



Learning Abroad Industry Survey Results 9.0

July 2026





Introduction

As part of CISaustralia's ongoing industry engagement strategy and to make a significant ongoing contribution to the Learning Abroad Sector (and to our partner Universities), CISaustralia have developed a detailed survey and subsequent set of data that supports the management and growth of institutional Learning Abroad strategies.

The survey and data was born out of COVID but has expanded to be far more than a COVID impact and recovery data set. Australian Universities have provided ongoing positive feedback about the data quality and we believe the survey continues to provide valuable insights, that advance shared knowledge across Australian institutions and the Learning Abroad sector as a whole.

The initial survey was sent in 2020 to determine the immediate impacts of COVID-19 on the Learning Abroad Sector. Subsequent versions of the survey, now in its ninth iteration, were all designed to build on those original results, analyse what has changed and to benchmark institutional data. A primary goal is to support universities and the Learning Abroad sector to successfully navigate into the future using the latest data and trends. The purpose of this survey is not to duplicate AUIDF data and enrolment reporting. The two surveys collate very different data sets and are complimentary.

CISaustralia has developed a set of indicators for Australian Universities to provide data that has been collated and shared anonymously and confidentially in a summarised format. This 9.0 survey was sent to all 39 Australian Universities and in most cases was completed by the University's Learning Abroad Director, Manager, Coordinator or similar.

A summary of survey results will also be presented at the IEAA Learning Abroad Forum in August 2026.

Thank You



Thank you for your valuable feedback. We truly value your input and appreciate your ongoing collaboration as we continue to support learning abroad opportunities for students across Australia.



Data Integrity

The insights gathered from this survey will enhance shared knowledge across the Learning Abroad Sector and Australian institutions in regards the latest strengths, challenges, trends, threats and opportunities impacting the Learning Abroad sector. Where applicable, the results will be benchmarked against data from the [previous eight industry surveys](#). We will share a summary of the results publicly, presenting the information anonymously and in a format without identifying any individual or institution. A detailed summary of the survey findings is also being prepared for the Learning Abroad Forum in August 2026.

Participation in this survey is voluntary, and all responses are kept confidential. No self-identifying information is collected, and all data is stored securely in a password-protected electronic format. All data from the 2026 survey and all previous surveys are publicly available from the [CISaustralia Industry Research web pages](#).

The initial survey in April 2020 assessed the immediate impacts of COVID-19 on Learning Abroad at Australian Universities. Subsequent versions have built on these results, analysing changes and benchmarking institutional feedback. The goal of the survey is to assist universities to better understand the sector and what other institutions across Australia are doing or considering in the Learning Abroad space.



Methodology / Results

The following slides contain summarised data from the 2026 Learning Abroad Industry survey sent 8th June 2026. The survey was sent to all 39 Australian Universities with 38 institutions providing responses (a 97.44% response rate).

Results for the 2026 survey will (where possible) be benchmarked to all previous eight surveys.

The response rate for each survey since inception (2020) has been between 87% - 97%, with the average response rate being 92.1%.

All survey data, including the past eight surveys, can be located on the [CISaustralia Industry Research website](#). Information is collated and saved on behalf of the Learning Abroad sector.

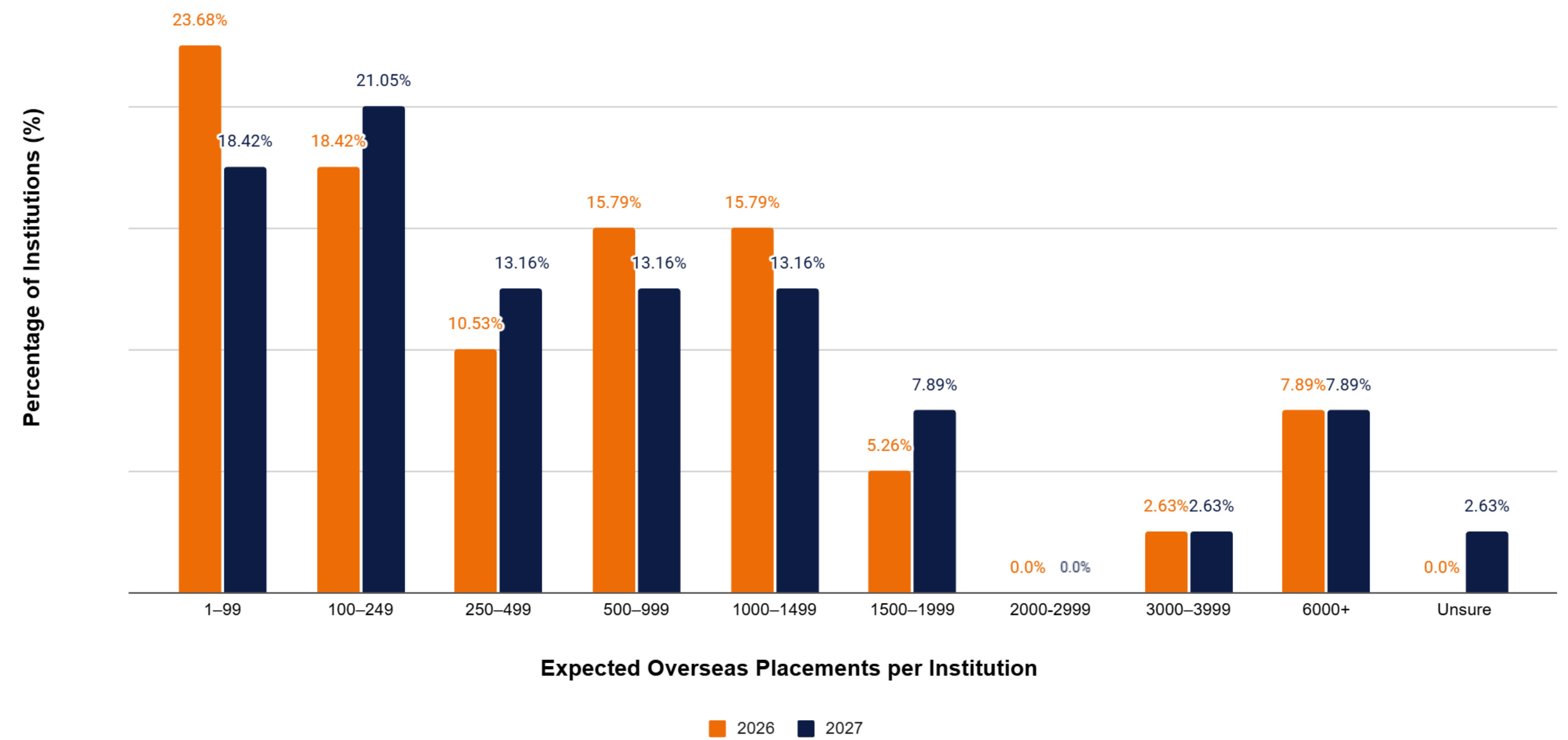
Response Rate

97.44%



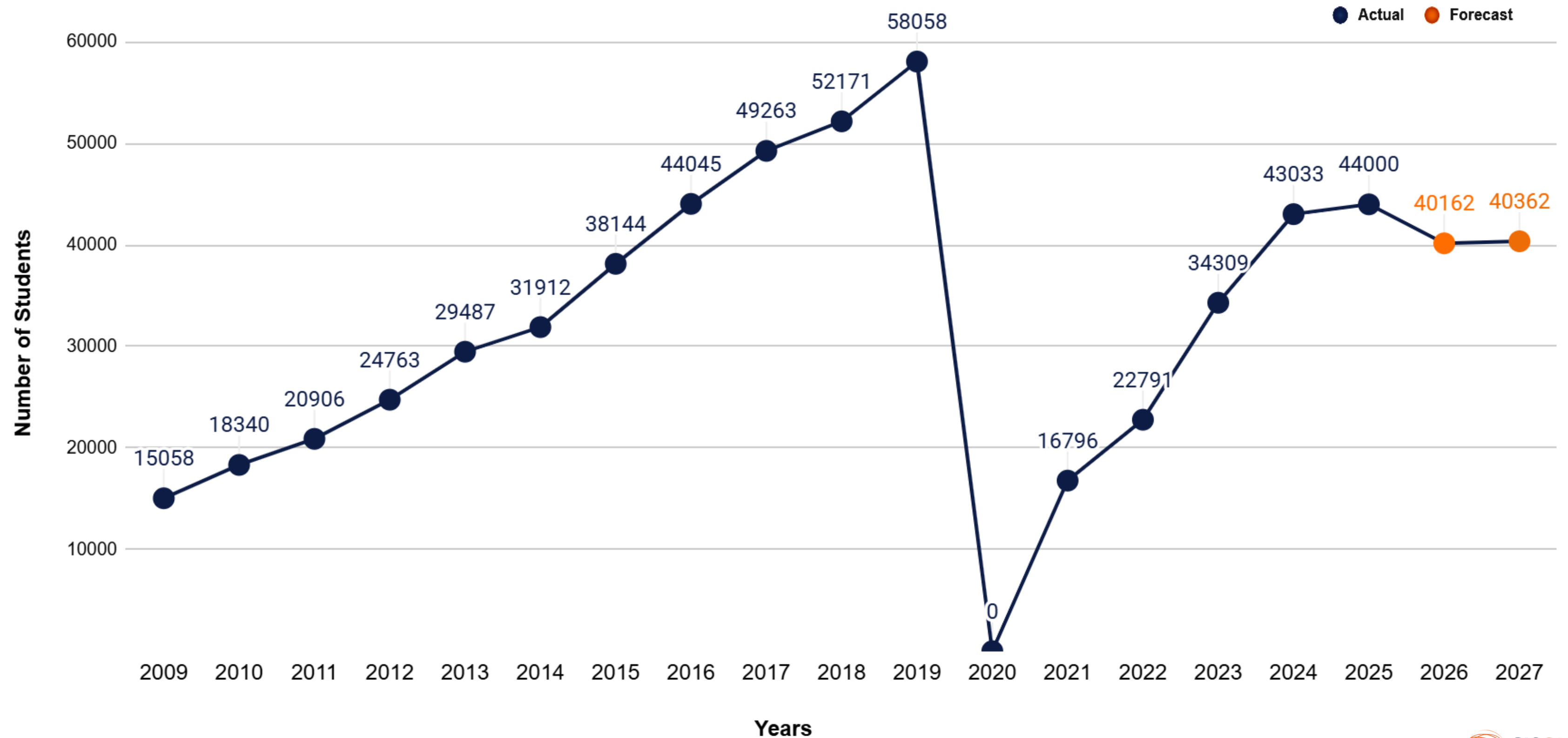
**Three Australian universities provided responses for questions 2, 3, 15 & 16 only.*

Q2 & Q3: In 2026 and 2027, how many students do you expect to place overseas in an approved (for credit) study, intern, volunteer, exchange, or other Learning Abroad (outbound) program?

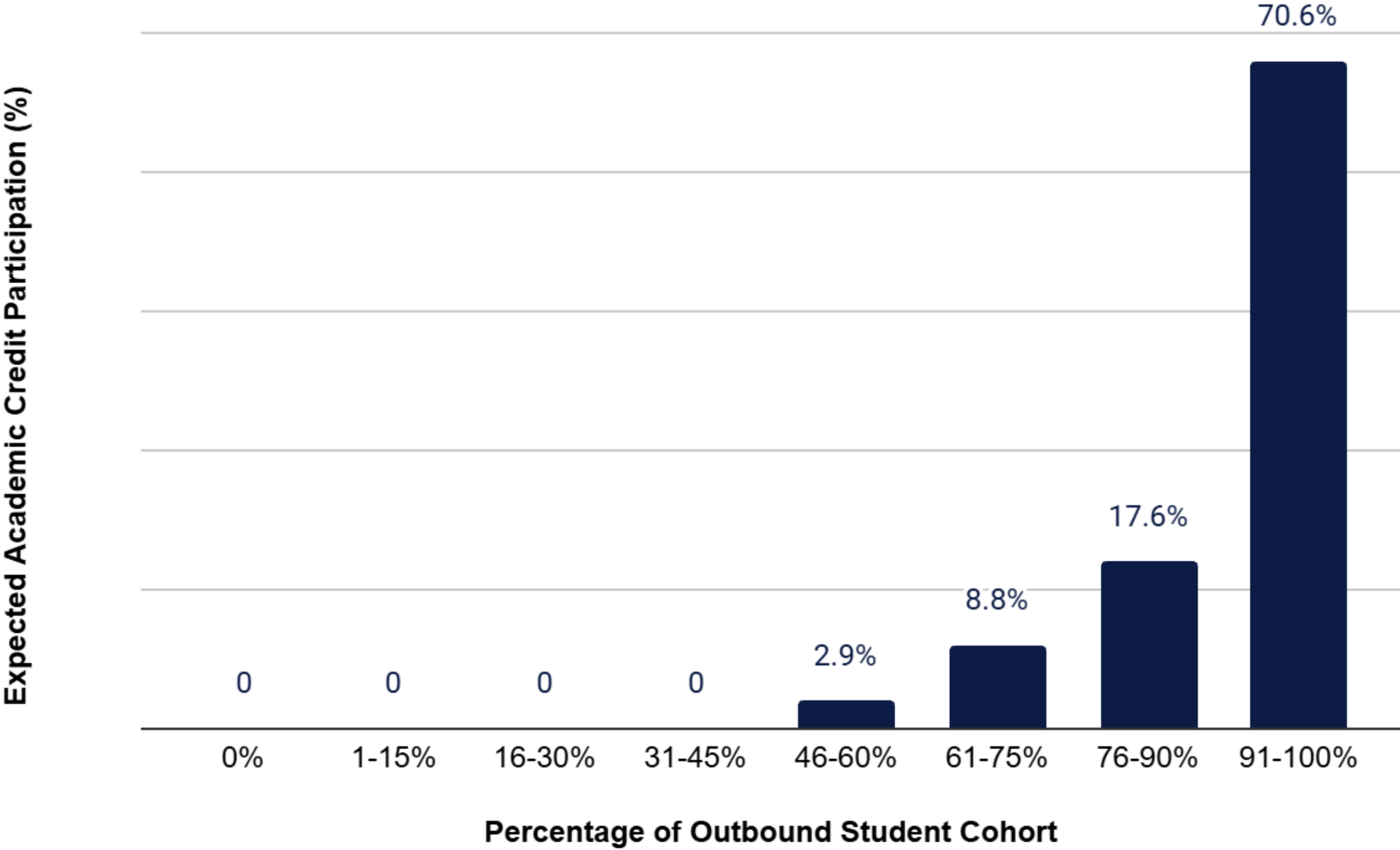


of Responses: 38 | Response Rate: 100%

Participation by Students from Australian Universities (Outbound Mobility) in Learning Abroad Programs: 2009 - 2027

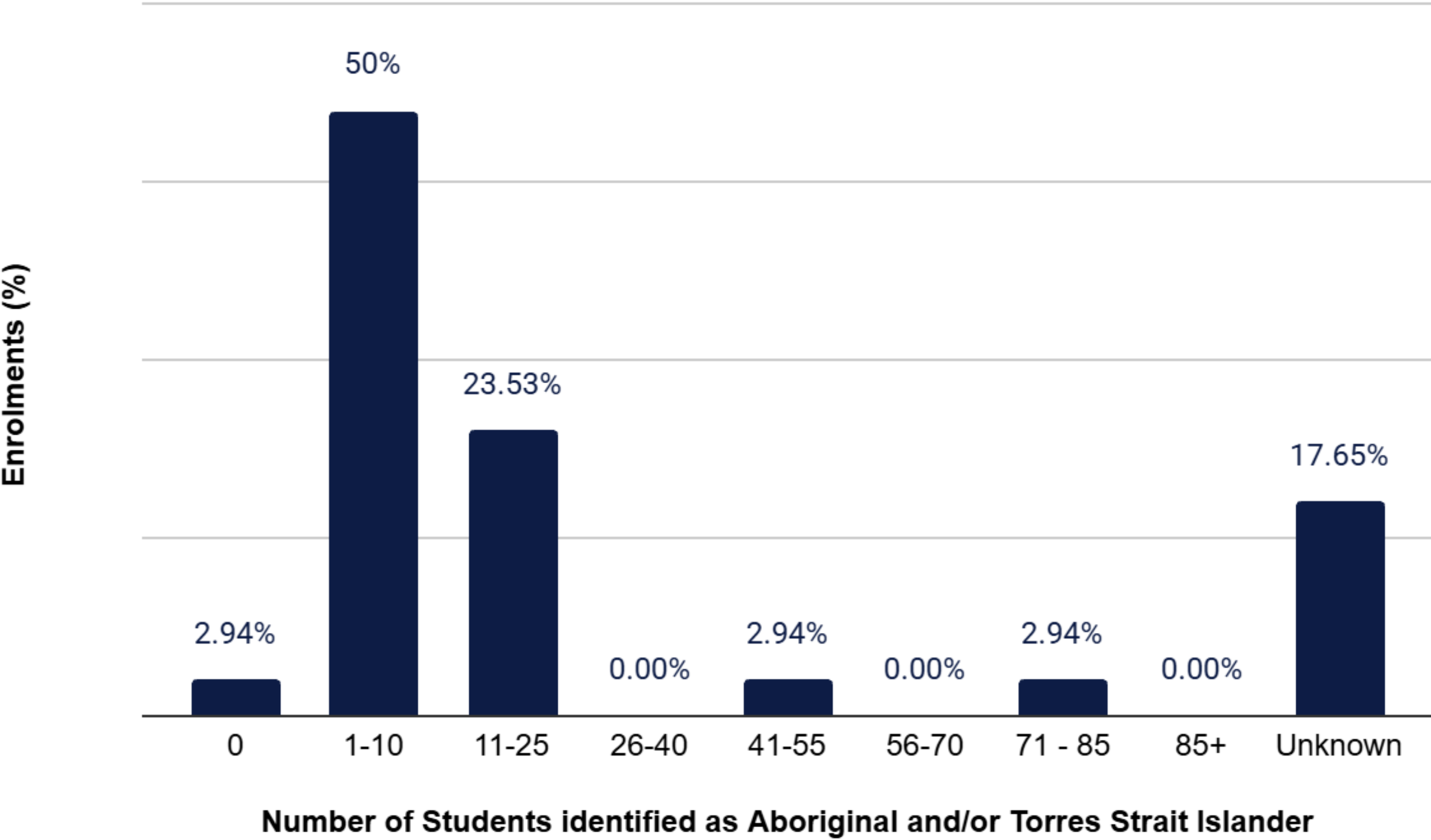


Q4. Approximately what percentage of your outbound student cohort in 2027 do you expect to participate in approved Learning Abroad programs FOR ACADEMIC CREDIT?



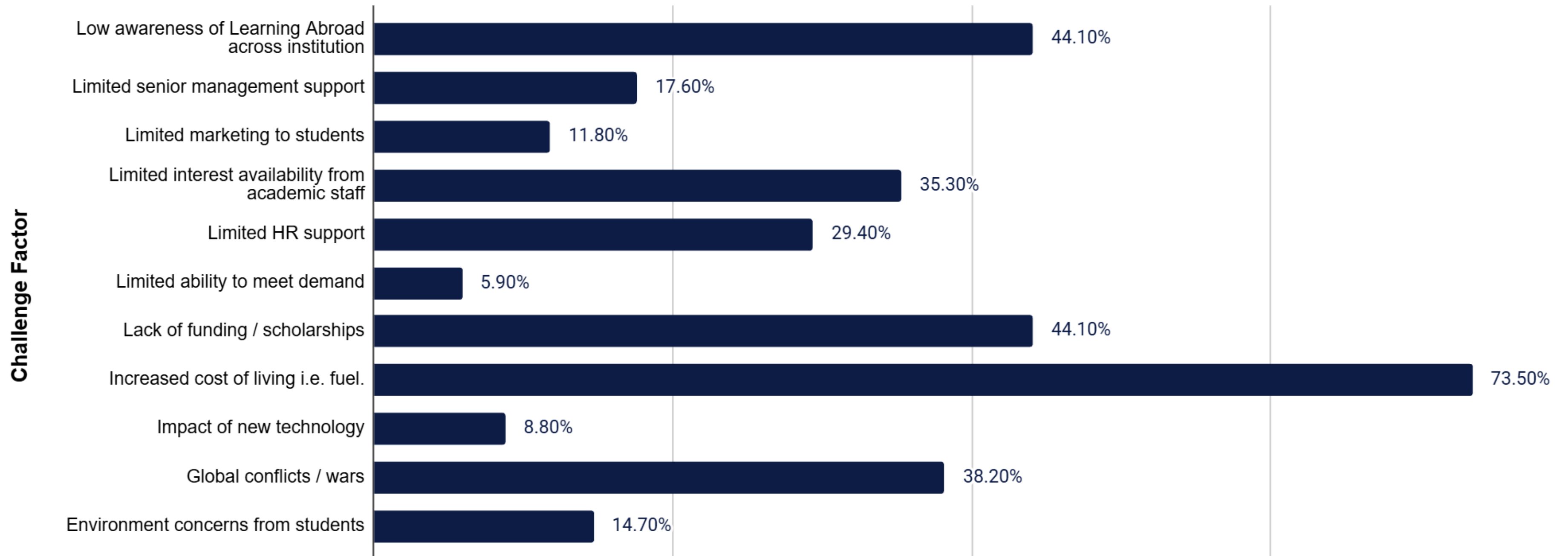
of Responses: 34 | Response Rate: 89.47%

Q5. In 2026, how many Learning Abroad (outbound) enrolments from your institution identify as Aboriginal and/or Torres Strait Islander?



of Responses: 34 | Response Rate: 89.47%

Q6. What are the major challenges that will limit your institution's Learning Abroad (outbound) enrolment levels in 2026?



Institutions that rated each factor as either, 4 'Challenge' or 5 'Extreme challenge'

of Responses: 34 | Response Rate: 89.47%

Q6. Are there any other important limiting factors to your institution's Learning Abroad (outbound) enrolments that you are aware of?

Curriculum and Credit Rigidity

- **Calendar Misalignment:** Academic calendar misalignments (such as trimester systems) create scheduling conflicts with universities.
- **Credit Matching Barriers:** A primary hurdle is the difficulty of matching subjects and aligning credits, which is often a slow and obscure process
- **Inflexible Degree Structures:** Rigid course requirements leave little room for mobility programs and students worry about extending their degree duration.

Institutional and Administrative Constraints

- **Restructuring Impact:** Institutional restructuring have caused a loss of specialised knowledge and reduced the capacity to support credit approvals.
- **Staff Workload & Resourcing:** High workloads leave academic staff with limited capacity to quickly process study plans or develop new partnerships.
- **Visibility & Awareness:** Low awareness and offices poorly located, non-visible campus offices reduce student engagement.

Student Demographics and Financial Barriers

- **Competing Commitments:** Cohorts consisting of mature or first-in-family students with work and family commitments they cannot leave.
- **Financial Pressures:** Program costs combined with cost-of-living pressures make learning abroad financially unfeasible for many.
- **Preference Mismatch:** There is a misalignment between institutional priority regions (e.g., Asia) and student demand (e.g., Europe and America).

Q7. How have recent government policy shifts, specifically stricter visa processing and increased fees for (inbound) international students, impacted your university's Learning Abroad (outbound) program?

Staffing Reductions and Operational Disruptions

- **Cost-cutting measures** have led to staffing challenges that impact the operational capacity of Learning Abroad offices and support staff.
- **Cuts and Freezes:** Institutions report direct staffing cuts, frozen positions or major restructures that limit program scalability.
- **Diverted Resources:** Staff resources are being reallocated away from outbound mobility toward research or transnational education (TNE) projects.

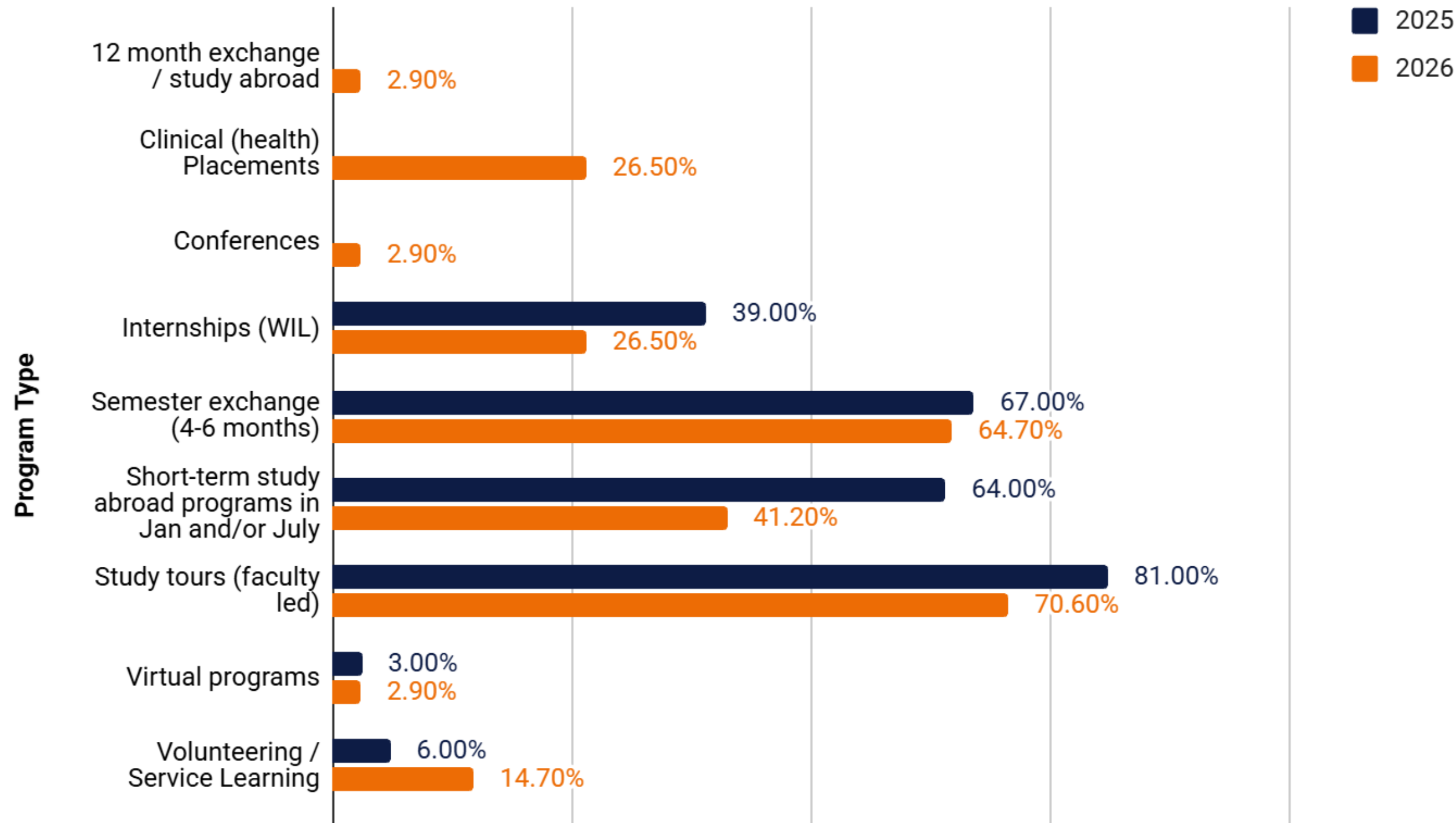
Reciprocity Imbalances and Capped Exchange Capacity

- **Stricter visa processing** and higher fees have discouraged inbound exchange students, creating a ripple effect that limits outbound opportunities.
- **Declining Inbound Enrolments:** High travel and living costs have caused a drop in incoming exchange students through application withdrawals or visa rejections.
- **Partnership Sustainability Risks:** Because exchange programs rely on reciprocity, falling inbound numbers create immediate imbalances with international partners.

Budgetary Constraints and Reduced Outbound Funding

- **Reduced Grants & Scholarships:** Reduction in NCP funding and internal funding for travel grants and scholarships is tightening due to university-wide financial constraints.
- **Restructured Program Delivery:** Due to cost pressures universities are restricting faculty-led programs and shifting online.
- **Shift in Priorities:** Non-revenue-generating Learning Abroad programs are increasingly deprioritised in favor of revenue-generating recruitment and financial sustainability.

Q8. How popular do you expect the following types of Learning Abroad (outbound) programming to be among your student body in 2026?



Institutions that rated each program type either, 4 'Popular' or 'Very Popular' (%)

Other Learning Abroad programming mentioned:

- Short-term exchange
- Other forms of study abroad
- Non-faculty study tours (not-for-credit)
- International field experience / practicum requirements. Note: Certain programs (e.g., Veterinary Science and Engineering) require overseas field hours for degree completion without awarding course credit.
- Dual-degree overseas components

Q9. What are the primary drivers behind your highest and lowest rated programs? Please include any caveats or emerging trends you are observing for 2026.

Primary Drivers of High-Rated Programs

- **Academic Alignment:** Clear credit mapping, embedded curriculum integration, or mandatory requirements (e.g., clinical placements/WIL).
- **Faculty Champions:** Strong academic backing, active faculty promotion, and cohort-based group models that offer student reassurance.
- **Financial & Logistical Security:** Availability of funding (scholarships/NCP) and destinations with high cultural or linguistic familiarity (Europe/US).
- **Reputation:** Positive student word-of-mouth and established institutional partnerships.

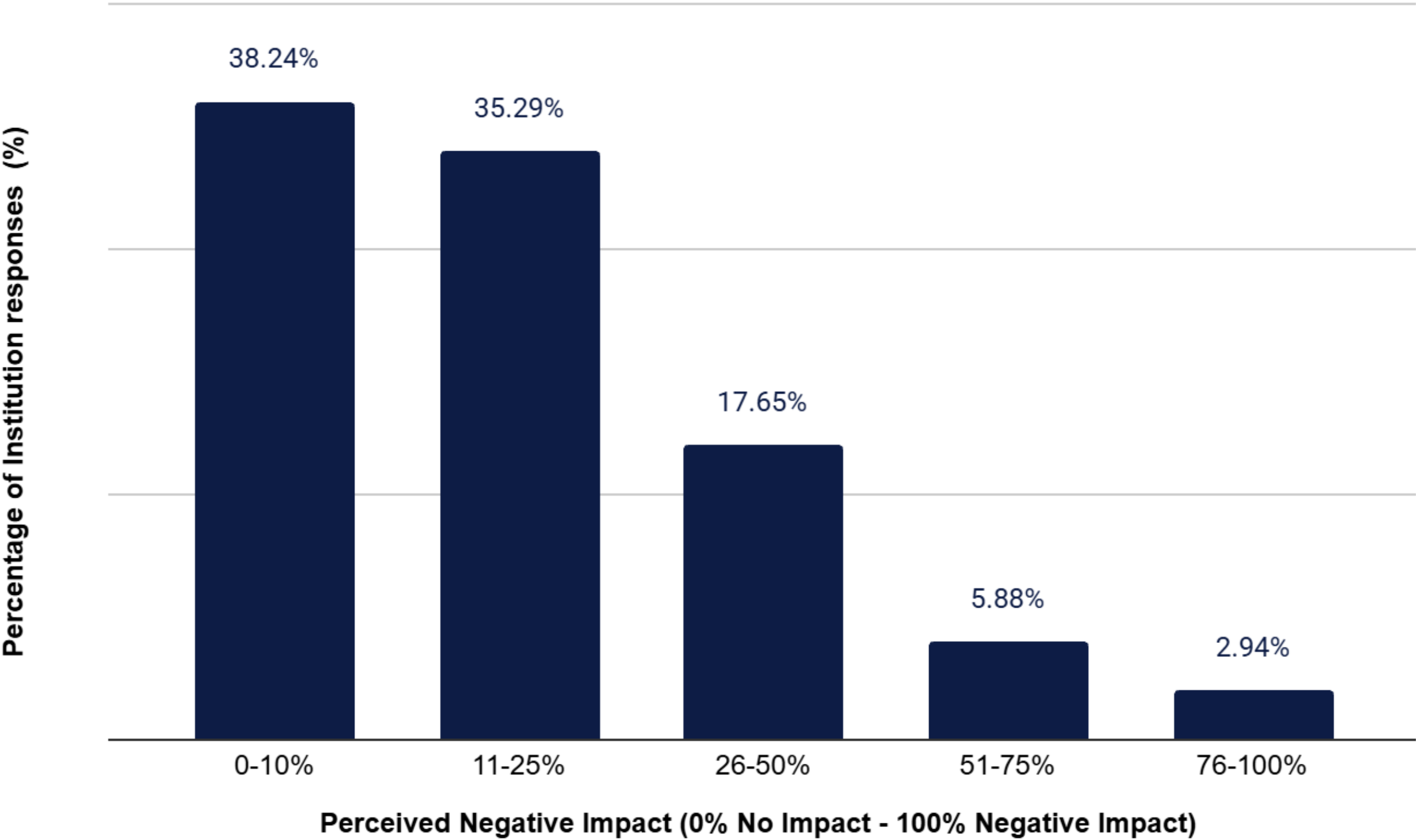
Primary Drivers of Low-Rated Programs

- **Financial & Personal Friction:** Out-of-pocket costs and long durations (e.g. 12 month exchange)
- **Academic & Bureaucratic Hurdles:** Rigid degree structures, complex visa processes and lack of credit flexibility.
- **Staffing Constraints:** Underresourced central teams deprioritising labor-intensive programs (e.g. 12 month exchange) to focus on higher-ROI options.
- **The Virtual Disconnect:** Virtual programs are universally lowest-rated due to low student perceived value, poor immersion and minimal institutional investment.

Key 2026 Emerging Trends

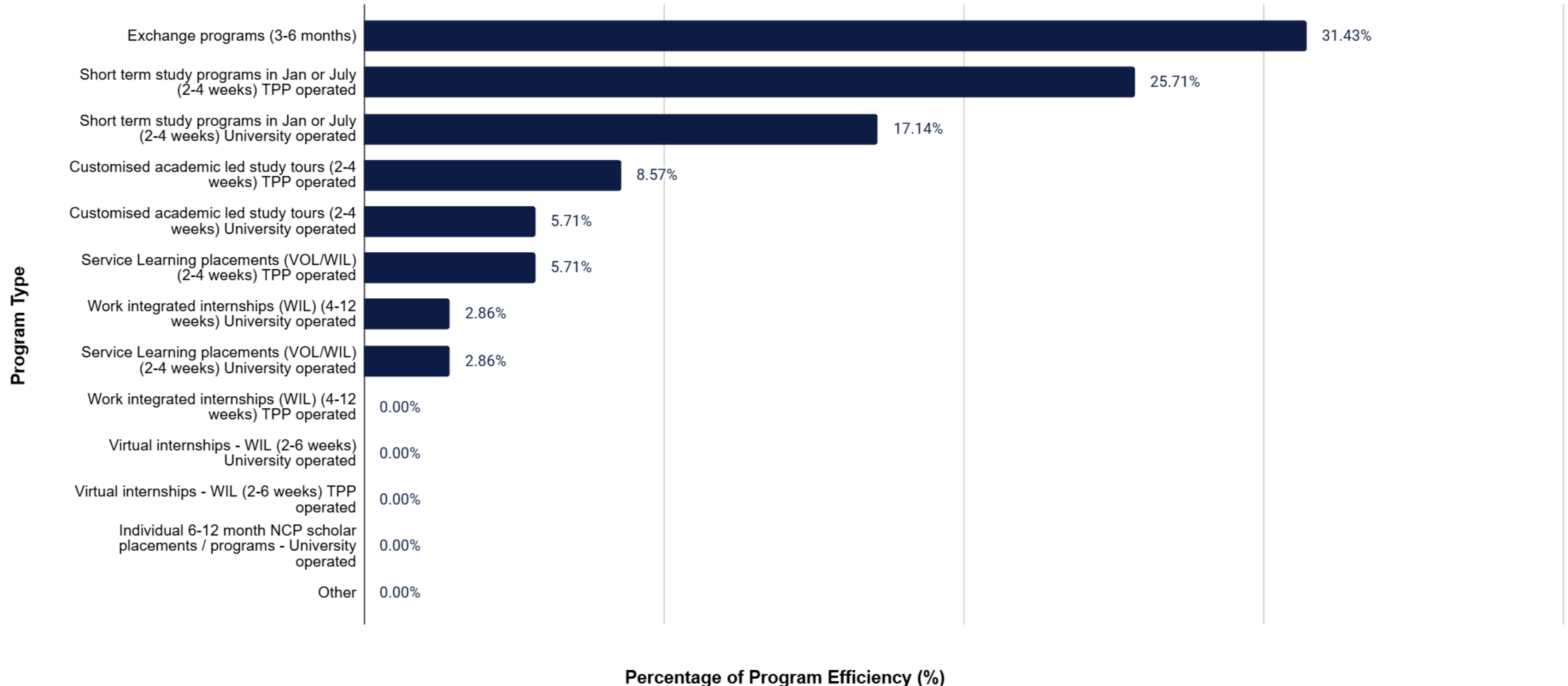
- **The Cost-of-Living Pivot:** A distinct shift toward short-term programs/semester exchange as a lower-cost than longer programs
- **The Faculty-Led Decline:** A drop in faculty-led short programs due to internal restructures, a loss of academic leaders and reductions in external funding. (reported up to 40%)
- **NCP Dependency:** Participation entirely dependent on external government grants.
- **Semester Exchange:** While some universities report a massive post-pandemic resurgence in semester exchange (up to 25% growth), others are actively moving away from it due to low ROI and administrative burnout.

Q10. What negative impact (%) do you think the US/Iran conflict has had on your Learning Abroad (outbound) enrolments in 2026?



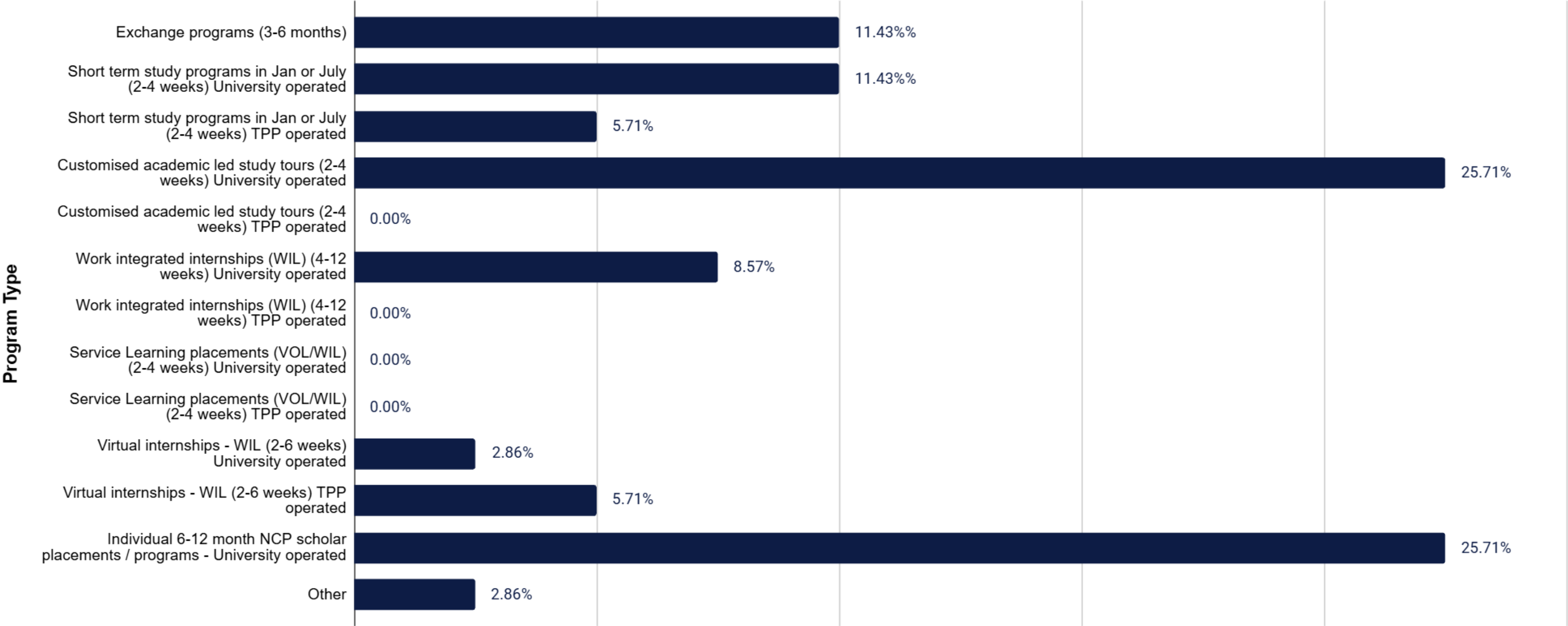
of Responses: 34 | Response Rate: 89.47%

Q11. From an institutional perspective, which type of Learning Abroad (outbound) program do you consider THE MOST efficient for your institute to deliver in terms of staffing resources and operational cost?



of Responses: 35 | Response Rate: 92.11%

Q11a. From an institutional perspective, which type of Learning Abroad (outbound) program do you consider LEAST efficient for your institute to deliver in terms of staffing resources and operational cost?

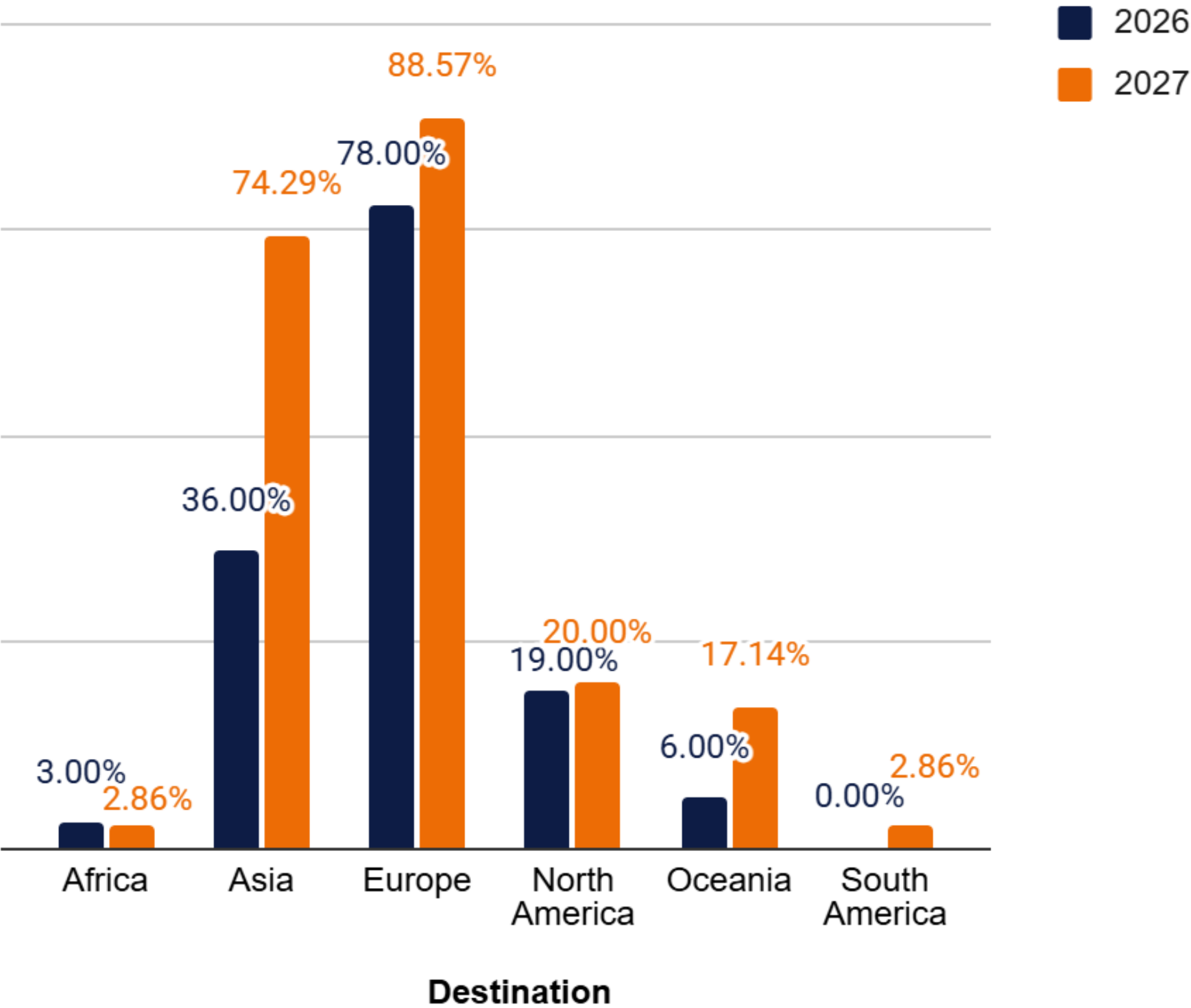


Percentage of Program Efficiency (Least) (%)

of Responses: 35 | Response Rate: 92.11%

Q12. What do you believe will be your students' most popular Learning Abroad (outbound) region for your institution in 2027?

Responses rated 4 'Popular' or 5 'Very Popular' (%)



- Key university insights:**
- **Europe/UK Booming:** Remains the top choice for traditional exchange, with the UK leading due to zero language barriers and easy credit matching.
 - **Asia Concentrated in Japan/Korea:** Student-driven interest in Asia is heavily focused on these two cultural hubs.
 - **USA in Decline:** Demand is dropping sharply due to fears over gun violence, the political climate, and safety; Canada is now preferred.
 - **NCP Cuts Hitting Diversity:** Reduced government funding has caused short-term programs to developing nations (Vietnam, Cambodia, Timor-Leste) to dry up.
 - **The "Value for Money" Pivot:** Cost-of-living pressures are driving students toward Asia due to cheaper flights and lower expenses.
 - **Oceania rise:** Region has been popular with outbound Clinical Placements.
 - **Africa & South America Blind Spots:** These regions see low numbers purely because Australian universities lack active partnerships there. These regions along with other exotic destinations are more popular for Volunteer/WIL programs.
 - **English speaking destinations:** Students preference remains to English speaking countries.

Q13. What will be your institution’s most popular NCP funded Learning Abroad program locations in 2027?

Q14. What will be your most popular non-NCP funded Learning Abroad program locations in 2027?

Country	% of Universities that ranked country as either “4” or “5 – Very Popular”
Japan	71.43%
Republic of Korea	54.29%
Indonesia	45.71
China	37.14%
Singapore	31.43%
Fiji	25.71%
Vietnam	25.71%
Hong Kong	20.00%
Malaysia	14.29%
Thailand	14.29%
Vanuatu	14.29%
Cambodia	11.43%
Nepal	11.43%

of Responses: 35 | Response Rate: 92.11%

Country	% of Universities that ranked country as either “4” or “5 – Very Popular”
England	77.14%
Canada	40%
Scandinavia	40%
Scotland	34.29%
Spain	31.43%
USA	28.57%
France	25.71%
Germany	25.71%
Italy	25.71%
Netherlands	25.71%
Wales	11.43%
New Zealand	8.57%

of Responses: 35 | Response Rate: 92.11%

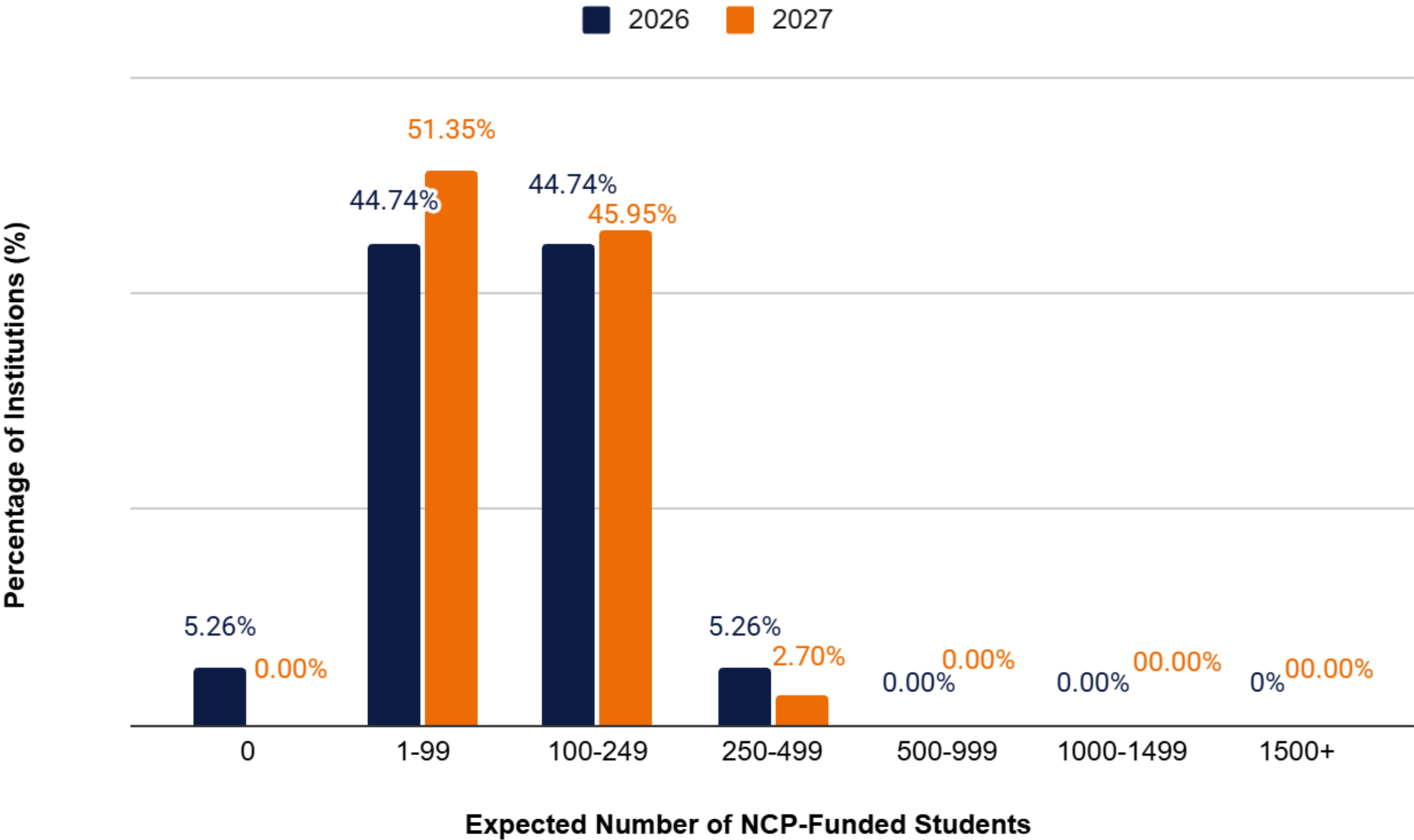
University Insights on NCP Country Rankings

- **Rankings Combine Demand and Funding:** Country priorities are based on student interest, active partnerships, and New Colombo Plan (NCP) grant availability.
- **Reduced Funding Shrink 2027 Pipelines:** Poor funding success in 2026 caused institutions to drop major hubs like Vietnam, India and Thailand.
- **Students Favor Premium Asian Hubs:** Organic student demand remains heavily concentrated in Japan, South Korea, and Singapore.
- **Learning Abroad Constrained by Faculty Capacity:** Short-term rankings depend entirely on motivated academic champions who have the staff resourcing to run them.
- **Specialisation Drives Regional Focus:** High rankings follow institutional strengths, such as specific degrees.

University Insights on non-NCP Country Rankings

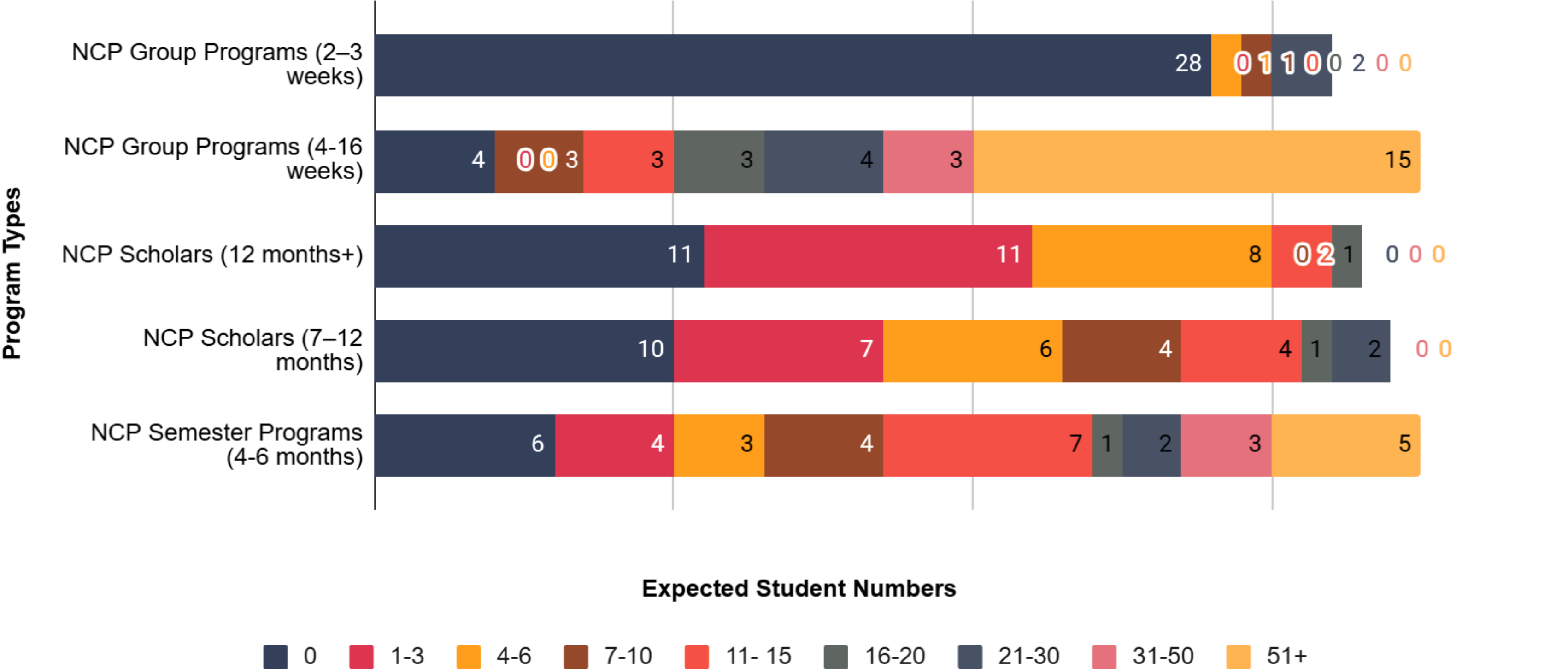
- **English-Speaking Nations Dominate Demand:** England, Scotland and Canada lead because no language barriers make credit alignment seamless.
- **Rankings Depend on Pre-Existing Agreements:** Non-NCP priorities are limited strictly to regions with active, pre-established partner agreements.
- **Discipline Overlap Dictates Travel Pathways:** High rankings follow specialised degree matching, such as marine students targeting the US, England and Scotland.
- **Scandinavia and Western Europe are Rising:** While the UK still dominates, student interest is rising for Spain, Italy and Denmark.
- **Missing Agreements and low interest:** Regions rank lowest simply because universities lack active partnerships or because students reject non-Western destinations.

Q15 & Q16. How many students do you expect to send overseas on Learning Abroad programs in 2026 and 2027 with NCP support funding?



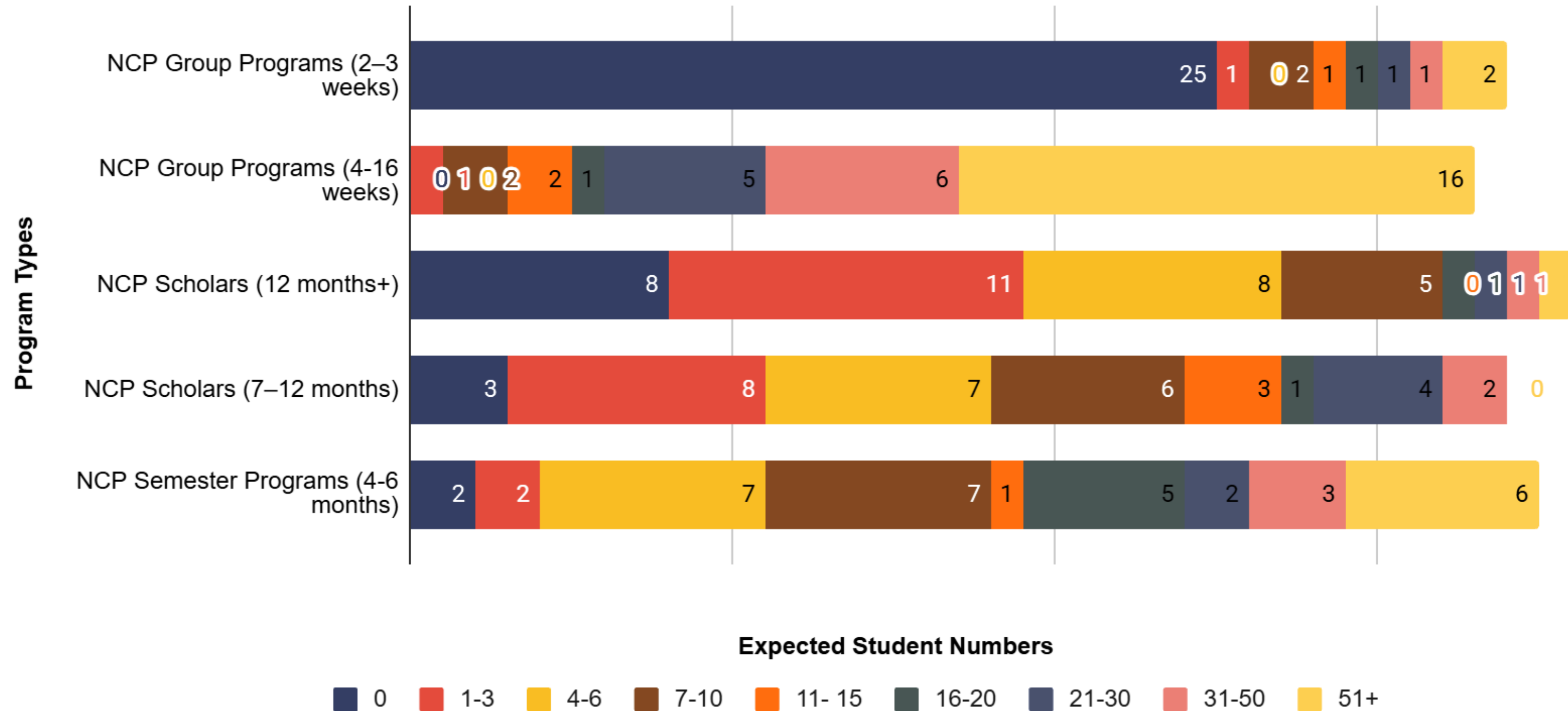
of 2026 Responses: 38 | Response Rate: 100%

Q17. In 2026, how many NCP funded students do you expect to place in each of the following program types?



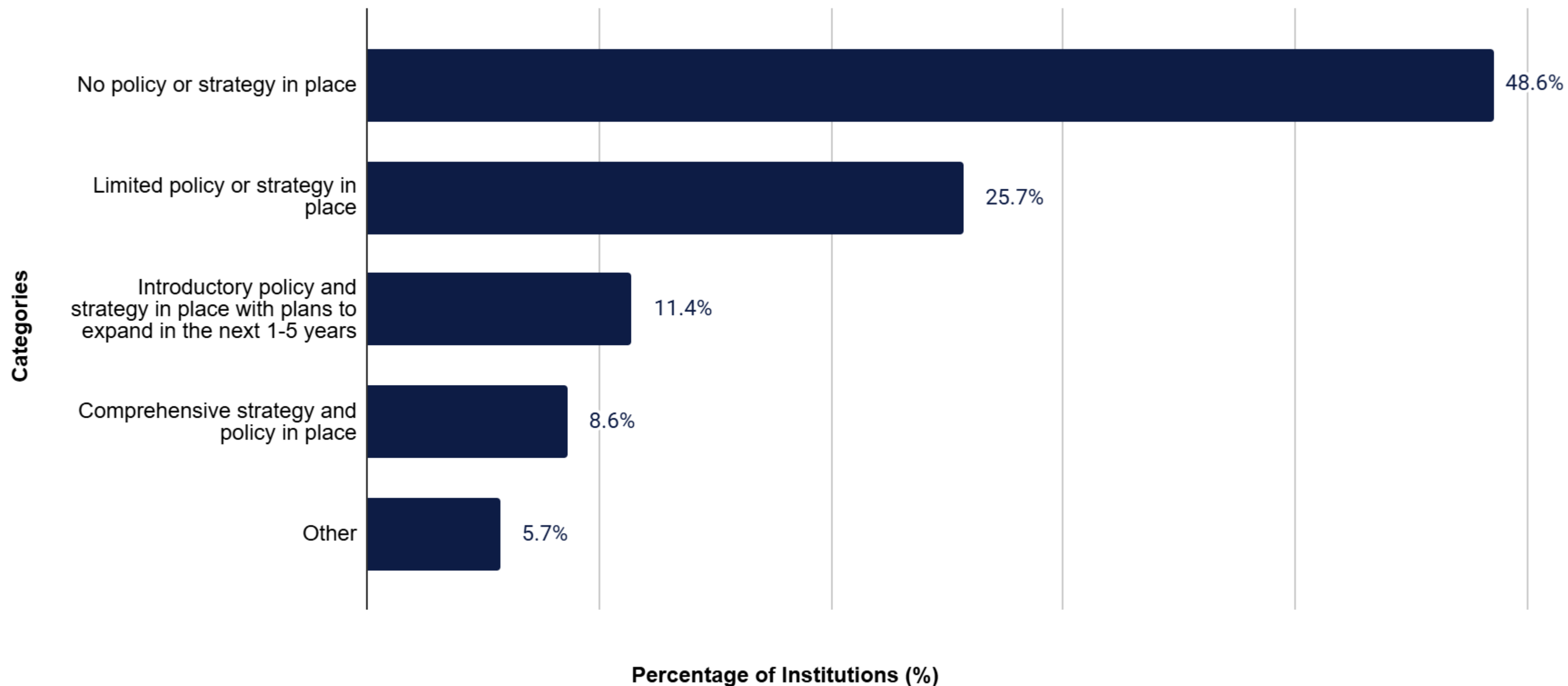
of 2026 Responses: 35 | Response Rate: 94.59%

Q18. In 2027, how many NCP funded students do you expect to place in each of the following program types?



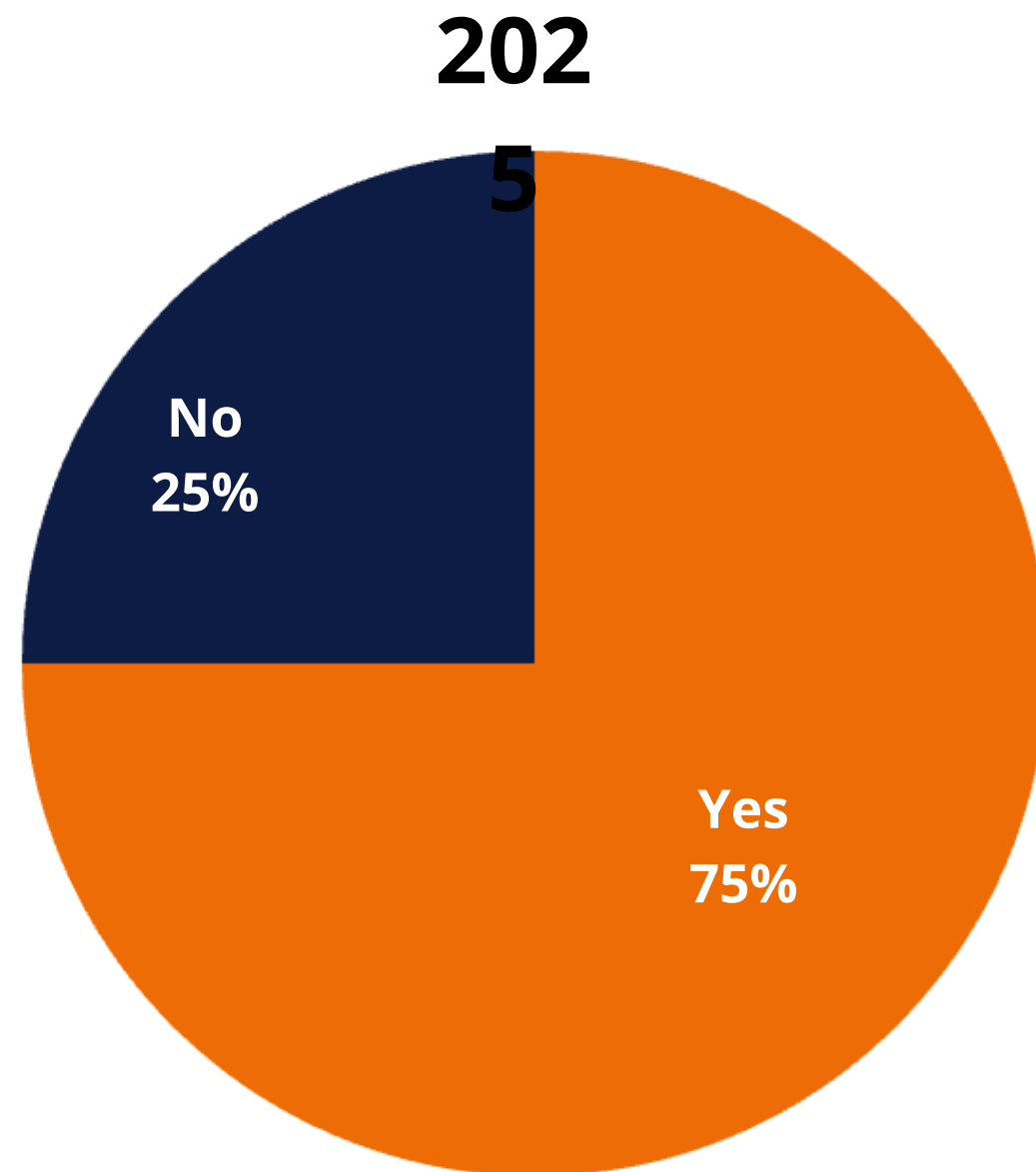
of Responses: 35 | Response Rate: 92.11%

Q19. Does your institution have a policy or strategy in place to offset the impact of carbon emissions on the environment as a result of student travel?

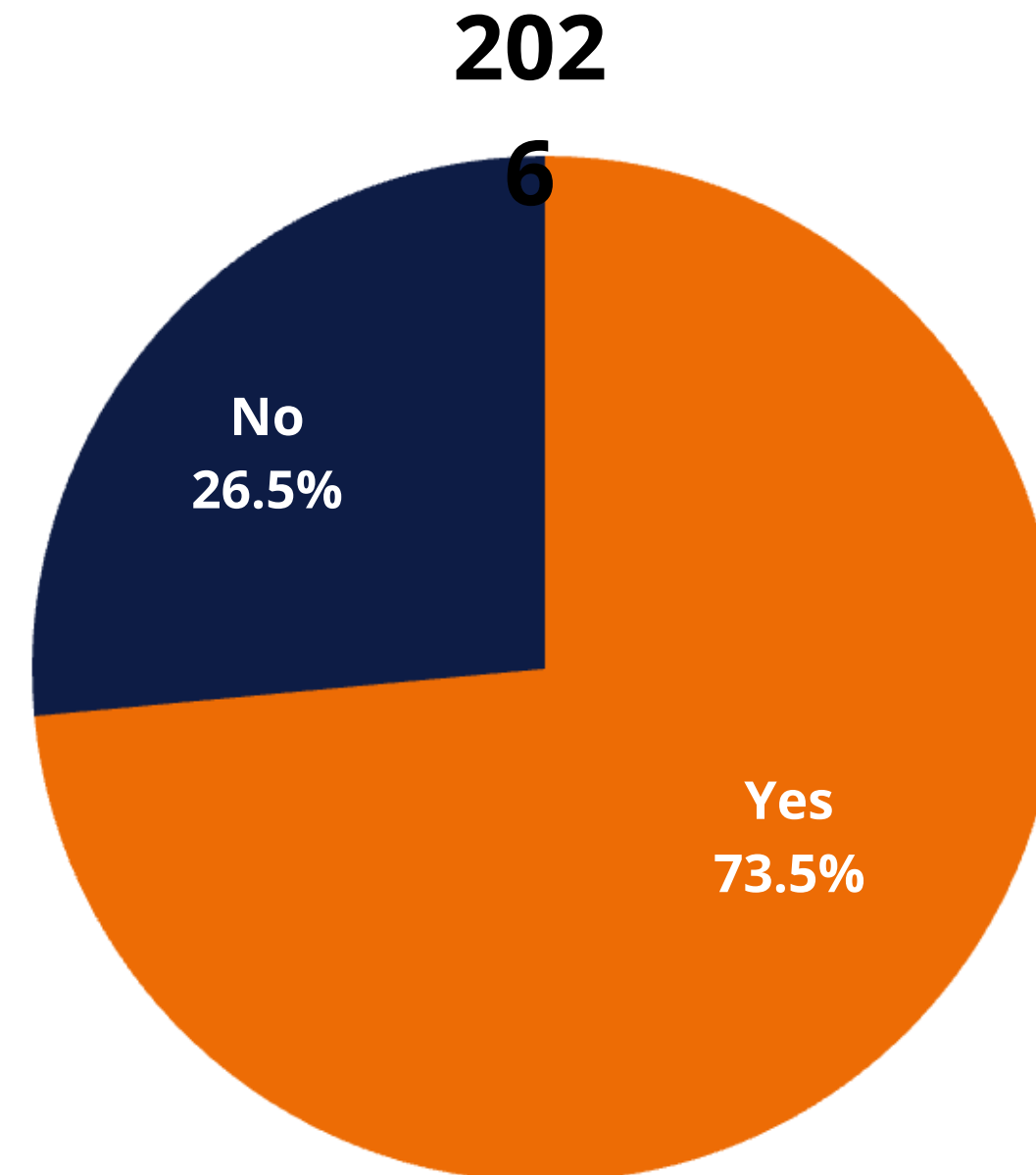


of Responses: 35 | Response Rate: 92.11%

Q20. Will your institution utilise the complimentary CISaustralia Green Book online resource as part of your pre-departure process for Learning Abroad (outbound) students in 2026?

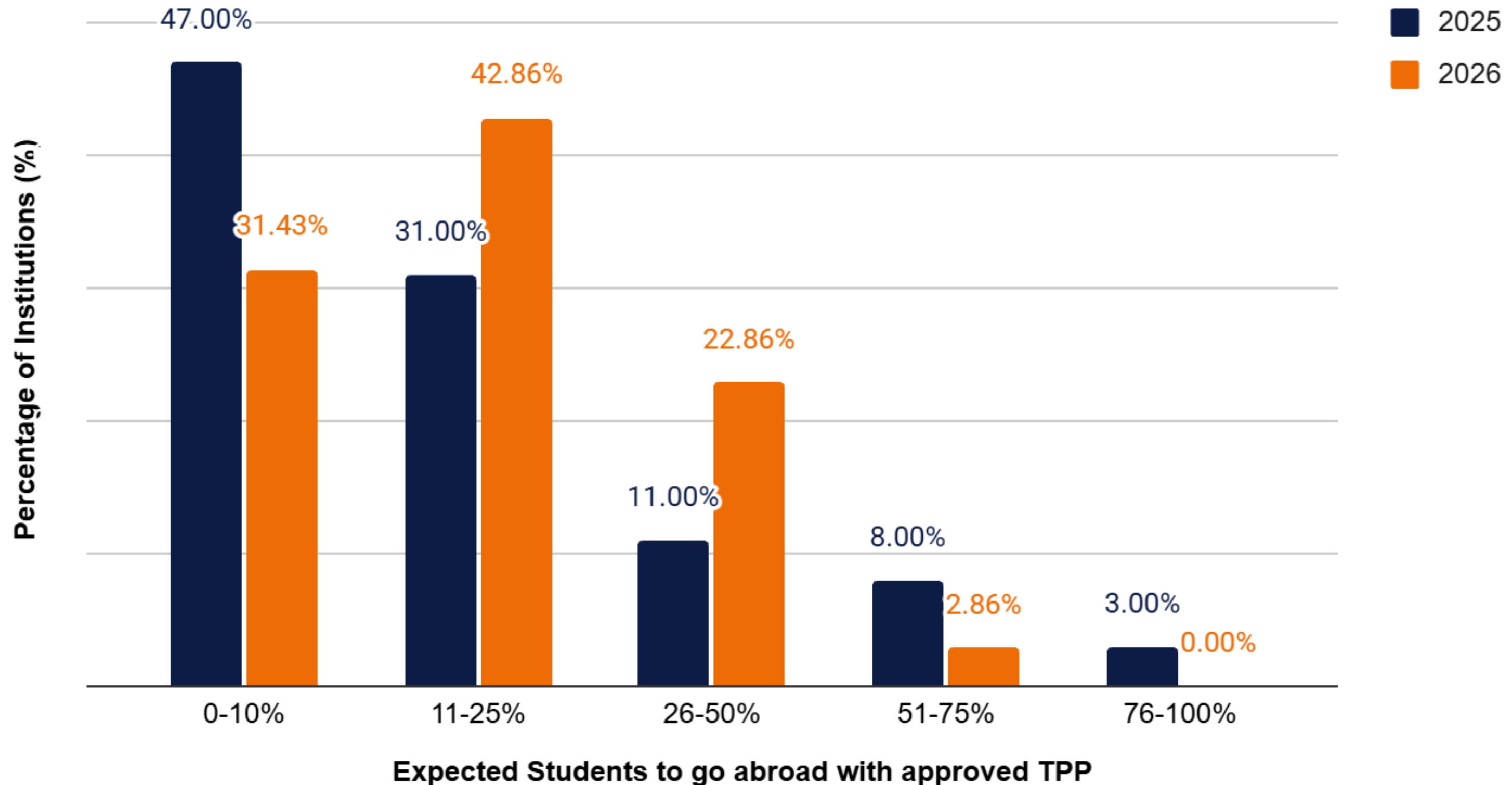


of 2025 Responses: 35 | Response Rate: 97%



of 2026 Responses: 34 | Response Rate: 89.47%

Q21. Approximately what percentage of your institution's Learning Abroad (outbound) student cohort in 2026 do you expect to go abroad through one of your approved Third-Party Providers (TPP)?



of 2026 Responses: 35 | Response Rate: 92.11%

Q22. What are the biggest challenges your institution faces when working with Third-Party Providers on Learning Abroad programs?

Limited availability for students due to trimester study arrangement

Suitability and ensuring alignment with institutional expectations, including academic standards, program quality

Program cost, credit mapping, limited resources to vet and promote programs

Getting Academic staff on board.

Constraints on promotion, as priority is given to programs delivered through established university partners.

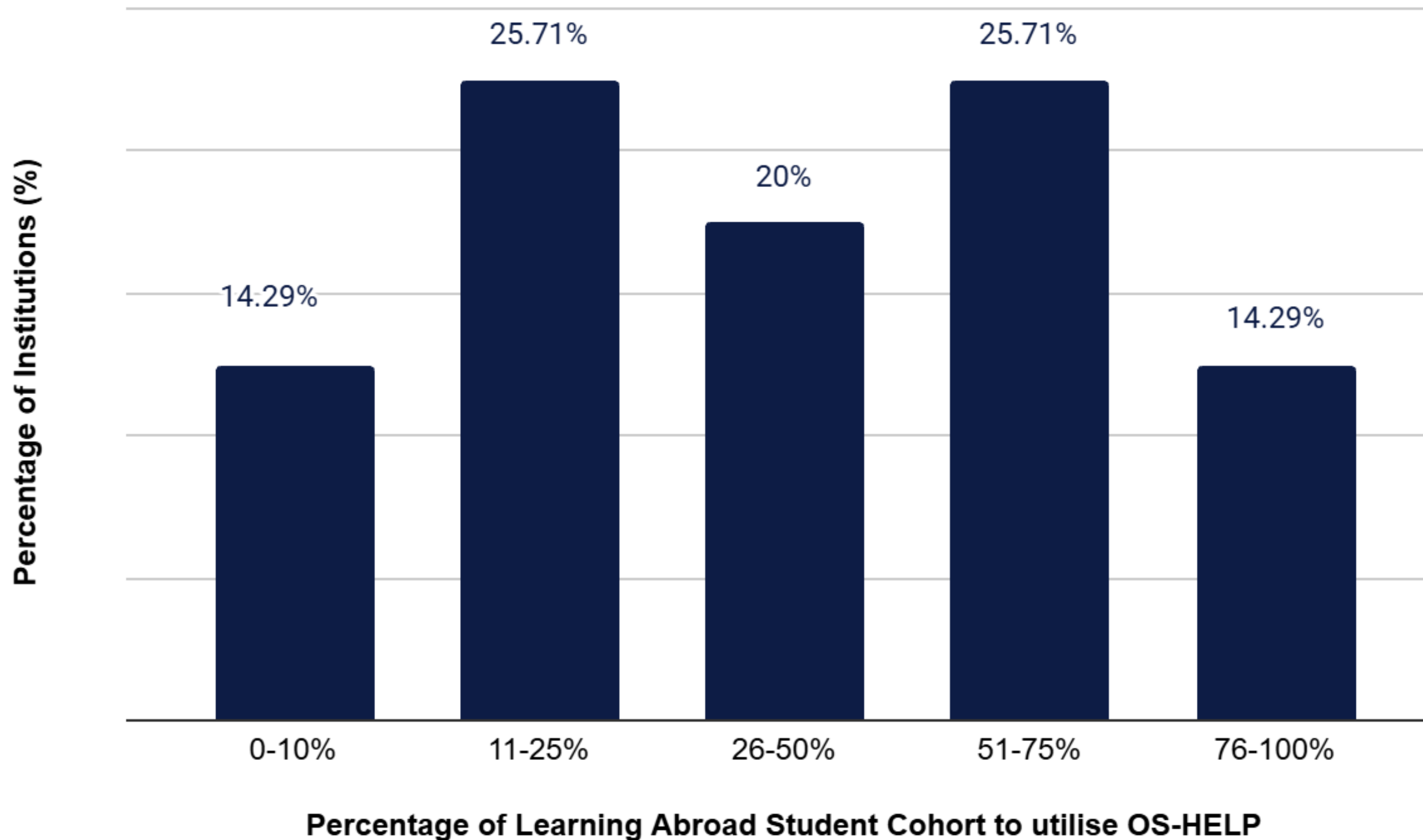
No guarantee of student experience satisfaction

Engagement, servicing partners, and reporting inconsistencies

Transparency around program delivery, roles and responsibilities, and obtaining the information required to meet institutional compliance requirements.

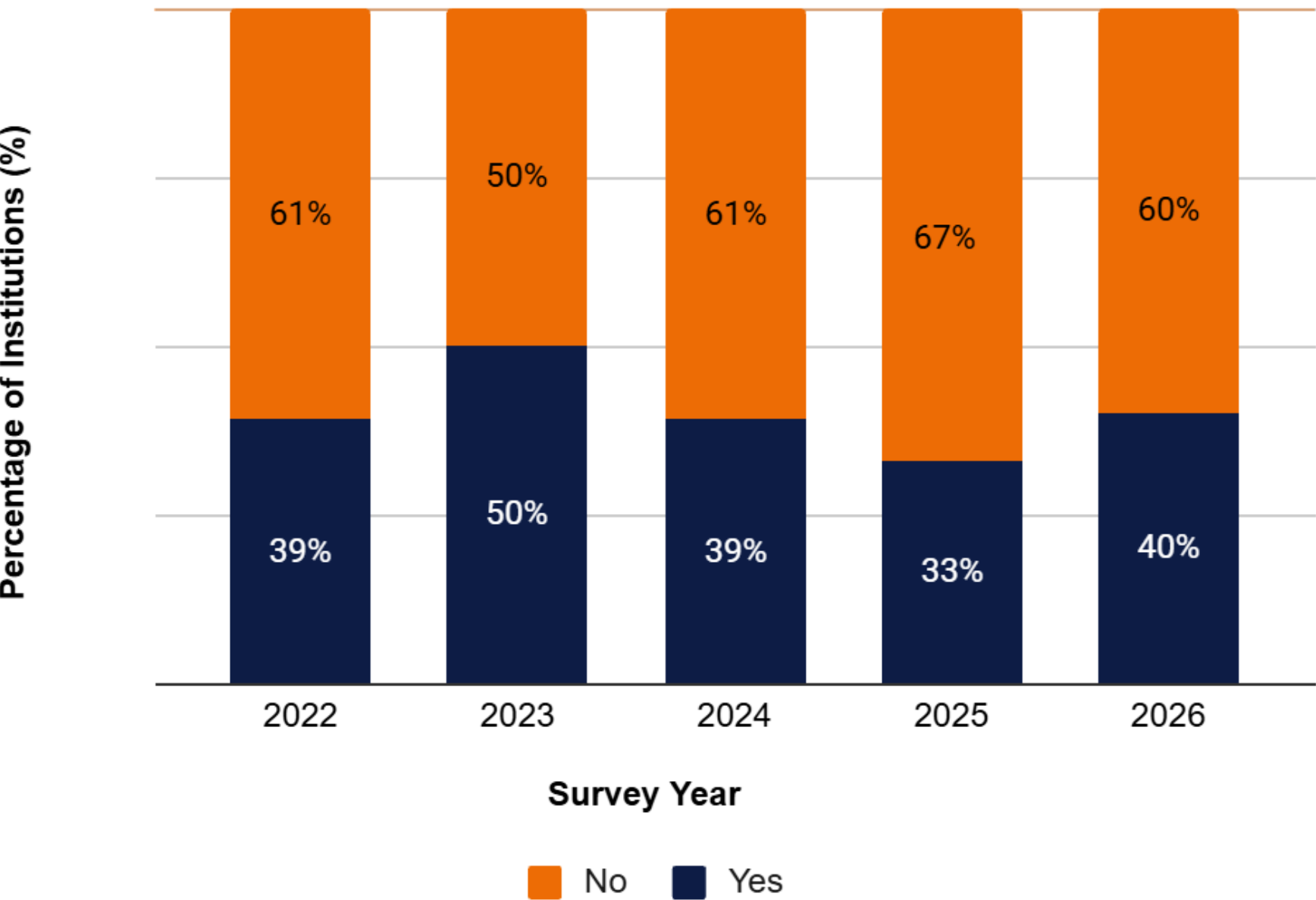


Q23. In 2026, approximately what percentage of your Learning Abroad (outbound) student cohort will utilise OS-HELP to fund their program?



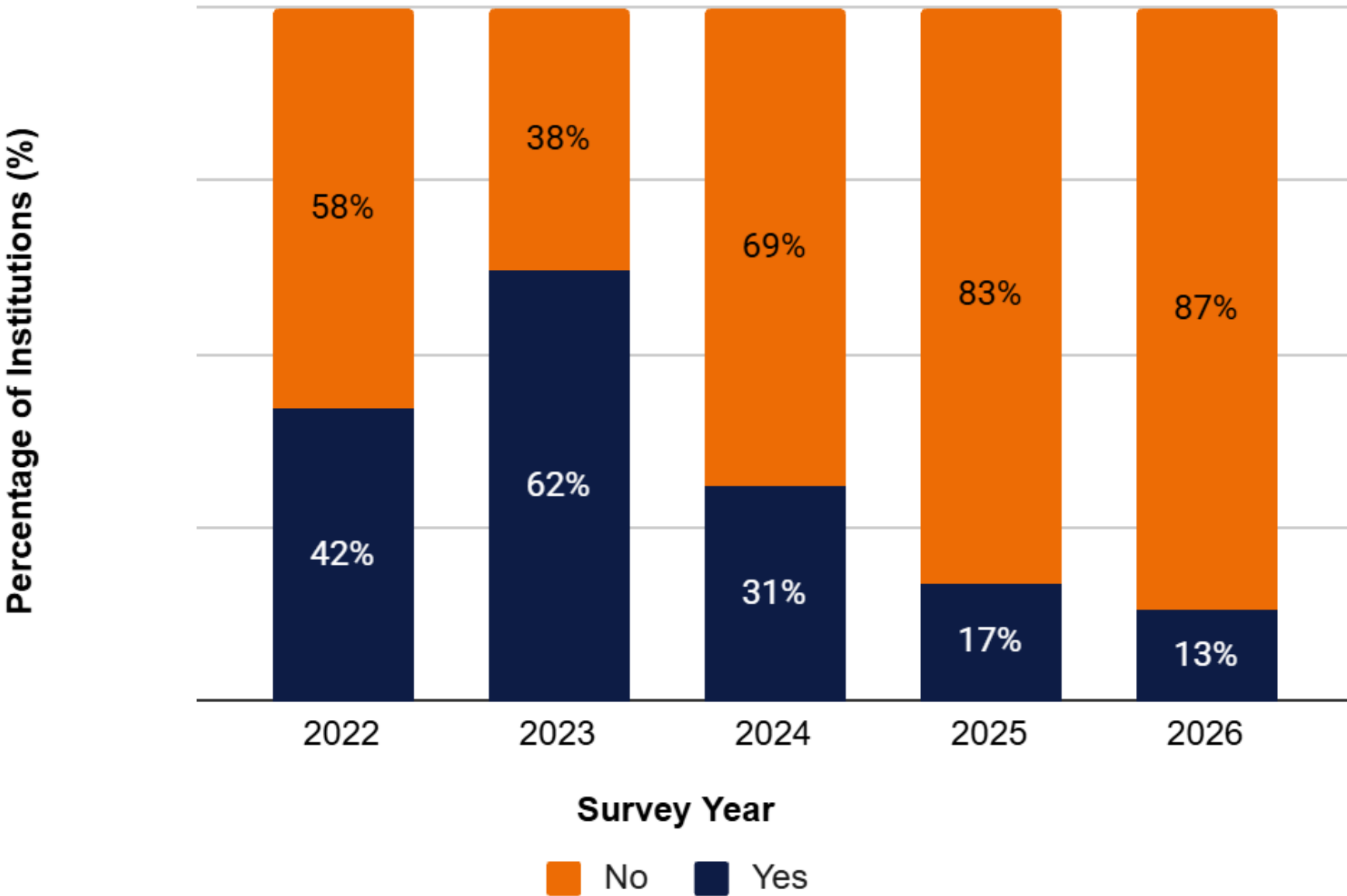
of Responses: 35 | Response Rate: 92.11%

Q24. Have you employed any new Learning Abroad staff in the past 6 months?



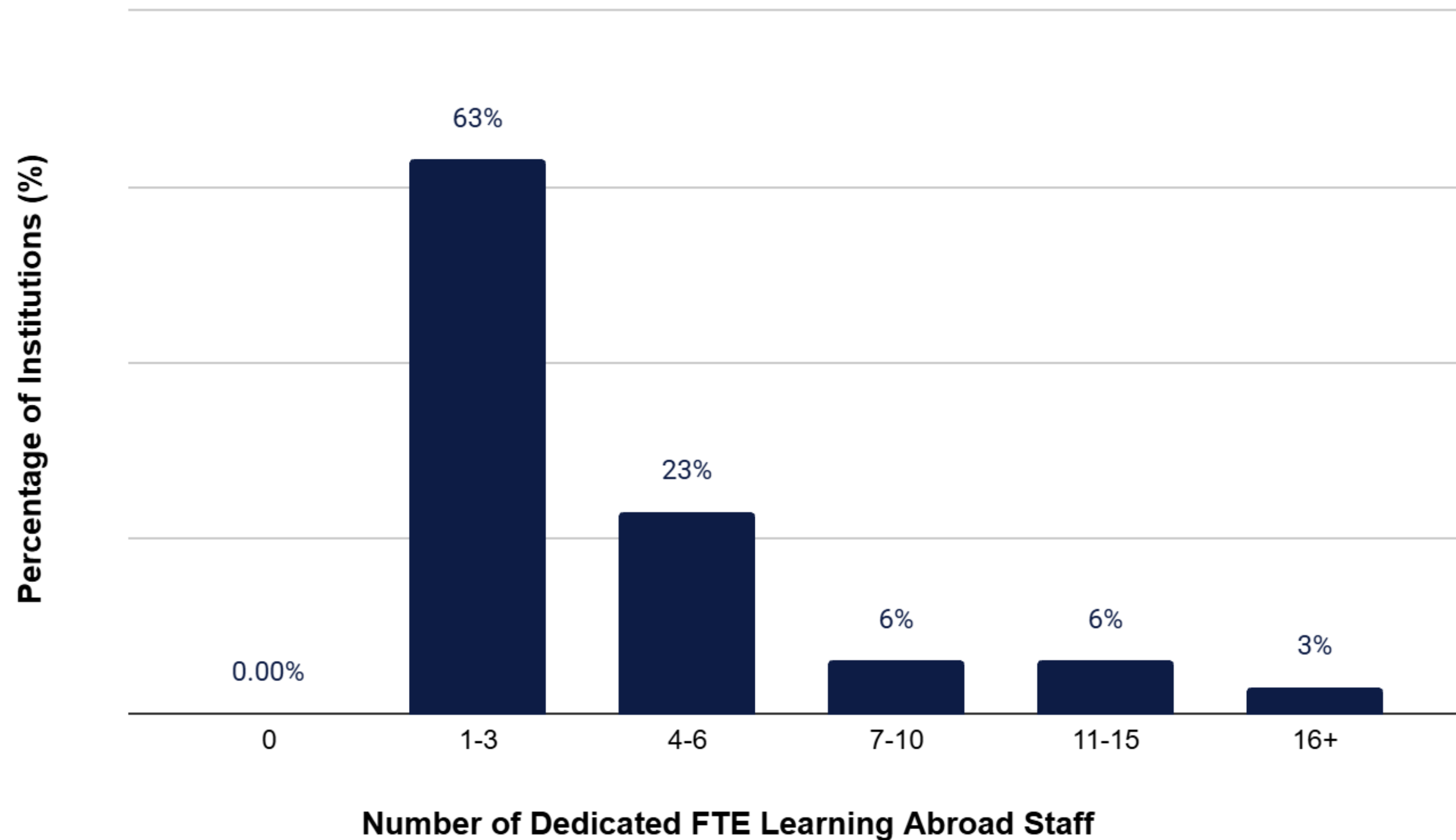
of 2025 Responses: 36 | Response Rate: 100%

Q25. Do you plan to employ any new Learning Abroad staff within the next 12 months?



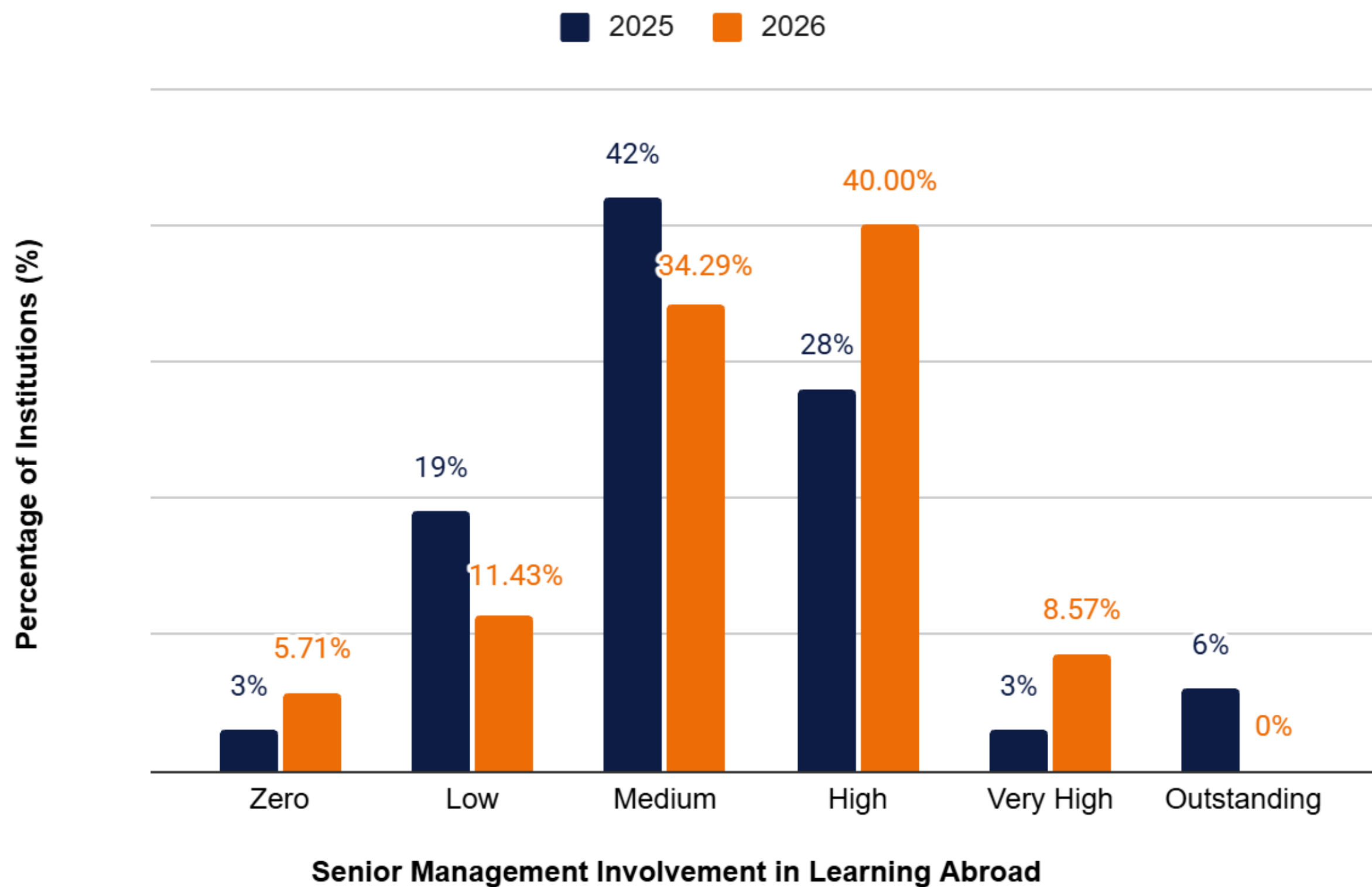
of Responses: 35 | Response Rate: 92.11%

Q26. How many dedicated Full Time Equivalent (FTE) Learning Abroad (outbound) staff do you have in your institution?



of Responses: 35 | Response Rate: 92.11%

Q27. What level of involvement and support do you receive from your institution's senior management (Director and/or PVC-I) in relation to outbound Learning Abroad?

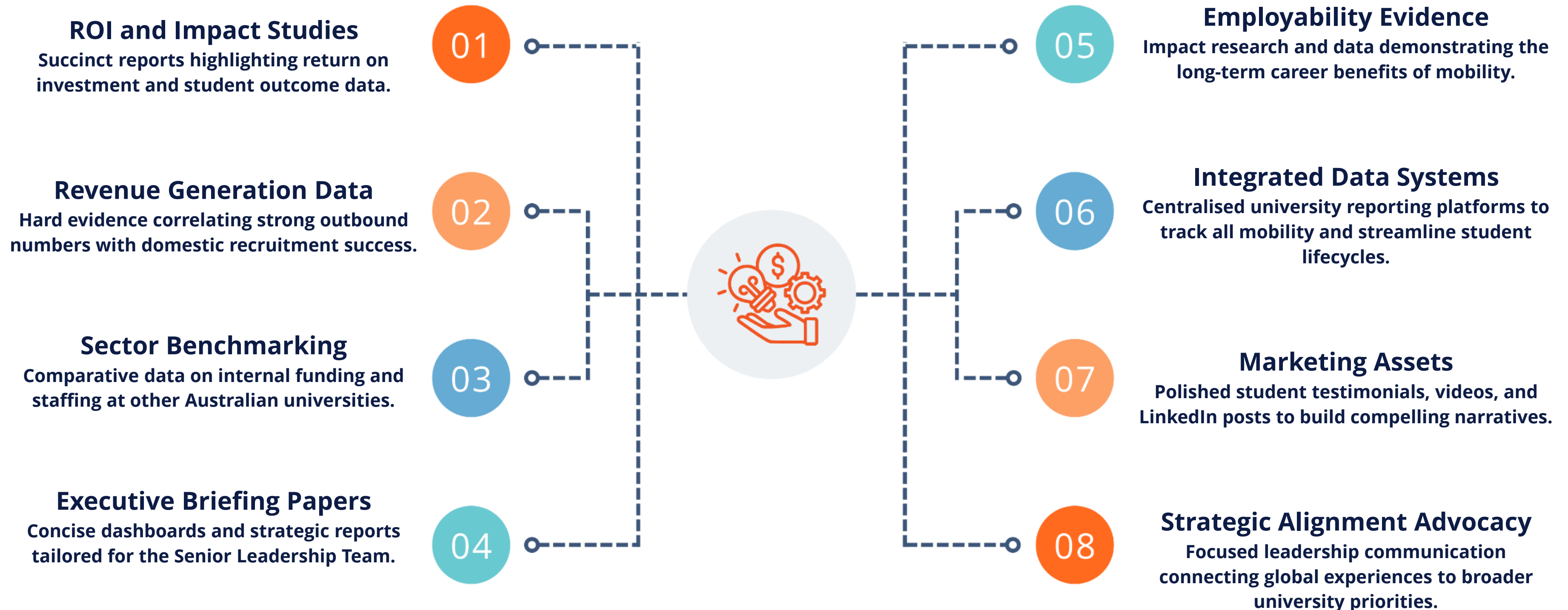


of 2026 Responses: 35 | Response Rate: 92.11%

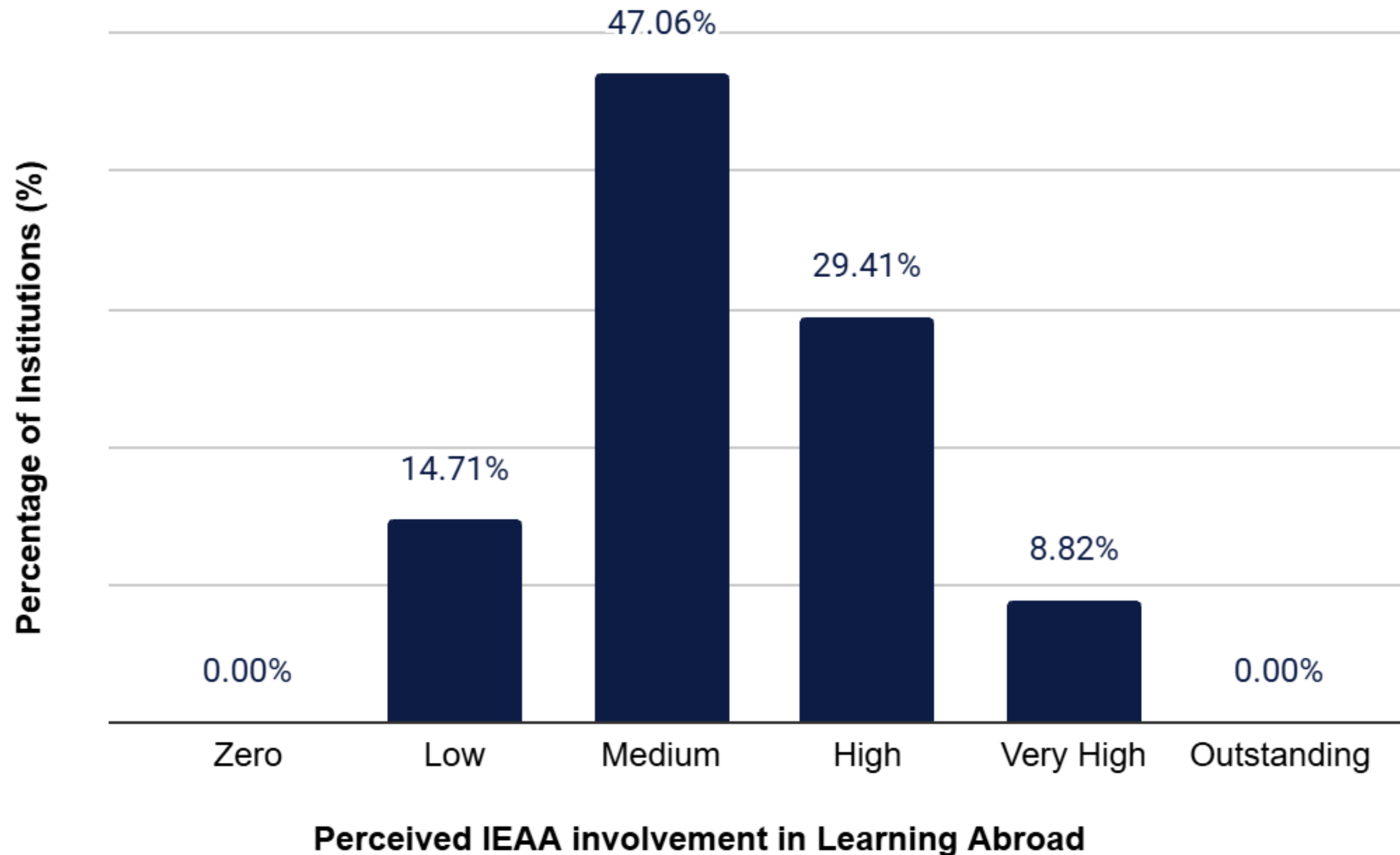
28. How could your institution's senior management improve its level of engagement and support for Learning Abroad (outbound)?

- **Embed Mobility Into Curricula:** Integrate global experiences directly into course structures to ensure seamless credit mapping.
- **Introduce KPIs to Faculties:** Shift accountability and recruitment targets from central offices to individual faculties and course directors.
- **Provide Stable Funding and Staffing:** Deliver predictable operational budgets and student scholarships instead of cost-cutting allocations.
- **Recognise Academic Workload:** Formally acknowledge the heavy administrative burden on academics who lead or map study tours.
- **Cut Internal barriers:** Streamline complex university travel approval, risk management, and insurance processes.
- **Elevate Strategic Visibility:** Drive cross-portfolio projects to boost awareness and align mobility with broader university goals.

Q29. What tools or resources would help you better communicate with, influence, or gain support from senior management for Learning Abroad (outbound) initiatives?



Q30. What level of involvement and support do you believe IEAA provides to your institution in relation to Learning Abroad (outbound)?

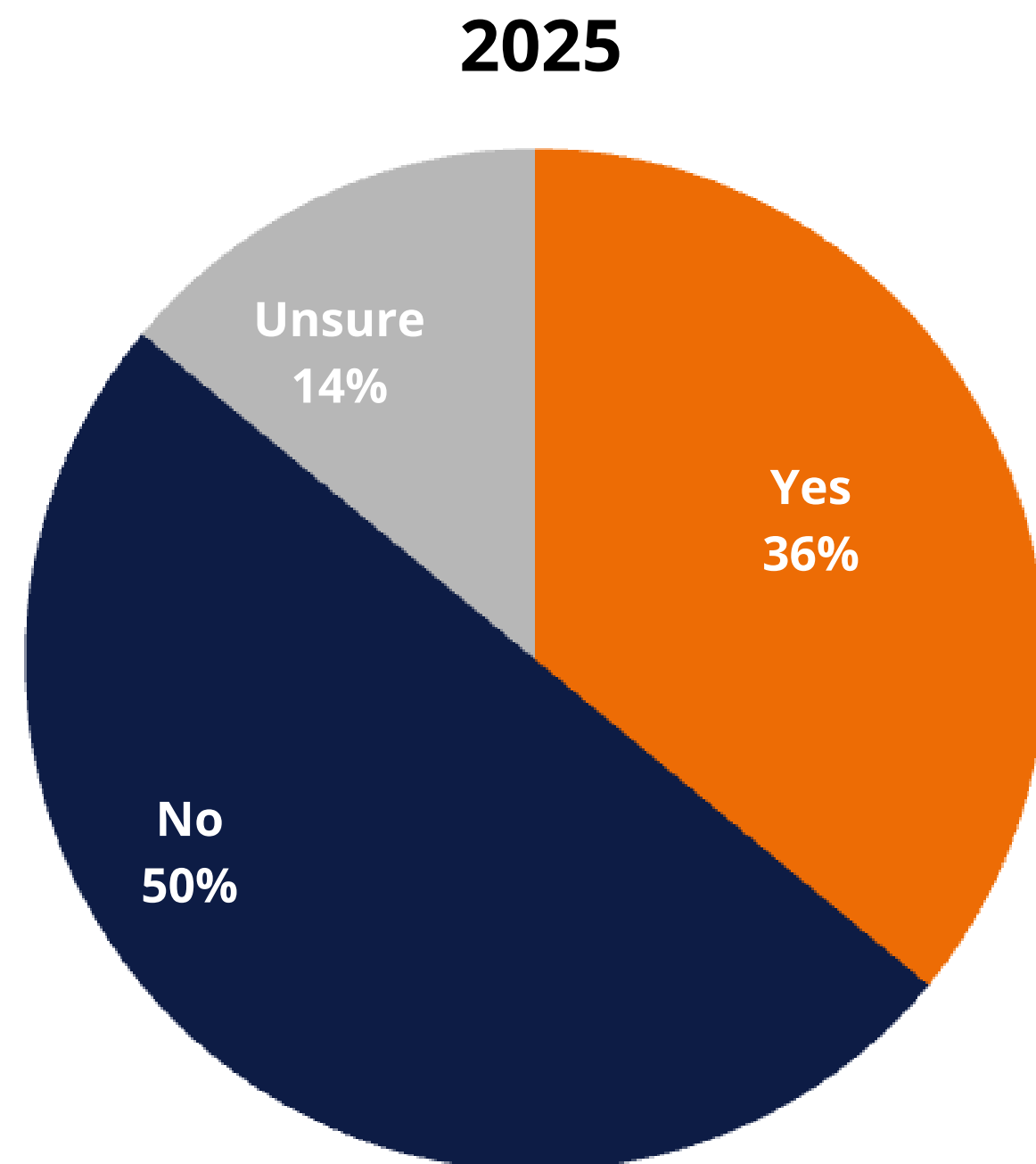


of Responses: 34 | Response Rate: 89.47%

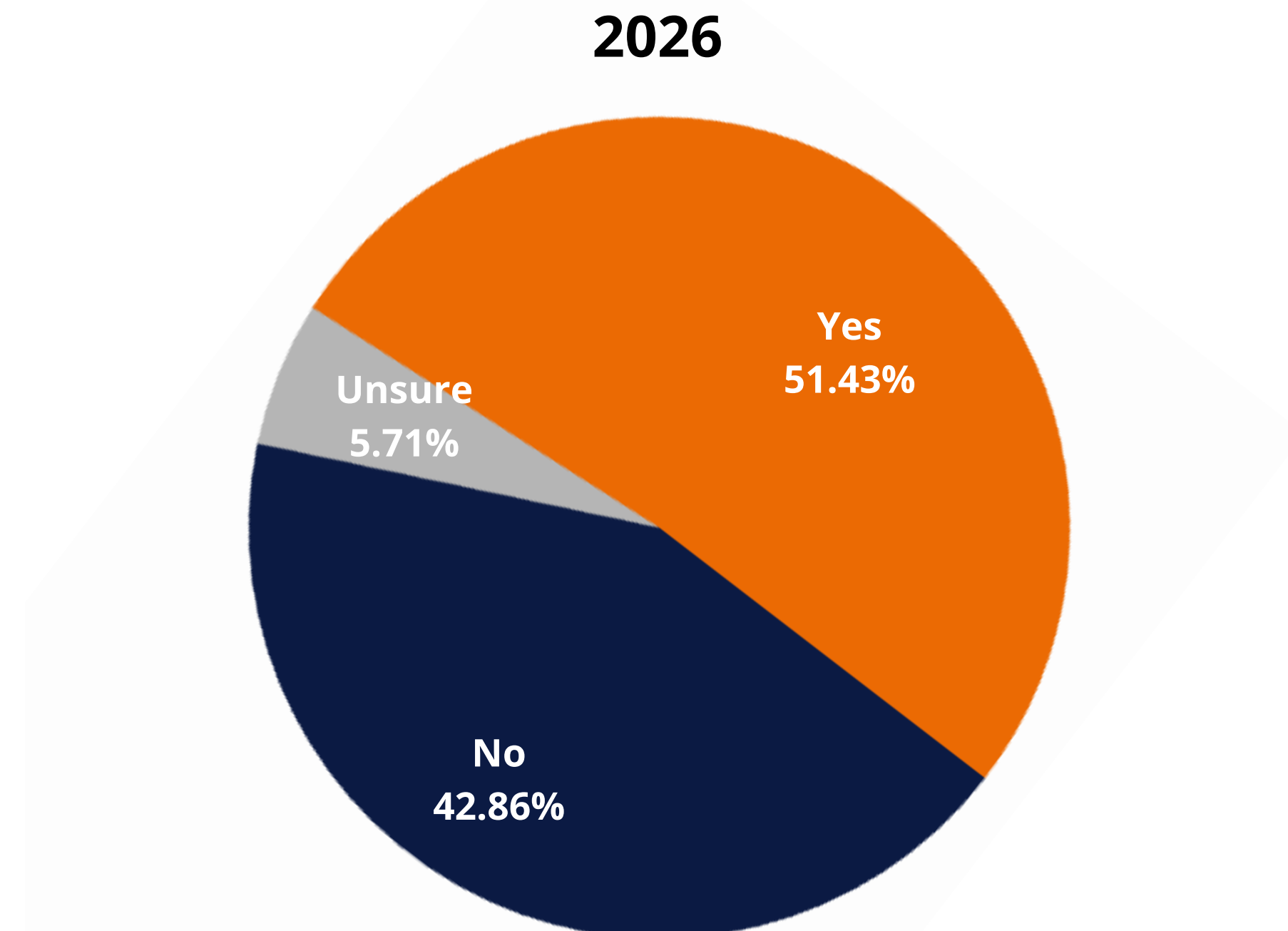
Q31. How could IEAA improve its level of engagement and support for Learning Abroad (outbound)?

- **Executive Advocacy:** Lobby senior leaders (VCs, DVCs) directly to frame mobility as a core strategic priority.
- **Commercial Models:** Connect outbound mobility to revenue generation, domestic recruitment and market differentiation.
- **Outcome Data & Research:** Publish data sets and outcome measurement models to influence institutional governance.
- **Leadership Networking:** Restructure events to better connect learning abroad professionals directly with university senior management.
- **Targeted Training:** Offer specialised professional development in mobility trends, risk management, and program evaluation.
- **Alternative Mobility Resources:** Provide practical frameworks for other outbound offering, COIL and blended programs.
- **Sector-Wide Lobbying:** Partner with state study bodies and industry groups to re-prioritise outbound mobility.
- **High-Impact Media:** Produce engaging videos and student testimonials to promote the value of study abroad.

Q32. Is Learning Abroad (outbound) clearly articulated and built into your institution's central overarching strategic plan (with clear goals and/or targets) in 2026/27?

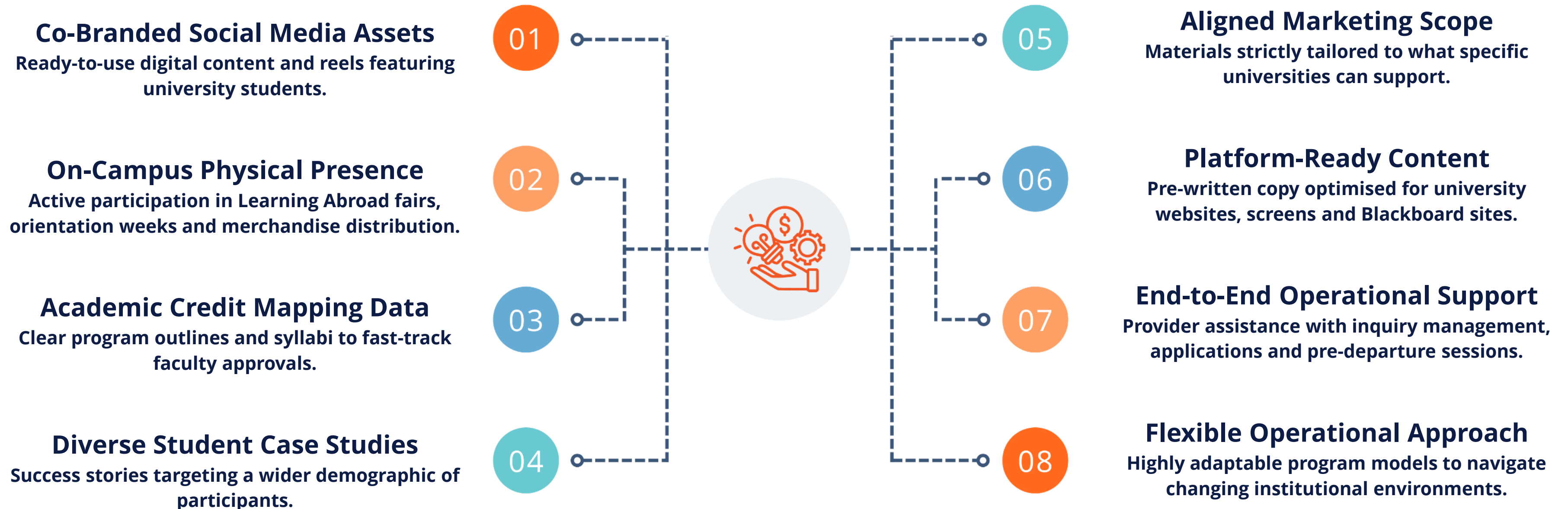


of 2025 Responses: 36 | Response Rate: 100%

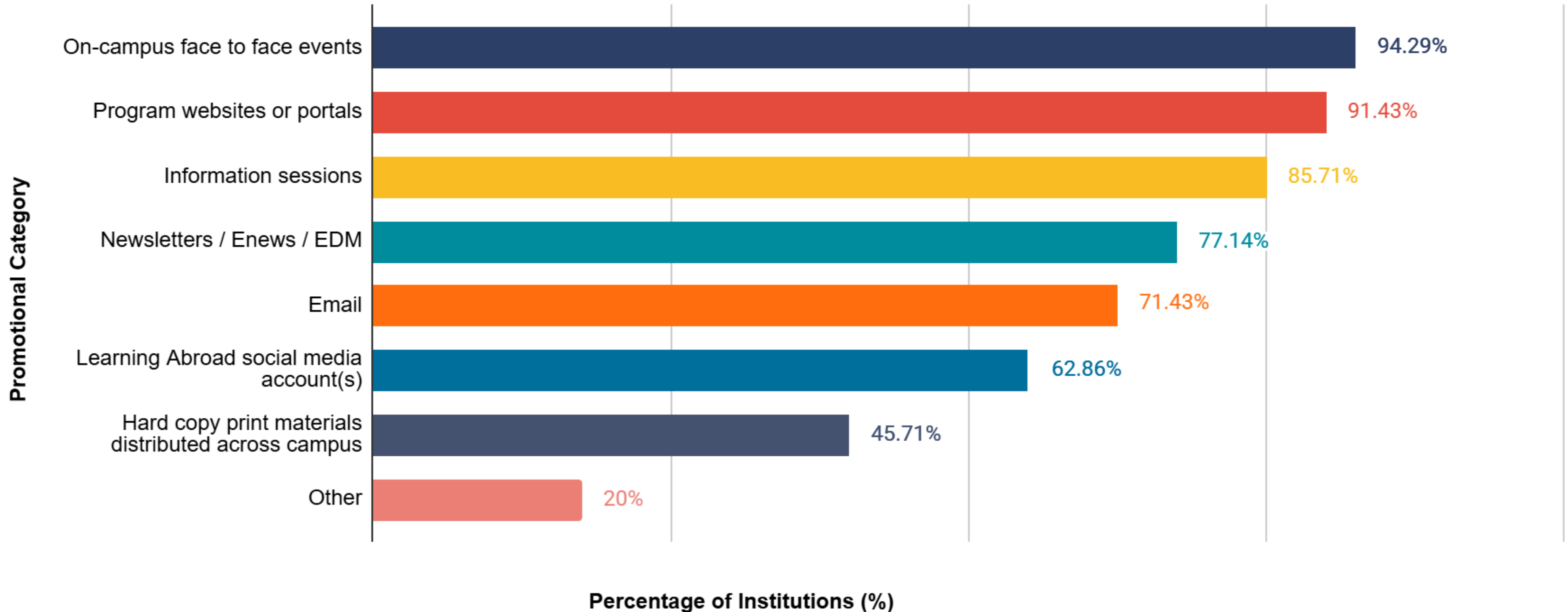


of Responses: 35 | Response Rate: 92.11%

Q33. What kind of support would be most helpful from Third-Party Providers in promoting Learning Abroad (outbound) to your students? (Examples: digital content, marketing toolkits, social media assets, co-hosted events, campus visits, personalised materials, program clarity, adaptable approach, other etc.)



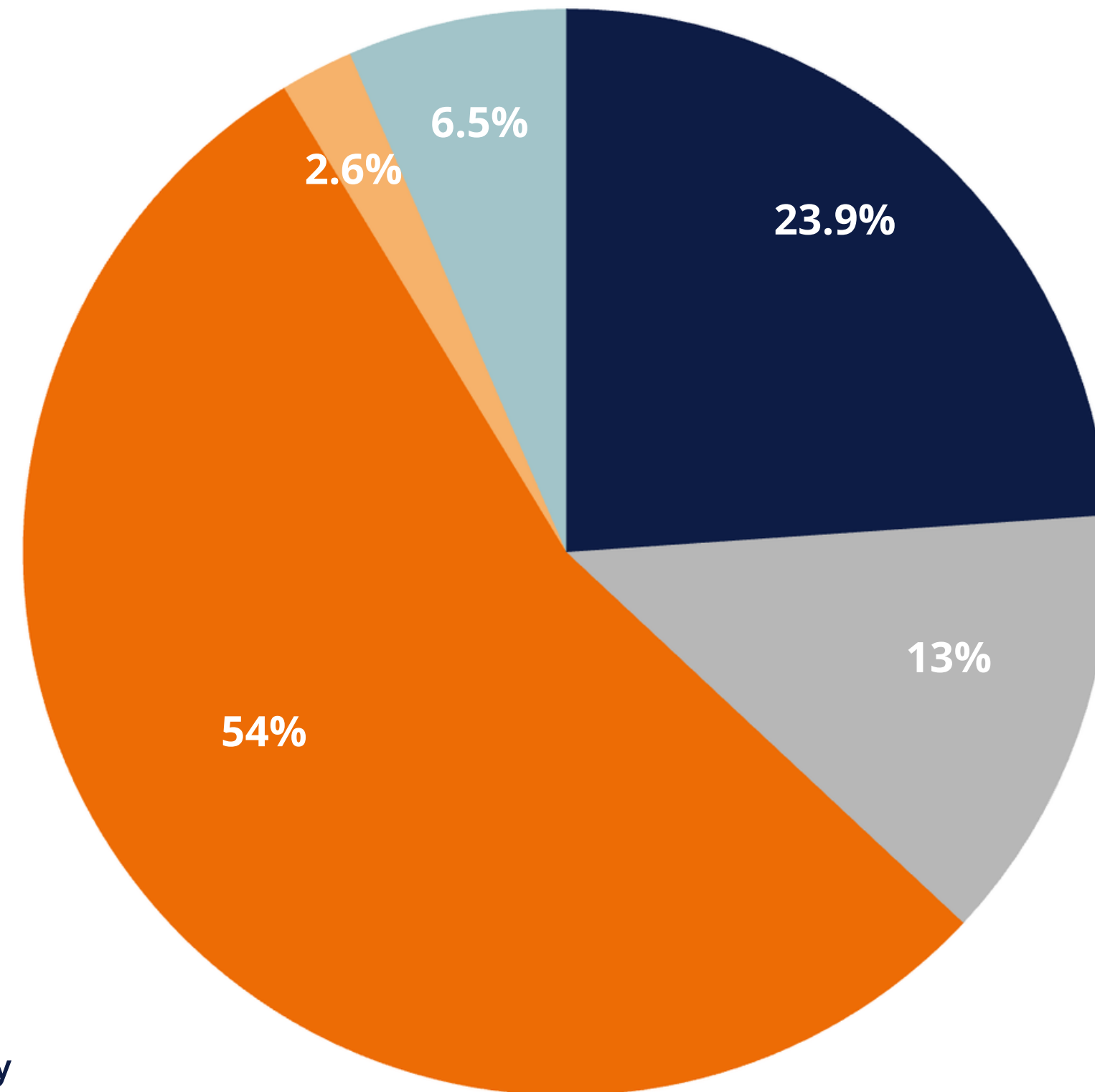
Q34. How does your institution typically promote Learning Abroad (outbound) opportunities to students?



of Responses: 35 | Response Rate: 92.11%

Q35. Which social media platforms does your institution currently use to promote Learning Abroad providing the highest student engagement?

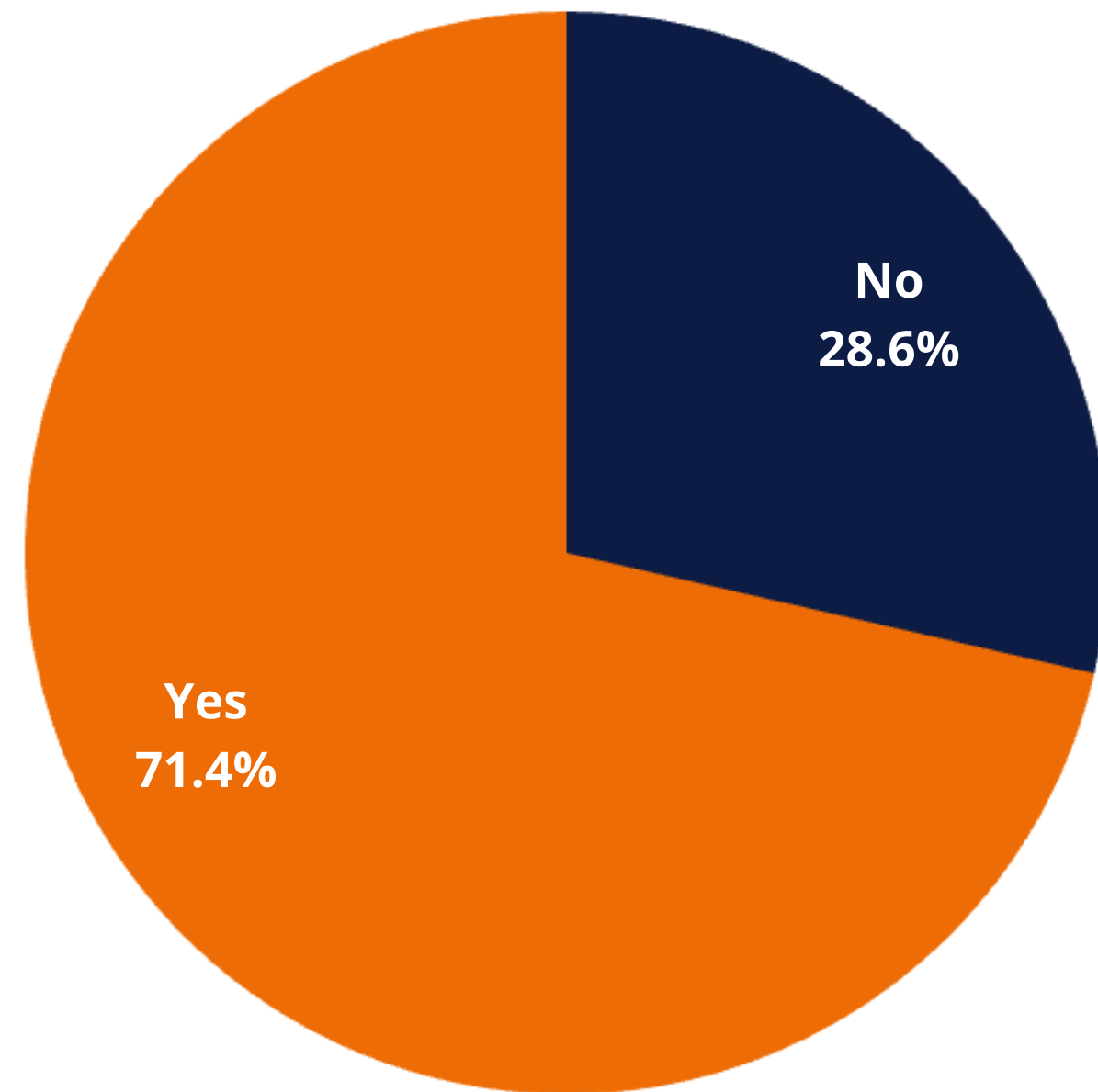
- Facebook
- LinkedIn
- Other
- Snapchat
- TikTok



Note: The high count in the 'Other' category is likely due to Instagram accidentally being omitted as a selectable platform option.

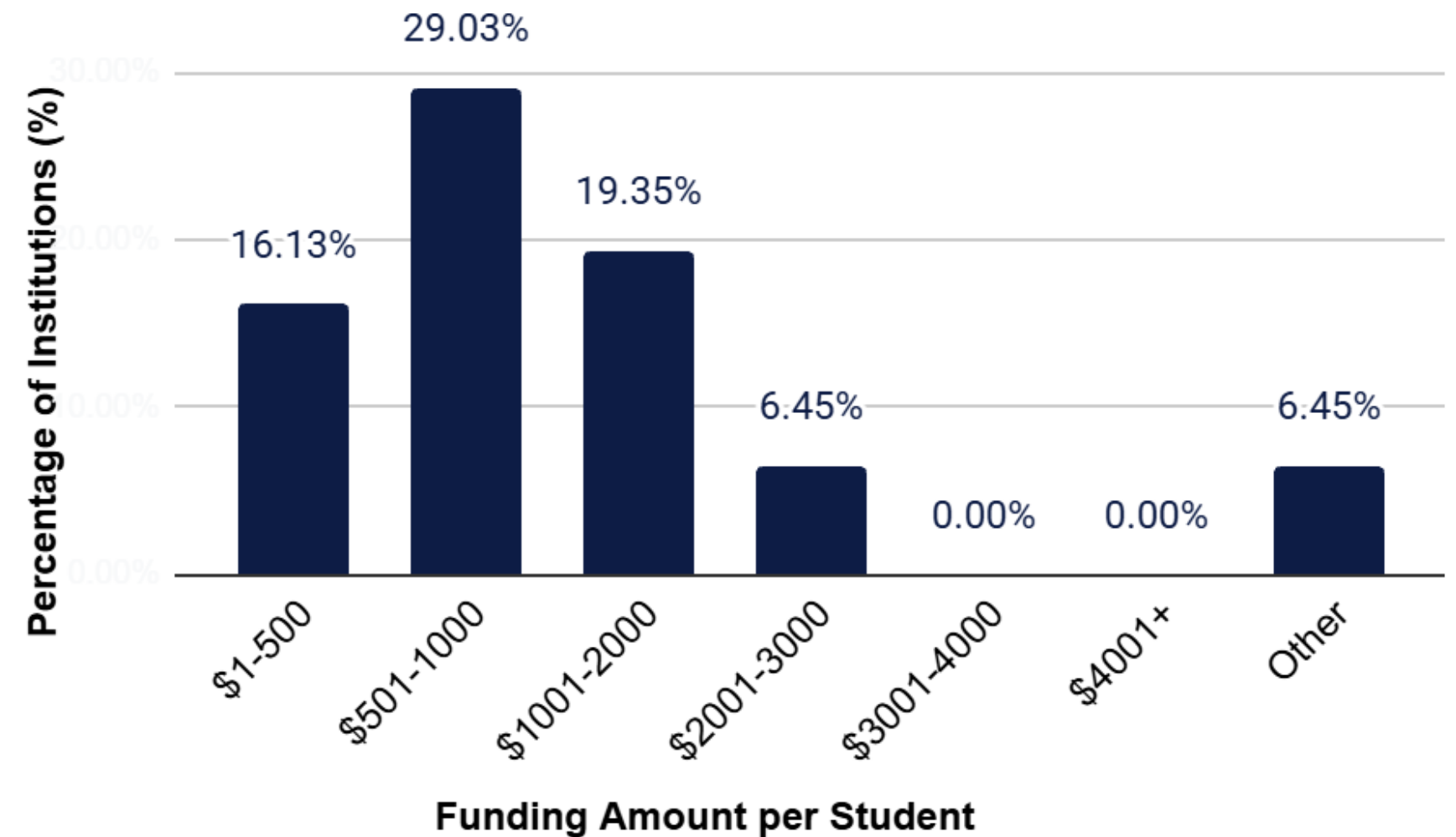
of Responses: 30 | Response Rate: 78.95%

Q36. Will your institution provide any internal central funding to support students participating in Learning Abroad (outbound) programs in 2026/2027?



of Responses: 35 | Response Rate: 92.11%

If yes, please indicate funding amount per student for short-term programs between 2 and 12 weeks?

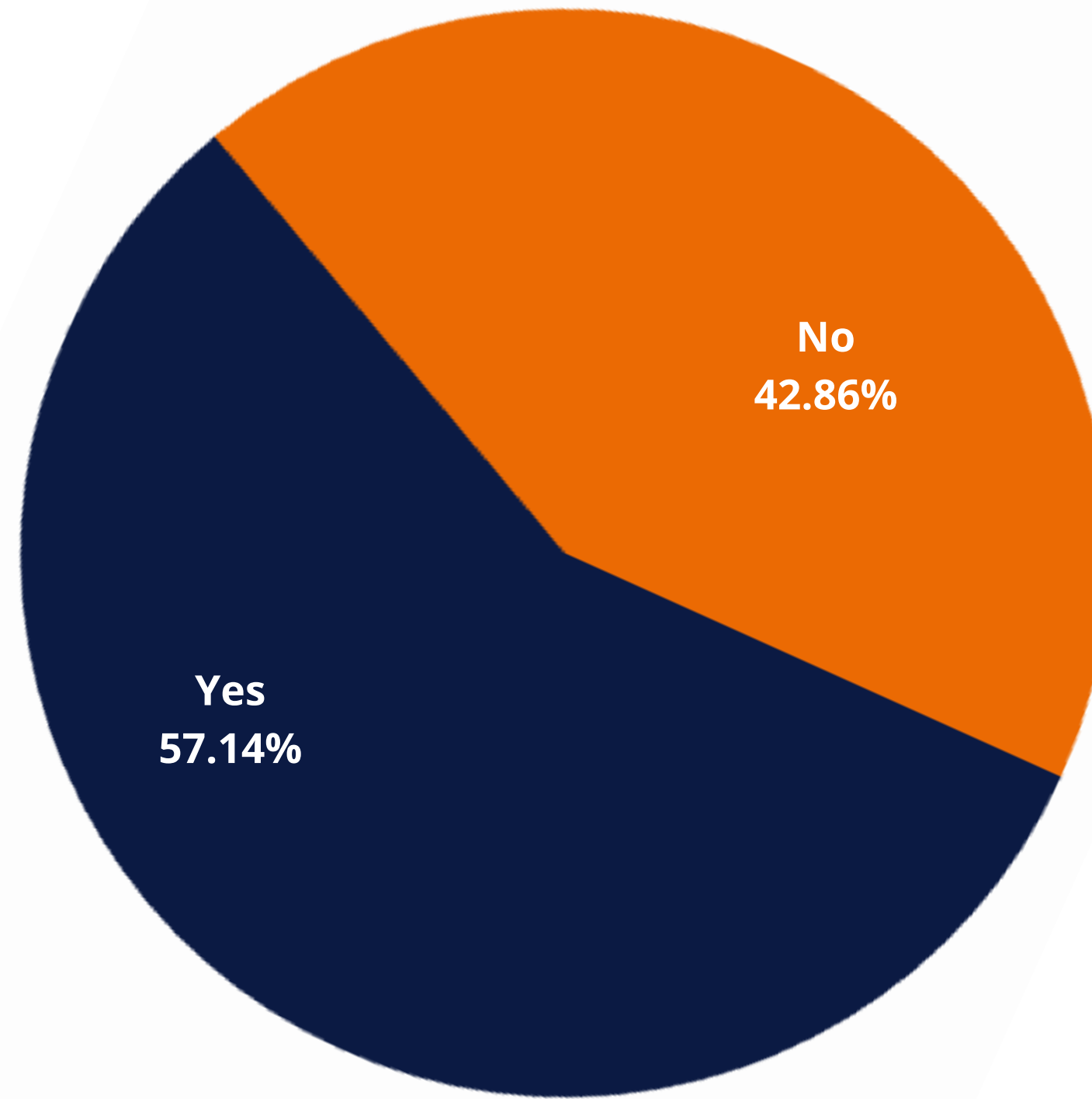


of Responses: 24 | Response Rate: 64.86%

Comments:

- Funding depends on the actual program including location, duration and how much is left in the budget
- Funds are allocated by student profile and activity
- Short-term: \$500-\$1,000 and Exchange: \$1,200 - \$2,000
- No central budget for short programs

Q37. Do you anticipate increased interest and engagement regarding Learning Abroad (outbound) from your institution's academic staff in 2026/27 compared to 2025/26?



of Responses: 35 | Response Rate: 92.11%

Q38. What do you see as the main barrier (challenge) for academic staff to lead Learning Abroad (outbound) programs, specifically customised study tours, in 2026/27?

01

Heavy Workloads

High teaching loads and a complete lack of formal workload credit for global programs.

04

Minimal Administrative Support

A lack of operational staff leaves academics buried in credit mapping and planning logistics.

02

Time & Duration Constraints

Tight academic calendars prevent staff from leaving for strict 4-week funding minimums.

05

Government Funding Reduction

NCP restructure and reduced funding has impacted motivation of academics to lead programs.

03

Widespread Budget Cuts

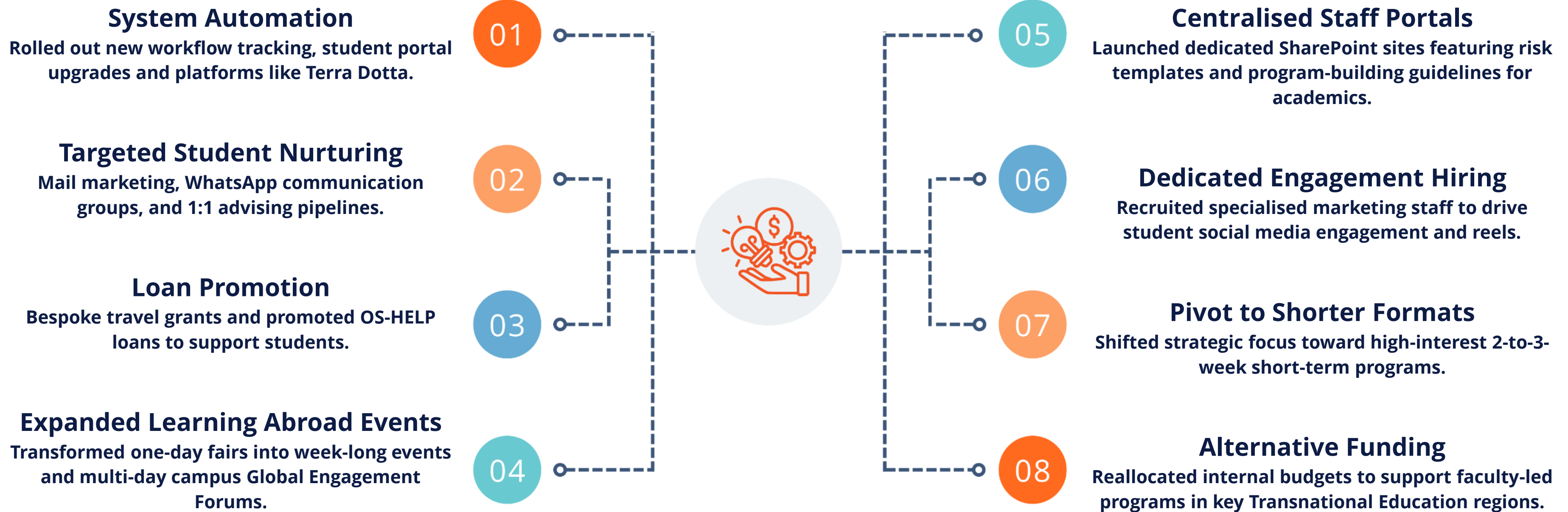
Internal funding drops for faculty travel, staff salaries away and short study tours.

06

No Career Incentives

Developing and running global mobility programs is not necessarily linked with development.

Q39. What successful new initiatives has your institution implemented in 2026 to support students and academic staff in participating in or leading Learning Abroad (outbound) programs?



Planning Ahead with CISaustralia: What Partners Need in 2027

(Summary of Q40, Q40a and Q41)

Institutional Priorities and New CISaustralia Program Demands for 2027

- **Shared Consortiums:** Multi-university models allowing regional schools to pool student numbers.
- **Bespoke Short Courses:** Custom, co-designed programs tailored to specific university degrees.
- **Low-Cost 2-Week Options:** Brief, affordable tracks for budget-conscious and non-credit students.
- **Asian Clinical Placements:** Hospital and sports science internships across Asia over Europe.
- **Winter Term Alignment:** Short-term travel options timed exactly for condensed winter breaks.
- **Scalable Pipeline Support:** High-capacity programs with provider staff handling recruitment and planning.
- **Niche Language & Diversity:** Unique destinations that avoid overlap with existing exchange pacts.

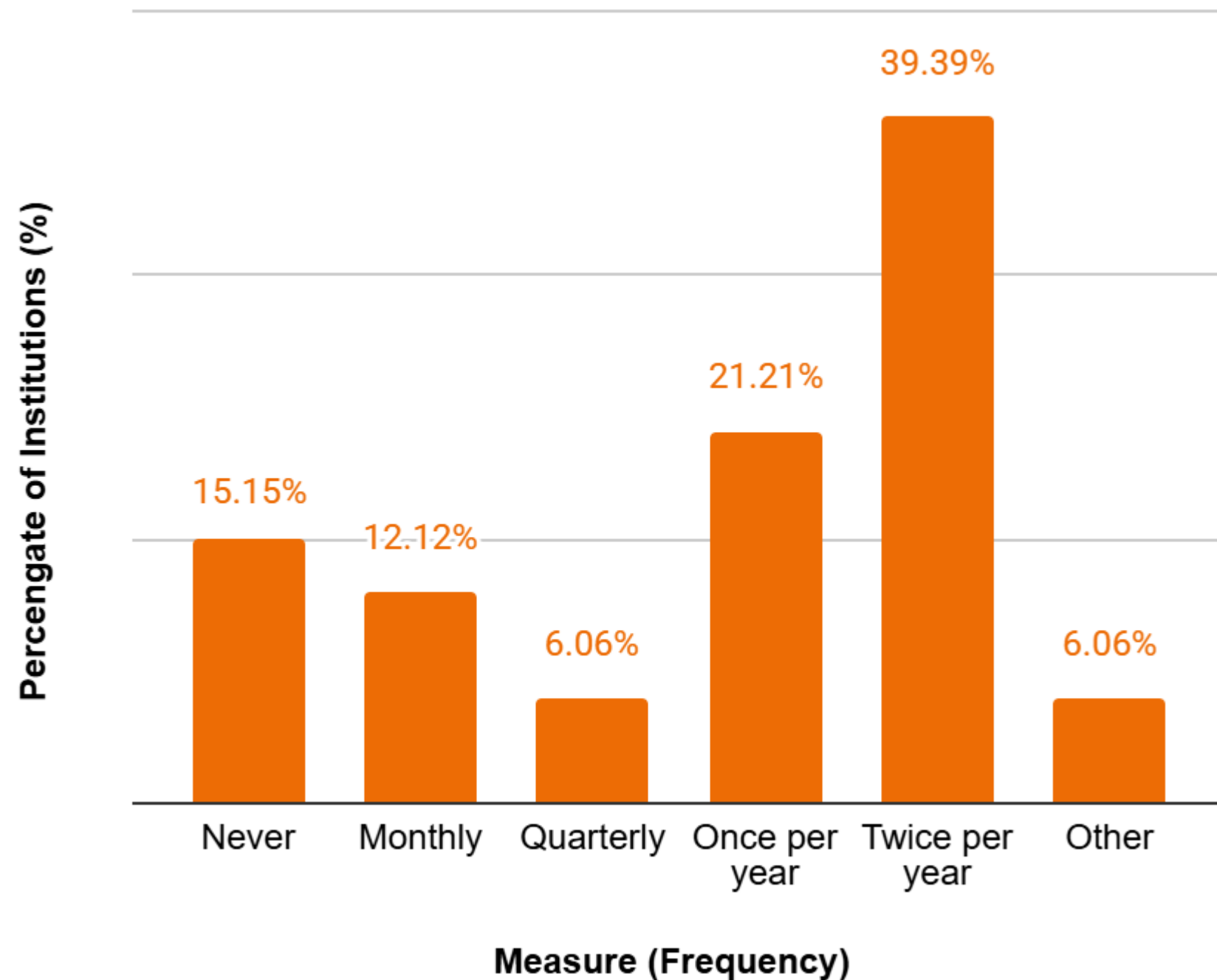
Requested Learning Abroad Destination Expansion: 2027 Geographic Priorities

- **Vietnam & Indonesia:** Top high-demand hubs driven by NCP funding and language pipelines.
- **Pacific Island Nations:** Key strategic zones (Fiji, Vanuatu) for clinical and hospital placements.
- **Kazakhstan & Central Asia:** Emerging, visa-free Silk Road options for unique market offerings.
- **Budget & North Europe:** Growing demand for Scandinavian options and affordable Eastern Europe tracks.
- **Malaysia, Taiwan, & Singapore:** Prime expansion markets targeted for structured, study-based programs.
- **High-Prestige US/UK Hubs:** Independent options at elite institutions (e.g., Oxford, UCLA) for smaller schools.
- **High-supported/Low Alternative Regions:** Managed tours to high-barrier or complex destinations (India, Morocco).

Core Operations: Areas to Continue and Strengthen

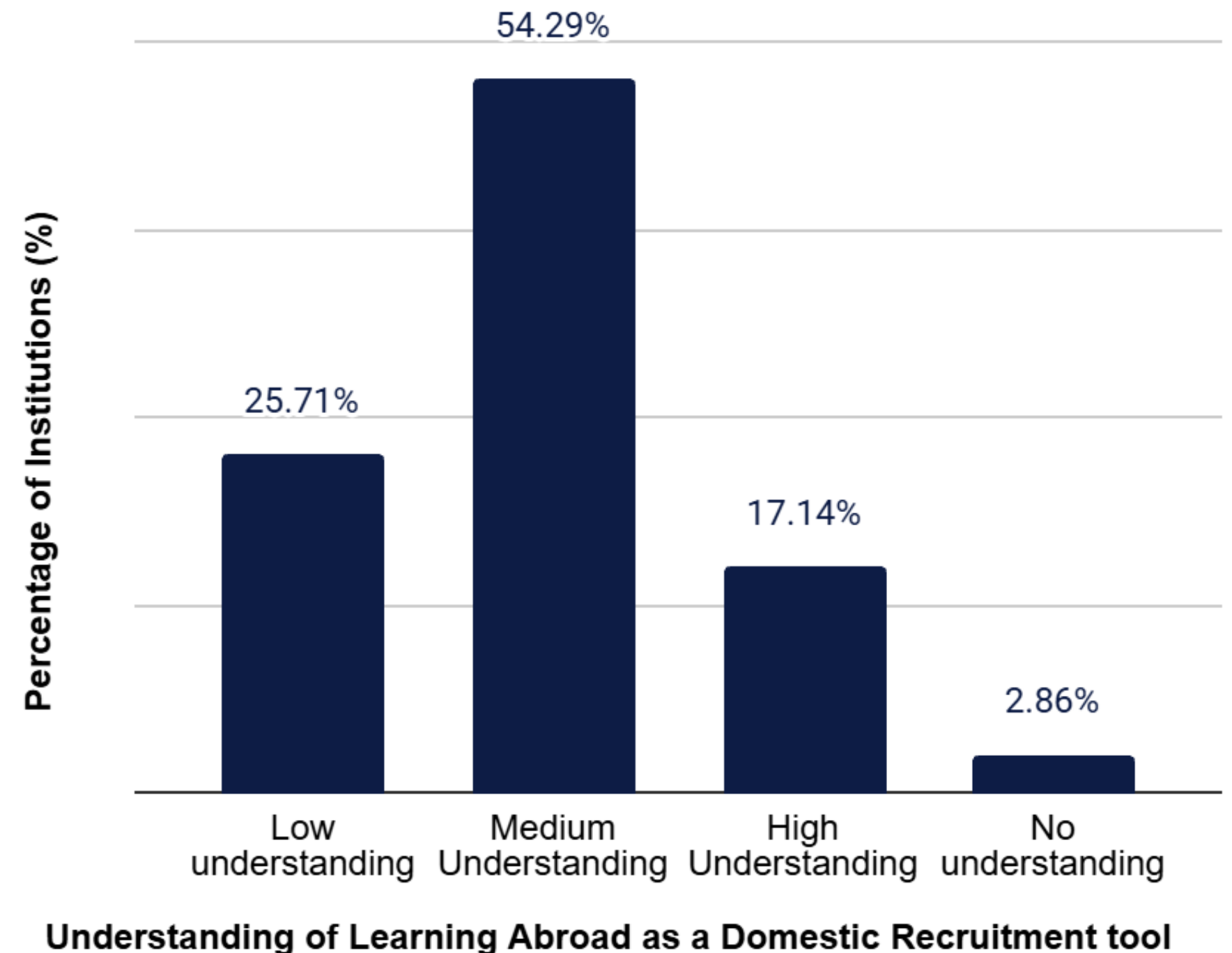
- **Responsive Risk Management:** Maintain trusted critical incident responses and university safety updates.
- **Structured Reporting:** Standardise recruitment tracking with consistent bi-monthly or quarterly data updates.
- **End-to-End Logistics:** Continue delivering excellent itinerary planning, local coordination and inquiry management.
- **Consultative Account Management:** Preserve the highly valued, flexible, and pressure-free relationship style.
- **Targeted Academic Outreach:** Sustain deep administrative and pre-departure assistance for faculty leads.
- **Peer Ambassador Leveraging:** Capitalize on the student ambassador network to drive enrollment growth.
- **Regional Resource Expansion:** Scale the popular "Green Book" model into targeted regional guides.

Q42. How often do you and/or your institution's Learning Abroad Office (outbound) meet with and engage with your institution's Domestic Recruitment Office/Department?



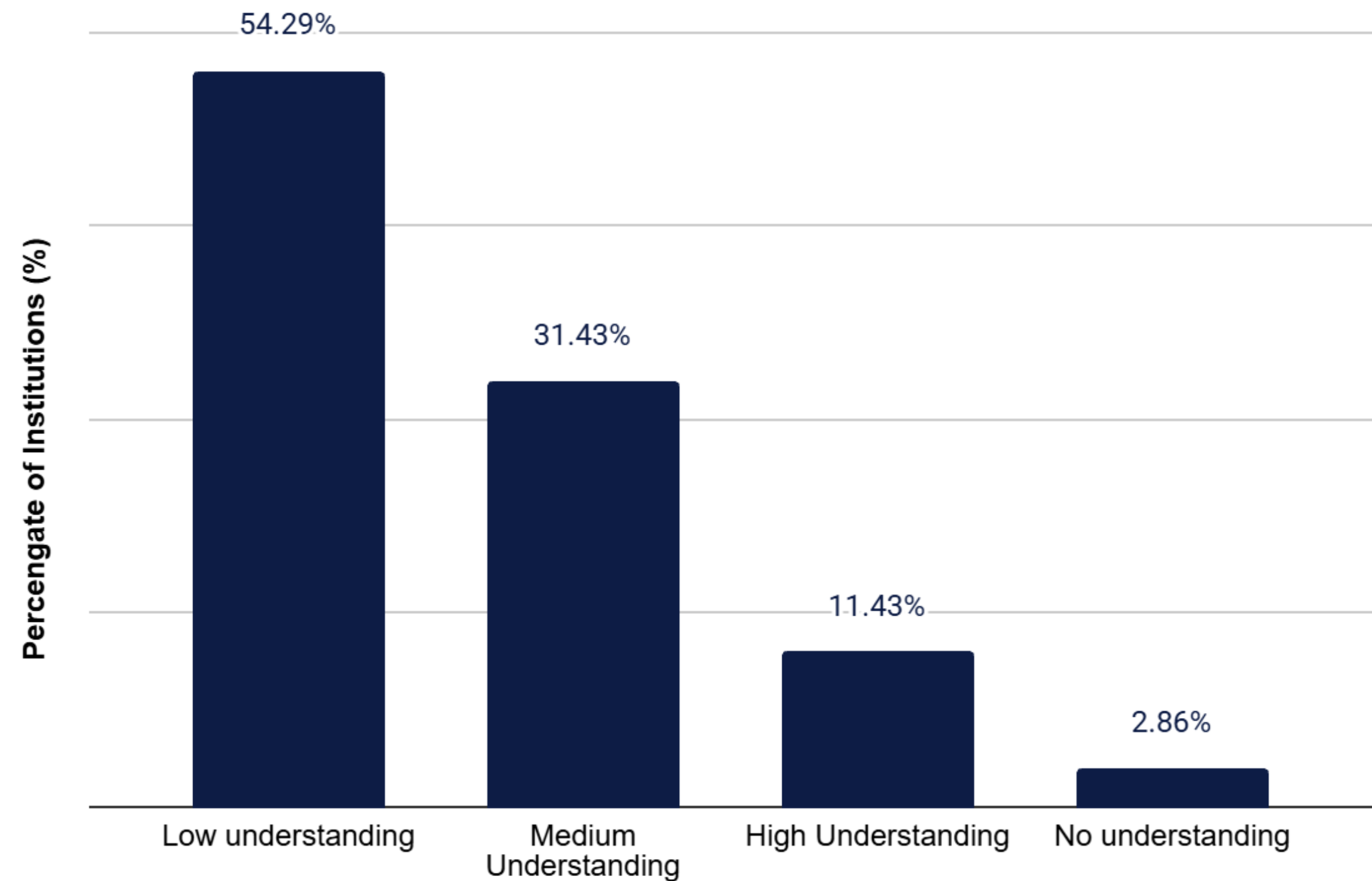
of Responses: 33 | Response Rate: 86.84%

42a. Does your institution understand the value of Learning Abroad (outbound) when used as a Domestic Recruitment tool to attract Australian high school students to your institution?



of Responses: 35 | Response Rate: 92.11%

Q43. Does your institution understand the positive impact that Learning Abroad (outbound) has on student retention at your institution (after a student has returned from their program abroad, as compared to students that never attend a Learning Abroad program)?



Institutional understanding of Learning Abroad participation student retention

of Responses: 35 | Response Rate: 92.11%

Additional comments / feedback / ideas / thoughts:

We appreciate the work that CISaustralia do and providing quality program opportunities to our students.

The team does a great job, and we appreciate the work you all do to provide our students with a great study experience

Using Learning Abroad opportunity as a Domestic recruitment tool and marketing opportunities at high school final year students is a new initiative that we are working towards.

You're all doing an amazing job and we're grateful to partner with you!

All covered above thank you. Thank you for your support.





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Creating Opportunities *Changing Lives*

Thank you for reading and to all those who collaborated.

Please don't hesitate to reach out if you have any questions, as we would love to hear from you.

www.cisaustralia.com.au