

# How tight is the border between visitors and locals?



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## OUR APPROACH



STUDENTMARKETING IS A UNITED NATIONS WORLD TOURISM ORGANIZATION AFFILIATE MEMBER.



AS AN ESOMAR MEMBER, I COMPLY WITH THE ICC/ESOMAR INTERNATIONAL CODE ON MARKET AND SOCIAL RESEARCH AND ESOMAR WORLD RESEARCH GUIDELINES.

PATRIK PAVLACIC, STUDENTMARKETING

## LOCALS AND VISITORS

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LOCALS



INTERNATIONAL  
STUDENTS



HOLIDAY  
MAKERS

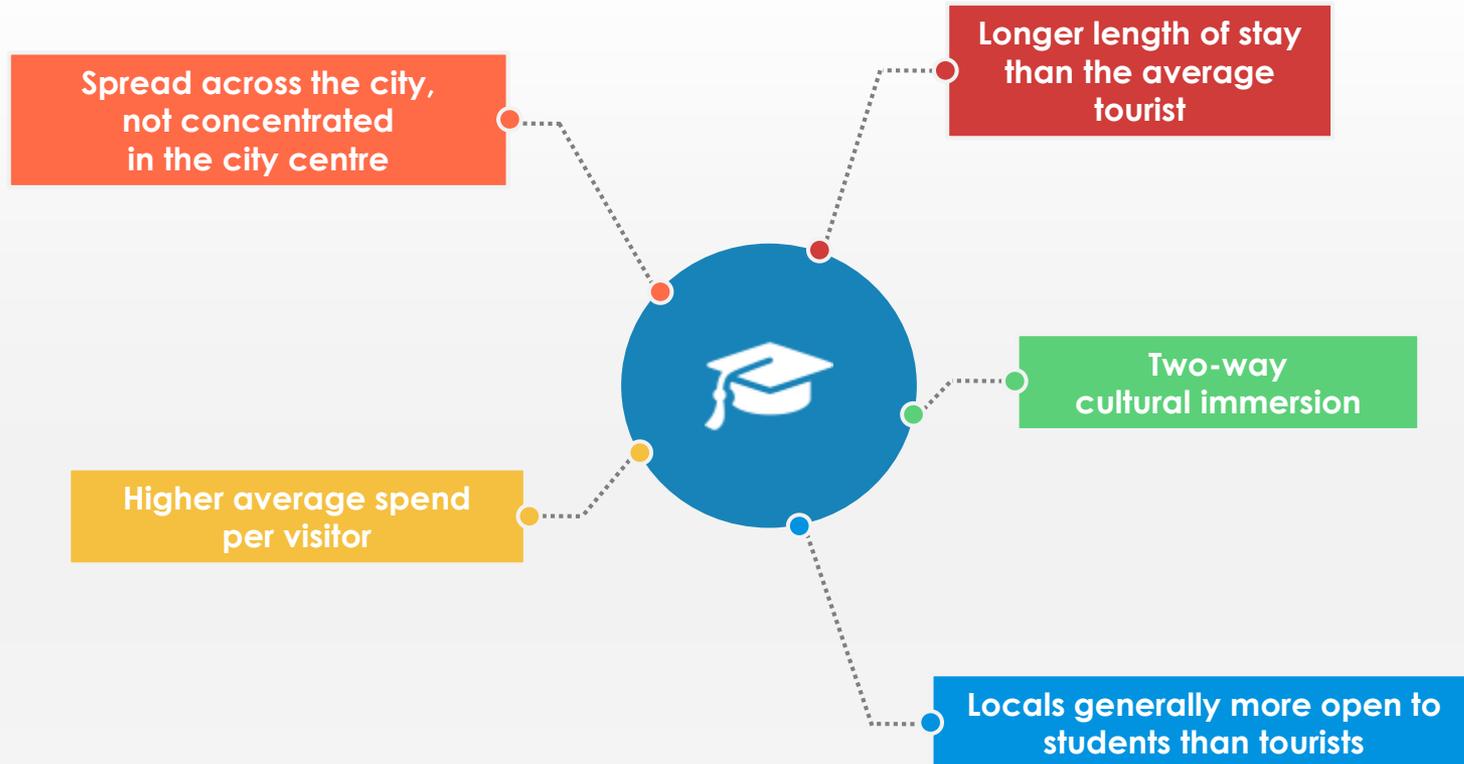


BUSINESS  
TRAVEL



DAY  
TRIPPERS

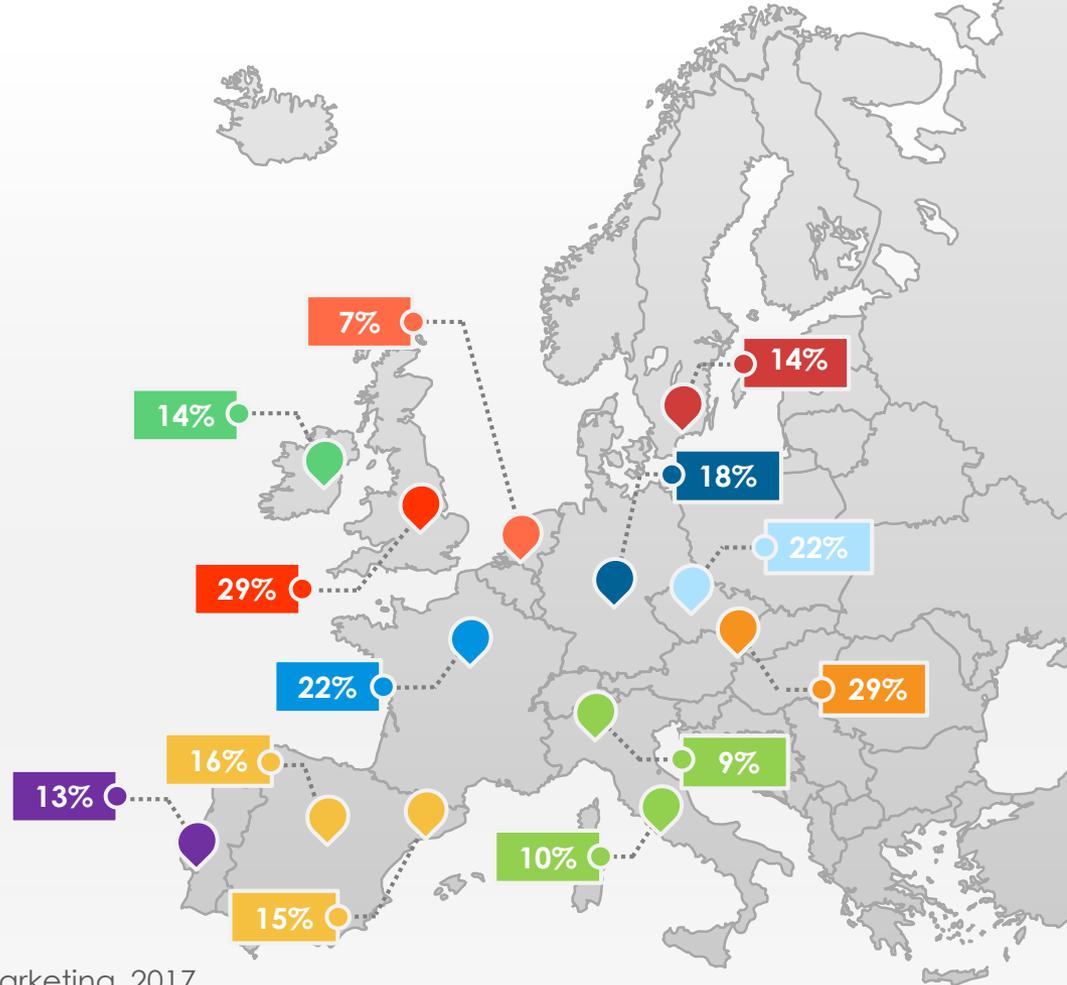
## WHAT SETS INTERNATIONAL STUDENTS APART?



# SHARE OF INTERNATIONAL STUDENTS IN EUROPEAN CITIES

  
**1,944,007**  
Degree-seeking  
international  
students

  
**4.3%**  
average  
annual  
growth



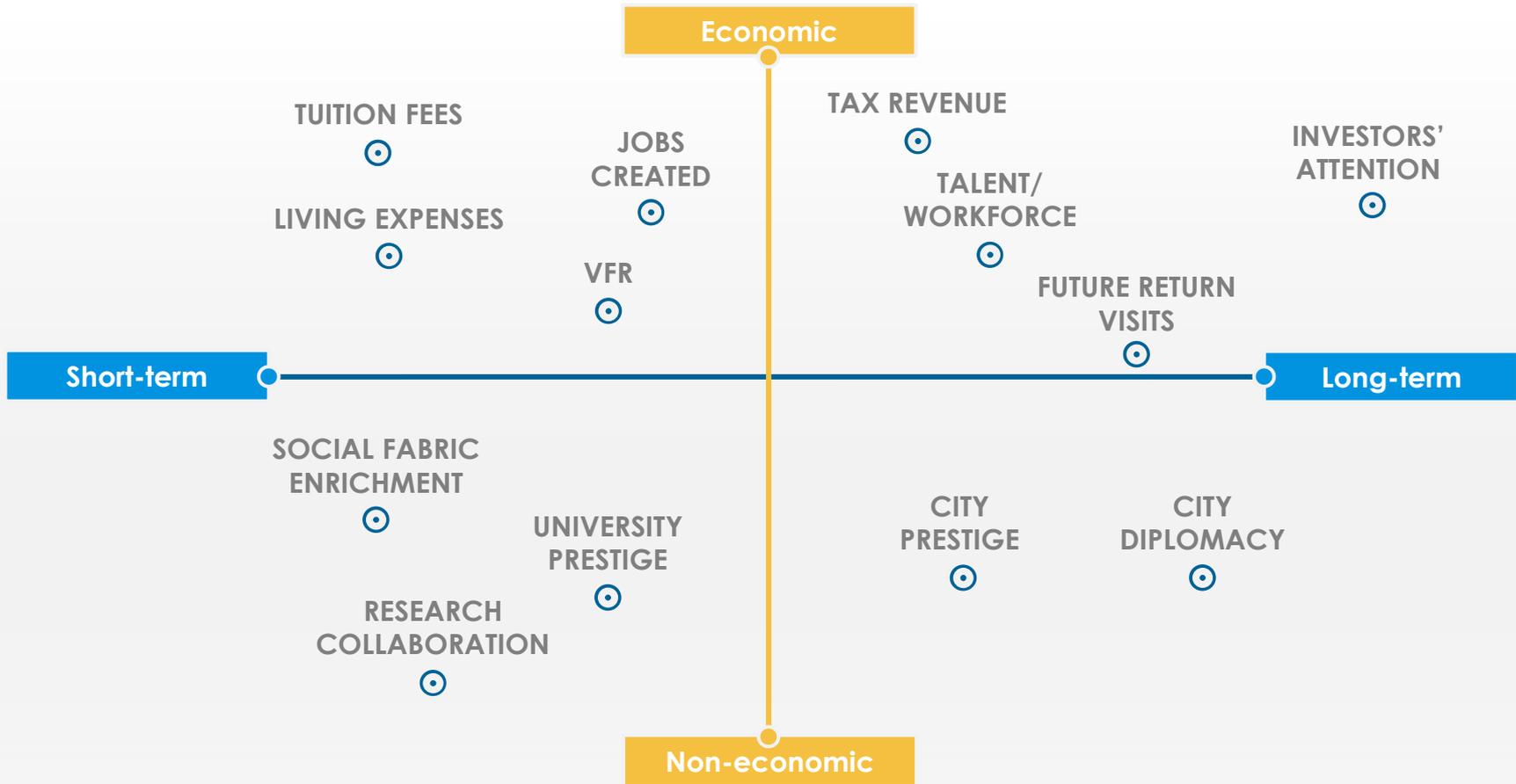
Source: UNESCO Institute for Statistics, 2017; StudentMarketing, 2017

## OVERVIEW OF SELECTED EUROPEAN CITIES

CITY	POPULATION	INTERNATIONAL VISITORS	INTERNATIONAL STUDENTS
Amsterdam	1,021,754	5,897,000	8,694
Barcelona	3,202,571	6,612,200	27,941
Berlin	3,501,872	4,925,400	31,725
Bologna	380,635	767,466	6,129
Bratislava	415,589	722,292	3,320
Budapest	1,727,495	3,775,700	13,084
Dublin	1,261,332	4,600,500	10,380
Helsinki	1,059,631	971,289	4,480
Lisbon	1,849,472	2,906,500	15,183
London	8,256,400	18,580,000	104,230
Madrid	3,233,527	4,604,500	50,844
Milan	3,105,489	6,684,000	10,953
Munich	1,378,176	3,251,800	20,076
Paris	6,695,233	15,023,000	75,046
Prague	1,246,780	6,967,400	20,976
Vienna	1,687,271	5,718,900	57,744
Warsaw	1,715,517	2,650,000	17,200

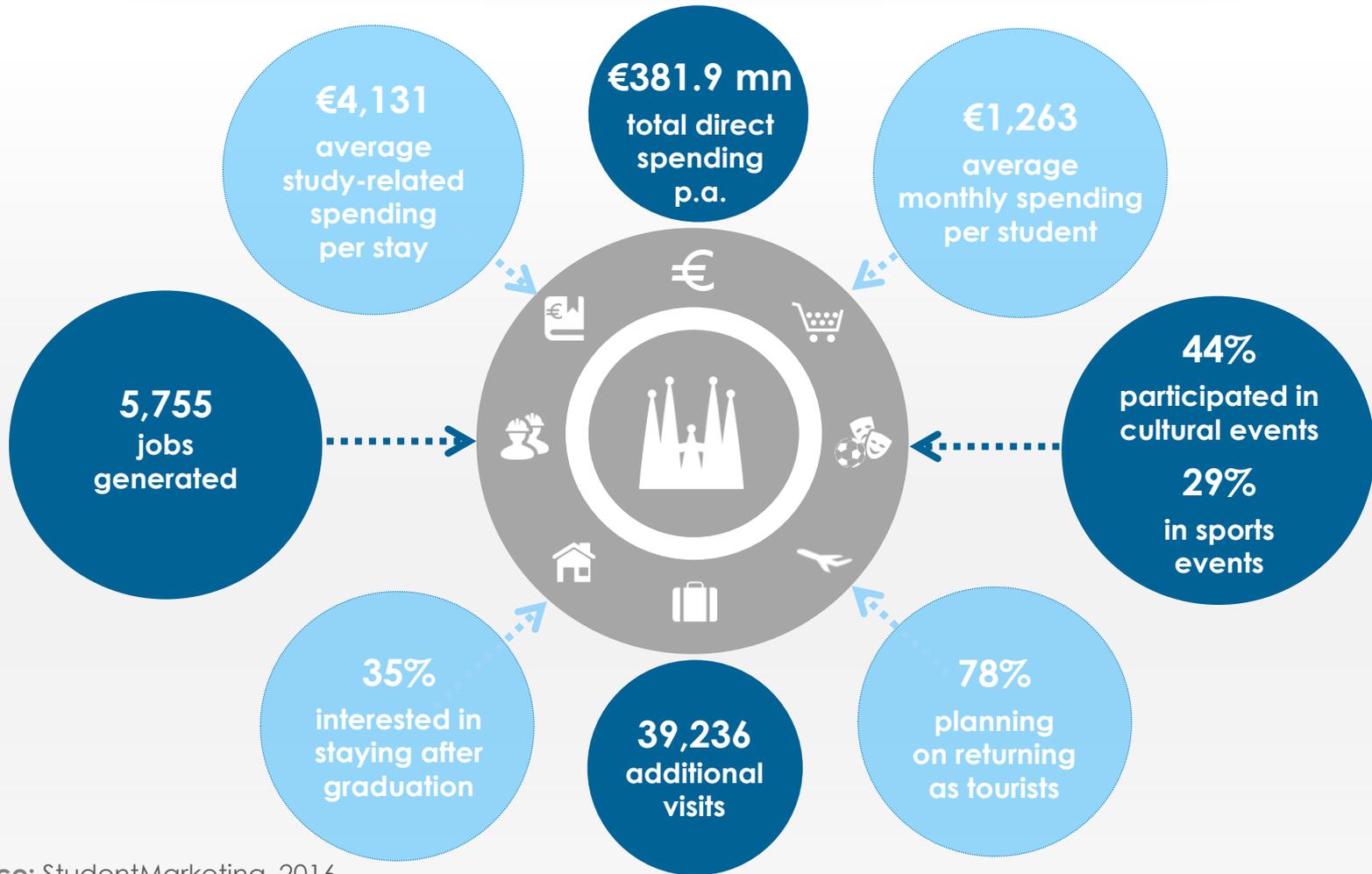
Source: Eurostat, 2017; Euromonitor International, 2017; StudentMarketing, 2017; national sources

# IMPACT OF INTERNATIONAL STUDENTS ON A CITY



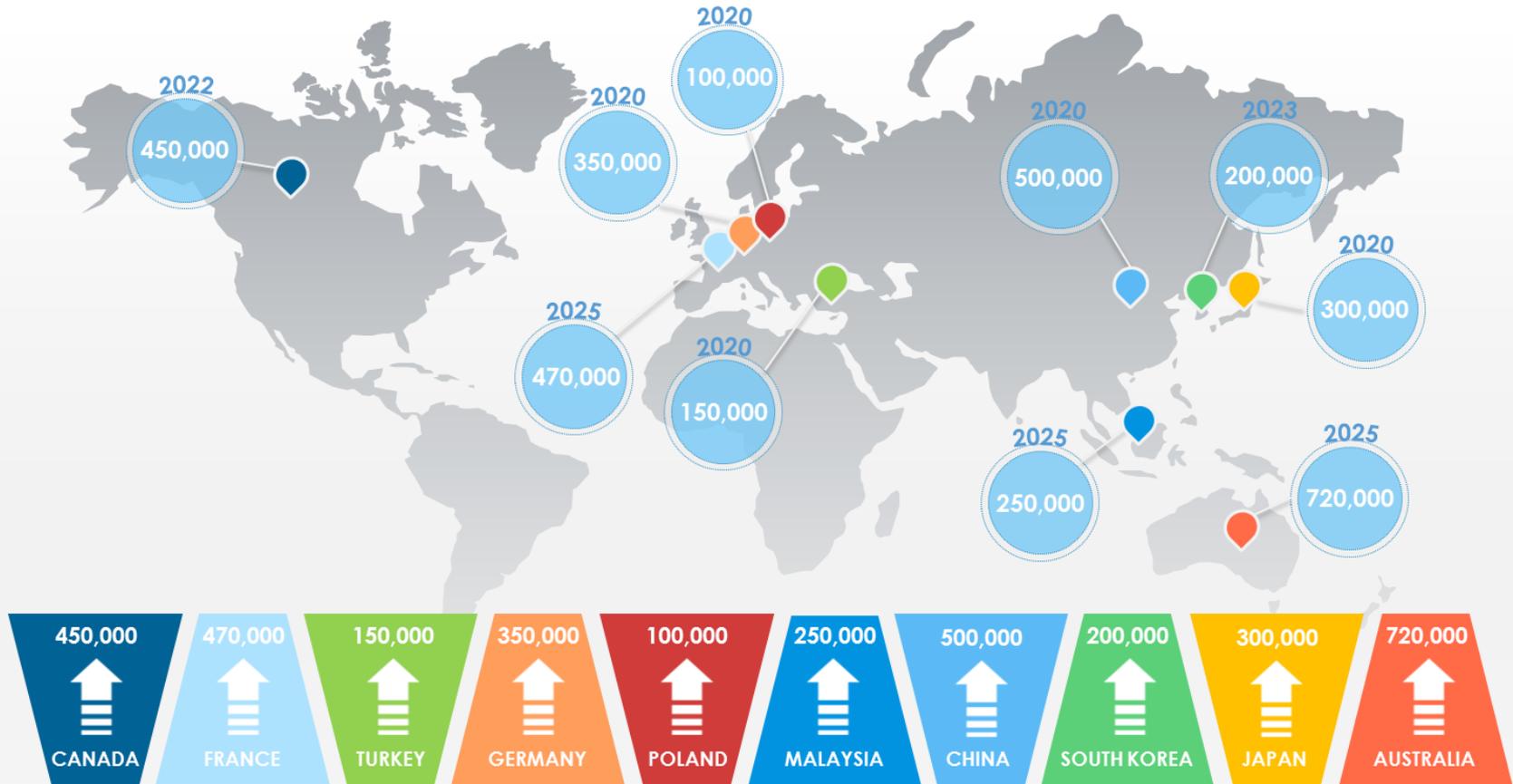
Source: StudentMarketing, 2017

# CASE STUDY | INTERNATIONAL STUDENTS IN BARCELONA



Source: StudentMarketing, 2016

# INTERNATIONALISATION | STUDENT RECRUITMENT TARGETS



**Source:** Government of Canada, 2015; Campus France, 2014; Ministry of Science and Higher Education Poland, 2015; International Relations Office Turkey, 2014; DAAD Germany, 2014; Ministry of Education China, 2011; Ministry of Education Malaysia, 2015; Ministry of Education, Republic of Korea, 2015; The Government of Japan, 2013; Australian Education International, 2017

## TAKEAWAYS

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1. International students are a distinct type of international visitors
2. Share the same space & time with residents
3. Continuum: Absorb >> Contribute >> Enrich
4. Effective promotional tool for DMOs = brand ambassadors (promoting education, tourism, language and culture)

# Thank you!



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**ESOMAR**  
member

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