the tourism interest and tourism information needs of overseas students, as well as to identify the importance and value of overseas students to tourism in Victoria.

Altaf Patel and Ian Michael, from the Graduate School of Business, Victoria University under the supervision of Dr Anona Armstrong, undertook this project as part of their Master in Business Administration (MBA). A total of 600 questionnaires were distributed randomly to seven tertiary institutions in Victoria. Of those 600 questionnaires 219 were received completed by students.

There is a continuing growth in the business of Australian education export to Asia. In 1995 there were approximately 70,000 Asian students studying in Australia yielding \$2 billion directly in export income, of this about \$400 million a year is contributed to the Victorian economy by about 17,900 students.

This research into the impact of overseas students on tourism in Victoria has produced a number of key findings.

The major reasons for students to study in Australia were Quality of education and Improvement of English language.

Friends and relatives were key influences in students decision making as to where to study.

Sixty four percent of all students researched took holidays while studying in Australia, New South Wales and Victoria were the highest visited destinations.

Forty four percent of the respondents who travelled, liked making their own arrangements.

The most visited places/attractions in Melbourne were Victoria Market, South Gate and Crown Casino, with regards to attractions outside Melbourne the Twelve Apostles and Sovereign Hill outshone others.

Private transport was the most popular means of travel for touring purpose. Driving and Shopping were activities they enjoyed most.

Sixty seven percent of students wanted to revisit places they had seen.

An average of \$225 was spent by students on their last trip around Victoria, they however stated that they could spend up to \$392 per person. Using the number of students (overseas) in Victoria ie. 17,900 and taking into consideration 64.4% would travel, they can spend approximately \$4,518,819 per annum.

Thirty six percent found it convenient to undertake travel during the summer break, it should also be mentioned that 60% of all students go home for this break.

Word of mouth played a significant mode of sourcing travel information, 73.1% said so. 65% stated that gathering information on tourism was easy.

Students found Victoria to be an interesting tourist destination.

There were 54.8% of students whose friends and relatives visit them while studying. Of these 54.8%, 46.2% said they visit them once a year, 39.7% twice a year and 9.9% thrice a year. The average expenditure of a friend/relative is \$527 in turn generating almost \$8.0 million.

Around 63.5% of students will visit Melbourne & Victoria after completion of their studies, this brings around 11,300 new inbound tourists per year. In turn these tourist numbers generate \$6 million.

Melbourne and Victoria will benefit tremendously in terms of attracting newer tourists, as 76.7% of students say they would recommend it.

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List of Abbreviations

ABS	Australian Bureau of Statistics
ATC	Australian Tourism Commission
BTR	Bureau of Tourism Research
DEET	Department of Employment, Education and Training
ELICOS	English Language Intensive Course for Overseas Students
FAA	Federal Airport Authority
FFPOS	Full - Fee Paying Overseas Student
RMIT	Royal Melbourne Institute of Technology
TAFE	Technical And Further Education
VFR	Visiting Friends and Relatives
VUT	Victoria University of Technology
VTC	Victoria Tourism Commission

1.0 INTRODUCTION

Tourism is one of the fastest growing industries in Australia. In Victoria education is one of the major industries, contributing just over \$1 billion over three years (1992-94). This study, supported by Tourism Victoria aims to explore the links between these two major economic activities with the purpose of determining how Victoria can most benefit from both.

1.1 THE CONTEXT OF THE STUDY

Victoria (Victorian Tourism Commission, March 1991) is one of Australia's six states, lying on the south - east coast of the continent. In area, it is 227,600 square kilometres. The population is 4,349,700 (at December 1989) representing 26% of Australia's population. Almost one million of the states 4.3 million people were born overseas, representing more than 60 nationalities. Melbourne, the capital is home to 3,039,100 people - 70% of the Victorian population. Located mid - way along Victoria's southern coast at the apex of Port Phillip Bay and the mouth of the Yarra River, it is a large metropolis spreading over 6202 square kilometres. Major geographic landmarks include the Great Dividing Ranges, the Grampians, the Otway Ranges, the Murray River, Port Phillip Bay, Westernport Bay, Wilson's Promontory, "The Lakes" in Gippsland and a network of rivers.

Victoria enjoys a temperate climate of mild and reliable rainfall with four distinct seasons free of extremes. Snowfall is usually confined to ranges above 600m, and the snow season begins in June and lasts till October. Melbourne is devoid of snow.

The state is home to many unique and interesting animals, mostly harmless to humans and nearly all protected by law. Victoria has 74 species of mammals as well as 78 species of marine mammals found in Victorian waters, 456 species of birds, 110 reptile species, 34 species of fresh water fish and 32 species of amphibians. Forests cover 36% of Victoria or 8.1 million hectares. The major plant groups are eucalyptus and acacias. The state also has 31 national parks (as of January 1990) along with 46

wilderness State parks and other parks which cover nearly 10% of the state which offer an amazing variety of outdoor experiences and enjoyable holidays.

To date no significant research or study has been carried out to measure the impact of the value added by overseas students to Victoria's tourism industry and its economy. There is a growing influx of international students to Australia, a study commissioned by the International Director of all of Victoria's universities has shown that export education has an annual growth of 15% over the last three years. This study which appeared in an RMIT press release (RMIT Communications and Marketing, 1994) further states that export education contributes \$400 million to the Victorian economy. Victoria gets a fair share ie 30% of the 58,000 international students studying in Australia as of 1994.

Several surveys and research studies have been carried out regarding overseas tourists to Australia. The Victorian Tourism Commission (VTC) as it was known until 1992, had several studies commissioned to identify potential market segments by visitor origin, visitor characteristics, including background information on International Air Services to Melbourne (Tourism Victoria 1994a).

The Banks Group (a consultancy group) commissioned by VTC, in their report released on 24th February, 1986 made no mention of the need to promote Victoria to the international students market as part of VTC's tourism strategy. Neither did the National Tourism Marketing Plan for Victoria - 3 year strategy 1987/88 - 1989/90 released by Banks in March 1987. A suggestion was made to target specific travellers and areas, but nothing to suggest the potential of international students as a viable tourist segment.

Tourism Victoria's list of six strategic issues that must be addressed does not include the untapped potential of international students and their visiting friends and relatives (The Key Strategic Issues, Tourism Victoria p.4, June 1993).

However, Mr Rod Myer in his article 'Asian tourists take a shine to Victoria', Sunday Age p. 19, 28th August 1994, mentions the increasing number of Asian tourists visiting

Victoria. The purpose of this study is to investigate whether this has special significance with the growth of Asian students coming to study in Australia.

2.0 SPONSORS

This project is conducted under 'Project Partnership' a program to link Victoria University of Technology with organisations in the community. The sponsor of the project is Tourism Victoria.

Tourism Victoria is sponsoring this study because:

- Tourism Victoria wish to explore the importance of attracting international students as a market segment and creating tourism products to suit any existing need
- Tourism in Victoria maybe able to gain valuable tourism dollars from this segment of the market
- Product suppliers such as attractions, coach companies, accommodation providers, restaurants etc will probably be able to get more customers, thus increasing their revenue and ultimately adding to the state economy

To our knowledge (the researchers') a study of this segment has not been done. It will give Tourism Victoria useful information on this emerging segment. This can be seen as an over riding importance to this project.

3.0 SIGNIFICANCE OF THE RESEARCH PROJECT

This paper considers the impact of international students and their visiting friends and relatives (VFR) on Victoria's tourism and the state economy. The increased growth of international students, their VFR visiting them while studying and later, on completion, these students' 'Word of Mouth' in their home countries can provide a significant gain to Victoria's tourism and the economy.

According to the in house journal 'Interesting facts about Melbourne and Victoria' Victorian Tourism Commission (1991), tourism contributes \$4 billion to Victoria's economy, the industry employs 130,000 people and is the state's fastest growing industry. With some of this background information it is relevant to keep tabs on the industry and keep innovating and gain penetration into niche market segments. A potential segment is the growing influx of international students into Victorian educational institutions.

This research will :

- Add to understanding of Victorian tourism revenue, which can in turn add to the Victorian economy by the multiplier effect
- Address and answer the question - Is the industry ignoring a lucrative market segment?
- Determine the role of 'Word of Mouth' by students when they return back to their homeland and address the probability of generating more visitors to Victoria
- Support initiatives for Victoria to be one of the leading providers of education in Australia
- Provide travel and tourism information about the growing Asian student market which can be used to the advantage of the industry

- Build relationships between Tourism Victoria and Victorian Universities to foster better opportunities for research which can address this segment
- Identify the importance of VFR as a market (segment)
- Provide directions to Tourism Victoria in their promotional effort to attract this segment, where to locate, attract and keep this segment. The recommendations from this report could be used by Tourism Victoria in strategic planning.

3.1 THE STRUCTURE OF THIS REPORT

This report presents the results of research involving a survey of overseas students studying in Victoria.

Chapter 1 outlines the context of the study and Chapter 2 mentions the sponsors. Chapter 3 discusses the significance of the research project to the sponsors, Tourism Victoria.

In Chapter 4 the Literature Survey discussed the research on which the study is based, first tourism research and second the research that is relevant and related to studies of overseas students. From these studies, the authors identified the relevant variables to be explained in this research.

Chapter 5 discusses the research questions. The methodology is described in Chapter 6. They were a number of difficulties to be overcome in doing this research. These are described under the section, 'the hurdles start'. The rest of the Chapter describes the study design, sample selection, and design of the questionnaire and data coding and survey analysis.

The findings from the study are reported in Chapter 7. The results describe the sample and response rate, the factors motivating students and friends to use tourism facilities and an estimate of the size and impact of international students to the Victorian economy. Conclusions and recommendations are presented in Chapter 8.

4.0 LITERATURE SURVEY

4.1. TOURISM

Tourism is booming in Australia. It is too important to the nation's future development and survival as an advanced economy for it to fail to flourish. The significance of this industry is illustrated by the fact that the value of one Japanese tourist to Australia is equivalent to 27 tonnes of coal exported to Japan.

There are a number of significant issues and problems about the availability of funding for tourism infrastructure and facilities on an on - going and large scale basis, with particular questions in relation to the future levels of foreign direct investment in projects. There are considerable questions about the capacity of existing institutions and the appropriateness of existing institutional arrangements for the strategic management of tourism regions and other growth and development in Australia. It is also important that we consider international tourism and the growth potential of the tourism industry in Australia in the context of the nation's total overseas debt, which passed \$A 150 billion in 1992.

One of the few bright stars, both currently and for the future of the nation, is the international tourism industry. The sustained development of the service industry is going to be crucial for the nation's future. It has also been argued that continued access to foreign direct investment funds will be crucial for the industry's growth and development. There is an enormous challenge and an urgent requirement for concerted public policy action if the potential benefits from the projected continued tourism boom are to be realised.

Australian tourism clearly stands to benefit from increasing links with the fast growing economies of Asia, and Australia's share of these markets should continue to expand. Japan is expected to remain the largest source country (Tourism Forecasting Council , April 95). Arrivals are forecast to more than double, from 671,000 in 1993 to 1,456,000

in 2003. Arrivals from other Asian markets are expected to increase at an annual growth rate of 16 percent.

Arrivals from established markets such as Europe and the United States are already reflecting the emergence of a world economy. The development of more special interest products and the additional publicity generated by the Olympic Games should see these markets grow over the medium to long term. European markets such as Germany and France also show potential for strong growth, as long - haul travel becomes more popular and awareness of Australia as a holiday destination increases (Tourism Forecasting Council, April 1995).

While the outlook is bright, some uncertainty surrounds the forecasting exercise. In particular it is difficult to estimate with precision the potential of emerging Asian markets. South Korea and Taiwan, for example, are currently exhibiting extremely rapid growth, but from a fairly small base. Outbound tourism from these countries is a recent phenomenon and, as a result, the future rate of expansion, and behaviour and destination choice of travellers, must be estimated using very scant historical data. The government and industry should be made aware of this uncertainty in the emerging markets, especially when using these forecasts for investment, planning and policy decisions.

A boom in Asian tourism and the Olympic games should help more than double international tourists to 6.3 million by the year 2000. Ex - Federal Tourism Minister Mr Michael Lee hoped 200,000 jobs would flow from the expected double digit growth in tourism through the decade. Asian tourists will make up 48% or 1.6 million of 3.3 million international visitors in 1995 according to forecasts (Travel Reporter, October 1994).

The number of international visitors to Australia was forecast to increase from 3 million in 1993 to 3.35 million in 1994 to 6.3 million in 2000 and 7.6 million in 2003. The average annual growth rate was forecast to be just under 10 percent for the period 1993 to 2003. The Sydney Olympic Games should lead to a relatively small increase in the growth rate in the year 2000. However, the Games are among many positive

factors influencing arrivals forecasts and are expected to have a positive impact on visitors numbers in every year of the forecast period.

The above forecast is headed in the right direction, as recent figures of overseas arrivals released by the ABS shows a record number of 4.1 million international visitors in 1995, compared to just 1.4 million 10 years ago (The Australian 28 February 1997).

A recent ANZ Mc Caughan Aviation Industry Research (Report Number 3) points out that the depreciation of the Australian dollar during much of the past decade, enhancing the price competitiveness of Australia as a tourist destination has helped spur the tourist traffic growth (The Travel Reporter, August 1994 p. 11).

Australian Tourism Data Card 1994a (Bureau of Tourism Research - BTR) shows that Victoria had visitors from other Asian countries as its largest source of visitors in 1993 and that trend is continuing.

Visitors from Asian countries has steadily risen since the early 1980's. In 1982, 122,500 visitors from Asian countries other than Japan arrived in Australia, comprising of 6.3% of all international visitors. By 1993, numbers have more than quintupled and reached 682,700 accounting for 22.7% of the visitors. The average growth from these markets between 1987 and 1993 was 18%. More impressively the growth for 1993 was 40%, the highest for any major source market (BTR 1994c).

TABLE 4.1

International Visitors to Victoria, 1995.

Key indicators for Major Country of Origin Markets.

	<i>New Zealand</i>	<i>Japan</i>	<i>Asia</i>	<i>UK/ Ireland</i>	<i>Europe</i>	<i>USA/</i>
<i>% of total to Victoria</i>	21%	14%	28%	28%	41%	40%
<i>% of nights at Victoria</i>	14%	8%	24%	14%	18%	23%

Source: Tourism Victoria Research Update 1996 - International visitor profiles are calculated from the International Visitor Survey compiled by the Bureau of Tourism Research 1996.

The number of short term visitors to Melbourne in 1984 was 325,000 and increased to 652,000 in 1992. In Victoria the number increased from 339,500 to 683,300 for the same period. (BTR - 1994b). In 1995 the total number of international visitors to Victoria stood at 890,500 (Tourism Victoria - Research Update, 1996a).

TABLE 4.2

Origin of Victoria's International Visitors:

Asia was Victoria's largest source of International visitors in 1995 with 288,000.

<i>Origin</i>	<i>1994</i>	<i>1995</i>
Asia	237,000	288,000
Hong Kong	36,000	43,000
Singapore	38,000	38,000
Malaysia	27,000	36,000
USA/Canada	129,000	143,000
Europe	149,000	159,000
Germany	51,000	56,000
New Zealand	82,000	113,000
UK/Ireland	102,000	108,000
Japan	104,000	110,000

Source Tourism Victoria Research Branch, December 1996

TABLE 4.3

Reason for visit

By far the most popular reason international visitors had for visiting Australia and Victoria was to take a holiday. But still 19% were visiting Friends and relatives, which could be overseas students. The following table shows that "other reasons" also forms a significant part, which could also include education.

<i>Origin</i>	<i>Holiday</i>	<i>Visiting</i>		<i>Business</i>
<i>Education</i>	<i>%</i>	<i>Friends %</i>	<i>%</i>	<i>%</i>
Asia	58	14	14	8
Europe	62	19	10	3
USA	47	19	23	4
Germany	70	17	8	2
UK/Ireland	43	40	8	1
New Zealand	32	26	25	3
Japan	78	1	10	3
Total	54	19	14	5

Source : Tourism Victoria Research Branch, December 1996

The main reasons for visits to Victoria were cited as 63% holiday, 18% visiting friends and relatives and 10% for other reasons including education (BTR 1994b). The average local expenditure is \$2100.

4.2 EDUCATION

Export education contributes about \$400 million to the Victorian economy. In a study commissioned by Victorian Universities (Victorian Export Education Study, October 1994), this figure broken down shows that universities account for 66% of this (includes university TAFE sectors), with other areas of education at the following percentages ; English language 5%, TAFE 5%, Private Colleges 23% and Government schools 1%.

Over the past 3 years, export education has contributed over \$1 billion, with an annual growth of 15%. This contribution has not been restricted to the metropolitan area of Melbourne. The activity has contributed about \$2 million a year to the Ballarat economy, over \$6 million a year to Geelong, more than \$4 million a year to Gippsland and \$2.5 million a year to Warrnambool.

In the Victorian Export Education Study (1994), a very conservative approach was taken in measuring the impact on the Victorian economy. This impact consists of fees paid by students and student expenditure such as housing, food, recreation and travel. The estimates are based on a study of international student expenditure carried out by Morgan Research, and does not include the travel and living costs of relatives and sponsors which should also be seen as contributing to the tourism industry.

The impact of export education to Victoria in 1994 (384 million) is comparable to the export of road vehicles in 1992 - 93 (\$376 million) and cereals and cereal products (\$344 million), according to the 1994 Victorian Yearbook published by the Australian Bureau of Statistics.

TABLE 4.4**Total Arrivals & Visitors for Education from selected countries in 1994.****VICTORIA.**

Country of Residence Arrivals	Visitors	Total Education
China	434	8588
Brunei	111	456
Hong Kong	1822	22349
India	215	2793
Indonesia	1861	16529
Malaysia	2743	18194
Pakistan	35	265
Philippines	164	3519
Singapore	1410	21670
Thailand	1319	12746

Source: Australian Bureau of Statistics 1995

TABLE 4.5**International students to Victoria**

	Hong Kong	Singapore	Malaysia	China	Indonesia	Others	Total
RMIT	514	1386	751	110	222	653	3636
Swinburne	58	19	70	9	47	677	880
VUT	1050	31	67	80	45	206	1479
Monash	1372	728	1112	129	283	676	4300
Deakin	256	82	318	27	44	202	929
Univ of Mel	204	147	474	43	65	1075	1514
Others	74	101	165	53	46	235	674
Total	3528	2494	2957	451	752	3231	13413

DEET Survey 1994 Showing break up of FFPOS students in major Universities

A survey by the Department of Employment, Education and Training (DEET 1994) reveals that the number of Full fee paying overseas students (FFPOS) rose from 10269 in 1992 to 13413 in 1994. Of this Monash accounts for 50% of the FFPOS. About 60% of these students come from Hong Kong, Singapore and Malaysia. The other major pool of students is from China, Korea and Indonesia. Note that this survey is only taking the universities into consideration. Of late the TAFE colleges have started recruiting FFPOS and their numbers are considerable. The survey results show that the FFPOS market is an emerging market and there is a lot of potential for Tourism Victoria to promote tourism in this market segment.

4.2.1 SOME INSIGHTS INTO NON - FEE STUDENT EXPENSES

Direct contribution to the Victorian economy by overseas students over the three years ending 1994 (1992 to 1994) stood at a staggering \$1,008,145,948. According to Morgan Research which conducted this study, in 1992 this direct contribution was \$290,798,616 which rose to \$332,870,491 and in 1994 it was at \$384,476,841. These figures include fees and other non - fee expenses like rent, food, travel, clothing, recreation etc.

Monash metropolitan leads the list of universities in terms of fees turnover collecting \$103,324,698 in 1994, followed by RMIT with a figure of \$84,063,750, The University of Melbourne came third with \$62,396,800.

The total non - fee expenses over the same three year period by overseas students was \$562,295,877. In this area there has been a significant increase from \$161,296,109 in 1992 to \$215,712,398 in 1994. Students of Monash Metropolitan once again head the list spending \$122,088,173 over the three year period, followed by RMIT students who had spent \$107,225,876.

4.2.2 THE SOARING OVERSEAS STUDENT NUMBERS

The number of full fee paying overseas students in Australia increased by around 20% between 1992 and 1993 to 63,013, according to statistics published by the Department of Employment Education and Training (DEET, 1994). About 86% of these came from Asia, with nine of the top ten source countries either East or South - East Asia. The United States was the 10th highest source country.

The figures published in Overseas Student Statistics 1993 and compiled by DEET's international division, show 68% came to Australia for higher education, 13% for secondary and 9% for ELICOS (English language intensive course for overseas students). About 64% of higher education were enrolled in bachelor degrees, 14.5% in diplomas and associate diplomas, 13.9% in masters and other graduate studies, 5.5% in doctorate and higher and 2% in non - award courses.

The most recent data available shows that student numbers in higher education rose in Victoria from 15,079 in 1994 to 17,065 in 1995 (International Student Enrolments Report, Victoria University 1996). ELICOS had a similar trend, student numbers rising from 869 to 1367.

The most popular field of study among 1993 full - fee students in higher education was business, administration and economics these making up almost half the enrolments. Science was the next most popular (14.4%) arts, humanities and social sciences (10.2), engineering and surveying (10) and health (7.1).

Students from Hong Kong, Malaysia and Singapore dominated the most popular field of business, administration and economics. The highest proportion in science were from Hong Kong. In arts, humanities and social sciences, students from Singapore, Hong Kong and Japan together made up more than a third of the full - fee higher education list.

According to the report, Malaysian students made up 23.5% of enrolments in engineering and surveying, while substantial proportions came from Hong Kong and Indonesia. Health studies were dominated by students from Malaysia and Hong Kong who combined to make up more than half the student population in that field of study.

4.2.3 FUTURE PROSPECTS

There is continuing growth in the business of Australian education export to Asia. In 1995 there were around 70,000 Asian students studying in Australia, yielding \$2 billion directly in export income (McIlwraith, July 1995). A survey released in the Australian Daily on 18th July 1995, conducted by Associate Professor Don Smart of the Asia Research Centre at Perth's Murdoch University, found that, with greater effort Australian Universities and TAFE institutions could double export income within the next decade. Smart stated, with greater effort a diversion can be made in Asian students traditional goal of studying in the United States to start coming to Australia.

The survey also took a close look at the Taiwanese market which is fast emerging as a lucrative one to universities and TAFE. Though Taiwan, contributed to less than 5% of Asian students, 1995's figure of 3200 students (from Taiwan) represented a strong growth; only 78 arrived 8 years ago.

The report warns that the Taiwanese market has been almost completely neglected by most Australian institutions and policy makers. Professor Smart acknowledged that the number of Taiwanese tertiary students going overseas was likely to remain static at about 20,000 a year, but the dominant position of the US (with nearly two - thirds) was being challenged.

In another news story from Kuala Lumpur (The Age 29 Jan 1997), trends have shown that students numbers are set to soar a senior Australian High Commission official said 1076 student visas were issued compared to 5179 for all of last year. In Singapore and Thailand, there was a 27% jump in the number of student visas issued in the year to December 1996.

4.2.4 SUMMARY

Earlier research and results suggest that Australia is well on its way to being a leading provider of overseas education especially to students who come from Asia. Victoria and its economy in particular is gaining tremendously from this influx, second to New South Wales in this area.

Research specified earlier by Morgan (section 4.1.2) has shown that overseas students spend more than \$215 million in non fee expenses which include travel. Research has not been done to date to test the impact on tourism from this segment. Our research intends to try and find this impact especially in areas such as likes and dislikes of attractions, perceptions of the state as a destination, some figures on money spent, impact of Visiting Friends and Relatives who visit these students and the method of communication to this market segment.

5.0 RESEARCH QUESTIONS

The potential for economic contribution to the Victorian Tourism industry from overseas students as a market segment was investigated. The students could contribute in four ways, this research sets out to highlight those issues:

- Firstly by travelling around Victoria during the course of study
- Secondly their relatives and friends who visit students during their course of study
- Thirdly by their re - visits and
- On returning to their home country, promoting Victoria as a tourism destination

The research questions explored the issues listed above.

The first section of the questionnaire asked students about their course of study which included the level of study, main reasons for studying in Victoria and where the information was accessed from.

The next section asked about how they (students) spent their leisure time ie whether they travel in Australia and specifically Victoria. If they did travel how they went about doing so. The reason for exploring this was to find out if they used any specific mode of transport ie car hire. The findings will give an opportunity to Tourism Victoria who can in turn make the appropriate service provider aware of this.

Questions relating to expenses were asked, and specific areas such as accommodation, food & drink, day tours, shopping etc were listed. The student was asked to write a dollar value of expense, this was designed to get a monetary value of overseas students expenses and contribution to the Victorian economy.

The third section discussed friends and relatives who visit the students in Australia. The time of their year when they visited and would visit , how long they stayed and would stay and how much they spent and would spend, and if students were expecting any visitors. These questions were designed to obtain a monetary value of friends and

relatives visits, what percentage of students had visitors and also the best time for these visits.

This section of questions also addressed issues of revisits by the students after returning to their country of origin and whether they would recommend Melbourne and Victoria as a good destination. The aim of this was to find out if the students would be a ready market for Victoria's tourism industry in the future and also if they would be a source of information in their country of residence.

The last section dealt with the demographics of the students, issues like country of origin, age, language/s spoken, whether they worked while studying and who they stayed with.

The hypotheses that were tested were whether the students country of permanent residence had a positive relationship with expectation of visitors.

The study tested whether the students who had intention to visit after studies would be the students expecting visitors during the course of study. It further tested whether the students who intended to visit after studies would recommend Melbourne and Victoria as a destination to visit.

From the literature search carried out, there is no specific study on the impact of overseas students and friends & relatives travel to Victoria. A Morgan Research (1995) states that overseas students non - fee expenses are \$215,712,398, this includes rent, food, travel, clothing and recreation. The results of the Morgan (1995) study arrives at an approximate dollar value of students expenses with regards to the specific area of travel eg, accommodation, entrance fees.

6.0 METHODOLOGY

6.1 LIAISON WITH TOURISM VICTORIA - A break through

In mid March 1995 Tourism Victoria was approached by Ian Michael and Altaf Patel to research into customer satisfaction of inbound tourists to Victoria. Ms Dorana Bettiol of the research department advised that this area was already researched extensively by the Australian Bureau of Statistics (ABS) and Bureau of Tourism Research (BTR). Ms Bettiol stressed that this research area was too complex as authority was needed from the Federal Airports Authority (FAA), to interview inbound tourists at airports. A suggestion was made by Ms Bettiol to contact the Australian Tourism Commission (ATC) in Sydney and find out the possibilities of undertaking a research project on emerging tourism markets.

A discussion was held with the Marketing Manager (emerging markets) of ATC. The Marketing Manager made it clear during the discussion that the ATC would not be able to support such a project and had no particular interest in sponsoring students. With this gloomy situation it was decided to contact Tourism Victoria again as they seem to have some possible interest in undertaking a joint project. As Tourism Victoria offices are a lot closer, ie in Melbourne, discussion could be held on a personal basis therefore offering a better channel of communication.

Ms Dorana Bettiol was contacted and an appointment made for a meeting at which the idea of researching overseas students to Victorian universities was mooted. Ms Bettiol mentioned that Tourism Victoria would be interested in this area of research, specifically to find out overseas students impact on tourism in Victoria. She also stated that if a partnership was realised a member of Tourism Victoria would be at hand to assist with the project. Telephone discussions were held after this and Ms Louise Kelly contacted us, and informed that she was assigned by Tourism Victoria to liaise with our project team.

6.1.1 THE FOUNDING OF PROJECT PARTNERSHIP

Dr Anona Armstrong, our Supervisor for this project was also instrumental in creating 'Project Partnership' at Victoria University. This concept 'Project Partnership' provides an opportunity for graduate students at Victoria University to work with an industry and /or business house or association, to research an area which interests that industry.

At the very outset the project team contacted Ms Louise Kelly to gather further information and more importantly seek Tourism Victoria's approval to join in as a 'Project Partner'. An initial proposal was requested to obtain approval. Communication took place in the next few weeks and a third and final proposal addressed all queries raised by Ms Louise Kelly.

On the 19th of May, 1995 our research team got the news they had been waiting for so anxiously, Tourism Victoria gave us the green signal to go ahead with the research, this came via a fax to Dr Armstrong. Victoria University of Technology, Tourism Victoria and our team from this day were 'Project Partners' in this research.

Ms Louise Kelly's communication to us is listed as Appendix 1, our subsequent submission of a proposal (the final one) is Appendix 2 and Tourism Victoria's acceptance is Appendix 3.

6.1.2 THE ROAD AHEAD

With 'Project Partnership' in place, it was now time to get the research project up and running. At the top of the agenda was literature search, especially in terms of obtaining overseas student numbers and more importantly to find out their distribution in universities across Victoria. This helped in two ways, firstly in defining the study parameters and also in coming to some conclusions on the selection of the sample, which is discussed later in the chapter.

At this juncture our team member/s held two meetings with Ms Louise Kelly at Tourism Victoria's office in Swanston Street, ideas were exchanged back and forth especially

with regards to the questionnaire and methods of accessing our target audience. It was at one of these meeting in June 1995 that Ms Kelly mentioned and referred Ian Michael to Ms Fiona Tarpey. Ms Tarpey was the Executive Officer at Victorian Universities International, a consortium of Victorian Universities and was further involved with the project team for around 4 months.

With the help of Ms Tarpey, the project team were able to access data relevant to the study, including reviews of student numbers spread across universities in Victoria and studies done by ELICOS. A subsequent meeting was held on the 15th of June at Victoria University of Technology, City Campus between the project team Ms Louise Kelly and Ms Fiona Tarpey which was chaired by Dr Anona Armstrong. At this meeting crucial issues discussed were, design of the questionnaire and what questions needed to be addressed, selection of the sample after reviewing student data, sample size and matters relating to finance of the project by the sponsors ie Tourism Victoria.

It was at this meeting that Ms Tarpey informed the team that the questionnaire once ready would be distributed thorough the Universities International office, who in turn would randomly post the questionnaires to their students. The officials at the concerned international offices needed from the project team a sample of the questionnaire which was to be reviewed by them before a final print, so as to weed out any objections they may raise at a later date. The same was agreed upon and in a matter of weeks of this meeting Ms Tarpey was furnished a sample copy of the questionnaire. The 'Project' was up and truly running by mid August 95 awaiting reply from international offices of the respective universities. It should be mentioned in this context that the universities targeted were Victoria University of Technology, Monash, University of Melbourne, RMIT, Deakin and Swinburne.

6.1.3 THE HURDLES START

The first hurdle came by the way of the research. At a meeting called for by Ms Louise Kelly to receive feed back as to the outcome of the approval of the questionnaire, the first bad news began to flow. International offices of some of the universities declined to send out the questionnaires. It was mentioned to the team by Ms Tarpey that at her

meeting with the international personnel, disagreement arose possibly due to clash of interest as the questionnaires came from Victoria University a competitor in the market place along with other universities.

This setback brought the project team back to the drawing board to ponder means of getting the survey to the students. Ms Louise Kelly proposed a letter from her office to explain the relevance of the project, via Ms Tarpey's office, this is enclosed as Appendix 4. This did not make a difference to the international offices, and now the team had to concentrate on other alternatives to get the survey across.

Victoria University of Technology proved no problem and at discussions held between Mr Ray Collogan and Ian Michael, the former stated he had no problem getting the survey out to students. The same however had to be approved by the ethics committee of the university at Footscray campus. The necessary application was made to Ms Palmina Nardella and is attached as Appendix 5.

A bigger problem facing the team at this juncture was the time frame, with all these hurdles springing up, November 95 was at the doorstep, this being examination time for the students. Concern was mounting whether response rate would be any good and the hurdles mentioned above were not overcome. A decision was taken to take the research project to 1996 sometime in March when students were back to their respective Universities. It was around this time somewhere in December that Ms Louise Kelly called up to inform Ian Michael that she would be leaving Tourism Victoria to pursue other interests.

6.1.4 THE DAWN OF 1996

Tourism Victoria informed our team sometime in February 1996 that Mr Michael Hauser would be taking up the role of co - ordinating the research. Things got moving with the team deciding to concentrate on contacting overseas students associations to get the survey thorough. The questionnaire after much deliberating was finalised and it got to the printer's office sometime in June 1996.

It was decided to wait for the second semester of 1996 to commence ie late July to get the questionnaires posted to students. In the last week of August the survey questionnaires were all set to go. Altaf Patel distributed them at RMIT, Swinburne and University of Melbourne while Ian Michael looked after Victoria University, La Trobe and Monash.

It must be mentioned in this context that through the office of Dr Anona Armstrong the team got a break - through. Ms Danielle Hartridge - Manager Operations at Monash International Pty Ltd kindly consented to get the questionnaires through her office. It was decided at this point in time to target private educational providers as well as some TAFE's, as these were attracting sizeable amount of students. Subsequently Box Hill College of TAFE, Barton TAFE, Hales College and Victoria International College were targeted.

After a bumpy road behind us thorough which the researchers gained knowledge and mustered tremendous patience, hard work began to pay dividends. The first questionnaires began appearing late September, and of 600 questionnaires randomly sent, responses were received from 219 students.

6.2 SELECTION OF THE SAMPLE

The criteria used for selection of the sample was based on the statistical information provided by the Department of Education, Employment and Training. Hence, the sample method proposed was a stratified random sample.

This sample was to have been stratified on the basis of Country of origin, and University. The objective at the beginning was to have surveyed 1,000 students, a response rate of 65% was expected overall. Hence to reach the objective of 1,000 students questionnaires were to have been sent to 1,539 students.

As discussed earlier the team experienced certain unforeseen hurdles, which affected overall plans. Altaf Patel and Ian Michael towards the end had no control over the selection of the stratified sample and a convenient sample reached. It must be

mentioned that all efforts were made to keep the objective of stratification planned earlier, this could only be done by giving a weighted number of questionnaires to universities based on the demographics of their students. For example Monash was to have received 480 while Swinburne would receive 98. The respective universities and /or associations would then post these randomly.

6.3 DESIGN OF THE QUESTIONNAIRE

The points listed below indicate the questions that were addressed in the survey.

1. The questionnaire included both open and closed questions. Open ended questions offered respondents a wide range of choice in their responses.
2. The demographics of the respondent included Country of origin, Age, Occupation, Course, Length of course, Part or full time study, Income, Marital status and Size of family, and whether their family stayed with them in Australia.
3. Questions pertaining to students likes and dislikes of tourist related experiences around Melbourne and Victoria, were addressed.
4. The issue of communication with students was dealt with, especially in asking them how they got to know about attractions and/or activities. This was necessary for Tourism Victoria as they wished to find out the best means of communicating to this market segment.
5. The probability was assessed of friends and relatives visiting, and the most appropriate time of the year (eg graduation ceremony etc), whether they travelled only around Victoria or interstate, their approximate budget (how much they spent).
6. The probability of students revisits to Victoria after going back to homeland after the completion of study (eg honeymoon, holidays with family etc) was dealt with.

7. Students were asked when was the most convenient time for them to travel around Melbourne/Victoria during the course of their study (eg semester break, summer break etc).

8. Perceptions were assessed of the activities, attractions and sightseeing that they have either heard of or experienced, any specific beliefs and attitudes regarding attractions and a list of popular tourist attractions around Melbourne and in Victoria state.

9. A question directed at finding out if students visited any attractions led to finding out their level of satisfaction with each attraction by rating those visited on a 5 point scale: from being very satisfied to not very satisfied.

10. The costs of students study in Victoria were measured for :

- Course
- Accommodation
- Meals
- Expenditure on tourist activities

11. A question addressed the reason/s for choosing to study in Australia.

12. Questions asked about their experience in Australia were :

How much did you like studying in Australia?

What do they like and why ?

13. Perceptions of costs were assessed by the question :

Do they believe Australia to be an expensive country, in terms of :

- Them as students
- As holiday makers
- For visiting friends and relatives

As stated earlier the research team along with Dr Anona Armstrong, Ms Louise Kelly and Ms Fiona Tarpey spent a great deal of time in setting out the questionnaire. In fact

it took approximately 2 to 4 months after 6 to 8 meetings to come out with this final questionnaire. This final questionnaire is attached as Appendix 8 along with a sample one, that was drafted during the initial stages and is Appendix 7.

Ms Louise Kelly provided the team with questionnaires used in the Travel & Tourism industry and ideas were sought from these for this research's questionnaire. The questionnaires are included as Appendix 6.

6.4 DATA CODING AND SURVEY ANALYSIS

Questions were encoded, and entered into the computer. The data was analysed using an SPSS programme. The analysis included frequencies and percentages and cross - tabulations. The significance of the cross - tabulations was tested using Chi - square test of significance. The acceptable probability was p less than or equal to .05.

7.0 SURVEY RESULTS

7.1 RESPONSE RATES

Out of 600 questionnaires distributed to Victoria University, Monash, RMIT, La Trobe, Barton TAFE, Box Hill TAFE, Victoria International College and Hales College, 219 were returned providing a response rate of 36.5%.

7.2 SAMPLE PROFILE

(Note : The following section numbers are as per sections in the questionnaire - Appendix 8)

SECTION 4

ABOUT YOU (DEMOGRAPHICS)

TABLE 7.1 Q42 Respondent's country of permanent residence.

	Value	Frequency	Percent
	0	9	4.1
China	1	4	1.8
Hong Kong	2	17	7.8
India	3	7	3.2
Indonesia	4	31	14.2
Japan	5	5	2.3
Malaysia	6	58	26.5
Singapore	8	26	11.9
South Korea	9	22	10.0
Taiwan	10	4	1.8
Thailand	11	21	9.6
USA	12	2	0.9
Other	13	13	5.9
Total		219	100.0

The DEET's overseas students education profile (Table 4.5 - 1994 data) is as follows : (brackets relate to survey profile).

Hong Kong	26.3%	(7.8%)
China	3.3%	(1.8%)
Malaysia	22.0%	(26.5%)
Singapore	18.6%	(11.9%)
Indonesia	5.6%	(14.2%)

Except for Hong Kong our sample shows a relatively similar profile. A reason for this could be that with Hong Kong's current political situation, many students may be taking up Australian residency. This implies that students who would have shown Hong Kong as their country of residence now find themselves making Australia as their country of residence. Furthermore our question specifically asked 'Country of permanent residence' and not 'Origin'.

TABLE 7.2 Q43 Languages spoken at home

	Value	Frequency	Percent
No Answer	0	10	4.6
Cantonese	1	32	14.6
English	2	25	11.4
Hindi	3	1	0.5
Indonesian	4	30	13.7
Japanese	5	5	2.3
Korean	6	21	9.6
Malaysian	7	14	6.4
Mandarin	8	34	15.5
Thai	9	21	9.6
Other	11	26	11.9
Total		219	100.0

TABLE 7.3 Q44 Age.

	Value	Frequency	Percent
No answer	0	7	3.2
Under 18 years	1	1	0.5
18 - 24	2	152	69.4
25 - 29	3	49	22.4
30 - 34	4	4	1.8
35 - 39	5	5	2.3
40+	6	1	0.5
Total		219	100.0

TABLE 7.4 Q46 Gender.

	Value	Frequency	Percent
No answer	0	8	3.7
Male	1	90	41.1
Female	2	121	55.3
Total		219	100.0

TABLE 7.5 Q47 Marital status.

	Value	Frequency	Percent
No answer	0	5	2.3
Married	1	8	3.7
Single	2	206	94.1
Total		219	100.0

TABLE 7.6 Q48 Who do you live with whilst studying?

	Value	Frequency	Percent
No answer	0	6	2.7
Uni accom	1	33	15.1
Share with other stu	2	90	41.1
By Myself	3	10	4.6
Wife/Husband/Part	4	12	5.5
Wife/Husb/Part/Chil	5	4	1.8
Other family or rel	6	42	19.2
Other	7	22	10.0
Total		219	100.0

TABLE 7.7 Q49 Are you working part time?

	Value	Frequency	Percent
No answer	0	5	2.3
Yes	1	120	54.8
No	2	94	42.9
Total		219	100.0

A majority of students surveyed spoke Mandarin at home (15.5%), followed by Cantonese (14.6%) and Indonesian (13.7%) - Table 7.2.

The majority of students surveyed were in the age group 18 - 24 (69.4%) followed by 25 - 29 years (22.4%) - Table 7.3.

Around 55% of students were female and 41% male - Table 7.4.

Most students were single (94.1%) - Table 7.5.

A majority of them shared accommodation with other students whilst studying in Victoria (41.1%). This was followed by "living with family and relatives" (19.2%) and university accommodation (15.1%) - Table 7.6.

Approximately 55% of students worked part - time while 43% did not work - Table 7.7.

7.3 THE REASONS FOR STUDYING IN VICTORIA

SECTION 1

ABOUT YOUR COURSE OF STUDY

This section deals with the students education including the reasons for studying in Victoria and where they sourced information from.

TABLE 7.8 Q3 Level of study.

	Value	Frequency	Percent
	0	9	4.1
Undergraduate	1	128	58.4
Masters	2	23	10.5
Doctorate	3	6	2.7
Others	4	53	24.2
Total		219	100.0

The majority of the respondents were undergraduate students 128 which made up 58.4% of the respondents.

TABLE 7.9 Q4a Reason for studying in Victoria.

Percent	Value	Frequency	
No answer	0	6	2.7
Proximity to country	1	17	7.8
Recommended by F & R	2	31	14.2
F & R living in Vic	3	30	13.7
Cost of studies	4	17	7.8
Quality of Educ	5	44	20.1
Course Content	7	7	3.2
Improve English	8	41	18.7
Safety	9	2	0.9
Other	10	24	11.0
Total		219	100.0

The quality of education (20.1%) was found to be the prime reason for overseas students to come to study in Australia. This was followed closely by 'Improving English' (18.7%) and recommendations by friends and relatives was cited as the next most important reason (14.2%).

TABLE 7.10 Q4b Other reasons for choosing to study in Victoria.

	Value	Frequency	Percent
Class size	1	5	2.3
Course content	1	54	24.7
Cost of studies	1	53	24.2
Quality of education	1	78	35.6
Other	1	26	11.9
Proximity to country	1	39	17.8
Recommended by F & R	1	65	29.7
F & R living in Vic	1	49	22.4
Safety	1	32	14.6
Improve English	1	60	27.4

The respondents were asked to tick all answers that applied.

Quality of education headed the list again scoring 35.6% followed by the recommendations made by friends and relatives 29.7%. Other notable responses were course content (24.7%) and cost of studies 24.2%.

Safety and class size were not of much concern to overseas students.

TABLE 7.11 Q5 Where was information sought that attracted students to study in Victoria

Value Label	Value	Frequency	Percent
Ads	1	26	11.9
Agent	1	44	20.1
Aust Educ Centres	1	80	36.5
Australian Consulate	1	38	17.4
Corres with Uni	1	26	11.9
Education exhibition	1	58	26.5
Other	1	17	7.8
Friends or Relatives	1	91	41.6
Uni in your country	1	17	7.8

Friends and relatives topped the list at 41.6% followed closely by Australian education centres at 36.5%. A recent trend of educational institutions holding exhibitions in many parts of Asia seems to be paying off with 26.5% respondents getting information through this source.

Advertisements account for only 11.9% of responses and the Australian consulate accounts for 17.4%.

TABLE 7.12 Q7 Airline used to come to Australia.

Airline	Frequency	Percent
Qantas	78	41.0
Malaysian	30	16.0
Singapore	16	8.5
Garuda	16	8.5
Cathay Pacific	12	6.3
British Airways	10	5.2
Air India	10	5.2

Qantas, Malaysian, Singapore and Garuda were the most popular airlines used to travel to Australia.

7.4 STUDENT TRAVEL WITHIN AUSTRALIA

SECTION 2

ABOUT YOUR TRAVEL IN VICTORIA AND AUSTRALIA

This section addressed the travelling habits of students. This includes the expenses by students on various components of travel.

TABLE 7.13 Q8a Have you travelled within Australia?

	Value	Frequency	Percent
	0	7	3.2
Yes	1	141	64.4
No	2	71	32.4
Total		219	100.0

Of the 219 respondents 141 which makes up 64.4% travelled within Australia while 71 did not travel.

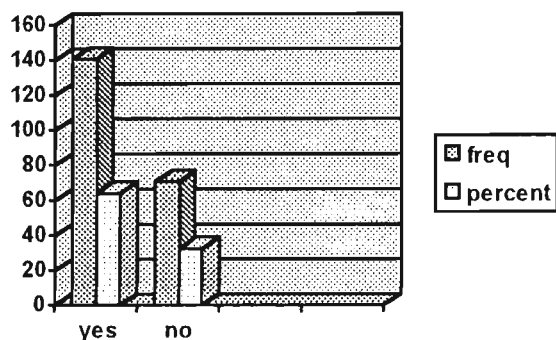


TABLE 7.14 Q8b If travelled within Australia which states did you visit?

	Value	Frequency	Percent
ACT	1	45	20.5
NSW	1	112	51.1
NT	1	19	8.7
QLD	1	74	33.8
SA	1	48	21.9
TAS	1	32	14.6
VIC	1	110	50.2
WA	1	16	7.3

Respondents could tick all states that they visited. NSW (51.1%) topped the list followed closely by Victoria 50.2%. Notable losers were the NT and WA at 8.7% and 7.3% respectively.

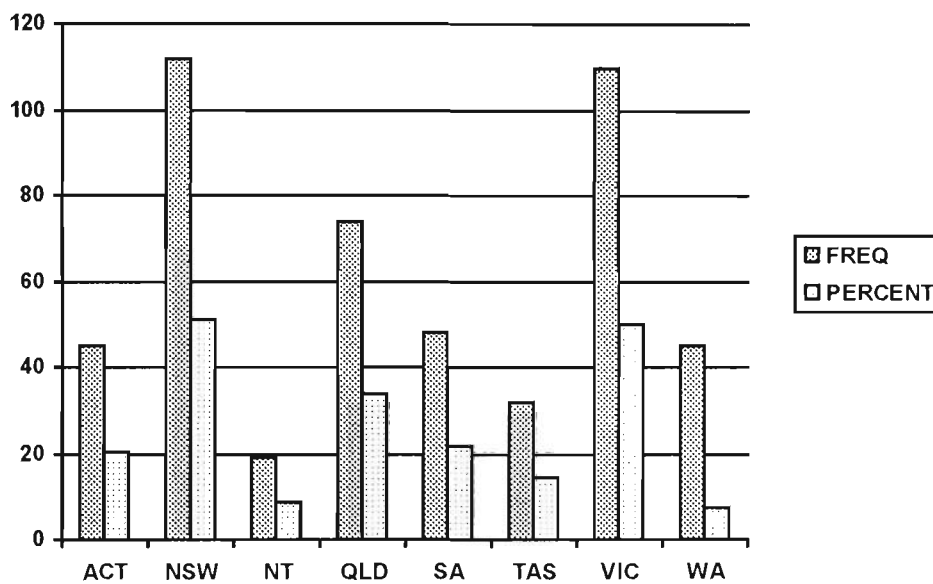


TABLE 7.15 Q9a What was the main destination on your last Australian trip?

Destination	Frequency
Sydney	24
Gold Coast	17
Hobart	10
Gt Ocean Road	8

Q9b Reason for travelling to this destination.

Sydney: recommended by friends and relatives and being the largest city, also many had friends and relatives living there.

Gold Coast: many stated that it was a very good beach and also lots of attractions.

Tasmania's Cradle Mountain, scenic beauty of the state and history were reasons for students to visit **Hobart**.

Great Ocean Road's scenic beauty was given as the reason.

TABLE 7.16 Q9c How was trip organised?

	Value	Frequency	Percent
Packaged tour	1	23	16.3
Own arrangements	2	97	68.8
Group tour	3	5	3.5
Uni organised	4	11	7.8
Other	5	5	3.5
Total		141	

The majority of respondents ie 44.3% seem to prefer to make their own arrangements, packaged tours follow next with 10.5%. Very few seem to be interested in group tours.

TABLE 7.17 Q10 Which attractions have you been to in Melbourne and Victoria?

	Value	Frequency	Percent
APOSTLES	1	115	52.5
ARTS	1	107	48.9
BOTANICAL	1	99	45.2
CASINO	1	133	60.7
COOKS	1	66	30.1
GALLERY	1	72	32.9
GAOL	1	12	5.5
GRAMPIANS	1	67	30.6
SOV HILL	1	108	49.3
VIC MARKET	1	183	83.6
MUSEUM	1	58	26.5
PENGUIN	1	99	45.2
PUFFING	1	54	24.7
HEAL SANC	1	60	27.4
SHRINE	1	82	37.4
SNOW	1	67	30.6
SOUTHGATE	1	151	68.9
WINE	1	38	17.4
ZOO	1	103	47.0
OTHER	1	48	21.9

Victoria Market (83.6%) is a prime place of visit for overseas students. This is followed by Southgate and the Casino. With regards to attractions outside Melbourne the Twelve Apostles (52.5%) leads followed by Sovereign Hill and the Penguin Parade.

TABLE 7.18 Q11 Overnight trips in Victoria.

	Value	Frequency	Percent
No answer	0	5	2.2
Yes	1	93	42.6
No	2	121	55.3
Total		219	100.0

About 43% of respondents who have travelled around Victoria have taken an overnight trip.

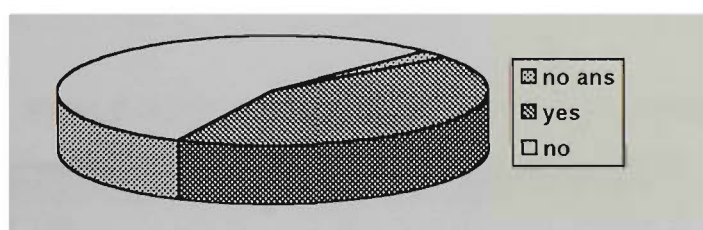


TABLE 7.19 Q15 Main type of transport used for your overnight trip.

	Value	Frequency	Percent
Private Car	1	44	47.3
Rented Car	2	25	26.8
Bus/Coach	3	21	22.6
Train	4	2	2.1
Other	6	1	1.0
Total		93	100.0

The main type of transport for the 42.6% of the respondents who took overnight trips, was private car (47.3%) followed by rented car.

TABLE 7.20 Q16 How was trip organised?

	Value	Frequency	Percent
Packaged tour	1	2	2.2
Own arrangements	2	76	83.5
Group tour	3	6	6.6
University organised	4	5	6.6
Other	5	2	2.2
Total		91	100.0

Once again students making their own arrangements while holidaying was high on the list, reinforcing the responses to Q9c - How was the trip organised.

TABLE 7.21 Q18 Type of accommodation used.

	Value	Freq	Percent
Hotel/Motel/Guest ho	1	35	38.5
Rented House/Flat	2	11	12.1
Bed and Breakfast	3	3	3.3
Host farm	4	2	2.2
Hostel/Backpackers	5	3	3.3
Caravan Park	6	10	9.1
Camping not in a car	7	11	12.1
In house of Friend	8	11	12.1
Total		91	

Hotel/Motel/Guest House was the most commonly used type of accommodation.

TABLE 7.22 Q21a Is there a place visited that you intend to return to?

	Value	Frequency	Percent
Yes	1	59	67.0
No	2	29	33.0
Total		88	

Sixty seven percent of those overnight trippers were happy to revisit the place.

7.5 STUDENT EXPENDITURE

TABLE 7.23 Q22a Expenditure on travel for last trip in Victoria.

Value (\$)	Freq	Total Dollars	Percent
16	1	16	1.3
19	1	19	1.3
20	2	40	2.6
45	1	45	1.3
50	7	350	8.9
58	1	58	1.3
60	1	60	1.3
65	1	65	1.3
70	2	140	2.6
75	2	150	2.6
80	1	80	1.3
100	10	1000	7.8
120	1	120	1.3
130	2	260	2.6
135	2	270	2.6
140	1	140	1.3
150	5	750	6.4
160	1	160	1.3
175	3	525	3.8
200	4	800	5.1
250	2	500	2.6
280	2	560	2.6
300	6	1800	7.7
400	8	3200	10.3
450	1	450	1.3
480	1	480	1.3
500	5	2500	6.4
600	2	1200	2.6
900	2	1800	1.3
Total	78	17538	

Of the respondents who stated their expenditure on their last trip, the average expenditure was \$225 per person.

Q22b How much of the above amount was for:

TABLE 7.24 Summary Table of expenditure on tourism related items

What for	Respon dents	Total (\$)	Average (Dollars)
Transport	61	4216	69.00
Accom	47	4205	89.46
Food & drink	59	3086	52.30
Shopping	23	1465	63.69
Entrance fees	31	1206	38.90
Other	13	1140	87.70

In absolute dollars accommodation and transport account for the major expenditure areas, \$4205 and \$4216 respectively.

TABLE 7.24.1 Accommodation

Value (\$)	Freq	Total Dollars
0	170	
2	1	2
10	1	10
15	2	30
18	1	18
20	4	80
25	3	150
30	2	60
40	2	80
45	1	45
50	6	300
60	3	180
80	2	160
90	1	90
100	3	300
120	3	360
150	6	900
200	5	1000
240	1	240
250	1	250
Total	47	4205

The average expenditure on accommodation was about \$90 per person, only respondents who replied were included in the calculation.

TABLE 7.24.2 Food and Drink

Value (\$)	Freq	Total Dollars
5	1	5
10	4	40
15	2	30
20	11	220
25	2	50
28	2	56
30	6	180
35	2	70
40	3	120
50	11	550
60	1	60
75	1	75
80	1	80
100	7	700
150	4	600
250	1	250
Total	59	3086

The average expenditure on food and drink was \$52.30 per person per day.

TABLE 7.24.3 Shopping

Value (\$)	Freq	Total (Dollars)
5	1	5
10	5	50
20	5	100
50	3	150
60	1	60
100	3	300
120	1	120
130	1	130
150	1	150
200	2	400
Total	23	1465

The average expenditure on shopping was \$63.69.

TABLE 7.24.4 Transport

Value (\$)	Freq	Total (Dollars)
4	1	4
5	1	5
10	4	40
15	2	30
16	1	16
20	7	140
30	4	120
38	1	38
40	3	120
45	2	90
48	1	48
50	10	500
60	3	180
65	1	65
70	2	140
75	2	150
90	1	90
100	8	800
140	1	140
150	2	300
200	2	400
400	2	800
Total	61	4216

The average expenditure on transport was \$69.11.

TABLE 7.24.5 Entrance Fees

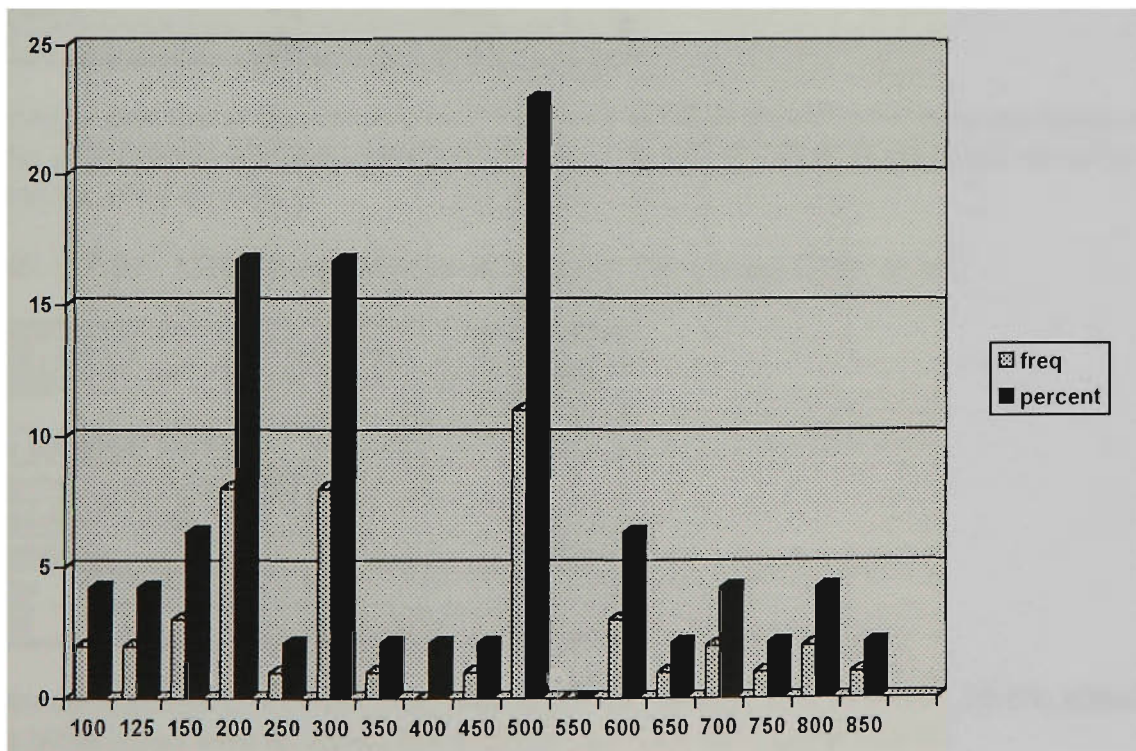
Value (\$)	Freq	Total (Dollars)
5	1	5
7	1	7
8	1	8
10	3	30
12	2	24
15	1	15
20	3	60
30	4	120
35	1	35
40	2	80
50	7	350
60	1	60
100	2	200
106	2	212
Total	31	1206

The average expenditure on entrance fees was \$38.90.

TABLE 7.25 Q23 Approximate expenditure in one year.

Value (\$)	Freq	Percent	Total Dollars
100	2	4.2	200
125	2	4.2	250
150	3	6.3	450
200	8	16.7	1600
250	1	2.1	250
300	8	16.7	2400
330	1	2.1	330
350	1	2.1	350
450	1	2.1	450
500	11	2.1	5500
600	3	6.3	1800
650	1	2.1	650
700	2	4.2	1400
750	1	2.1	750
800	2	4.2	1600
850	1	2.1	850
Total	48		18830

The average expense on travel over a year is \$392 based on 48 respondents. Extrapolating \$392 by the total number of students in Victoria (18000) would give us \$7,056,000 to the Victorian travel industry.



7.6 TOURISM ACTIVITIES

TABLE 7.26 Q24 What type of activities do students like doing while travelling in Victoria.

	Value	Freq	Percent
CONCERT	1	82	37.4
ART	1	72	32.9
BUSH-WALK	1	85	38.8
CINEMA	1	130	59.4
DISCO	1	65	29.7
DRIVES	1	151	68.9
FESTIVAL	1	118	53.9
FISHING	1	55	25.1
GAMBLING	1	46	21.0
MUSEUM	1	91	41.6
NAT PARK	1	105	47.9
OTHER	1	5	2.3
PARK	1	124	56.6
SPORT	1	63	28.8
RES	1	146	66.7
SAILING	1	53	24.2
SHOPPING	1	151	68.9
SKI	1	83	37.9
SWIM	1	63	28.8
THEATRE	1	89	40.6
THEME	1	87	39.7
TOURS	1	77	35.2
WINERY	1	49	22.4
ZOO	1	102	46.6

Wineries and water based activities such as fishing and sailing feature low down in the order of priorities whereas driving and shopping are the most popular activities for students while travelling.

TABLE 7.27 Q25 The best time of the year for students to travel.

	Value	Freq	Percent
	0	39	17.8
July semester break	1	70	32.0
Summer Hols (Nov - Feb)	2	78	35.6
Orientation Week	3	2	0.9
Weekends	4	22	10.0
Other	5	8	3.7
Total		219	100.0

Summer holidays (Dec - Feb) are the best time for students to travel, 35.6% stated this. The other good time is during the July (winter) semester break (32%).

TABLE 7.28 Q26 Do you return to your home country during the summer break?

	Value	Frequency	Percent
No answer	0	11	5.0
Yes	1	130	59.4
No	2	78	35.6
Total		219	100.0

About 60 % of students return home during the summer break.

TABLE 7.29 Q27 How did you find out about attractions and places to visit?

	Value	Frequency	Percent
TOUR OPERATOR	1	27	12.3
AGE	1	20	9.1
INFO BOOTH	1	73	33.3
INT STU OFFICE	1	34	15.5
OTHER	1	17	7.8
RACV	1	41	18.7
STU ORG	1	69	31.5
HERALD	1	16	7.3
TV	1	58	26.5
TOUR VIC	1	55	25.1
T/AGENTS	1	67	30.6
WORD OF MOUTH	1	160	73.1
Total		219	100.0

Word of mouth (73.1%) was the highest response. The daily newspapers were a poor source of travel information.

TABLE 7.30 Q28a Ease in obtaining suitable information.

	Value	Frequency	Percent
	0	10	4.6
Very easy	1	36	16.4
Easy	2	107	48.9
Neither	3	52	23.7
Difficult	4	5	2.3
Very difficult	5	1	.5
Not applicable	6	8	3.7
Total		219	100.0

Most students find it easy to obtain tourist information.

TABLE 7.31 Q30 How interesting is Victoria as holiday destination ?

	Value	Frequency	Percent
	0	9	4.1
Very interesting	1	43	19.6
Interesting	2	106	48.4
Neither interesting	3	48	21.9
Boring	4	12	5.5
Very Boring	5	1	.5
Total		219	100.0

A majority of students (68%) find Victoria an interesting destination. Only 5.5% find it boring.

7.7 FRIENDS AND RELATIVES WHO VISIT STUDENTS IN AUSTRALIA

SECTION 3

This section deals with 'Friends and Relatives' who may visit students during their course of study in Victoria. How often they visit and the time of year which best suits them.

TABLE 7.32 Q31 Have friends or family members visited students while you were studying?

	Value	Frequency	Percent
No answer		5	2.2
Yes	1	121	55.3
No	2	93	42.5
Total		219	100.0

In response to this question approximately 55% mention that their friends & relatives visit them while they study in Victoria and 42.5% answered that they are not visited while studying.

Q32 How many times visitors from overseas visit student?

Of the 55% of respondents who mentioned in the earlier question positively that their friends and relatives visit them, 46.2% further state that they visit them at least once a year and 39.7% say their friends & relatives visit them twice.

TABLE 7.33

	Value No. of times	Frequency	Percent
	1	56	46.2
	2	48	39.7
	3	12	9.9
	4	5	4.1
Total		121	100.0

TABLE 7.34 Q33 When last did your Friends and or Relative visit you ?

	Value	Frequency	Percent
Sep 1995	1	30	41.6
Aug 1995	2	5	6.9
July 1995	3	11	15.3
Jun 1995	4	8	11.1
May 1995	5	3	4.2
Apr 1995	6	4	5.6
Mar 1995	7	1	1.4
Feb 1995	8	1	1.4
Jan 1995	9	1	1.4
Dec 1994	10	3	4.2
Nov 1994	11	3	4.2
Sep 1994	13	2	2.8
Total		72	100.0

There is an increase of visitors from mid 1995, September was the highest with 41.6%.

TABLE 7.35 Q34 Length of last visitor's stay.

Value (Days)	Frequency
2	5
3	2
4	5
5	17
6	8
7	28
10	11
12	3
13	1
14	16
15	3
20	2
21	9
28	2
30	3
31	5
60	4
99	1
Total	125

Twenty eight respondents said their last visitor/s stayed 7 days.

7.8 EXPENDITURE RELATED TO FRIENDS AND RELATIVES

TABLE 7.36 Q35a Expenditure of last visitor in Victoria.

Value (\$)	Freq	Total (Dollars)
100	1	100
200	2	400
250	2	500
300	3	900
350	2	700
500	11	5500
600	4	2400
700	2	1400
750	4	3000
800	4	3200
900	1	900
Total	36	19000

Almost 55% of the students stated that their friends and relatives visit them. Of these, 46.2% stated that they visited them once a year, 39.7 % say twice a year and 9.9% thrice a year. Based on the expenditure of \$19,000 (Table 7.34) the average expenditure is \$527 per person (19000/36) per visit gives an expenditure of value of \$8,295,691.

TABLE 7.37 Q35c How much did you spend on visitor/s?

Value (\$)	Frequency	Total (Dollars)
0	131	0
10	1	10
20	3	60
50	10	500
60	2	120
75	2	150
100	12	1200
150	3	450
200	7	1400
250	6	1500
300	2	600
350	1	350
400	4	1600
500	17	8500
Total	219	16440

Eighty eight students spent a total of \$16,440 on visitors, giving an average of \$186 spent by each student.

TABLE 7.38 Q37 Did your visitor/s use organised tours?

	Value	Frequency	Percent
No answer	0	87	39.7
Yes	1	45	20.5
No	2	87	39.7
Total		219	100.0

Of the visiting friends & relatives around 21% said their visitors used organised tours while 39.7% said they did not.

TABLE 7.39 Q38 Was it easy or difficult in accessing information?

	Value	Frequency	Percent
	0	79	36.1
Very easy	1	23	10.5
Easy	2	76	34.7
Neither	3	23	10.5
Difficult	4	5	2.3
Very difficult	5	1	0.5
Not applicable	6	12	5.5
Total		219	100.0

Most students found it easy to access information.

7.9 FUTURE INTENTIONS

TABLE 7.40 Q39a Are you expecting visitors in next 12 months?

	Value	Frequency	Percent
No answer	0	25	11.4
Yes	1	130	59.4
No	2	64	29.2
Total		219	100.0

TABLE 7.41 Q39b Expected length of days your next visitor/s are likely to stay in Victoria.

	Value	Frequency	Percent
	0	109	49.8
	1	1	.5
	2	3	1.4
	3	1	.5
	4	3	1.4
	5	4	1.8
	6	2	.9
	7	30	13.7
	8	1	.5
	10	11	5.0
	12	2	.9
	13	3	1.4
	14	25	11.4
	15	3	1.4
	20	1	.5
	21	2	.9
	22	1	.5
	25	2	.9
	28	1	.5
	30	10	4.6
	31	1	.5
	60	1	.5
	90	1	.5
	99	1	.5
Total		219	100.0

Though at Q39a they were 130 positive responses ie. stating they expect visitors in the twelve months, Q39b has 109 No answer responses to the question of length of stay. This could be that the students are not certain of the length of stay of visitors.

TABLE 7.42 Q40 Your intention to visit Melbourne and/or Victoria in the next 5 years on completion of your studies.

	Value	Frequency	Percent
No answer	0	20	9.1
Yes	1	139	63.5
No	2	60	27.4
Total		219	100.0

Approximately sixty four percent of students are inclined to visit Melbourne and/or Victoria on holiday after the completion of their studies.

TABLE 7.43 Q41 Would you recommend Melbourne and Victoria to friends and relatives as a good place for a holiday?

	Value	Frequency	Percent
Yes	1	168	76.7
No	2	31	14.2
Total		219	100.0

Students were very positive in recommending Melbourne and Victoria to their friends & relatives, 76.7% of respondents said yes.

7.10 CALCULATION OF THE DOLLARS ADDED BY STUDENTS TO THE VICTORIAN ECONOMY

	Percentage of all students	Total number of students	Number of VFR visiting	Expenditure per person (contribution)
Total pop. visi per year	55.0	18,432	10,137	
1 visits	46.2	10,137	4,863	\$2,468,242
2 visits	39.7	10,137	4,024	\$4,241,706
3 visits	9.9	10,137	1,003	\$1,585,743
Total				\$8,295,691

Approximately \$8,295,691 is added per annum to the Victorian economy by students' friends and relatives who visit them while they study in Victoria.

The most recent data available shows that student numbers in higher education rose in Victoria from 15,079 in 1994 to 17,065 in 1995 (International Student Enrolments Report, Victoria University 1996). ELICOS had a similar trend, student numbers rising from 869 to 1367. This gives a total of 18,432 students attending tertiary educational institutions in Victoria.

Out of these 18,432, fifty five percent (10,137) of the students stated that their friends and relatives visit them. Of the 10,137, approximately forty six percent stated that friends and relatives visit them once a year, therefore a total number of 4,683 friends and relatives visit students once a year. About forty percent of students get friends and relatives visiting them twice a year, this gives us a number of 4,024. Ten percent of students stated their friends and relatives visit them three times a year, giving a number of approximately 1,003.

Based on the total expenditure of \$19,000, derived from the sample (Table 7.34) the average expense per visitor is \$527. Hence for 4,683 visitors of students once a year money spent amounts to \$2,468,242. For twice a year visitors the total amount spent is \$4,241,706 and respectively \$1,585,743 for visitors who come to Victoria three times a year to visit students.

The amount added to the Victorian economy is \$8,295,691 by visitors of overseas students. It must be noted in this context that this figure reflects expenditure only within Victoria. It excludes travel expenses getting to Melbourne ie. air fares from country of origin to Melbourne. This amount does not take into account the 'multiplier effect' it has on the Victorian economy.

7.11 HYPOTHESES

The observed significance level of the test gives the probability of independence or lack of. If the significance level is less than 0.05 , the hypotheses is rejected that the variables are independent (Norusis p.208).

TABLE 7.44 Q42 Country of permanent residence by Q39a Are you expecting visitors in next 12 months

	Chi-Sq Value	DF	Significance
Pearson	44.33974	24	.00697
Likelihood Ratio	48.97557	24	.00191
Mantel-Haenszel test for linear association	1.42083	1	.23327

Minimum Expected Frequency - .228.

The country of residence of students is significantly related to the probability of friends and relatives visiting Australia (Table 7.44). The country of residence is dependent on friends and relatives visiting.

The hypothesis (H_i) That there will be a positive relationship between country of origin and expectation of visitors in the next twelve months is accepted.

The correlation between country of permanent residence and expectation of visitors in the next twelve months is significant (Table 7.44) because it can be seen that the Chi - square value of 44.339, with 24 degrees of freedom, is significant (.001).

TABLE 45 Q40 Intention to visit after studies by Q39a Are you expecting visitors in next 12 months

Significance		Chi-Sq Value	DF
Pearson	118.36829	4	.001
Likelihood Ratio	77.10852	4	.001
Mantel-Haenszel test for linear association	41.94267	1	.001

Minimum Expected Frequency - 2.283

Approximate				
Statistic	Value	ASE1	Val/ASE0	Significance
Pearson's R	.43863	.07039	7.19003	.001
Spearman Corr	.40597	.07028	6.54380	.001

Those students that are expecting visitors are also hoping to visit Australia after their studies are completed.

The hypothesis (H_i) That there will be a positive correlation between intention to visit after studies and expectation of visitors in the next twelve months is accepted.

The correlation between intention to visit and expectation of visitor/s in the next twelve months is significant $r = .43$; $p = .001$. The hypothesis (H_i) was accepted that there is a positive correlation between intention to visit and expectation of visitors.

TABLE 7.46 Q40 Intention to visit after studies in next 5 years by Q41 Recommend Melbourne and Victoria to Friends & Relatives

Significance		Chi-Sq Value	DF
Pearson	144.19947	4	.001
Likelihood Ratio	92.14931	4	.001
Mantel Haentszel test for linear association	57.09334	1	.001

Minimum Expected Frequency - 1.826

Approximate				
Statistic	Value	ASE1	Val/ASE0	Significance
Pearson's R	.51176	.06849	8.77477	.001
Spearman Corr	.48752	.07006	8.22533	.001

Those students who are likely to visit are more likely to recommend Melbourne and Victoria when they return.

Ho: There will be no relationship between intention to visit after studies and recommending Melbourne and Victoria to friends and relatives.

Hi: Those with the intention to visit Melbourne and Victoria after studies will recommend Melbourne and Victoria to friends and relatives.

The correlation between intention to visit Melbourne and Victoria after studies and recommending to friends and relatives, is significant $r = .51$ therefore **Hi** is accepted.

TABLE 7.47 Q42 Country of permanent residence by Q31 Have friends or family members visited

	Chi-Sq Value	DF	Significance
Pearson	97.47594	24	.00000
Likelihood Ratio	89.14635	24	.00000
Mantel-Haenszel test for linear association	9.24624	1	.00236

Minimum Expected Frequency - .055

Approximate				
Statistic	Value	ASE1	Val/ASE0	Significance
Pearson's R	.20595	.07202	3.10024	.00219 *4
Spearman Corr	.18568	.07023	2.78364	.00585 *4

Country of permanent residence has an impact on visiting friends and relatives. Hong Kong 11 of 17, Malaysia 36 out of 57 and Singapore 25 out of 26.

Ho: There will be no impact between the country of permanent residence and friends and relatives visiting Melbourne and Victoria.

Hi: Country of permanent residence has an impact on friends and relatives visiting students.

The country of permanent residence has an impact on friends and relatives visiting as the Chi square value of 97.47 with 24 degrees of freedom is significant (less than .001).

8.0 CONCLUSION

The research project found that overseas students as a market segment to the travel and tourism industry can be a profitable one. It was further found that as a segment overseas students conservatively generate approximately \$15.2 million per annum to the industry, and in turn directly contribute to the Victorian economy. The above figure includes visiting friends and relatives but does not include students who visit Melbourne and Victoria after their education.

Compared with an estimated figure of \$215 million by Morgan Research (RMIT 1996) which included expenditure on rent, food, travel, clothing, recreation etc, \$15.2 million seems relatively small. However it should be noted that Morgan research includes estimates of all above costs and also takes into account post primary students in Victoria. Based on a conservative average of \$70 per week on rent, each student would spend \$3640 per annum. This gives an amount of \$81 million only on rent (22,484 students - Victoria University 1996).

Word of mouth was the strongest means of obtaining information to decide about touring in Victoria, and private arrangements of travel was the most preferred option. The study identified specific activities that students like, ie dining, festivals and going to national parks. Arts and entertainment, which includes theatre, theme parks and museum were also popular activities.

The overseas student segment is a ready current and future market. Further, almost 75% of students responded that they will recommend Melbourne and Victoria as a tourist destination when they return to their country of residence.

The majority of respondents were from Malaysia, Indonesia and Singapore with the average age falling between 18 to 24 years. The research found that a large proportion of students lived in shared accommodation with other students.

Most respondents were undertaking undergraduate courses. The quality of education was a prime reason for them choosing to study in Victoria, with recommendations from friends and relatives and cost of education being other strong factors.

About sixty four percent of students travelled within Australia. The most visited states were New South Wales, Victoria and Queensland. Most students (68.8%) preferred to make their own arrangements for travel.

Victoria Market was the most visited place / attraction in Melbourne, while the Twelve Apostles (Great Ocean Road) was a prime attraction in the state followed by Sovereign Hill and The Penguin Parade.

Sixty seven percent of students gave a positive indication that they would revisit attraction/s they liked.

The average expenditure by students (excluding friends & relatives) on travel was approximately \$392, this would add \$7 million to the Victorian economy.

Drives and shopping were the most popular activities for students while travelling within Victoria.

Students depend greatly on 'Word of Mouth' (73.1%) to make decisions about travel.

Fifty five percent of students in Victoria have friends and relatives visiting them during the course of their studies. These visits add \$8.3 million approximately to the Victorian economy.

The students who expect visitors are inclined to revisit Victoria themselves in the future. About 64% of students are inclined to visit Melbourne and Victoria after completing their studies and returning back to their homeland.

The country of origin of students has an impact on friends and relatives visiting them, with Hong Kong heading the list followed by Singapore and Malaysia.

As shown above, the total value added by overseas students and their relatives to tourism in Victoria is \$15.2 million each year. This market segment to the travel and tourism industry can be a profitable one.

RECOMMENDATIONS

In the light of the findings and discussions the following recommendations are made:

Tourism Victoria should foster close relationship with Universities in Victoria to attract this segment by providing kits and travel information to the student. This could be done by including the kit at the enrolment/orientation and can motivate students to travel in greater numbers. It could also be mentioned in this context that Tourism Victoria should make presentations whenever possible to the students as groups.

A finding was that most students go home for their summer holidays. Many Universities of late are having summer school and giving shorter breaks making it not worth while for students to go home in terms of air fare. Tourism Victoria can look at this as an opportunity and negotiate with travel industry suppliers to give targeted specials for students during this time.

The study identified the likes and places of interests of students. Tourism operators can start targeting this segment with their products and/or services.

The travel and tourism industry should provide impetus to Universities of Victoria for enhanced projection of the State not only as a place to pursuing education but also as an excellent tourist destination.

Tourism Victoria can introduce the State at the very outset by joining with Victorian Universities at their exhibitions held regularly in Asia.

It was found that most visiting friends and relatives come to Melbourne during the winter. Airlines like Ansett and Qantas can think of introducing special fares ie "Visit Your Scholars Fare" to motivate and get more friends and relatives of students to Melbourne.

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APPENDIX 1

Tourism Victoria

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Telephone (03) 653 9777
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27 April 1995

Mr Ian Michael
2/2A Thomson Avenue
Murrumbeena VIC 3163

Dear Mr Michael

PROJECT PARTNERSHIP

Thank you for forwarding your initial proposal for a cooperative research project on the tourism value of the overseas student market.

Your proposed study area is of interest to Tourism Victoria and has the potential to provide some useful information on the overseas market. In order for your project to be accepted by Tourism Victoria under the Project Partnership scheme, you need to provide more information about how you intend to do the project. Please provide details on the following areas.

Project Description (very important)

How you intend to carry out the project.

- what is involved? desk research, survey of xx students where and when.
- if you are going to do a survey, how will it be done and how will you analyse the results?
- who will do the work?
- how long will the project take?

Project Staff

What is the background of each member of the project team and what tasks will each member of the team carry out in the project.

Timing

Need to produce a project timetable, and give an indication of total hours to be spent on the project.

Include project meetings in the timetable.

Costs and Resources

Need to state total costs involved before approval from Tourism Victoria can be given for project to commence.

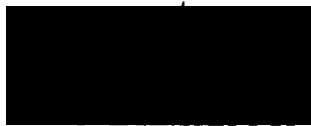


Reporting

What type of report will you provide Tourism Victoria the end of the project? What will the report contain in terms of data?

I look forward to working with you on your study into the value of overseas students to Victorian tourism.

Yours sincerely

A solid black rectangular box redacting the signature of Louise Kelly.

LOUISE KELLY

APPENDIX 2

11 May 1995

Ms Louise Kelly
Tourism Victoria
55 Swanston Street
Melbourne VIC 3000

Dear Ms Kelly

Thank you for your letter, in reponse to a proposal for a cooperative research on the tourism value of the overseas student market. It is very encouraging to note of Tourism Victoria's interest in our groups proposal for this research project. Further to the letter I wish to provide you with relevant details as requested.

PROJECT DESCRIPTION

The project will involve carrying out a literature search in the relevant area of work. This search will be done by collecting information from various sources like BTR, DEET, Trade articles from Travel Week, Travel Trade, Travel Talk etc, ABS. This search is to gain a further understanding in the research topic thorough this secondary data collection method.

Along with this the group will be working on framing a questionnaire that will be addressed to the target audience, as specified in my proposal. The questionnaire will be discussed with you to check and in turn finalised with your approval. This questionnaire is the method used for our survey, and we intend to start a pilot run by the last week of May. The pilot run most probably will be done thorough our group meeting the target students directly, we plan to target 75 students in the pilot run.

group meeting the target students directly, we plan to target 75 students in the pilot run.

The final target audience around 425 will be sent questionnaires to their mailing address, along with a stamped self addressed envelope C/O Ian Michael at Victoria University of Technology. The results will be analysed using a computer assisted programme like SAS.

The work will be done by the group and the final analysis with a written report according to any specifications you have, will be done by Mr Altaf Patel and myself.

We are aiming to have the findings for the project by the first week of September at the latest (confirm this after discussing with you).

PROJECT STAFF

Supervisor of the Project: Dr Anona Armstrong
Research and Graduate Studies
Victoria University of Technology
City Campus
Tel : (03) 9248 1037

Members: Mr Ian Michael
2/2A Thomson Avenue
Murrumbeena 3163
Tel : (03) 9563 1312

Mr Altaf Patel

SOME BACKGROUND:

Dr Anona Armstrong is the Co - ordinator of Business and Graduate studies at the city campus of Victoria University of Technology. She is a Professor in the Research Methodology unit, and at present Mr Altaf Patel and myself are studying under her.

Dr Armstrong's experience in the field makes her the ideal supervisor for this project. Our group will be following her close guidance in the success of this project.

Mr Ian Michael comes from the ideal Tourism background needed for this project, being an outbound product and Branch Manager with two of India's largest tour operators Shree Raj Travels and SOTC Tours (Bombay) Pty Ltd. He was responsible for creating modular inbound programmes for Majestic International Travel (Kew) specially designed for their agents in the USA. He has a lot of interests in the field of Tourism and wishes to further his professional career in this area of work.

Mr Altaf Patel hails from Zambia and holds a degree in B.Bus from Victoria University of Technology. He is a member of the students union and holds an executive position in the office of Trading and Operations at the Victoria University student union office. Altaf holds a managerial position with Franklins Stores.

The literature search will done by Ian, with Altaf doing most of the computer analyses of the findings. The other work will be done by both, with expert guidance from Dr Anona Armstrong.

TIMING

Enclosed in a format

COSTS AND RESOURCES

As part of Project Partnership, Victoria University of Technology usually charges \$ 4000.00 for a project. Access to work at Tourism Victoria's office to obtain data for the project, a co - ordination officer from Tourism Victoria.

In case of further clarification you are most welcome to call me on 9563 1312.

I look forward to working with you on this project.

Thanking You

With Regards

Ian Michael

PROJECT TIMETABLE

MONTH COMMENCING

	MAY	JUNE	JULY	AUGUST
Understand Methodology	***			
Finalise Project with Tourism Vic.	***			
Literature Search	***	***		
Consult BTR	***	***		
Framework of Questionnaire		***		
On going work with Tourism Vic		***		
Get the sample size		***		
Get the target audience		***		
Finalise Questionnaire with Tourism Victoria		***		
Consult with Consortium of Victorian Universities		***		
Get Questionnaires posted			***	
Get Questionnaires back			***	
Back up in casualties			***	
Analyse Questionnaires				***

APPENDIX 3

Tourism Victoria

55 Swinston Street
Melbourne 3000 Victoria Australia
GPO Box 2219T Melbourne 3001
Telephone (03) 653 9777
Facsimile (03) 653 9755

27 September 1995

Ms Fiona Tarpey
Executive Officer
Victorian Universities International
International Student Unit
Swinburne University of Technology
Hawthorn Campus
Hawthorn VIC 3122

Dear Fiona

Further to our conversations last week and your letter of 22 September, I wish to clarify a few issues in relation to the study being carried out into the value of overseas students to tourism in Victoria.

This study is a higher degree research project conducted by Ian Michael and Alf Patel from Victoria University of Technology (VUT). Tourism Victoria is very interested in this research study and has agreed to assist the VUT students with some financial and in kind support under the 'Project Partnership' scheme run by VUT. Student work in tourism is an important supplement to Tourism Victoria's mainstream tourism monitoring and tracking studies.

Tourism is a fast developing industry in Australia and Tourism Victoria is encouraging student research into existing, and potential visitor markets for Victoria. Overseas students studying in Victoria represent a significant source of visitors to the state (in 1993 students studying in Victoria represented 2.3% of all overseas visitors to Victoria) and are also a potentially rich source of future tourism through friends and relatives who visit these students, students making return holiday trips and 'word of mouth' recommendations. It is hoped that the study now underway will enable the true value of the overseas student market to tourism in Victoria to be quantified, and that methods of better servicing this market with tourism information will be identified.



Part of the study involves the analysis of existing statistics and literature on overseas student visitors to Victoria. However, the study would be greatly enhanced by original research into overseas students' tourism behaviour including tourism expenditure and tourism information needs. It was hoped that the original research would take the form of a survey of a sample of 1,600 overseas students and as outlined in my letter to you of 12 July 1995, the assistance of your organisation to the students involved would enable the survey research to happen.

I believe that this study is a most important piece of work as there is virtually nothing written on this particular market in terms of its tourism value and potential. Furthermore, I believe that it is time the market is recognised and developed to the benefit of visiting students and to industry in Victoria.

I am aware from our conversations that the universities are reluctant to allow a higher degree student to survey overseas students through the universities' overseas student units. I find this disappointing but can appreciate concerns universities have to surveys of students. I am well aware of the limitations of the survey in reaching the entire student market (for example students studying English in private colleges are not included) and in the limitations of surveys in general. However, I think that there is still a great deal to be gained from the proposed survey. Tourism Victoria has been heavily involved in the development of the survey part of the project to ensure a professional standard is maintained. If the directors of the international student units would allow the survey to go ahead, I know that the VUT students involved would be more than happy to incorporate any constructive criticisms or suggested changes to the questionnaire.

Finally, I would be pleased if you could pass on a copy of this letter to the directors of the international student units. I would be more than happy to discuss the project and the proposed survey in greater detail with you or with any of the directors, as would the students involved. I can be contacted on ☎ (03) 9653 9822.

Tourism Victoria remains interested in this area and will continue to conduct research into the overseas tourism market. I am aware that Maggie Nettleship from Tourism Victoria's Industry Development area is working with Victorian Universities International on possible marketing strategies and that you may become interested in market research for this project. I hope we can work together on any future tourism market research projects.

Yours sincerely



LOUISE KELLY
Market Research Coordinator

APPENDIX 4

Tourism Victoria

55 Swanston Street
Melbourne 3000 Victoria Australia
GPO Box 2219T Melbourne 3001
Telephone (03) 9653 9777
Facsimile (03) 9653 9744

31 October 1995

The Secretary,
Human Research Ethics Committee
Victoria University of Technology
PO Box 14428 MMC
Melbourne VIC 3000

Dear Sir/Madam

At present, Victoria University of Technology (VUT) is conducting a cooperative research study with our organisation into the value of overseas students to Victoria's tourism industry. The study will seek to identify the size and nature of the overseas student tourism market, the economic contribution of this market to Victoria, and the impact of this market on increasing tourism through visiting friends and relatives and through word of mouth. As such, I believe that this study will be a most important and valuable piece of work.

The study is being conducted by Ian Michael and Alf Patel from VUT as a higher degree research project. Part of the study involves the analysis of existing statistics and literature on overseas student visitors to Victoria, however, it is also intended to carry out a mail questionnaire with a sample of overseas students studying at VUT to better understand the overseas student tourism market.

Tourism Victoria has been heavily involved in the development of the survey part of the project to ensure a professional standard is maintained. I am well aware of the confidentiality issues associated with the proposed survey and I can assure you that any information provided by overseas students in the survey will be used only for this study and will not be passed onto any other individual or organisation.

Tourism Victoria is keen to further develop the overseas student visitor market and is interested in better servicing this market with appropriate tourist information. I look forward to the results from this study

Yours sincerely

[Redacted Signature]

LOUISE KELLY
Market Research Coordinator



477-5

Victoria University of Technology

Human Research Ethics Committee

Application for Approval of Project Involving Human Subjects in Victoria University of Technology

Introduction: This application form is included in the Human Research Register. If your project includes any information of a commercial or patentable nature, this information should be sent separately and marked confidential.

If an institution other than Victoria University of Technology is to be involved in the project, please provide with this application, evidence of ethics approval from the other institution.

If insufficient space is available on the form for your answer, please attach an additional page/s.

Applications to be typewritten and all questions answered.

To: Director
Office for Research

I attach a proposal for a project involving human subjects for the purposes specified on the attached sheets during the period to

Note: The Human Research Ethics Committee normally grants approval for periods of up to two years, subject to annual review. Consideration will be given to granting approval for a longer period in certain circumstances.

PROJECT TITLE:
"IMPACT OF OVERSEAS STUDENTS ON TOURISM IN VICTORIA"
PRINCIPAL INVESTIGATOR/S:
(Projects to be undertaken by students should list the Supervisor as the Principal Investigator)
DR ANONA ARMSTRONG
DEPARTMENT/S: AND CAMPUS
DEPARTMENT OF BUSINESS - CITY CAMPUS

Office Use Only

Received by Secretary, Human Research Ethics Committee - Date:

REGISTER NUMBER:

Project provisionally approved by the Executive, acting on behalf of the Human Research Ethics Committee.

Period of approval:

Comments:

Date: Chair:

Endorsed by the Human Research Ethics Committee, Meeting No. / , held on

Principal Investigator notified: / /

Victoria University of Technology
Human Research Ethics Committee
Classification of Projects Involving Human Subjects

Category	Project	Institutional Base for Project	Action
A	<p>Uses intrusive techniques. Causes discomfort in participants. beyond normal levels of inconvenience Examines potentially sensitive or, contentious areas.</p>	<p>Victoria University of Technology affiliated institutions</p>	<p>Obtain approval of Departmental Human Experimentation Committee and Institutional Ethics Committee. Use of consent form required.</p>
B	<p>Uses therapeutic techniques. Seeks disclosure of information which may be prejudicial to participants.</p>	<p>Non-affiliated institutions</p>	<p>Obtain approval of Departmental Human Experimentation Committee. Obtain written agreement from institution accepting responsibility. Inform Institutional Ethics Committee Use of consent form required.</p>
C	<p>Projects to which none of the above-listed characteristics apply.</p>	<p>Victoria University of Technology affiliated institutions</p>	<p>Obtain approval of Departmental Human Experimentation Committee. Inform Institutional Ethics Committee.</p>
D		<p>Non-affiliated institutions</p>	<p>Obtain approval of Departmental Human Experimentation Committee. Obtain written agreement from institution accepting responsibility. Inform Institutional Ethics Committee.</p>

Classification of Project
(see page 3)

A

1. Title of Project

Impact of Overseas Students on Tourism in Victoria

2. Principal Investigator/s:

(Projects to be undertaken by students should list the Supervisor as the Principal Investigator)

Dr ANORA Armstrong

3. Department/s:

Department of Research & Business - City Campus

4 (a) Associate Investigator/s and/or Co-Investigator/s:

Ms Louise Kelly - Tourism Victoria

(b) Student/s:

Ian Michael and Altaf Patel

5. Type of Project:

(a) Is application for a higher degree program?

Yes

(b) Is application for a pilot program of a higher degree?

Yes

If yes, please note that a second application is required for the full program

(c) Is application for an honours program of an undergraduate degree?

Yes

If yes, please indicate semester dates:

(d) Is application for a funded research program?

Yes

If yes, please indicate source of funding:

6. Aim of project:

Access the overseas students as market segment to tourism industry, and their impact on Victorian economy.

7. Plain language statement of project:

Please state briefly, in language which may readily be understood by members of the general public, the aims, methodology and the nature of any potential risks associated with this project. Explain any terminology or professional/technical words in plain language. If acronyms are used, please give full explanation. (It is recognised that in some areas of research, this statement may be the same as that appearing under questions 6, 8, 15 and 16 of the application form.)

Aims: As stated above, also best means of directing communication at this market segment. time (appropriate) they travel in Melbourne and around Victoria. Visiting friends and relatives of the students and the economic impact by them.

Methodology: Survey. Questionnaire (Random Stratified Sample)

8. Nature of research, including a list of all procedures to be used on human subjects, with a description of those techniques which are considered by the profession to be established and accepted. Please give details of support for their application:

(If, in the course of your research, procedures are significantly varied from those stated here, the Human Research Ethics Committee must be informed.)

Survey / questionnaire.

9. Date of commencement of project:

May 1995

10. Indicate duration of project:

6-8 months

11. Number, type and age range of subjects:

4 subjects, Research Methodology / Major Project.

12. Source of subjects, and means by which subjects are to be recruited:

VUT STUDENT ADMINISTRATION
OVERSEAS STUDENT REGISTER -
REF. MR. Roy Cologon

13. Is there any payment of subjects proposed:

NO

Yes

If so, how much?

Any further comments:

14. Premises on which project is to be conducted:

Copy of approval to use subjects in institutions other than Victoria University of Technology to be attached.

NA

15. Identification of potential risks:

(a) *Identify physical, psychological, social, legal or other risks connected with the proposed procedures.*

-NONE-

(b) *Minimising of potential risks - indicate how these potential risks will be minimised.*

(c) *Management of potential risks - indicate how these potential risks will be managed if they occur.*

(d) *Justification of no potential risks - explain fully why no potential risks have been identified.*

16. If you consider the subjects to be 'at risk', indicate how the potential benefits to the subjects or contributions to the general body of knowledge would outweigh the risks.

NA

17. Informed Consent:

- (a) State how you will obtain documentation of informed consent. Please attach a copy of your consent form.

FORM CIRCULATED WITH QUESTIONNAIRE

- (b) If you consider subjects to be 'at risk' (see Question 16), or if the subject is in a dependent relationship with you (eg. patient or student), state exactly what you tell him or her in lay language to obtain informed consent to each procedure whereby he or she is 'at risk'. This must be in a written format that is given to the subject particularly for this purpose. PLEASE ATTACH A COPY.

18. Confidentiality:

(a) Describe the procedures you will adopt to ensure confidentiality.

AGGREGATION OF DATA - NO INDIVIDUALS
IDENTIFIED - NO NAMES REQUESTED

(b) Indicate who will be responsible for the security of confidential data, including consent forms, collected in the course of the research.

IAN MICHAEL

(c) Indicate the period for which the data will be held. (Please refer to section 3.1 of the University's Code of Conduct for Research, February 1993).

Dec. 95 - Feb. 96.

(d) Indicate the names of people who will be granted access to the data and the reason for the access. People identified should maintain all aspects of confidentiality.

Ian Michael, ALTAZ PATIL
- RESEARCHERS

19. Privacy:

(a) Does this project involve the use of personal information obtained from a Commonwealth department or agency? *NO*

If YES you may need to comply with the requirements of the Privacy Act 1988.

Under the Commonwealth Privacy Act 1988 disclosure of personal information by Commonwealth agencies is not permitted except in a number of circumstances specified in Information Privacy Principle (IPP) II. These include consent by the individual concerned. Where consent has not been given, and where none of the other circumstances specified in IPP II apply, additional guidelines for consideration of the project application and for conduct of research apply. Note that the Act does not apply to publicly available material (such as electoral rolls).

If a Commonwealth agency (for instance, the Australian Bureau of Statistics, Commonwealth Government departments, Australian Electoral Commission, most Repatriation Hospitals) is involved in the collection, storage, security, access, amendment, use or disclosure of personal information for a research project investigators must ensure that the project complies with the requirements of the Act.

20. Any other relevant comments:

Declaration

I, the undersigned, have read the current NH&MRC Statement on Human Experimentation and the relevant Supplementary Notes to this Statement, or Code of Ethics for the Australian Psychologists Association, or * and accept responsibility for the conduct of the experimental procedures detailed above in accordance with the principles contained in the Statement and any other condition laid down by the Human Research Ethics Committee.

DR. A. ARMSTRONG

16/11/95

Principal Investigator

Date

Principal Investigator

Date

Associate Investigator**

Date

If the project is to be undertaken by a student, student's signature:

Date

[Redacted signature]

Co-Investigator

Date

Co-Investigator

Date

Co-Investigator

Date

[Redacted signature]

Head of Department

16/11/95
Date

Dean of Faculty

Date

- * If NHMRC Statement or APA Code are not appropriate to your project, please identify your professional code of ethics under which this project would operate.
- ** The Associate Investigator will assume responsibility for the project in the absence of the Principal Investigator

Victoria University of Technology

Sample Consent Form for Subjects Involved in Experiments

CERTIFICATION BY SUBJECT

I,
of

certify that I have the legal ability to give valid consent and that I am voluntarily giving my consent to participate in the experiment entitled:

being conducted at Victoria University of Technology by:

I certify that the objectives of the experiment, together with any risks to me associated with the procedures listed hereunder to be carried out in the experiment, have been fully explained to me by:

and that I freely consent to participation involving the use on me of these procedures.

Procedures:

I certify that I have had the opportunity to have any questions answered and that I understand that I can withdraw from this experiment at any time and that this withdrawal will not jeopardise me in any way.

I have been informed that the confidentiality of the information I provide will be safeguarded.

Signed: }

Witness other than the experimenter: }

Date:

..... }

Any queries or complaints about your participation in this project may be directed to the experimenter, or to the Secretary, Human Research Ethics Committee, Victoria University of Technology, PO Box 14428 MMC, Melbourne, 3000 (telephone no: 03-9688 4710).

APPENDIX 5

1993: INTERNATIONAL VISITORS SURVEY

Q'aire No:

START TIMEam/pm

VI: INTERNATIONAL TRAVEL PATTERNS

RECORD CITY OF INTERVIEW

- Delbarton 1
- Gold Coast 2
- Melbourne 3
- Perth 4
- Sydney 5
- Torquay 6
- Townsville 7
- Warrnambool 8
- Wendoubo 9

On your way to Australia on this visit did you stopover for one or more nights in any country including your own?

- Yes 1
- No 2 → Q.3b

How many nights altogether did you spend on these stopovers?

Nights ..

How many nights did you spend on the plane/ship on your way to Australia?

Nights ..

On your way home from Australia, will you stopover for one or more nights in any country including your own?

- Yes 1
- No 2 → Q.4c

How many nights altogether will you spend on these stopovers?

Nights ..

How many nights will you spend on planes or ships on your way home?

Nights ..

Q.5a How many nights have you spent in Australia for this visit?

Nights ..

Q.5b Thinking about the whole trip: by the time you get back home, how many nights in total will you have been away?

Nights ..

CHECK: TOTAL IN 3a + 3b + 4b + 4c + 5a SHOULD EQUAL TOTAL IN Q.5b

TICK ANSWER IN Q.5b WHEN CORRECT

Q.5c Will any of those (number in Q.5b) nights have been spent in New Zealand?

- Yes 1
- No 2

Q.6 Is this your first visit to Australia? (IF ANSWER IS "BORN IN AUSTRALIA" ASK: Is this your first return visit to Australia?)

- Yes 1
- No 2

BELOW BEFORE FIRST CONTACT. START A NEW SCREENING SHEET FOR EACH FLIGHT

JRNE SYDNEY BRISBANE PERTH ADELAIDE DARWIN TOWNSVILLE CAIRNS HOBART

2 3 4 5 6 7 8 9

C. FLIGHT NO: D. THIS IS SHEET NO. FOR THIS FLIGHT: E. INTERVIEWER NAME ID:

(READ OUT ON INITIAL CONTACT)
 My name is We are conducting a survey on behalf of the Bureau of Tourism Research

NUMBER (CIRCLE)		O1	O2	O3	O4	O5	O6	O7
Are you visiting Australia for the first time?	Visiting Resident (TERMINATE)	.	.	.	.	.	.	.
1		1	1	1	1	1	1	1
Are you a passenger on an international flight?	Yes No (TERMINATE)	.	.	.	.	.	.	.
2		2	2	2	2	2	2	2
Did you select this flight?	Selected Not selected (TERMINATE)	.	.	.	.	.	.	.
3		3	3	3	3	3	3	3
Do you have sufficient time to get to the airport?	Sufficient time Insufficient time (TERMINATE)	.	.	.	.	.	.	.
4		4	4	4	4	4	4	4
Do you have sufficient time to get to the airport?	WRITE IN Yes No (TERMINATE)	.	.	.	.	.	.	.
5		5	5	5	5	5	5	5
Do you have sufficient time to get to the airport?	Yes No (TERMINATE)	.	.	.	.	.	.	.
6		6	6	6	6	6	6	6
How long have you been in Australia?	Less than a year A year or more (TERMINATE)	.	.	.	.	.	.	.
7		7	7	7	7	7	7	7
Are you 15 years of age or over?	15 or over Under 15 (TERMINATE)	.	.	.	.	.	.	.
8		8	8	8	8	8	8	8

ask you some questions about your impressions of Australia and what you did while you were here. About 20 minutes - will that be okay?

RESULT	OK to proceed	9	9	9	9	9	9	9
(TERMINATE)	Refusal	0	0	0	0	0	0	0
	Language Barrier	X	X	X	X	X	X	X
	Other non-interview reason	Y	Y	Y	Y	Y	Y	Y

(24 HOUR CLOCK)

Bureau of Tourism Research

1. INTRODUCTION (READ OUT ON INITIAL CONTACT) Good My name is We are conducting a survey on behalf of the Bureau of Tourism Research							
2. CONTACT NUMBER (CIRCLE)		O8	O9	10	11	12	13
3. Have you been visiting Australia or are you an Australian resident?	Visiting	*	*	*	*	*	*
	Resident (TERMINATE)	1	1	1	1	1	1
4. Are you leaving Australia from here today: that is, are you completing your OUTGOING PASSENGER card at this airport?	Yes	*	*	*	*	*	*
	No (TERMINATE)	2	2	2	2	2	2
5. a) What is your Flight Number?	Selected	*	*	*	*	*	*
	Not selected (TERMINATE)	3	3	3	3	3	3
b) What is the departure time? (IF LESS THAN 30 MINS OR 60 MINS IN CHECK OUT AREA - TERMINATE)	Sufficient time	*	*	*	*	*	*
	Insufficient time (TERMINATE)	4	4	4	4	4	4
6. In which country do you now live? MATCH WITH QUOTA SHEET REQUIREMENTS?	WRITE IN	.....				
	Yes	*	*	*	*	*	*
	No (TERMINATE)	5	5	5	5	5	5
7. DOES SEX MATCH WITH QUOTA SHEET REQUIREMENTS?	Yes	*	*	*	*	*	*
	No (TERMINATE)	6	6	6	6	6	6
8. How long have you been in Australia?	Less than a year	*	*	*	*	*	*
	A year or more (TERMINATE)	7	7	7	7	7	7
9. IF NECESSARY Are you under 15 years of age?	15 or over	*	*	*	*	*	*
	Under 15 (TERMINATE)	8	8	8	8	8	8
10. I would like to ask you some questions about your impressions of Australia and what you did while you were in Australia. It will take about 20 minutes - will that be okay?							
11. RECORD RESULT (TERMINATE)	OK to proceed	9	9	9	9	9	9
	Refusal	0	0	0	0	0	0
	Language Barrier	X	X	X	X	X	X
	Other non-interview reason	Y	Y	Y	Y	Y	Y
RECORD TIME (USE 24 HOUR CLOCK)							

Q.32a Before arriving in Australia how much did (you/your party) pay for your inclusive tour?

AMOUNT:

Q.32b ASK OR RECORD
In which currency have you answered?

.....

CONVERSION TO A\$

\$

--	--	--	--	--	--	--	--

Q.32c Did any of that expenditure cover the cost of air fares within Australia?

Yes 1
No 2

Q.32d Apart from the (amount in Q.32b) (you/your party) paid for your inclusive tour, how much altogether did (you/your party) pay for Australian expenses both here and before arriving in Australia?

AMOUNT:

Q.32e ASK OR RECORD
In which currency have you answered?

.....

CONVERSION TO A\$

\$

--	--	--	--	--	--	--	--

→ **NOW SKIP TO Q.34**

Q.33a Before arriving in Australia, how much was paid for (your/your party's) international (air/sea) fares? Do not include any international fares paid for in Australia. Please include any payment you contributed for any persons travelling with you.

AMOUNT:

Q.33b ASK OR RECORD
In which currency have you answered?

.....

CONVERSION TO A\$

\$

--	--	--	--	--	--	--	--

Q.33c Did any of that expenditure cover the cost of airfares within Australia?

Yes 1
No 2

Q.33d Apart from the (amount in Q.33b) (you/your party) paid for international (air/s) fares, how much altogether did (you/your party) pay for Australian expense both here and before arriving in Australia?

Include any international air fares bought in Australia on this trip.

AMOUNT:

Q.33e ASK OR RECORD
In which currency have you answered?

.....

CONVERSION TO A\$

\$

--	--	--	--	--	--	--	--

Q.34 I see that you spent (amount in Q.32e or Q.33e) on Australian expenses.

→ **SHOWCARD 23**
Looking at Card 23 (PAUSE), on which of items did you spend any of that money. This includes money spent in Australia, amount paid after you leave, and amounts paid before arriving in Australia (apart from your international air fare or inclusive tour cost)

ON THE FOLLOWING PAGE ASK Q's 34a, b, AND c FOR EACH ITEM IN TURN

SECTION VI: TRAVEL EXPENDITURE

CHECK Q.10a AND Q.10d (Page 2):

RESPONDENT ARRIVED UNACCOMPANIED (code 2 in Q.10a): 1 → Q.28

RESPONDENT ARRIVED WITH TRAVEL PARTY:
ENTER IN NUMBERS FROM Q.10d:

Age	<input type="text"/>	<input type="text"/>	} → Q.29a
15 years or younger	<input type="text"/>	<input type="text"/>	

I'd like to ask you about your expenditure for this visit to Australia.....

SHOWCARD 21

Card 21 (PAUSE), shows what to include. Did you spend **any** money for fares or other items, on this visit?

- Yes 1 → Q.30a
- No 2 → Q.37 **ONLY WHEN CONVINCED THAT RESPONDENT SPENT NOTHING**

a Are you leaving Australia today with the same private travel party as you arrived with? That is including yourself, the (..... adults and children) in your travel party?

- Yes 1
- No 2 → Q.30a

b Did this private travel party stay together during your entire stay in Australia?

- Yes 1
- No 2 → Q.30a

Q.29c I'd like to ask you about the cost of your trip and your expenditure in Australia...

→ **SHOWCARD 22**

Card 22 (PAUSE), shows what information to include.

Can you give me answers on what was spent for all the (..... adults and children) in your travel party, or is it easier to answer for what you spent?

- Private Party 1 → Q.30b
- Personal Only 2
- No expenditure 3 → Q.37 **WHEN CONVINCED!**

Q.30a I am now going to ask you some questions about your own personal expenditure. This includes what you personally have spent and any costs paid for by a company or organisation overseas on your behalf. → Q.31

Q.30b I am now going to ask you some questions about the expenditure for you and your travel party. This includes what you personally have spent and any costs paid for by a company or organisation overseas on your behalf.

Q.31 CHECK Q.7a:
Did respondent travel on inclusive package tour (code 1 in Q.7a)?

- Yes 1 → Q.32a
- No 2 → Q.33a

→ SHOWCARD 19

Q.27a Looking at Card 19 (PAUSE), which, if any, of these places did you visit or attend while you were in Australia?

FOR EACH CIRCLED IN Q.27a:

Q.27b How many times did you visit or attend (*SPECIFY PLACE*) while you were in Australia?

	Q.27a	Q.27b			DK
		Once	Twice	Three or more	
National/State Parks/reserves/caves	01	1	2	3	9
Historic/heritage buildings, sites, monuments, towns..	02	1	2	3	9
Aboriginal sites	03	1	2	3	9
Craft workshops/studios to see the crafts being made.. . . .	04	1	2	3	9
Local or ethnic festival or fair.. . . .	05	1	2	3	9
Cinema or drive-in	06	1	2	3	9
Botanical gardens	07	1	2	3	9
Zoos, animal or marine parks.. . . .	08	1	2	3	9
Concerts of classical music.. . . .	09	1	2	3	9
Performances of popular music.. . . .	10	1	2	3	9
Theatre, dance opera musicals and other performing arts (eg variety, revue, comedians, circus).. . . .	11	1	2	3	9
Art galleries or museums..	12	1	2	3	9
Amusement/theme park or agricultural show.. . .	13	1	2	3	9
Study course, summer school, music camp or organised study/educational tour.. . . .	14	1	2	3	9
Casinos.. . . .	15	1	2	3	9
Winery.. . . .	16	1	2	3	9
NONE OF THESE	00	→ Q.27c			

→ SHOWCARD 20

Q.27c Looking at Card 20 (PAUSE), which, if any, of these activities did you attend or take part in while you were in Australia?

Swimming/surfing.. . . .	01
Bushwalking.. . . .	02
Scuba diving/snorkelling.. . . .	03
Tennis/squash.. . . .	04
Sailing.. . . .	05
Golf.. . . .	06
Cricket/football.. . . .	07
Rock climbing/mountaineering.. . . .	08
Horse riding/trail riding.. . . .	09
Game/deep sea/other fishing/angling..	10
Horse racing.. . . .	11
Motor racing.. . . .	12
Skiing.. . . .	13
Outback Safari Tours.. . . .	14
Wildflower viewing.. . . .	15
NONE OF THESE.. . . .	00

SHOWCARD 16

Looking at Card 16 (PAUSE), which of these places in Western Australia did you visit?

Perth	01
Perth:	
Kings Park	02
Casino	03
Pioneer World/Elizabethan Village	04
Cohunu Wildlife Park	05
Hillary's/Underwater World	06
Spearmentle	07
Mandurah Island	08
Swan Valley Wineries	09
Mandurah/Toodyay/Northam	
North East of Perth	10
Mandurah/Yanchep National Park	11
The Pinnacles	12
Mandurah/Rockingham	13
Mandurah Mia/Shark Bay	14
Three Rock	15
Margaret River/Margaret River Wineries	16
Mandurah/Karri Forests	17
Mandurah	18
Mandurah	19
Mandurah	20
NONE OF THESE	00

NO TERRITORY VISITED - ASK Q.25
Q.25 → Q.26

SHOWCARD 17

Looking at Card 17 (PAUSE), which of these places in the Northern Territory did you visit?

Uluru	01
Uluru National Park	02
Uluru National Park	03
Uluru Peninsula (Nhulunbuy)	04
Uluru Gorge (Nitmiluk)	05
Uluru	06
Uluru Creek	07
Uluru Marbles	08
Uluru Springs	09
Uluru Gap/Standley Chasm	
Uluru Helen	10
Uluru River/Aritunga	11
Uluru Rock (Uluru)	12
Uluru Canyon	13

**SHOWCARD 18****Q.26**

Looking at Card 18 (PAUSE), which of these places in Tasmania did you visit?

Hobart	01
Huon Valley	02
Port Arthur Historic Site	03
Maria Island	04
Launceston	05
Flinders Island	06
Evandale Historic Township	07
King Island	08
Stanley Historic Township	09
Gordon River via Strahan	10
Cradle Mountain National Park	11
Lake Pedder or Strathgordon	12
Ross Historic Township	13
Richmond Historic Township	14
NONE OF THESE	00

~~IF VICTORIA VISITED - ASK Q.21~~
OTHERWISE → Q.22

→ **SHOWCARD 13**

Q.21 Looking at Card 13 (PAUSE), which of these places in Victoria did you visit?

- Melbourne 01
- In Melbourne:
- Melbourne Shopping, Festivals and Events 02
- Museum of Victoria 03
- Royal Melbourne Zoo 04
- National Gallery of Victoria 05
- Old Melbourne Gaol 06
- Royal Botanic Gardens 07
- Victorian Arts Centre/Theatre/ Concert Hall 08
- Queen Victoria Market 09
- Captain Cooks Cottage, Fitzroy Gardens 10
- Como House 11
- Puffing Billy Railway, Belgrave 12
- Sovereign Hill at Ballarat 13
- Phillip Island/Penguin Parade 14
- Healesville Sanctuary 15
- The Twelve Apostles/ Great Ocean Road 16
- Dandenong Ranges 17
- The Grampians (Gariwerd) National Park 18
- Victorian Snowfields/Alpine Area 19
- Wineries 20
- NONE OF THESE 00

~~IF QUEENSLAND VISITED - ASK Q.22~~
OTHERWISE → Q.23

→ **SHOWCARD 14**

Q.22 Looking at Card 14 (PAUSE), Which of these places in Queensland did you visit?

- Brisbane** 01
- In Brisbane:
- Lone Pine Sanctuary 02
- Queensland Cultural Centre/Art Ctr./ Queensland Museum/Southbank. 03
- The Gold Coast** 04
- On the Gold Coast:
- Surfers Paradise 05
- Sea World 06
- Currumbin Bird Sanctuary 07
- Jupiter's Casino 08
- Dreamworld/Movieworld 09
- Sunshine Coast** 10
- On the Sunshine Coast:
- Big Pineapple 11
- Noosa 12
- Mooloolabah Wharf 13
- Stradbroke, Moreton Bay, Moreton Is. 14
- Fraser Island/Hervey Bay 15
- Townsville/Magnetic Island 16
- Green/Fitzroy Islands.. 17
- Whitsunday Islands** 18
- Cairns 19
- Kuranda Rail/Atherton Tablelands 20
- Port Douglas 21
- Daintree/Cape Tribulation.. 22
- Queensland National Parks 23
- Toowoomba, Darling Downs, Wineries 24
- Outback Queensland/Stockman's Hall of Fame 25
- NONE OF THE ABOVE 00

~~IF SOUTH AUSTRALIA VISITED - ASK Q.23~~
OTHERWISE → Q.24

→ **SHOWCARD 15**

Q.23 Looking at Card 15 (PAUSE), which of these places in South Australia did you visit?

- Adelaide**.. . . . 01
- In Adelaide:
- North Terrace, (eg.State Museum/Art Gallery/Old Parl. House)02
- Adelaide Casino 03
- Glenelg.. . . . 04
- Adelaide Hills 05
- Cleland Wildlife Park 06
- The Barossa Valley 07
- Hahndorf 08
- Clare Valley 09
- Burra 10
- Victor Harbor 11
- Flinders Ranges or Wilpena Pound or Arkaroola 12
- Kangaroo Island 13
- Coober Pedy Opal Fields 14
- Mount Gambier 15
- River Murray Region 16
- Port Lincoln 17
- NONE OF THESE 00

Yes 1

→ **SHOWCARD 9**

Q.17a Looking at Card 9 (PAUSE), which of these forms of transport did you use during your visit? (PROBE: Any others?)

RECORD ALL MENTIONED IN LEFT HAND COLUMN

Q.17b **NB : ONLY IF TWO OR MORE STOPOVERS RECORDED ON ACCOMMODATION GRID ASK Q.17b, OTHERWISE GO TO Q.18.**

For travelling **between** your stopovers in Australia, which **one** of those forms of transport did you use **most often**?

RECORD ONE ONLY IN RIGHT HAND COLUMN

	Q.17a	Q.17b
Private or company car	01	01
Rental car	02	02
Self-drive van, motor-home or camper van.. . . .	03	03
Taxi or chauffeur driven hire car	04	04
Domestic or government airline.. . . .	05	05
Long distance train (non-suburban)	06	06
Long distance coach or bus.. . . .	07	07
Day or half day bus tour	08	08
Ship, boat, ferry	09	09
Motorcycle, motorbike.. . . .	10	10
Hitch-hiking.. . . .	11	11
Local public transport.. . . .	12	12
Other (SPECIFY)		
.....	98	98

Q.18 I now want to ask you about some of the places you may have visited on this trip to Australia.

→ **SHOWCARD 10**

Looking at Card 10 (PAUSE), which of these States did you visit on this trip?

New South Wales	1
ACT (Canberra)	2
Victoria	3
Queensland	4
South Australia	5
Western Australia	6
Northern Territory	7
Tasmania	8

IF NSW VISITED - ASK Q.19
OTHERWISE → Q.20

→ **SHOWCARD 11**

Q.19 Looking at Card 11 (PAUSE), which of these places or activities in New South Wales did you visit?

Sydney	01
In Sydney:	
Sydney Opera House	02
Sydney Tower(Centrepont)	03
Sydney Shopping	04
Sydney Day Tours/Harbour Cruises	05
Bondi/Manly/Sydney Beaches	06
The Rocks/Historical Suburbs	07
Darling Harbour	08
Live Theatre/Music Concerts	09
Museums/Art Galleries	10
Wineries	11
Zoos/Wildlife Sanctuaries/Aquariums	12
National Parks	13
Beaches Outside Sydney	14
Farm Experiences	15
Festivals/Events	16
Aboriginal Culture/Attractions	17
Extended Bus/Car Tour	18
Snow/Skiing	19
NONE OF THESE	00

IF ACT VISITED - ASK Q.20
OTHERWISE → Q.21

→ **SHOWCARD 12**

Q.20 Looking at Card 12 (PAUSE), which of these places in the Australian Capital Territory did you visit?

Canberra	01
In Canberra:	
Australian War Memorial	02
New Parliament House	03
National Science and Technology Centre	04
Royal Australian Mint	05
Tidbinbilla Nature Reserve	06
Regatta Point Planning Exhibition	07
Black Mountain Tower	08
High Court of Australia	09
Cockington Green	10
National Gallery	11
Botanic Gardens	12
Canberra Casino.. . . .	13
NONE OF THESE	00

TRAVEL & ACCOMMODATION GRID

CODING:
NO. STOPOVERS

Q.16c What was the (.....) city or town you stayed in for one or more nights on this trip to Australia?
(IF NECESSARY, SHOW MAP - CIRCLE CODE FOR OR WRITE IN NAME)

Q.16d How many nights did you stay in (say place)?

→ **SHOWCARD 8**

Q.16e Looking at Card 8 (PAUSE), which of these types of accommodation did you use in (say place)?
(ENTER CODE OR WRITE IN IF OTHER - NOTE: IF MORE THAN ONE USE TWO COLUMNS)

→ **SHOWCARD 9**

Q.16f Looking at Card 9 (PAUSE), what form of transport did you use to get from (previous stopover) to (this stopover)

Q.16c NAME OF STOPOVER

1st STOPOVER	2nd STOPOVER	3rd STOPOVER	4th STOPOVER	5th STOPOVER
Sydney 104 Other N.S.W. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Sydney 104 Other N.S.W. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Sydney 104 Other N.S.W. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Sydney 104 Other N.S.W. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Sydney Other N.S.W. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>
Canberra 117	Canberra 117	Canberra 117	Canberra 117	Canberra
Melbourne 201 Other Victoria .. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Melbourne 201 Other Victoria .. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Melbourne 201 Other Victoria .. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Melbourne 201 Other Victoria .. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Melbourne .. Other Victoria .. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>
Brisbane 302 Townsville 311 Cairns 312 Gold Coast 301 Other Q'land ... <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Brisbane 302 Townsville 311 Cairns 312 Gold Coast 301 Other Q'land ... <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Brisbane 302 Townsville 311 Cairns 312 Gold Coast 301 Other Q'land ... <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Brisbane 302 Townsville 311 Cairns 312 Gold Coast 301 Other Q'land ... <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Brisbane Townsville .. Cairns Gold Coast .. Other Q'land .. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>
Adelaide 404 Other S.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Adelaide 404 Other S.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Adelaide 404 Other S.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Adelaide 404 Other S.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Adelaide .. Other S.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>
Perth 507 Other W.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Perth 507 Other W.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Perth 507 Other W.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Perth 507 Other W.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Perth Other W.A. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>
Hobart 601 Launceston 605 Other Tasmania . <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Hobart 601 Launceston 605 Other Tasmania . <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Hobart 601 Launceston 605 Other Tasmania . <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Hobart 601 Launceston 605 Other Tasmania . <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Hobart .. Launceston .. Other Tasm. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>
Darwin 801 Alice Springs 807 Ayers Rock 806 Other N.T. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Darwin 801 Alice Springs 807 Ayers Rock 806 Other N.T. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Darwin 801 Alice Springs 807 Ayers Rock 806 Other N.T. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Darwin 801 Alice Springs 807 Ayers Rock 806 Other N.T. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>	Darwin Alice Sprng .. Ayers Rock .. Other N.T. <div style="border: 1px solid black; width: 40px; height: 15px; margin-top: 5px;"></div>

Q.16d NO. OF NIGHTS

--	--	--	--

Q.16e TYPE OF ACCOMMODATION

--	--	--	--

Q.16f TYPE OF TRANSPORT

Q.16g How many nights did you spend travelling in Australia - in trains, planes, buses and so on?

WRITE IN

NOW CHECK TOTALS:

Total stopover nights (this page)

Stopover nights from continuation sheets

Nights spent travelling

TOTAL

IS THIS THE SAME
Q.5a? IF NOT - CHE

14. In which city did you go through Customs and Immigration?

- Sydney 01
- Melbourne 02
- Brisbane 03
- Perth 04
- Adelaide 05
- Darwin 06
- Townsville.. . . . 07
- Cairns 08
- Hobart 09
- Other (SPECIFY)

..... 98

15. When you arrived in Australia, did you use a domestic flight to travel to another city before spending your first night in Australia?

- Yes.. 1
- No.. 2 → Q.15d

16. To which city did you travel on the domestic flight?

- Sydney 01
- Melbourne 02
- Brisbane 03
- Perth 04
- Adelaide 05
- Darwin 06
- Townsville.. . . . 07
- Cairns 08
- Hobart 09
- Other (SPECIFY)

..... 98

17. Today, did you travel from another city on a domestic flight before arriving at this international terminal?

- Yes.. 1
- No.. 2 → Q.16a

18. From which city did you travel on the domestic flight?

- Sydney 01
- Melbourne 02
- Brisbane 03
- Perth 04
- Adelaide 05
- Darwin 06
- Townsville.. . . . 07
- Cairns 08
- Hobart 09
- Other (SPECIFY)

..... 98

19. Did respondent stay for one or more nights in Australia?

- Yes 1 → Q.16b
- No 2 → Q.17a

Q.16b COMPLETE TRAVEL GRID ON FOLLOWING PAGE FOR ALL STOPOVERS.

USE CONTINUATION SHEETS IF NECESSARY AND STAPLE TO BACK OF TRAVEL GRID

SECTION IV: TRAVEL ARRANGEMENTS

→ **SHOWCARD 5**

Q.13a Looking at Card 5 (PAUSE), which, if any, of these travel arrangements did you, or any other person or company on your behalf, pay for in (country of residence) for this v (PROBE : Any others?)

→ **SHOWCARD 6 - FOR EACH ITEM MENTIONED IN Q.13a ASK :**

Q.13b Looking at Card 6 (PAUSE), which of these booking agents in (country of residence) booked (item..)? **CIRCLE OR WRITE IN ONE RESPONSE ONLY**

Q.13a TRAVEL ARRANGEMENTS

Q.13b BOOKING AGENTS

Q.13a TRAVEL ARRANGEMENTS	AIRLINE	OWN COMPANY	TRAVEL AGENT	TOUR OPERATOR	OTHER (SPECIFY)
International (air/sea) fare 01	1	2	3	4	8
Airfares within Australia 02	1	2	3	4	8
Organised tours in Australia 03	1	2	3	4	8
Most accommodation in Australia 04	1	2	3	4	8
Some accommodation in Australia 05	1	2	3	4	8
Most ground transport within Australia 06	1	2	3	4	8
Some ground transport within Australia 07	1	2	3	4	8
Most meals in Australia 08	1	2	3	4	8
Some meals in Australia 09	1	2	3	4	8
Entertainment in Australia 10	1	2	3	4	8
Other items (SPECIFY MOST EXPENSIVE ONE)					
..... 98	1	2	3	4	8
NONE/NO ARRANGEMENTS 00 →	Q.14				

→ **SHOWCARD 7**

Q.14 Card 7 (PAUSE) lists some different types of air tickets. On which one of these tickets did you arrive in Australia? (CHECK TICKET IF NECESSARY)

- An advance purchase fare (eg APEF, APEX, EPIC, BUDGET) C
- An inclusive tour fare (includes all or most accommodation) C
- An excursion fare (where minimum and maximum length of stay are specified) C
- A round-the-world or round-the-Pacific fare C
- A normal economy fare with no restrictions C
- A special travel industry concession (free or reduced rate) C
- Frequent Flyer 07
- A business class fare (eg Clipper, Cabin, Club Class) 08
- A first class fare paid at full rate 09
- No fare paid - private company or government flight 10
- Did not arrive by air 11
- Other type (SPECIFY) 98

SHOWCARD 3

Looking at Card 3 (PAUSE), when you arrived in Australia and completed your INCOMING PASSENGER CARD, which one of these did you mark as your **main** reason for coming to Australia?

- In transit.. 01
- Convention 02
- Business 03
- Accompanying business visitor 04
- Visiting relatives.. 05
- Holiday 06
- Employment 07
- Education 08
- Other reasons (SPECIFY) 98

SHOWCARD 4

Looking at Card 4 (PAUSE), what **other** reasons, if any, did you have for this visit to Australia? (PROBE: Any others?)

- In transit 01
- Convention, conference, trade-fair, exhibition 02
- Business 03
- Accompanying business visitor.. 04
- Visiting relatives.. 05
- Holiday/Pleasure.. 06
- Employment.. 07
- Education.. 08
- Visiting friends.. 09
- Accompanying convention visitor 10
- Working holiday.. 11
- Other reasons (SPECIFY) 98
- NO OTHER REASONS 00

12a In Australia, did you attend a convention, trade fair or conference or accompany someone who did?

- Yes 1
- No 2

12b In Australia, did you participate in or watch any sporting event?

- Yes 1
- No 2 → Q.13a

Q.12c Did you find out about this event before leaving (country of residence)?

- Yes 1
- No 2 → Q.13a

Q.12d How did you find out about this event?

- Articles in newspapers or magazines 1
- Advertising in newspapers or magazines 2
- Australian Tourist Commission information.. 3
- Travel agent.. 4
- Clubs/Societies 5
- Other (SPECIFY) 8

TRAVEL & ACCOMMODATION GRID
(CONTINUATION SHEET)

Q'NAIRE No.:

What was the (.....) city or town you stayed in for one or more nights on this trip to Australia?
(IF NECESSARY, SHOW MAP - CIRCLE CODE FOR OR WRITE IN NAME)

How many nights did you stay in (say place)?

SHOWCARD 8

Looking at Card 8 (PAUSE), which of these types of accommodation did you use in (say place)?

(ENTER CODE OR WRITE IN IF OTHER - NOTE: IF MORE THAN ONE USE TWO COLUMNS)

SHOWCARD 9

Looking at Card 9 (PAUSE), what form of transport did you use to get from (previous stopover) to (this stopover)?

NAME OF STOPOVER

STOPOVER	... STOPOVER	... STOPOVER	... STOPOVER	... STOPOVER
Sydney .. 104 Other N.S.W. ... <input type="text"/>	Sydney .. 104 Other N.S.W. ... <input type="text"/>	Sydney .. 104 Other N.S.W. ... <input type="text"/>	Sydney .. 104 Other N.S.W. ... <input type="text"/>	Sydney .. 104 Other N.S.W. ... <input type="text"/>
Canberra .. 117 <input type="text"/>	Canberra .. 117 <input type="text"/>	Canberra .. 117 <input type="text"/>	Canberra .. 117 <input type="text"/>	Canberra .. 117 <input type="text"/>
Melbourne .. 201 Other Victoria .. <input type="text"/>	Melbourne .. 201 Other Victoria .. <input type="text"/>	Melbourne .. 201 Other Victoria .. <input type="text"/>	Melbourne .. 201 Other Victoria .. <input type="text"/>	Melbourne .. 201 Other Victoria .. <input type="text"/>
Brisbane .. 302 Townsville .. 311 Cairns .. 312 Gold Coast .. 301 Other Q'land ... <input type="text"/>	Brisbane .. 302 Townsville .. 311 Cairns .. 312 Gold Coast .. 301 Other Q'land ... <input type="text"/>	Brisbane .. 302 Townsville .. 311 Cairns .. 312 Gold Coast .. 301 Other Q'land ... <input type="text"/>	Brisbane .. 302 Townsville .. 311 Cairns .. 312 Gold Coast .. 301 Other Q'land ... <input type="text"/>	Brisbane .. 302 Townsville .. 311 Cairns .. 312 Gold Coast .. 301 Other Q'land ... <input type="text"/>
Adelaide .. 404 Other S.A. <input type="text"/>	Adelaide .. 404 Other S.A. <input type="text"/>	Adelaide .. 404 Other S.A. <input type="text"/>	Adelaide .. 404 Other S.A. <input type="text"/>	Adelaide .. 404 Other S.A. <input type="text"/>
Perth .. 507 Other W.A. <input type="text"/>	Perth .. 507 Other W.A. <input type="text"/>	Perth .. 507 Other W.A. <input type="text"/>	Perth .. 507 Other W.A. <input type="text"/>	Perth .. 507 Other W.A. <input type="text"/>
Hobart .. 601 Launceston .. 605 Other Tasmania .. <input type="text"/>	Hobart .. 601 Launceston .. 605 Other Tasmania .. <input type="text"/>	Hobart .. 601 Launceston .. 605 Other Tasmania .. <input type="text"/>	Hobart .. 601 Launceston .. 605 Other Tasmania .. <input type="text"/>	Hobart .. 601 Launceston .. 605 Other Tasmania .. <input type="text"/>
Darwin .. 801 Alice Springs .. 807 Ayers Rock .. 806 Other N.T. <input type="text"/>	Darwin .. 801 Alice Springs .. 807 Ayers Rock .. 806 Other N.T. <input type="text"/>	Darwin .. 801 Alice Springs .. 807 Ayers Rock .. 806 Other N.T. <input type="text"/>	Darwin .. 801 Alice Springs .. 807 Ayers Rock .. 806 Other N.T. <input type="text"/>	Darwin .. 801 Alice Springs .. 807 Ayers Rock .. 806 Other N.T. <input type="text"/>

NO. OF NIGHTS

TYPE OF ACCOMMODATION

TYPE OF TRANSPORT

TOTAL NUMBER OF STOPOVER NIGHTS COVERED BY THIS SHEET:

I confirm that this is a true and accurate record of an interview conducted by:

PRINT NAME:

RECORD DATE: (DD/MM/YY)

				9	3
--	--	--	--	---	---

SIGNED:

INTERVIEWER NUMBER:

--	--	--	--	--	--

MAKE SURE THAT THIS QUESTIONNAIRE AND ANY TRAVEL GRID CONTINUATION SHEETS ARE STAPLED TOGETHER AND THAT THE QUESTIONNAIRE NUMBER IS WRITTEN ON THE FRONT OF THIS QUESTIONNAIRE AND ON ALL CONTINUATION SHEETS.

STAPLE SHEETS IN THE FOLLOWING ORDER:

- * MAIN QUESTIONNAIRE
- * GREEN CONTINUATION SHEET(S) (if used)

.....	00
.....	09
.....	12
.....	13
.....	16
.....	18
.....	20
.....	24
.....	25
.....	26
.....	46
.....	47
.....	50

(SPECIFY)

--	--

Thank you very much for your cooperation. We would like you to accept this item as a token of our appreciation.
DO NOT OVER PIN)

ORD LANGUAGE OF INTERVIEW:

.....	00
.....	13
.....	18
.....	20
.....	25
.....	26

(SPECIFY)

--	--

ORD FLIGHT NUMBER FROM CONTACT SHEET:

--	--	--	--	--	--	--

ORD FLIGHT GROUP:

--	--

..... am/pm

LENGTH: (mins)

--	--

SECTION X: CLASSIFICATION

Q.46 Finally, just a couple of questions for classification purposes.

ASK IF NECESSARY

Which country do you live in ?

- England 102
- Wales 103
- Scotland 104
- Northern Ireland 105
- Republic of Ireland. 106

- Canada 005
- France. 221
- Germany. 212
- Hong Kong 302
- Italy. 227
- Japan 500
- Malaysia 304
- Netherlands 222
- New Zealand 801
- Singapore 303
- Switzerland. 223
- Indonesia. 306
- U.S.A. 001
- Other(SPECIFY)

--	--	--

Q.47a CHECK Q.47b BELOW:
Does the respondent live in any of the countries listed in Q.47b below?

- Yes 1 → Q.47b
- No 2 → Q.50

Q.47b ACCORDING TO WHICH COUNTRY RESPONDENT LIVES IN, SHOW APPROPRIATE CARD AND CHECK FOR FURTHER INFORMATION

Which (.....) do you live in?

COUNTRY	CARD	ASK FOR
England	26	COUNTY
Wales	27	COUNTY
Scotland	28	COUNTY
Northern Ireland	29	COUNTY
Republic of Ireland	30	COUNTY
Canada	31	PROVINCE
France	32	REGION
Germany	33	STATE
Italy	34	PROVINCE
Japan	35	PREFECTURE
Netherlands	36	AREA
New Zealand	37	PROVINCE
Switzerland	38	CANTON
USA	39	STATE

ENTER CODE:

--	--	--

Q.48 CHECK Q.46:

Does the respondent live in the USA?

- Yes 1 → Q.49
- No 2 → Q.50

Q.49 What is your ZIP code?

--	--	--	--	--

Q.50 RECORD SEX:

- Male 1
- Female 2

→ **SHOWCARD 40**

Q.51 Looking at Card 40 (PAUSE), which of these age groups do you fall within?

- 15 to 19 01
- 20 to 24 02
- 25 to 29 03
- 30 to 34 04
- 35 to 39 05
- 40 to 44 06
- 45 to 49 07
- 50 to 54 08
- 55 to 59 09
- 60 to 64 10
- 65 and over 11

→ **SHOWCARD 41**

Q.52 Looking at Card 41 (PAUSE), which of these best describes your occupation?

ENTER CODE:

--	--

VIEWERS TO ASK Q.45d - Q.45j IN
 ARY, FEBRUARY & MARCH ONLY.

CARD 25

Looking at Card 25 (PAUSE), which of these facilities have you used since you arrived at the terminal today?

FOR EACH OF THE CODES 1 TO 5 CIRCLED IN Q.45g:
 Approximately how much money did you spend (SPECIFY FACILITY) today?

	Q.45d	Q.45e
Bar..	1 A\$	<input type="text"/>
Buffet/cafeteria..	2 A\$	<input type="text"/>
Australian produce shop..	3 A\$	<input type="text"/>
Newsagent/gift shop..	4 A\$	<input type="text"/>
Duty free shop..	5 A\$	<input type="text"/>
Bank/money exchange..	6	
None of these..	7	→ Q.45g

CK Q.45d:
 codes 1, 2, 3, 4, 5 & 6 all circled in Q.45g?

1 → Q.45i
 2 → Q.45g

Looking back at Card 25 (PAUSE), are there any airport facilities that you haven't used but you intend to use before you depart?

FOR EACH OF THE CODES 1 TO 5 CIRCLED IN Q.45g:

Q.45h

Approximately how much money do you intend to spend at the (SPECIFY FACILITY) before you depart?

	Q.45g	Q.45h
Bar..	1 A\$	<input type="text"/>
Buffet/cafeteria..	2 A\$	<input type="text"/>
Australian produce shop..	3 A\$	<input type="text"/>
Newsagent/gift shop..	4 A\$	<input type="text"/>
Duty free shop..	5 A\$	<input type="text"/>
Bank/money exchange..	6	
None of these..	7	→ Q.45i

Q.45i

On this trip, in total, approximately how much money have you spent altogether on duty free shopping...?

at the airport?.. \$

somewhere else?.. \$

Q.45j

How many people came to the airport today to farewell you?

People..

SECTION VIII: IMPRESSIONS OF AUSTRALIA

→ **SHOWCARD 24**

Q.44 Looking at Card 24 (PAUSE), please tell me how satisfied you were with certain aspects of your stay in Australia. How satisfied were you with.....?
(READ OUT: RECORD CODE OR "9" FOR DK OR NOT APPLICABLE)

- The amount of tourist information available in Australia.
- The service provided in hotels, restaurants etc.
- The quality of hotel or motel rooms
- The cost of hotel or motel rooms
- The cost of domestic airfares
- The cost of other forms of transport
- The convenience and availability of public transport
- The times when shops are open
- The cost of goods in the shops - gifts, clothes and so on
- The times when you can buy a drink - that is when bars or pubs are open
- Airport facilities

Q.45a In the next five years, do you think you might return to Australia to **visit relatives** or to have a **holiday**? We are not talking about visits you might have for business reasons.

Yes 1
 No 2 → **Q.45c**
 Don't know 9 → **Q.45d**

Q.45b Which places in Australia would you like to when you come back next time? (PROBE: others?)

IF STATE OR TERRITORY PROBE:
 Any particular part of (state/territory)?

- Sydney 01
- Other NSW 02
- NSW (unspecified) 03
- ACT/Canberra 04
- Melbourne 05
- Other Victoria 06
- Victoria (unspecified) 07
- Brisbane 08
- Gold Coast 09
- Cairns. 10
- Other Queensland 11
- Queensland (unspecified) 12
- Adelaide 13
- Other SA 14
- South Australia (unspecified) 15
- Perth 16
- Other WA 17
- Western Australia (unspecified) 18
- Hobart 19
- Other Tasmania 20
- Tasmania (unspecified) 21
- Darwin 22
- Alice Springs 23
- Ayers Rock 24
- Other NT 25
- Northern Territory (unspecified) 26
- NO OTHER PLACES 27
- EVERYWHERE 28

WRITE IN IF NOT SURE OF LOCATION:

.....

→ **NOW GO TO Q.45d**

Q.45c What's the main reason you will not be visiting Australia again within the next 5 years for a holiday?

- International fares too expensive
- Too expensive in Australia
- Too expensive overall
- Prefer to go/like to try elsewhere
- Too far away
- Other reasons (SPECIFY)

.....

Before you left (*country of residence*) did you get any information about Australia for this visit?

Yes 1
 No 2 → Q.40

Where did you get that information?
 (PROBE: anywhere else?) DO NOT AID!

Airline 01
 Travel Agent 02
 Tour Operator 03
 Travel Book or Guide 04
 Friend or relative living in
 Australia 05
 Friend or relative who has
 visited Australia 06
 Australian Consulate/
 Embassy 07
 Australian Tourist Commission .. 08
 Newspaper or Magazine/Media .. 09
 The library 10
 Somewhere else (SPECIFY)
 98

Does respondent live in Japan?

Yes 1 → Q.43b
 No 2 → Q.44

Q.43b CHECK Q.11a AND Q.11b (Page 3):

Did respondent give "Holiday" (code 6 in Q.11a or 11b) as a reason for coming to Australia in Q.11a or Q.11b?

Yes 1 → Q.43c
 No 2 → Q.44

Q.43c Are you on your honeymoon?

Yes 1
 No 2 → Q.44

Q.43d Are you on an organised honeymoon tour?

Yes 1
 No 2

CHECK Q.5b:

Does number of nights in Q.5b exceed 365?

Yes 1 → Q.42a
 No 2 → Q.41

In the 12 months before leaving (*country of residence*) did you see or hear any advertising for Australia. . . .

	Yes	No
On Television?	1	2
On Radio?	1	2
In Magazines?	1	2
In Newspapers?	1	2

Before leaving (*country of residence*) did you see any travel articles or features about Australia in newspapers or magazines?

Yes 1
 No 2

Did you see any films or television programmes on Australia?

Yes 1
 No 2

AUSTRALIAN EXPENDITURE ONLY

Q.35a How much of the (*total in Q.34b*) was charged to International Credit Cards?

AMOUNT:

CURRENCY:

CONVERSION TO A\$

\$

Q.35b How much of the (*total in Q.34b*) was paid in Australia by cash, travellers cheques, bank drafts or letters of credit?

AMOUNT:

CURRENCY:

CONVERSION TO A\$

\$

Q.35c CHECK Q.34b and Q.35a/b:

Is amount in Q.34b the same as the total amount in Q.35a and Q.35b?

Yes 1 → Q.36a

No 2 → Q.35d

Q.35d Apart from any amounts to be paid to International Credit Card companies, will any of the (*total in Q.34b*) be paid **after** you leave Australia?

Yes 1

No 2 → Q.35f

Q.35e How much?

AMOUNT:

CURRENCY:

CONVERSION TO A\$

\$

Q.35f NOW CHECK THAT THE TOTAL IN Q.35a, b & e EQUALS TOTAL IN Q.34b. ADJUST IF REQUIRED.

Q.36a Of that (*total in Q.34b*) was any from bank accounts or deposits in Australia?

Yes 1

No 2

Q.36b About how much?

A\$

Q.36c Did you (or any member of your party) receive any income from within Australia during this visit?

Yes 1

No 2

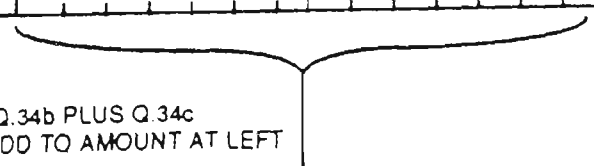
Q.36d About how much income was received?

A\$

Q.37 (In addition to the (*total in Q.34b*)) of persons or companies in Australia any of **your** transport, tours, paid accommodation, meals or entertain:

Yes 1

No 2

<p>Q.34a</p> <p>Q.34b</p> <p>Q.34c</p>	<p>Q.34a</p> <p>ANY EXPENDITURE ON ITEMS</p> <p>Yes No</p>	<p>Q.34b</p> <p>AUSTRALIAN EXPENDITURE AMOUNT</p> <p>AS</p>	<p>Q.34c</p> <p>PRE-PAID EXPENDITURE AMOUNT</p> <p>AS</p>
<p>Did you spend anything on item 1?</p>			
<p>How much did (you/your party) spend on (say item) whilst in Australia? Include any amounts still to be paid.</p>			
<p>Did you pay for any of your (say item) before arriving in Australia? IF YES How much?</p>			
<p>Train or coach fares for long distance travel in Australia</p>	<p>1 2</p>		
<p>Organised tours not including accommodation. Include tours which combine coach, train or plane travel.</p>	<p>1 2</p>		
<p>Organised tours including accommodation. Include tours which combine coach, train or plane travel.</p>	<p>1 2</p>		
<p>Airline fares for travel within Australia</p>	<p>1 2</p>		
<p>International airfares bought in Australia</p>	<p>1 2</p>		
<p>Taxis, limousines</p>	<p>1 2</p>		
<p>Self-drive cars, rent-a-cars, camper vans. Please exclude petrol costs</p>	<p>1 2</p>		
<p>Petrol and oil costs for self-drive cars or other vehicles driven</p>	<p>1 2</p>		
<p>Shopping, includes gifts, souvenirs, clothing, books, jewellery and duty free goods you may just have bought or intend to buy before departing</p>	<p>1 2</p>		
<p>Food, drink and accommodation. Include restaurant and bar expenditure</p>	<p>1 2</p>		
<p>Horse racing and gambling. Include casinos, horse racing, trotting, etc</p>	<p>1 2</p>		
<p>Entertainment such as theatres, movies, zoos, museums, nightclubs, recreation</p>	<p>1 2</p>		
<p>Convention registration fees</p>	<p>1 2</p>		
<p>Departure tax</p>	<p>1 2</p>		
<p>Education fees (ask only if this is visit's purpose)</p>	<p>1 2</p>		
<p>Any other expenditure? Please include public transport, postage, telephone, fax and any other. (SPECIFY)</p> <p>.....</p> <p>.....</p>	<p>1 2</p>		
<p>CALCULATE TOTAL FOR Q.34b AND Q.34c</p>			
<p>TRANSFER AMOUNT FROM Q.32e OR Q.33e TO THIS LINE:</p> <p>.....</p>	<p>TOTAL IN Q.34b PLUS Q.34c SHOULD ADD TO AMOUNT AT LEFT</p> 		

SECTION II: TRAVEL GROUPS

1a Did you arrive in Australia travelling on an **inclusive package** tour? That is, before you arrived, did you buy a package tour that included your international (air/ship) fare and **all or most of your** Australian accommodation?

Yes 1
 No 2 → Q.8

7b Was **every** night's accommodation in Australia covered by your inclusive tour payment?

Yes 1 → Q.8
 No 2

7c How many nights **not** covered by your inclusive tour payment were spent on paid accommodation?

Nights..

7d How many nights were spent in unpaid accommodation - staying with friends or relatives for example?

Nights..

→ **SHOWCARD 1**

1.8 Looking at Card 1 (PAUSE), did you travel to Australia on a **group tour**? That is, did you come with a group of people who were associated in some way?

Card 2 shows some examples of what we mean by "group tour".

Yes 1
 No 2 → Q.9c

1.9a Is that....

- A group tour as part of a job bonus or reward? 1
- A sporting or special interest group tour?..... 2
- An ordinary group holiday tour? 3
- A business or convention group tour? 4
- Other (SPECIFY)

..... 8

Q.9b About how many persons, altogether, came to Australia in your tour group?

Number → Q.10a

Q.9c Is your trip part of a job bonus or reward for a high level of sales?

Yes 1
 No 2

Q.10a When you arrived in Australia, were you travelling alone or were you accompanied by a family member, friend or business colleague?

Accompanied 1
 Unaccompanied 2 → Q.11a

Q.10b How many of your family or friends arrived with you?

Number

Q.10c So that makes a total of (number in Q.10b + 1) including yourself?

Number

Q.10d How many of these (number in Q.10c) people were:

15 years and over?

3 to 14 years?

Under 3 years?.....

Q.10e How many of those (say number) of (say age group) were males?

15 years and over

3 to 14 years

Under 3 years

Q.10f Of the (number in Q. 10c) people who arrived in Australia together, how many **usually** travelled together **within** Australia?

Number

→ **SHOWCARD 2**

Q.10g Looking at Card 2 (PAUSE), which one of these statements best describes your travel party?

Adult male and female - such as husband and wife..... 1

Family group - parents and children..... 2

Family group - parents, children and other relatives or friends 3

Family group - couple with other adults but no children 4

Friends or relatives travelling together. 5

Business associates travelling together with or without spouse. 6

APPENDIX 6

Sovereign Hill, Ballarat

Mount Buller

Mount Hotham

Lakes Entrance

Hepburn Springs

14) Are you satisfied with the facilities at the visiting spots? Yes No

15) How did you find out about the above places?

Victorian tourism brochures.

Magazine

Word of mouth

16) Mode of transport: Own vehicle Arranged tours Public transport

17) Would you revisit the places you have been to? Yes No

18) If not, why not:

19) Type of accommodation:

Camping

Motel

Caravan

Others

20) Are you interested in packages like student group tours? Yes No

21) Has your University done enough to promote tourism? Yes No

22) Have you seen or heard any advertising for Victoria? Yes No

23) Has Tourism Victoria done enough to promote Student tourism? Yes No

PILOT TEST / REVIEW

A selected sample of around 50 students eg 5 to 7 per country of origin will be surveyed by a questionnaire for a pilot study. This would enable us to check if the questionnaire needs any further refinement.

On getting the filled in questionnaires from students, a review would be done and questionnaire finalised for the survey.

SURVEY / FOLLOW UP

Questionnaires will be posted to the population sample, enclosing a stamped self-addressed envelope. The addresses of the sample students will be obtained thorough the office of the Consortium of Victorian Universities.

The questionnaire is to be posted during the last week of July, will be followed up during August.

CODING DATA / KEYING TO COMPUTER FOR STATISTICAL ANALYSIS

1. Questions will be encoded, and entered into the computer.
2. Analyses - The data will be analysed using a SAS programme. The analysis will produce descriptive statistics and test the hypotheses.

REPORT

Once the data analyses is completed and conclusions drawn from the findings, the result of the research and recommendations will be written into a formal report.

As a result of this report, Tourism Victoria will ;

- Have an estimate of how much students spend on tourism
- Have an estimate of the contribution of Friends and Relatives of students to the tourism economy
- Know what factors relate to the expenditure on tourism to Victoria by overseas students and their friends and relatives

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Meeting Visitor Expectations and Enhancing Visitor Enjoyment, AGPS 1993, Fyshwick ACT.

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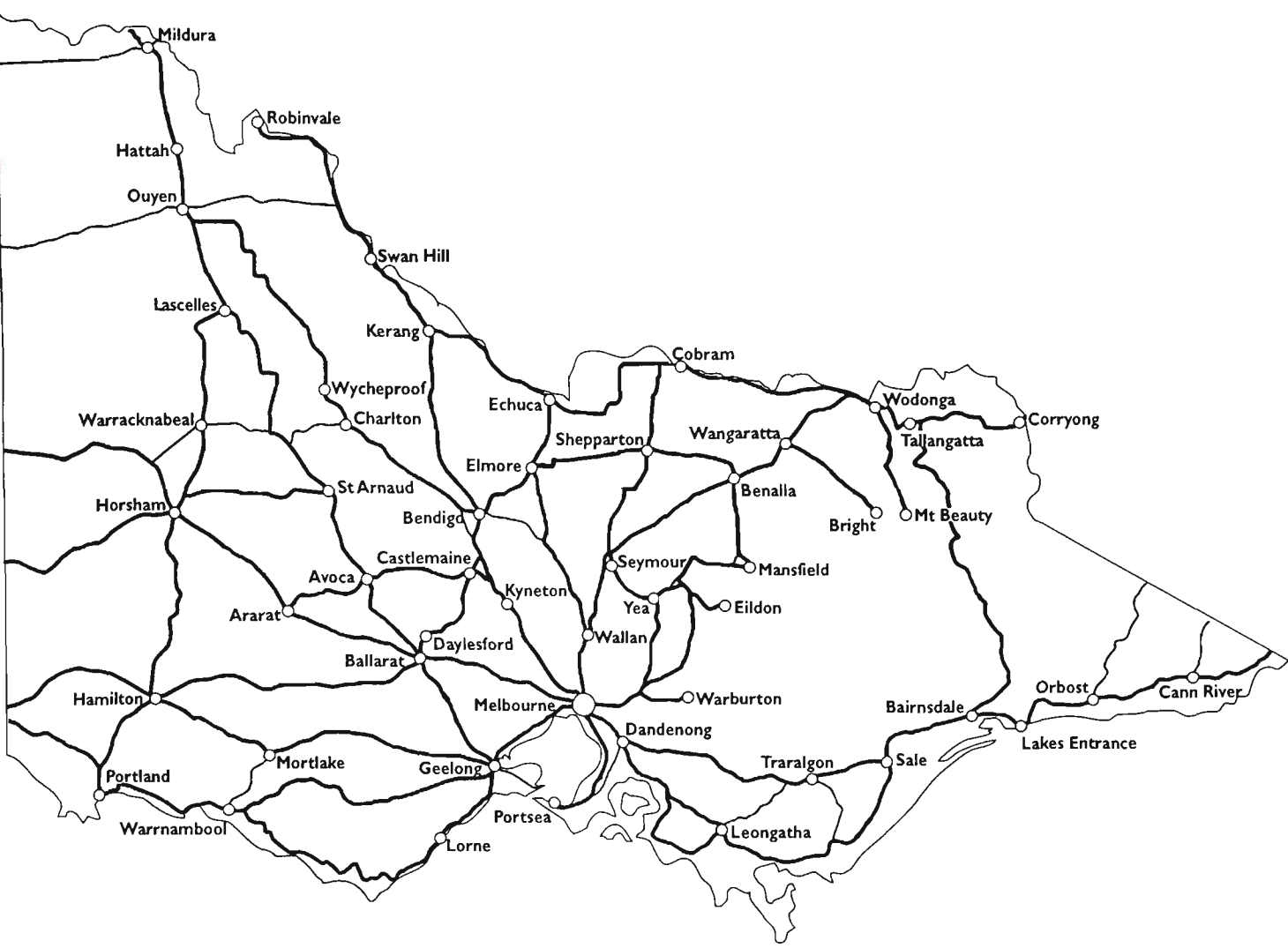
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APPENDIX 7

A Survey of Overseas Students' Tourism Activity





Q47 Are you married or single?

- (✓) Married..... 1
- Single..... 2

Q48 Who do you live with while studying in Victoria?

- (Please tick one box.) (✓)
- University accommodation..... 1
 - Share with other students..... 2
 - I live by myself..... 3
 - Wife /Husband /Partner..... 4
 - Wife /Husband /Partner and children..... 5
 - Other family or relatives..... 6
 - Other (specify)_____ 7

Q49 Are you working part time?

- (✓) Yes..... 1
- No..... 1

Q50 Do you have any other comments, suggestions or criticisms that you would like to make about tourism or travel services in Victoria?

Dear student

Victoria University together with Tourism Victoria are conducting a research project titled 'The Impact of Overseas Students on Tourism in Victoria'. The main aim of this study is to find out about the tourism interests and tourism information needs of overseas students, as well as to identify the importance and value of overseas students to tourism in Victoria.

We are asking universities to contact overseas students and to send them the questionnaire enclosed. We would be grateful if you would complete the enclosed questionnaire and **return it promptly in the reply paid envelope** [redacted]

All information you provide will be kept strictly confidential and details from the survey will only be used by Victoria University and Tourism Victoria for planning tourism services in the future. If you have any queries about the survey, please contact Michael Hauser at Tourism Victoria on (03) 9653 9777

Thank you for taking the time to help us understand more about your travel in Victoria, we greatly appreciate your cooperation.

May we take this opportunity to wish you all the best in your studies and in your career.

Yours sincerely

Ian Michael and Altaf Patel
Victoria University of Technology, City Campus, Melbourne.

**SECTION 1
ABOUT YOUR COURSE OF STUDY**

Q1 At which Victorian university do you study?

(Please tick one box.) (✓) 1

Australian Catholic University..... 1

Deakin University..... 2

La Trobe University..... 3

Monash University..... 4

Swinburne..... 5

RMIT..... 6

Victoria University of Technology..... 7

University of Ballarat..... 8

University of Melbourne..... 9

Q2 Please write in the name of the course you are studying.

Q3 Please indicate your level of study.

(Please tick one box.) (✓) 1

Undergraduate..... 1

Masters..... 2

Doctorate..... 3

Other (specify)_____ 4

Q44

Please indicate your age group?

(Please tick one box.) (✓) 1

Under 18 years..... 2

18 - 24..... 3

25 - 29..... 4

30 - 34..... 5

35 - 39..... 6

40 +..... 6

Q45

What sort of leisure activities do you like to do in Melbourne?

(Please tick all that apply.) (✓) 1

Dine out..... 2

Go to a hotel for a drink..... 3

Go to cinema / movies..... 4

Attend theatre / concert..... 5

Play sport (e.g. tennis, golf)..... 6

Exercise to keep fit..... 7

Hobbies..... 8

Watch TV..... 9

Read a book..... 10

Visit casino/ club with gaming machines..... 11

Visit an art gallery / craft centre..... 12

Visit a museum..... 13

Other (specify)_____ 13

Q46

Are you...? (✓) 1

Male..... 2

Female..... 2

**SECTION 4
ABOUT YOU**

Q42 Please indicate your country of permanent residence

(Please tick one box only.)

(✓)

- China..... 1
- Hong Kong..... 2
- India..... 3
- Indonesia..... 4
- Japan..... 5
- Malaysia..... 6
- Pakistan..... 7
- Singapore..... 8
- South Korea..... 9
- Taiwan..... 10
- Thailand..... 11
- USA..... 12
- Other (specify) _____ 13

Q4a What was the MAIN reason you chose to study at a University in Victoria, Australia?

(Please tick one box only.)

(✓)

- Proximity to your country of residence..... 1
- Recommended by Friends and relatives..... 2
- Friends and relatives living in Victoria..... 3
- Cost of studies..... 4
- Quality of education..... 5
- Size of classes..... 6
- Course content..... 7
- To improve English language skills..... 8
- Personal safety..... 9
- Other (specify) _____ 10

Q43 What language do you speak at home?

(Please tick one box.)

(✓)

- Cantonese..... 1
- English..... 2
- Hindi..... 3
- Indonesian..... 4
- Japanese..... 5
- Korean..... 6
- Malaysian..... 7
- Mandarin..... 8
- Thai..... 9
- Urdu..... 10
- Other (specify) _____ 11

Q4b Please indicate OTHER reasons for choosing to study in Victoria, Australia?

(Please tick all that apply.)

(✓)

- Proximity to your country of residence..... 1
- Recommended by Friends and relatives..... 2
- Friends and relatives living in Victoria..... 3
- Cost of studies..... 4
- Quality of education..... 5
- Size of classes..... 6
- Course content..... 7
- To improve English language skills..... 8
- Personal safety..... 9
- Other (specify) _____ 10

Q5

Where did you go to find information about studying in Victoria?

(Please tick all that apply.)

- 1 Australian Consulate in your country.....
- 2 Education exhibitions.....
- 3 Australian Education Centres.....
- 4 A University in your country.....
- 5 Friends or relatives.....
- 6 Correspondence with the University in Australia.....
- 7 Advertisements.....
- 8 University Agent.....
- 9 Other(specify) _____

Q40

After your studies are completed and you have returned to your home country, do you intend to return to Melbourne or Victoria in the next 5 years for a holiday?

- (✓) Yes..... 1
- No..... 2

Q41

Would you recommend Melbourne and Victoria to friends and relatives as a good place for a holiday?

- (✓) Yes..... 1
- No..... 2

Q6

How long have you been studying at a university in Victoria?

(Please write your answer in years and months.)

Years:

Months:

Q7

On which airline did you travel to Australia?

(Please write down the name of the airline.)

Q37

Did your visitors go on any organised tours in Victoria (e.g. bus trip to Penguin Parade)

(✓)

Yes..... 1
No..... 2

Q38

How easy or difficult was it to access suitable Victorian tourist information for your visitors?

(Please tick one box.) (✓)

Very easy..... 1
Easy..... 2
Neither..... 3
Difficult..... 4
Very difficult..... 5
Not applicable..... 6

Q39a

Are you expecting visitors from overseas in the next 12 months?

(✓)

Yes..... 1
No..... 2

Q39b

If yes, please indicate the year, the likely month of arrival and length of stay of your next visitors.

Year
Month of Arrival
Expected days in Victoria

SECTION 2

ABOUT YOUR TRAVEL IN VICTORIA AND AUSTRALIA

Q8a

Have you travelled within Australia while based in Victoria for university study?

(✓)

Yes..... 1
No..... 2 → GO TO Q10

Q8b

If yes, which Australian States have you visited?

(Please tick all that apply.) (✓)

Australian Capital Territory (e.g. Canberra)..... 1
New South Wales (e.g. Sydney)..... 2
Northern Territory (e.g. Darwin, Northern Territory)..... 3
Queensland (e.g. Brisbane, Cairns)..... 4
South Australia (e.g. Adelaide)..... 5
Tasmania (e.g. Hobart)..... 6
Victoria (e.g. Melbourne)..... 7
Western Australia (e.g. Perth)..... 8

Q9a

What was your main destination on your LAST Australian trip?

(Please write in the name of the destination.)

Q9b

Why did you choose to travel to this destination?

(Please write in the main reasons for selecting this destination.)

Q9c

How was this trip organised?

(Please tick one box.)

- Packaged tour (through travel agent or tour operator)..... 1
- Independent trip/ own arrangements..... 2
- Group tour e.g. special interest or sporting tour..... 3
- University organised tour..... 4
- Other (specify) _____ 5

Q10

Which tourist attractions have you visited in MELBOURNE and VICTORIA while studying in Victoria?

(Please tick all that apply.)

- Royal Botanic Gardens..... 1
- Cook's Cottage/Fitzroy Gardens..... 2
- Southgate..... 3
- Victorian Arts Centre..... 4
- National Gallery of Victoria..... 5
- Melbourne Zoo..... 6
- Museum of Victoria..... 7
- Old Melbourne Gaol..... 8
- Shrine of Remembrance..... 9
- Crown Casino..... 10
- Queen Victoria Markets..... 11
- Sovereign Hill..... 12
- Healesville Sanctuary..... 13
- The Grampians National Park..... 14
- The Twelve Apostles..... 15
- Wineries..... 16
- Snowfields..... 17
- Puffing Billy..... 18
- Penguin Parade..... 19
- Other (specify) _____ 20

Q34

How long did your last visitor(s) stay in Victoria?

(Please write in the number of days.)

Days stayed in Victoria:

Q35a

Approximately how much in total did your last visitor(s) spend while in Victoria? (Please estimate including accommodation, transport in Australia, food, shopping and entertainment.)

Total spent in Victoria: \$AUS

Q35b

How many people does this expenditure cover?

Total persons included in expenditure:

Q35c

Approximately how much did YOU spend on your last visitors while they were in Victoria?

Total spent on last visitors: \$AUS

Q36

Please indicate the places and attractions in Melbourne and Victoria which you visited with your last overseas guests. (Please write in the names of any attractions or places visited.)

**SECTION 3
FRIENDS AND RELATIVES WHO VISIT YOU IN AUSTRALIA**

Q31 Have any of your friends or members of your family travelled from overseas to visit you while you have been studying in Victoria?

- (✓)
 Yes..... 1
 No..... 2

Q32 How many times a year would you have visitors from overseas?

Number of times a year you have visitors:

Q33 When did you last have friends or family visiting from overseas?

- (Please tick one box.) (✓)
 September 1995..... 1
 August 1995..... 2
 July 1995..... 3
 June 1995..... 4
 May 1995..... 5
 April 1995..... 6
 March 1995..... 7
 February 1995..... 8
 January 1995..... 9
 December 1994..... 10
 November 1994..... 11
 October 1994..... 12
 September 1994..... 13

Q11 Have you taken any overnight trips in Victoria in the last 12 months?

- (✓)
 Yes..... 1
 No..... 2 → GO TO Q24

Q12 How many overnight trips in Victoria have you taken in the last 12 months?

Number of trips:

Q13 On what date did your LAST OVERNIGHT TRIP in Victoria commence?

___ / ___ / ___

Q14 What was your MAIN destination in Victoria on this trip? (Please write in the name of the destination, refer to map of Victoria for town and region names.) _____

Q15 What was the main type of transport you used to travel to this destination?

- (Please tick one box.) (✓)
 Private car..... 1
 Rented car..... 2
 Bus/coach..... 3
 Train..... 4
 Plane..... 5
 Other..... 6

Q16 How was this trip in Victoria organised?

(Please tick one box.)

- 1 Packaged tour (through travel agent or tour operator).....
- 2 Independent trip/ own arrangements.....
- 3 Group tour e.g. special interest or sporting tour.....
- 4 University organised tour.....
- 5 Other (specify) _____

Q28a How easy or difficult is it for you to access suitable tourist information about Victoria?

(Please tick one box.)

- 1 Very easy.....
- 2 Easy.....
- 3 Neither.....
- 4 Difficult.....
- 5 Very difficult.....
- 6 Not applicable.....

Q17 How many nights did you spend away on your last trip?

Number of nights:

Q29b Can you suggest ways of improving the distribution of Victorian tourist information to overseas students? (Please write in your suggestions.)

Q18 What was the MAIN type of accommodation used on your last trip?

(Please tick one box.)

- 1 Hotel/Motel/Guesthouse.....
- 2 Rented House/Flat/Serviced Apartment.....
- 3 Bed and Breakfast.....
- 4 Host Farm.....
- 5 Hostel/Backpackers.....
- 6 Caravan Park
- 7 Camping not in a caravan park.....
- 8 In house or flat of a friend or relative.....
- 9 Other.....

Q30 How interesting to you is Victoria as a holiday destination?

(Please tick one box.)

- 1 Very interesting.....
- 2 Interesting.....
- 3 Neither interesting or boring.....
- 4 Boring.....
- 5 Very boring.....

Q25

Which is the best time of year for you to travel to tourist spots in Victoria?
(Please tick one box.)

- July semester break..... 1
- Summer holidays (November to February)..... 2
- Orientation week..... 3
- Weekends..... 4
- Other (specify) _____ 5

Q26

Do you return to your home country during the summer break?

- Yes..... 1
- No..... 2

Q27

How did you find out about tourist attractions and places to visit in Melbourne and Victoria?
(Please tick all that apply.)

- The Age newspaper..... 1
- The Herald Sun newspaper (Time Away)..... 2
- Holiday Programs on television..... 3
- Tourism Victoria..... 4
- RACV Office..... 5
- Tourism information booths around the city..... 6
- Word of mouth ie friends..... 7
- Travel agent..... 8
- Tour operators (e.g. AAT Kings, Australian Pacific).... 9
- Student organisations..... 10
- International student office..... 11
- Other (specify) _____ 12

Q19

Overall how satisfied were you with each of the following aspects of your last overnight trip in Victoria? (Please tick one box for each line.)

	Very Satisfied	Neither Satisfied Disatisfied	Very Dissatisfied	Not Applicable
Accommodation	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Restaurants/Cafes	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Attractions	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Commercial tours	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Availability of tourist information	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

Q20a

What have you enjoyed MOST about this trip in Victoria?
(Please write in comments.)

Q20b

What have you enjoyed LEAST about this trip in Victoria?
(Please write in comments.)

Q21a

Is there a place which you have visited in Victoria and intend to return to?

- ()
- Yes..... 1
- No..... 2

Q21b If yes, please write down the name of that place and the reason you would return.

Name of place _____

Reason for return _____

Q22a Approximately how much did you spend on travel expenses for your LAST trip in Victoria? (If you cannot recall exactly, please estimate.)

Total spent on trip:

Q22b And how much of this amount was for:

Transport

Accommodation

Food & Drink

Shopping

Entrance fees / entertainment

Day tours

Other (specify)

Q24

What type of activities do you like to do while travelling in Victoria?

(Please tick all activities done while travelling in Victoria.)

Shopping.....

Restaurants/ dining out.....

Drive to sightsee or just for pleasure.....

Visit a museum or historic site.....

Visit an art gallery / craft centre.....

Attend a festival / special or sport event.....

Attend theatre /concert.....

Go to cinema / movies.....

Go to nightclub / disco /nightlife.....

Gambling/ casino /gaming machines.....

Visit a winery.....

Visit a theme, amusement or historic park.....

Bushwalking.....

Visit a national park/ forest.....

Visit a park or garden.....

Visit animal / wildlife park /zoo.....

Swimming / surfing / diving.....

Sailing / boating.....

Fishing.....

Playing sport (e.g. golf, tennis).....

Water skiing/ snow skiing.....

Adventure activity (e.g. rafting, horseriding).....

Organised tour / group activity.....

Other (please specify).....

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Q23 Approximately how much would you spend on travel in Victoria in one year? (Please provide your best estimate.)

Expenditure on travel in one year: