

Report to the Future Melbourne Committee

Agenda item 6.7

Support and Pilot Project for Return of International Students

13 April 2021

Presenter: Andrew Wear, Director Economic Development and International

Purpose and background

1. The purpose of this report is to provide an update on activity in relation to Melbourne's international education sector, including support for international students.
2. At its meeting on 8 December 2020, the Future Melbourne Committee noted that the return of international students would be critical to the recovery of the City of Melbourne economy and requested that the Lord Mayor write to the Victorian and Australian governments requesting that all necessary measures be put in place to allow for the return of international students in time for the 2021 academic year.
3. In response to the Lord Mayor's letter, the Federal Minister for Education and Youth wrote (in February) that 'there is currently no clear timeline for the return of international students'. On 19 January, the Premier said publicly that 'there was little prospect of many students returning this year.'
4. Pre-COVID, there were more than 200,000 international students from 170 countries living and studying in Greater Melbourne. International students made up 39 per cent of Carlton residents, 38 per cent of CBD residents, 15 per cent of Southbank residents and 14 per cent of Docklands residents.
5. International students contribute enormously to the city's economy, culture and vitality. They are customers, employees, tourists, performers, business operators and entrepreneurs.

Key issues

6. COVID-19 has devastated the international education sector in the City of Melbourne, with profound economic and social impacts. With no new arrivals, international student numbers are currently at half of pre-COVID19 levels.
7. With very few exceptions, international students are currently not able to arrive or return to Victoria from overseas due to current restrictions on incoming arrivals. The crisis continues to cause great hardship for Melbourne's international students – including those studying onshore as well as those studying remotely in their home countries.

Student support

8. The City of Melbourne has supported international students during the COVID-19 crisis via a range of programs. These include a series of health and wellbeing initiatives (mental health, social connection activities) and pathways to employment programs (entrepreneurship, resume, communication skills workshops).
9. In May 2020, the City of Melbourne implemented the '**Our Shout' food voucher program** in partnership with the Queen Victoria Market (QVM) to provide \$200 food vouchers to international students impacted by job loss, housing insecurity or other financial concerns.
10. Due to significant over subscription of the program, consultations with other stakeholders resulted in further funds being made available, including the City of Melbourne's contribution increasing from \$200,000 to \$600,000, \$1 million from the Victorian Government and contributions from a number of education institutions, bringing the total to approximately \$2 million. This enabled a \$200 voucher to be provided to 9,704 international students.
11. The program officially concluded on 31 December 2020, with over 95% of vouchers redeemed through the Market during the six-month program. This program provided much-needed funds directly to international students and QVM traders at a time when visitation to the Market was at an all-time low. A final summary report from QVM is Attachment 2.

12. On 29 March 2021, CoM opened **The Couch – International Student Centre** (in partnership with the Salvation Army). This is a space for international students to engage, access free cooked meals, volunteer, and connect with the local community through planned activities.

Melbourne as a student city

13. Prior to COVID-19, Melbourne was ranked the third best student city in the world in the Quacquarelli Symonds (QS) Best Student Cities Ranking. However, stakeholder feedback indicates that Melbourne – and Australia – risks enduring brand damage if students continue to be prevented from arriving to undertake studies.
14. To mitigate this risk, it is critical that at least an initial group of students is able to arrive onshore for Semester 2 this year. Sector stakeholders have developed a range of proposals that would enable such a pilot program to occur safely, using the state's existing quarantine capacity or additional quarantine capacity established in purpose-built student accommodation. Given the importance of international students to the city, the City of Melbourne is working together with stakeholders on a joint advocacy effort to the Victorian and Federal governments. Key elements of the proposed approach include:
 - 14.1. An initial pilot program supporting the return of a several thousand students in time for Semester 2 this year, who would be accommodated in established hotel quarantine facilities.
 - 14.2. By the start of 2022, a substantial scaling up of the number of students (with the aspiration of ultimately reaching pre-COVID19 levels), via additional quarantine facilities, potentially using existing purpose-built student accommodation.
15. Students currently onshore are brand ambassadors for Melbourne's international education sector. There is value in exploring how the experience of this cohort can be further improved. Management is proposing to work with partners in the sporting, cultural and entertainment sectors to offer tickets and other novel Melbourne experiences to international students.
16. A range of organisations provide support and offer activities to international students. Management is also exploring how the City of Melbourne could assist to better coordinate stakeholders to promote the activities and initiatives offered to international students.

Recommendations from management

17. That the Future Melbourne Committee:
 - 17.1. Notes that the City of Melbourne is working with stakeholders on a joint advocacy effort to the Victorian and Federal governments in support of a pilot program enabling students to return to Melbourne in time for Semester 2 this year.
 - 17.2. Notes the significant impact of the Our Shout food voucher program.
 - 17.3. Requests management to further improve the experience of international students in Melbourne, by working with partners to offer tickets and other novel Melbourne experiences to international students.
 - 17.4. Requests management to coordinate with stakeholders on a coordinated effort to promote the activities and initiatives offered to international students in Melbourne.

Attachments:

1. Supporting Attachment (Page 3 of 16)
2. International Student Voucher Program Final Report (Page 4 of 16)

Supporting Attachment

Legal

1. There are no legal issues arising from the recommendation from management.

Finance

2. No significant implications arise from the recommendations contained in this report.

Conflict of interest

3. No member of Council staff, or other person engaged under a contract, involved in advising on or preparing this report has declared a material or general conflict of interest in relation to the matter of the report

Health and Safety

4. In developing this proposal, no Occupational Health and Safety issues or opportunities have been identified.

Stakeholder consultation

5. Management has had discussions with a range of stakeholders, including representatives from the universities, student groups, and government.

Environmental sustainability

6. In developing this paper, environmental sustainability issues have been considered and no direct issues were identified.

International student voucher program

Final report

Prepared by Rebecca Curcija, Communications Manager Queen Victoria Market

1 March 2021

1. About the program

1.1 Background

The City of Melbourne in partnership with the Queen Victoria Market (QVM) successfully delivered the 'Our Shout' International Student Voucher Program.

The program saw approximately \$2 million of QVM food vouchers distributed to 10,000 international students (\$200 per student) impacted by the COVID-19 pandemic and associated restrictions. This initiative also brought customers and increased expenditure to the Market at a time when visitation was at an all-time low and received widespread media coverage.

1.2 From concept to launch in just 20 days

The program was initiated on 6 May 2020 and launched just 20 days later on 26 May 2020. During this time the program was developed and launched to 10,000 students. The launch of the program included:

- Development of guidelines, terms and conditions;
- Design and printing of 400,000 vouchers;
- Promotion to students and follow up assessment and approval of over 11,000 student applications;
- Distribution of vouchers for 10,000 students;
- Development and integration of a secure voucher redemption system within Salesforce;
- Development of financial management system to process trader invoices and seek reimbursements from the City of Melbourne; and
- Regular and comprehensive communication of the program to 150+ food traders.

1.3 Student applications

The program was communicated via City of Melbourne and QVM social and digital platforms and received widespread media coverage. International Students were encouraged to apply via the City of Melbourne website with over 11,000 student applications received.

To be considered applicants needed to:

- Provide proof of current enrolment;
- Be an international student and provide a copy of their visa;
- reside or study in the City of Melbourne Municipality; and
- need food assistance due to financial difficulties.

2. Implementation

2.1 Distributing the vouchers

Distribution of food vouchers commenced on Wednesday 27 May 2020 at the Melbourne Town Hall.

By close of business Friday 12 June, 9,704 international students were provided with \$200 worth of QVM food vouchers totalling \$1,940,800. Each of the 11,270 eligible international students that applied was given an opportunity to collect food vouchers.



Image: Students lining up to collect their vouchers

2.2 Managing the data

Throughout the six-month program QVM management processed over 362,696 individual vouchers.

Each of the 362,696 vouchers redeemed by a trader was individually collated by the QVM team and manually entered into Salesforce using a unique serial number.

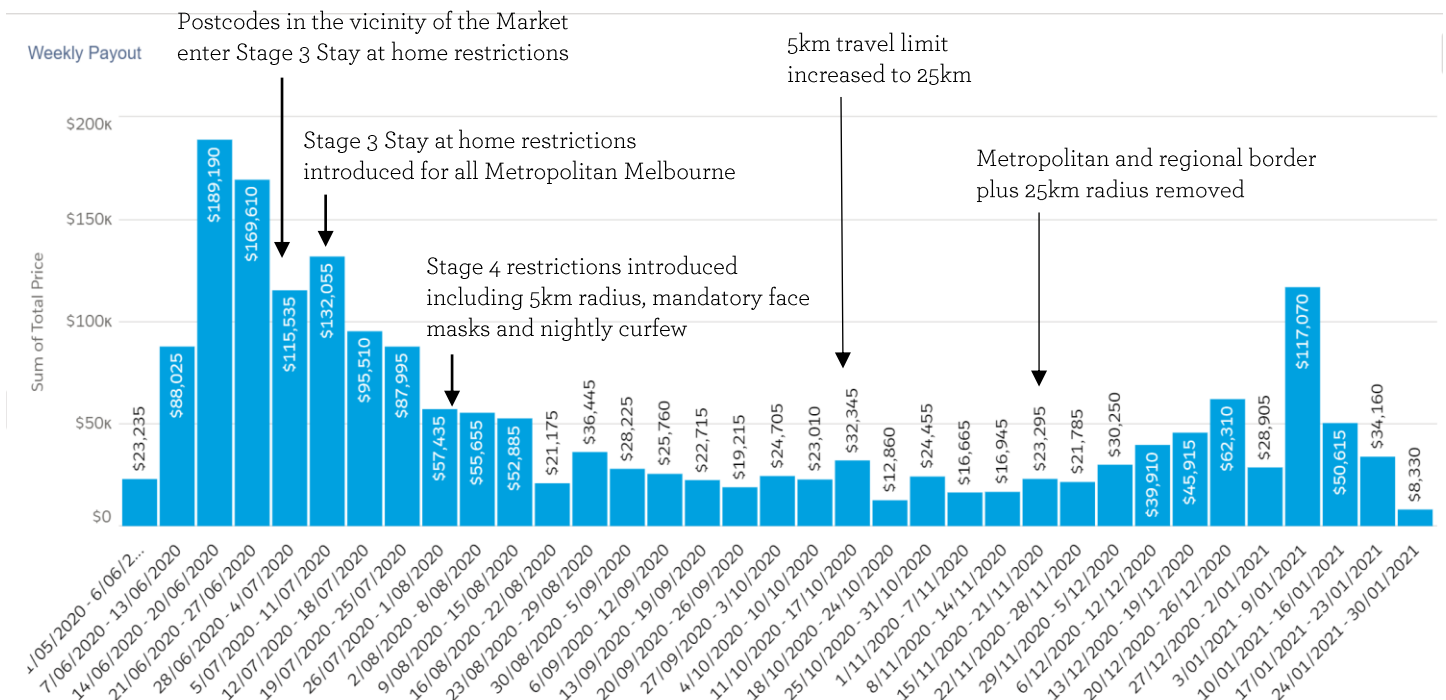
For the duration of the initiative, QVM management processed over 1,800 individual trader invoices. All traders were reimbursed within 7 days of submitted an invoice.

3. Redemption trends and insights

95% of all vouchers were redeemed during the six-month program totalling \$1,834,195 worth of food to students in need from 26 May to 31 December 2020.

3.1 Week by week redemption data

The chart below shows week by week redemptions overlay with COVID-19 restriction levels.



3.2 Where students spent their vouchers

Eggs, seafood and fruit and vegetables were the most popular amongst students.

Fruit and vegetables were the most popular with students with meat and poultry as well as seafood also very popular.

Market area	Total vouchers redeemed
Fresh produce shed (A,B, H and I)	\$838,035
Butchers/poulterers	\$448,745
Fishmongers	\$267,910
Dairy Hall	\$175,880
Hospitality	\$58,180

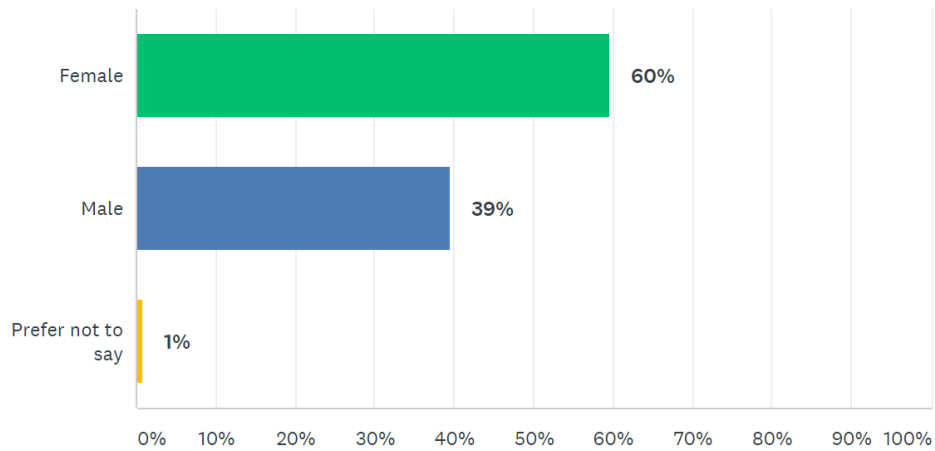
4. Student profile and feedback

4.1 About the students

Over 1300 students completed a post-program survey. Survey respondents were a mix of both male and female with 25 to 34 year old's representing the largest cohort of respondents. 88% of respondents were aged between 18 and 34.

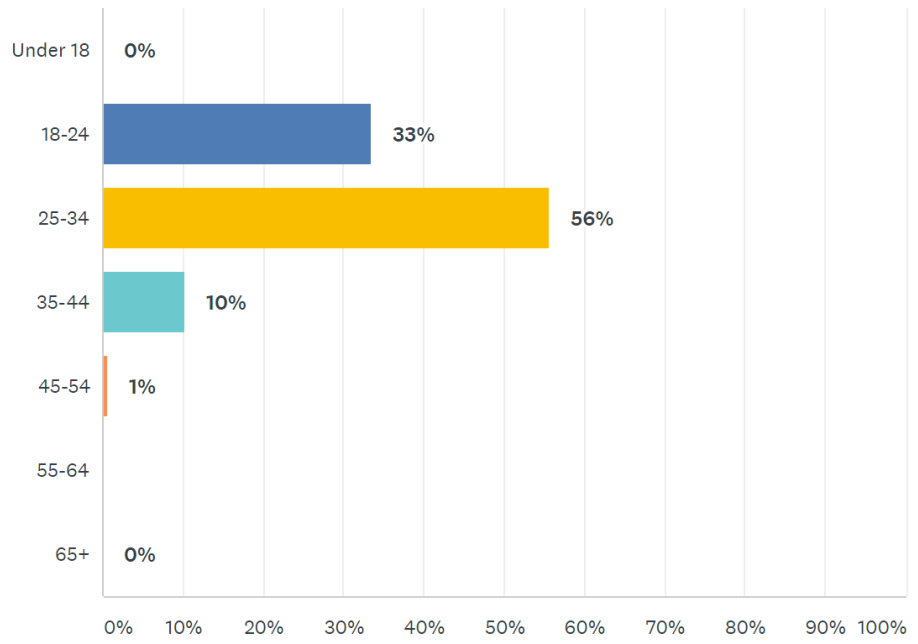
Your gender

Answered: 1,682 Skipped: 0



How old are you?

Answered: 1,682 Skipped: 0



4.2 Cultural background

Prior to arriving in Australia, the majority of students previously resided in Asia with India (20%), China (10%), Nepal (11%) and the Philippines (7%) making up the largest proportion of students from this region. There were also a number of students from South America including Colombia (11%), Brazil (3%) and Chile (2%).

The table below shows the top 15 countries respondents previously resided in.

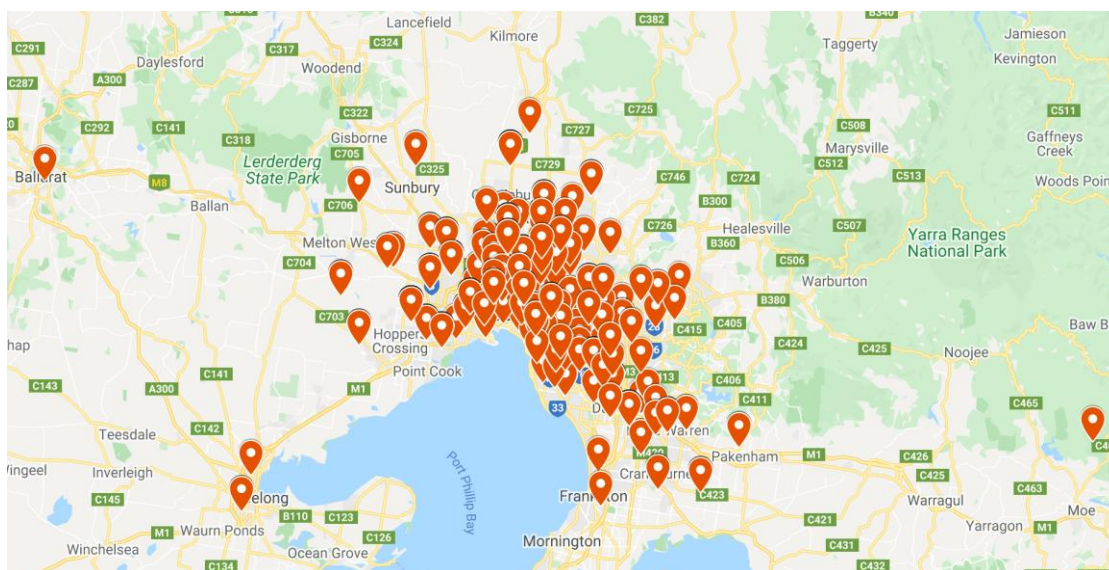
Country	Responses
India	20%
Nepal	11%
Colombia	11%
China	10%
Philippines	7%
Thailand	5%
Malaysia	3%
Republic of Korea	3%
Vietnam	3%
Brazil	3%
Taiwan	3%
Indonesia	2%
Japan	2%
Sri Lanka	2%
Chile	2%

4.3 Where the students currently live

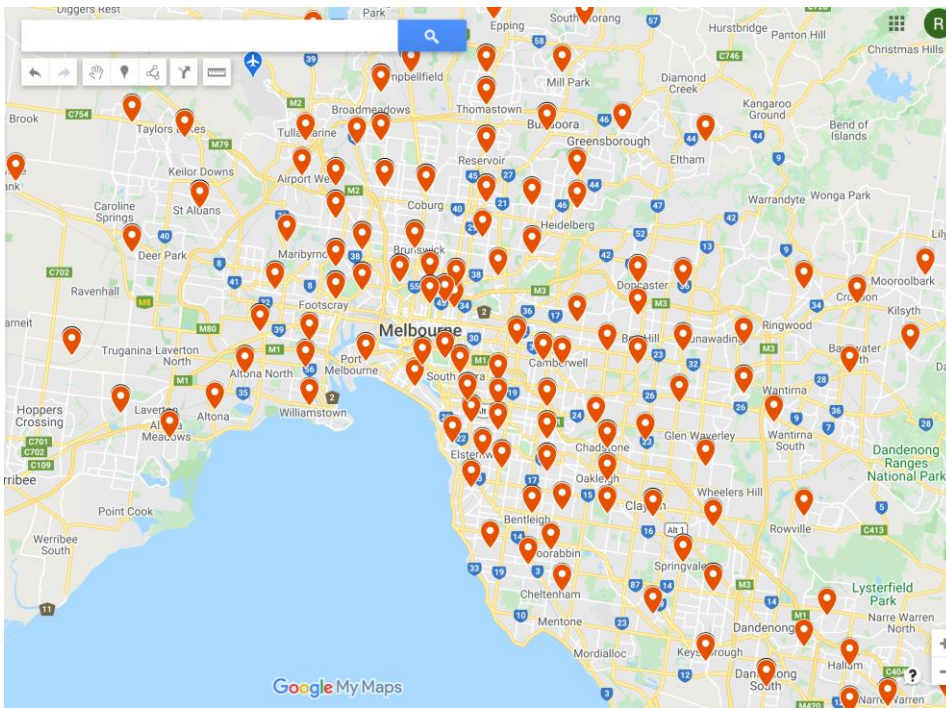
While the majority of respondents live within the Metropolitan Melbourne region, the spread of students reached far into the outer Melbourne suburbs and some regional towns including Ballarat and Geelong.

The maps below show the spread of student residential data only and do not account for student density in each postcode area.

Where students live regional map



Where students live metropolitan Melbourne

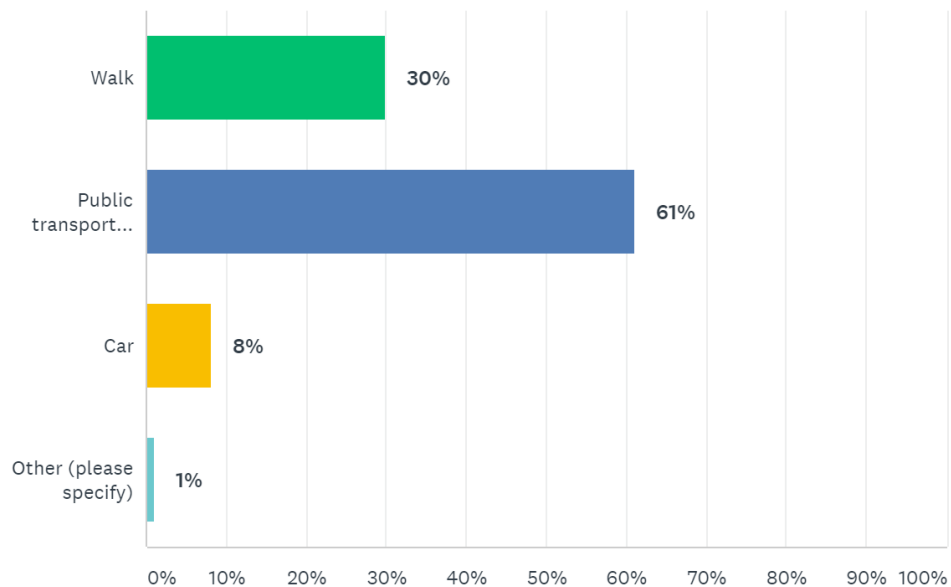


4.4 Travelling to the Market

Over 60% of students travel via public transport. A further 30% use active transport including walking or cycling to visit the Market with the majority of 'other' responses being bicycle. Travel preferences are likely typical of international students who may have reduced access to a private vehicle.

How do you usually travel to the Queen Vic Market?

Answered: 1,223 Skipped: 459



4.5 Spending the vouchers

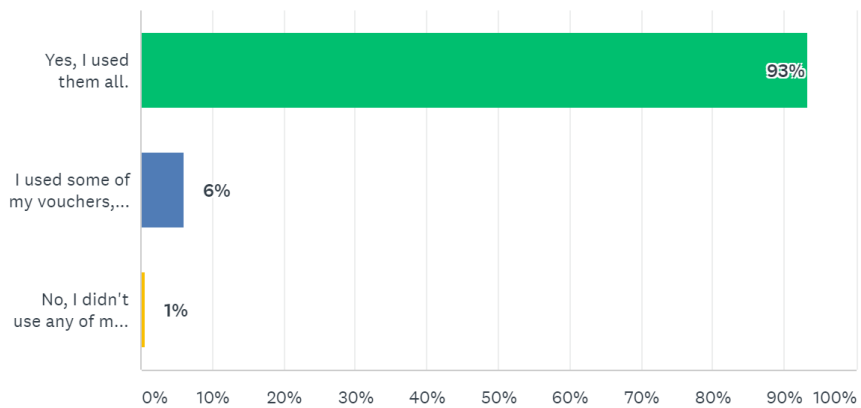
93% of respondents reported using all their vouchers with only 1% of respondents not using their vouchers at all.

Only 7% of respondents reported not using some or all their vouchers.

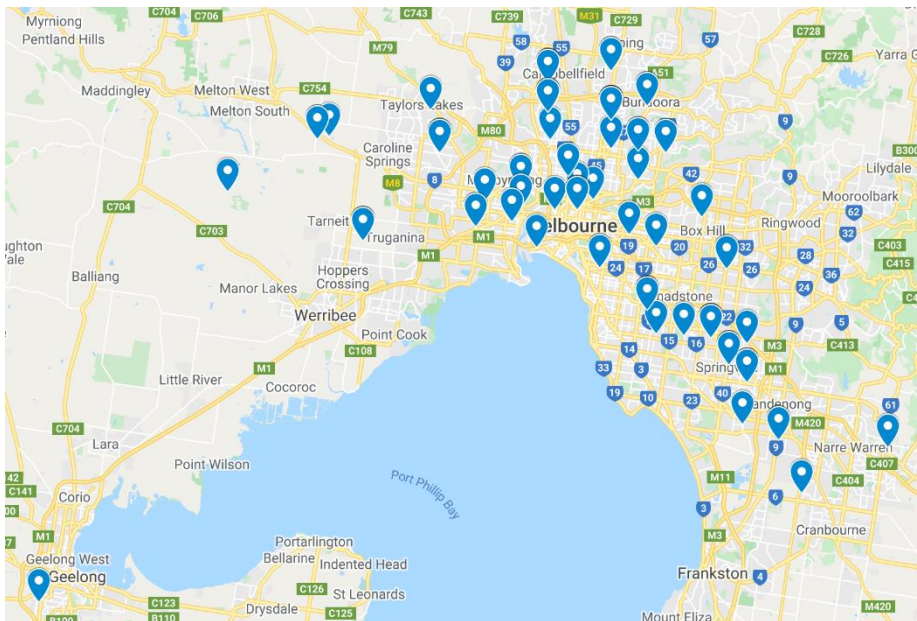
Of those who reported not using their vouchers, almost half cited living too far or not being able to get to the Market as the primary reason. However, the residential data of the students who did not redeem all or some of their vouchers shows a balanced sprawl of both inner city and outer metropolitan Melbourne suggesting other factors such as transport or opening hours may have also been a factor.

Did you use your \$200 Queen Victoria Market food vouchers?

Answered: 1,680 Skipped: 2



Residential data of students who did not redeem all or some of their vouchers



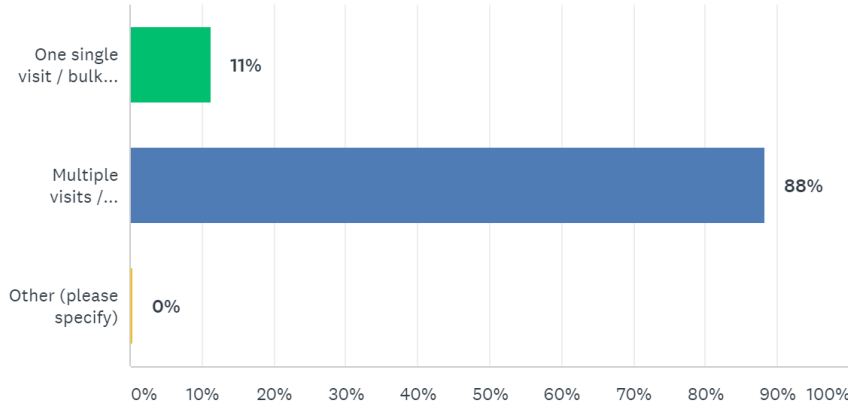
4.6 How students shop

Students considered availability, freshness, price and crowds when choosing what time and day they prefer to shop.

Almost 90% of students reported spending their vouchers in multiple smaller shops as opposed to larger bulk shops.

How did you spend your vouchers?

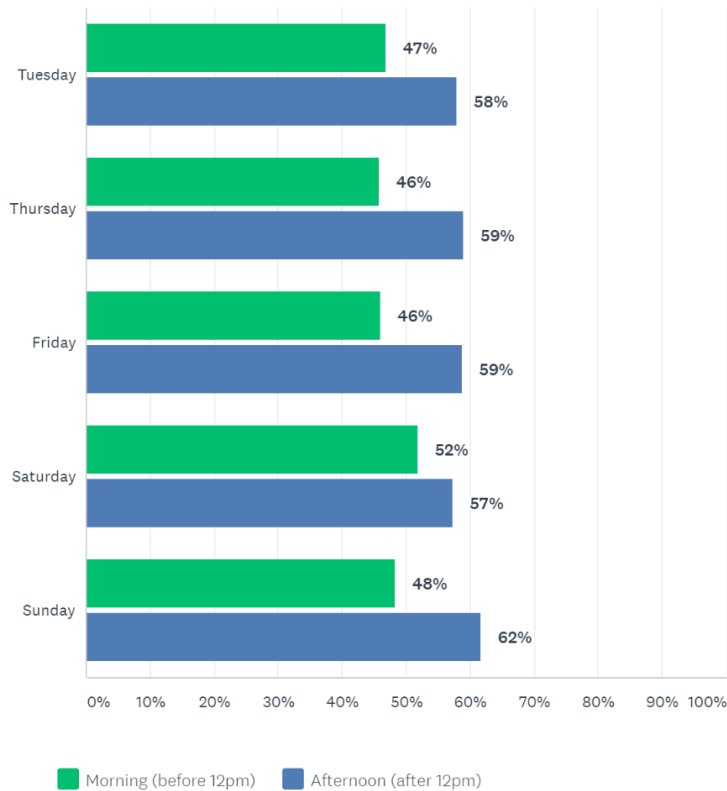
Answered: 1,650 Skipped: 32



Students showed a preference for afternoon shopping with no definitive preference for day of the week.

When you shop at Queen Vic Market, what is your preferred time and day to visit? Select all that apply

Answered: 1,584 Skipped: 98



Many students cited discounted produce as the reason for afternoon shopping with those who preferred to shop in the morning citing greater range and fresher produce as a leading driver.

Students preference to shop was also strongly driven by their availability and study/work schedule and preferred to shop at times they perceived to be less busy or crowded.

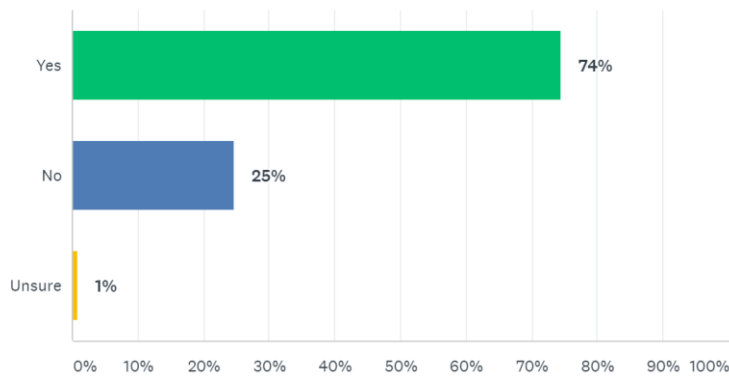
4.7 Customer conversion and retention

74% of students who received the vouchers have returned since they finished spending their vouchers. However, 74% of respondents also reported being previous shoppers at the Market indicating the program may not have delivered new customers to QVM.

Open ended feedback in the survey indicated students may be more likely to increase their frequency of visits since participating in the program.

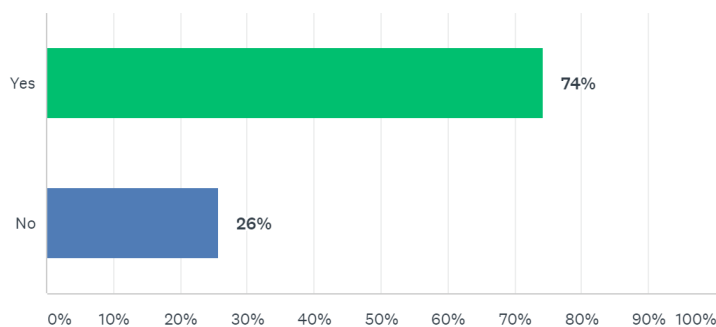
Before receiving the food vouchers, had you previously shopped at the Queen Victoria Market?

Answered: 1,646 Skipped: 36



Since you finished spending your vouchers, have you returned to the Market to shop?

Answered: 1,650 Skipped: 32



4.8 International students and the future market

Overall offer

Students have shown a strong interest in expanding Market trading hours (38%), increasing special events (31%) and the option of evening dining and bars (27%).

Customer experience and comfort was also an important driver for future visitation including more places to sit (30%), weather protection (15%) and improved way finding (12%).

Hospitality was also important for students showing interest in more street food vendors (21%) and casual dining options (17%)

Access to parking unsurprisingly scored relatively low (12%) given travelling by car was the least likely mode of transport for the respondents.

The table below shows the top improvements that would make students more likely to visit the Market in the next 12 months. Students were asked to select all that apply.

Answer Choices	Responses
More trading days / later opening hours	38%
More activities / special events	32%
More places to sit	30%
More evening and late-night dining options / bars	28%
Hawker style / street food vendors	21%
Nothing needs to change / I like it as it is	20%
More quick and casual dining options	17%
Product demonstrations in the fresh produce areas	17%
Improved shop/stall presentation	17%
More weather protections (e.g. covered areas and indoor / air-conditioned spaces)	16%
More parking / better access to parking	12%
Improved directional signage / way finding	12%
Other (please specify)	2%

Fresh produce

Students may be more likely to visit the Market with a greater range of seasonal produce offers (29%) plus access to international specialty grocers (28%) and produce (27%).

There was a strong preference for more vegetarian options (24%), organic (17%), locally made (19%), sustainably and ethically sourced (13%) and produce direct from growers (22%) showing students are socially conscious and may be looking for an 'authentic' market experience.

Students also want to see more ready to eat products including ready to eat seafood (20%), ready to eat/semi prepared take home meals (13%) and ready to cook/semi prepared ingredients (12%).

The following table shows the top-rated fresh produce options students would like to see at the Market.

Answer Choices	Responses
Specialised seasonal fresh produce offers (e.g. mushrooms, cherries, truffles)	29%
Specialty grocers (e.g. Asian, Indian, African, Middle Eastern)	28%
More specialty produce (e.g. Asian herbs/vegetables)	27%
More vegetarian options	24%
Products direct from growers	22%
More ready to eat seafood (e.g. fresh oysters, sashimi and cooked crayfish/prawns/scallops)	20%
More locally made/sourced food	19%
Bakeries that bake on site	19%
More organic options	18%
More bulk foods/wholefoods	15%
More ethically and sustainably produced/sourced products	14%
More ready to eat / semi prepared take home meals	13%
More ready to cook / semi prepared ingredients (e.g. pre-cut, marinated, crumbed, ove ready)	12%
More spice mixes, nut butters and pantry staples (e.g. flour, tinned and bottled goods)	12%

Dining options

Students may be more likely to visit the Market with a greater range of Asian dining options including Thai (32%), Japanese (31%), Korean (29%), Indian (28%) and Chinese (25%).

More coffee (23%) and breakfast/brunch options (28%) were also popular with students.

The following table shows the top 10 dining options students would like to see at the Market.

Answer Choices	Responses
Thai	32%
Fish/seafood	32%
Japanese	31%
Korean	29%
More breakfast/brunch options	28%
Indian	28%
Chinese	26%
Italian	25%
More coffee	23%
Healthy options	21%
Modern Australian	21%

Specialty merchandise

Students were most satisfied with specialty merchandise with 27% suggesting nothing needs to change. This may be attributed to the general merchandise areas of the Market being closed for much of the student voucher program and therefore students may not have experienced the offer.

The top-rated items students would like to see added to the retail mix include plants and gardening supplies (21%), household essentials (19%) and vintage clothing (16%).

Rotating speciality markets was also highly rated by students (19%) and students also showed a preference for handmade (19%) and locally made and designed (21%) products.

The following table shows the top-rated speciality merchandise offers students would like to see at the Market.

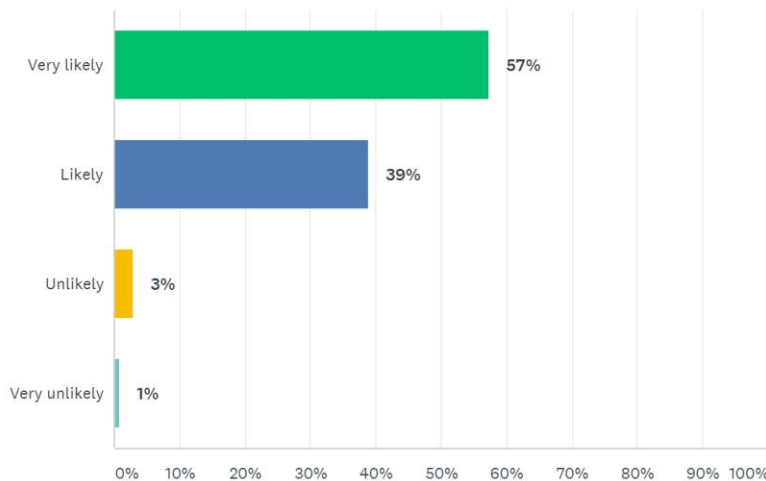
Answer Choices	Responses
More plants/seedlings/gardening supplies	21%
More locally made/designed speciality merchandise products	21%
Household essentials (e.g. toilet paper, toothpaste, cleaning products)	19%
More rotating specialty markets (e.g. fashion, antiques/vintage, technology, art, photography, books)	19%
More handmade/artisan products (e.g. pottery, homewares, jewellery)	19%
More vintage clothing and accessories	16%
More ethical/sustainably made products	13%
Stationery	12%

4.9 Returning to the Market

Over 96% of respondents indicated they were likely or very likely to return to the Market.

How likely are you to visit Queen Victoria Market in the next 12 months?

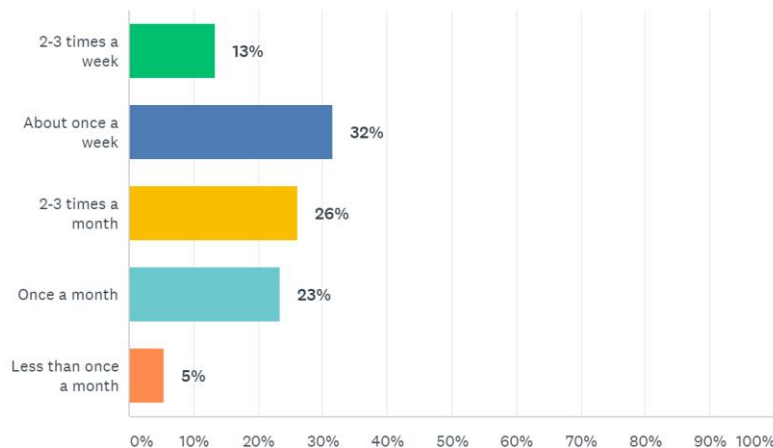
Answered: 1,558 Skipped: 124



Of the respondents who were likely or very likely to return to the Market, over 45% of them would visit on a weekly basis with an additional 26% visiting 2-3 times per month.

How frequently do you intend to visit Queen Vic Market in the future?

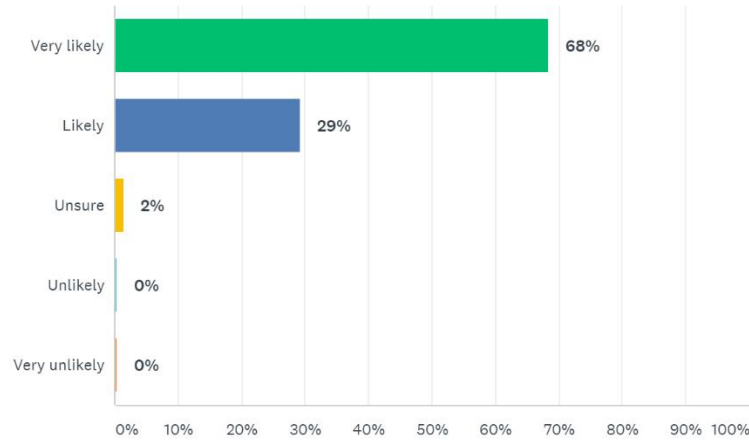
Answered: 1,495 Skipped: 187



97% of students are likely or very likely to recommend QVM to their friends and family.

How likely are you to recommend Queen Victoria Market to a friend or family member?

Answered: 1,553 Skipped: 129



4.10 Student shopping habits

74% of student respondents reporting shopping at QVM, however 82% of students indicating they normally shop at supermarkets for their fresh produce.

Markets and other local specialty stores accounted for around 30% each.

When prompted to provide further information many students cited lower cost, convenience, longer opening hours and being closer to home/local as the driver for shopping at supermarkets.

Where do you normally shop for fresh produce (fruit, vegetables, meat and poultry, seafood, cheese and dairy, deli, bread)? Select all that apply

Answered: 1,557 Skipped: 125

