



QUEENSLAND
TOURISM INDUSTRY
COUNCIL

The Voice of Tourism

**SUBMISSION TO TRADE AND INVESTMENT
QUEENSLAND**

ON THE

**QUEENSLAND'S INTERNATIONAL EDUCATION
AND TRAINING STRATEGY 2016-2026 (DRAFT)**

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QUEENSLAND TOURISM INDUSTRY COUNCIL

The Queensland Tourism Industry Council (QTIC) welcomes the opportunity to respond to Trade and Investment Queensland in response to the Draft Queensland International Education and Training Strategy 2016-2026.

QTIC is the state peak body for tourism in Queensland. QTIC is an independent, private sector, membership-based tourism industry organisation.

All of Queensland's 13 Regional Tourism Organisations (RTOs) are members of QTIC, as are 20 industry sector associations and in excess of 3,000 regional members, operating in all sectors of the tourism industry.

QTIC works in partnership with government agencies and industry bodies at a local, state and national level and is a member of the Australian Tourism Industry Council (ATIC).

THE TOURISM INDUSTRY

The tourism industry in Queensland contributed \$27.3 billion to Queensland's Gross State Product (GSP) year ending June 2018¹. This represents 7.8% of total GSP. The industry also generated \$7.5 billion in exports, making it the state's second largest export accounting for 10.1% of total Queensland exports.

The tourism industry consists of over 57,000 tourism businesses across Queensland²; over nine out of 10 of these are small businesses. These businesses support employment to over 237,000 Queenslanders. Positions in cafes, restaurants and takeaway food services contribute the largest share of direct tourism employment (41,000 jobs), as well as retail trade (25,000 jobs) and accommodation (19,000 jobs).

International education plays a significant role in the tourism industry in Queensland. Recent visitor statistics indicate that 1 in 23 international visitors to Queensland were education visitors³. There has been a 7% growth in education visitation over the past three years from 99,000 visitors (2016) to 122,000 visitors (2019). This is slightly below the national average increase of 9%. Queensland's current market share of international education visitors sits at 19%, this is a slight decrease from the peak share of 21% in 2015. New South Wales continues to maintain the highest market-share with 38% of education visitors and Victoria following with 31%.

As of September 2019, mainland China was the top market for international education visitors to Queensland with 32,000 visitors – an increase of 19% over the same three-year period. Given the recent pandemic, this may have a significant impact on this market and the international education sector.

Other key markets for Queensland include Japan (17,000), the US (7,000), Hong Kong (6,000) and Korea (5,000). The US is the only market to show decline over the past three years (-7%). University degrees are the most popular courses from the Chinese, US and Hong Kong markets whilst ELICOS is most popular among Japanese and Korean visitors.

¹ Tourism Research Australia. State Satellite Accounts 2017-18.

² Tourism businesses in Australia, June 2013 to June 2018, Australian Bureau of Statistics

³ Tourism Research Australia. International Visitor Survey. Year Ending September 2019.

It is important to understand that those participating in international education do not just come here to study, their impact is felt across the broader tourism and leisure industries. In addition, flow-on benefits are also realised through the visitation of family and friends.

The World Travel and Tourism Council⁴ (WTTC) projects travel and tourism employment will grow 5.8% (compound annual growth) over the next decade in the Asia Pacific region. In contrast, the total economic growth is projected at 4.1% per annum and other industries such as mining and agriculture are forecast to grow at 1.8% and 2.2% per annum respectively.

The five-year average growth rate for total visitor nights in Queensland is projected to be 4.0% over 2014–15 to 2019–20, or 3.9% over 10 years. This compares to 4.4% total five-year average annual growth for Australia, or 3.8% over 10 years.

⁴ World Travel and Tourism Council. 2017. Travel & Tourism Economic Impact 2017 Asia Pacific

RESPONSE TO THE DRAFT STRATEGY

In response to the draft, QTIC highlights the following:

Vision

QTIC supports the vision for the sector, noting a clear alignment between the values highlighted in the vision and the values set out in the *Queensland Plan* vision – "*We will value education as a lifelong pursuit where we gain practical skills, enrich our lives, find secure jobs and improve the competitiveness of our economy*".

Aligning to the goals associated with G27 – Attracting Bright Minds to Queensland – the Queensland plan highlights success as "regions are attractive to bright minds and trained professionals".

Attract

Examining the strategic imperative of *Attract* is critical, particularly with the expected impacts of the COVID-19 crisis on international education in Australia.

Whilst focused destination marketing is a strong initiative, ensuring that there is a balanced portfolio and that Queensland is not overly reliant on a single source market is also important. The impacts of the current global health crisis have highlighted this.

The alignment with existing tourism destination plans, including the 2035 Queensland tourism strategy which is under development, is important to ensure consistency in messaging and to avoid the duplication of resources. Partnerships with the Regional Tourism Organisations (RTOs), the destination marketing specialists, should be utilised to optimise outcomes.

It is understood that High Potential students are important, but the sub-indicators of talent should not just highlight highly academic and STEM related courses. Opportunities for Queensland are not just related to STEM and Research. Potential exists across different areas of skills shortages to demonstrate globally leading practices to sectors where supply-demand imbalances exist.

Consideration also needs to be given to the implications of visas on attraction. The federal Department of Home Affairs determines the availability and length of visas; however, the current structure is not conducive to attracting the brightest minds. Ease of transition from short-term student visas to permanent residency need to be advocated for. Currently, Australia is ranked 44th in the *Global Travel and Tourism Competitiveness Index*⁵ for visa requirements. Compared to Australia's overall ranking of 7th indicating that visa restrictions are inhibiting Australia's competitiveness as a global tourism destination.

Recommendations

- Ensure that there is a balanced portfolio of market attraction and not a reliance on a single source market.
- Partner with destination marketing experts to ensure that greatest results are achieved.
- Include skills shortage careers as priority indicators for talents. This needs to be a flexible program.
- Advocate for better visa pathways at a federal level.

⁵ World Economic Forum. Travel and Tourism Competitiveness Index. 2019. http://reports.weforum.org/pdf/ttci-2019/WEF_TTCI_2019_Profile_AUS.pdf

Nurture

QTIC supports the opportunity to enhance student support and community integration. Provision of basic safety and lifestyle information should be included as part of the visa process. Provided in the native language, this will assist in preparing potential students for the change in lifestyle and important safety information – for example waterways safety.

Opportunities for enhancing student support through digital technology should also be considered. Technology can build networks prior to reaching Australia and assist international students in assimilating and integrating into their new society.

An integral part of nurture is to ensure the integrity of the courses on offer. A balance must be achieved between taking a student centric approach and providing quality education. Through the provision of high-quality education, students will be able to cultivate the critical thinking, communication and creativity skills required.

Consideration should also be given to the outcomes of education and ensuring that program and courses lead to employment outcomes. By forging strong relationships with employers, additional opportunities are created for students both in practical application of the theory delivered in the classroom or lecture theatre and in the development of social networks and communities. Often a criticism is that there is not enough work-experience with employers and that there is a theoretical rather than practical approach to education and learning. There is an opportunity to foster stronger relationships with students by engaging them in work integrated learning, assisting them to assimilate into their communities and understand the practical requirements of their career focus.

Other support services and counselling should continue to be made available through institutions to support the transition of students.

Recommendations

- Provide lifestyle and safety information with visa confirmation.
- Balance a student centric-approach with quality of curriculum.
- Mandate work integrated learning to enhance engagement with communities and foster a fruitful and meaningful time in Australia.

Launch

The connection between workplace opportunities and education is integral, especially within tourism and hospitality training. The opportunity to engage with real work experiences, offering different learning structures, practical learning environments and hands-on implementation of the theories taught, supports a strong learning environment⁶. Furthermore, reports by *UNESCO Institute for Statistics* highlights the value of integrative learning environments as enabling learnings to enhance knowledge in a more "joyful" way⁷. Such positive engagement with learning experiences will not only enhance education outcomes but also positive attachments with the destinations, leading to increased likelihood of repeat visitation and the visitation of friends and family, thereby generating greater economic benefits for Queensland.

⁶ Kim, Y. H., Spears, D. L., Vargas-Ortega, E. E., & Kim, T. H. (2018). A practical learning environment for sustainability and sustainable tourism. *International Journal of Sustainability in Higher Education*.

⁷ UNESCO Institute for Statistics (2012), "A place to learn: lessons from research on learning environments", Technical Paper No. 9, p. 86.

It is important to note that internships not only add value to students, but also provide benefits to small businesses and employers. They offer the opportunity to build cultural awareness, to understand contemporary business practices and open new markets to businesses.

In building strong employer networks and start-up platforms, the State Government should look at partnering with peak bodies across varying sectors to support the cultivation of the networks. By engaging with existing stakeholder networks and drawing on trusted, well-established partnerships the State Government is likely to expedite the process, rather than having to build a network of trust. Highlighting success stories and showcasing case-studies where mutual value has been achieved through the engagement with international education and training could be utilised to further enhance these networks.

A strong alumni program and meaningful engagement requires significant investment and dedicated resources. Tertiary education providers already provide robust alumni programs and regularly invest in engagement. Rather than duplicating existing programs or creating a new initiative it is advised that existing programs are supported and the opportunity for a combined, Queensland based, event is explored.

Recommendations

- Engage industry associations to build networks of industry champions to support industry engagement with international education and training providers and students.
- Leverage off existing alumni programs in partnership with Queensland institutes.

Additional comments

The plan's contribution to the UN Sustainable Development Goals should be explicitly recognised. As one of the 193 countries that signed on to the 2030 Agenda for Sustainable Development, it is important that we acknowledge our contribution. In particular, Goal 4 – Quality Education. Specifically, this plan addresses goal 4.4 *substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship*. Dependent on the implementation of the strategy it also has the potential to significantly contribute to 4.B *substantially expand globally the number of scholarships available to developing countries, in particular least developed countries, small island developing States and African countries, for enrolment in higher education, including vocational training and information and communications technology, technical, engineering and scientific programmes, in developed countries and other developing countries*.