

This fact sheet provides a summary of the latest tourism data for Taiwanese visitors to Victoria. Information includes: visitor numbers, purpose of visit, expenditure, visitor forecasts, regional visitation and dispersal, demographics, visitor behaviour, airline used, travel style, information sources and booking methods.

I OVERVIEW OF TAIWANESE VISITORS TO AUSTRALIA

I.1 Trends

Total Visitation from Taiwan to Australia, 2000-2010

Year Ending							Av Annual	Av Annual	
							% change	% Change	% change
December	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	09-10
Visitors (000s)	120	86	85	73	92	80	-4.0%	-1.6%	-12.9%
Visitor Nights (000s)	2,174	2,349	2,682	3,279	4,303	4,623	7.8%	18.4%	7.4%
Average Length of Stay	18.0	27.4	31.5	45.0	46.6	57.4			

Taiwan generated 80,000 visitors to Australia in the year ending December 2010. The number of visitors from Taiwan coming to Australia has decreased by 12.9% over the previous year. Taiwanese visitors to Australia are also spending more nights in the country. In 2010, they spent 4.6 million nights in Australia, a 7.4% increase from the previous year. Visitor nights have grown at a rate of 7.8% per annum between 2000 and 2010. The average length of stay in Australia by Taiwanese visitors was 57.4 nights in 2010 up from 18.0 nights in 2000.

I.2 Main Purpose of Trip

Visitation from Taiwan to Australia by Purpose of Trip, 2000-2010

Year Ending							Av Annual	Av Annual	
							% change	% Change	% change
December	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	09-10
Holiday	91	61	59	48	67	53	-5.3%	-3.3%	-20.4%
Visiting friends and relatives	10	9	9	9	9	10	0.1%	2.4%	4.5%
Business	10	8	8	6	7	7	-3.5%	-2.1%	2.3%
Education	8	8	7	8	8	8	1.1%	2.5%	5.8%

NB: Where there is a '-', figures are unreliable and are unable to be published.

53,000 visitors came to Australia from Taiwan in 2010 for holiday purposes, a decrease of 20.4% from the previous year. 10,000 Taiwanese visitors came to Australia to visit friends and relatives (VFR), an increase of 4.5% from the previous year. The VFR segment has experienced marginal growth over the period 2000-2010, increasing by an average of 0.1% per annum, whereas holiday visitation has decreased at an annual average rate of 5.3% over the same period.

The business travel sector has also experienced a decline since 2000 (-3.5% p.a.), however this segment has increased year-on-year by 2.3% to 7,000 visitors in 2010. The education sector has increased at an average annual rate of 1.1% since 2000 to 8,000 Taiwanese visitors in 2010.

I.3 States/Territories Visited

Taiwanese Overnight Visitation to Australia by State/Territory, 2000-2010

Year Ending							Av Annual	Av Annual	% change	
	December	2000	2006	2007	2008	2009	2010	% change		% Change
								2000-2010	2006-2010	09-10
Australia		120	86	85	73	92	80	-4.0%	-1.6%	-12.9%
New South Wales		77	50	49	45	60	52	-3.8%	1.2%	-12.7%
Victoria		48	22	23	20	26	26	-6.1%	3.5%	-1.0%
Queensland		81	53	50	42	50	46	-5.4%	-3.2%	-7.8%
Western Australia		-	-	-	5	6	6	-	-	-4.8%
Other States & Territories		29	-	7	8	10	9	-11.2%	-	-12.3%

NB: Where there is a '-', figures are unreliable and are unable to be published.

There were 26,000 Taiwanese overnight visitors to Victoria in 2010, representing a 1.0% decrease over the previous year. Taiwanese visitation to Victoria has decreased by an average rate of 6.1% per annum since 2000. During the same period decreases were also experienced in New South Wales (-3.8% p.a.), Queensland (-5.4% p.a.) and across Australia more generally (-4.0% p.a.).

Taiwanese Visitor Nights (000s) in Australia by State/Territory, 2000-2010

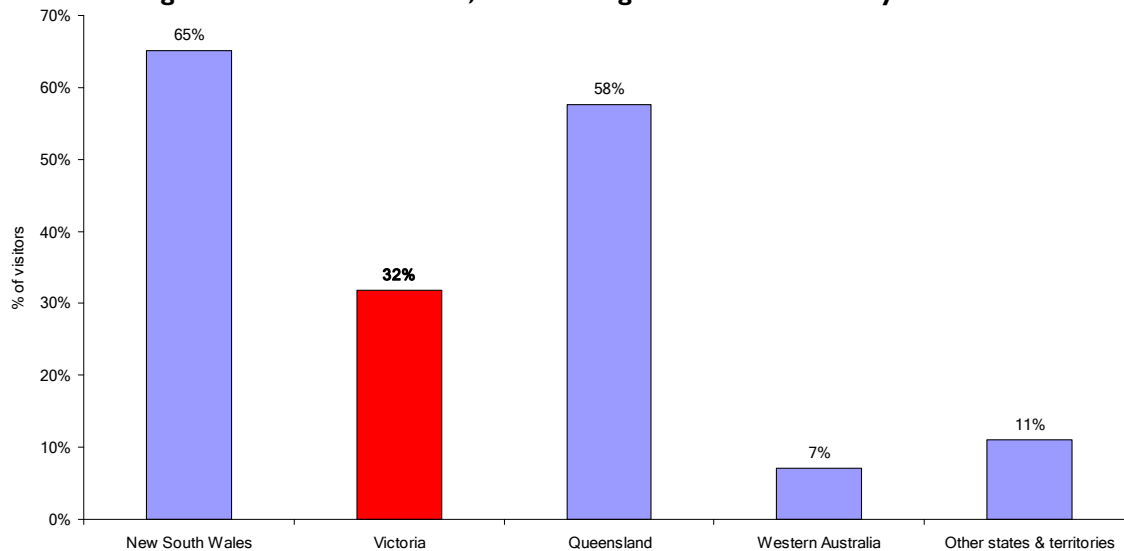
Year Ending							Av Annual	Av Annual	% change	
	December	2000	2006	2007	2008	2009	2010	% change		% Change
								2000-2010	2006-2010	09-10
Australia		2,174	2,349	2,682	3,279	4,303	4,623	7.8%	18.4%	7.4%
New South Wales		986	740	754	830	1,256	1,268	2.5%	14.4%	0.9%
Victoria		-	-	621	-	-	531	-	-	-
Queensland		584	1,136	1,068	1,525	1,685	1,683	11.2%	10.3%	-0.1%
Western Australia		-	-	-	-	520	653	-	-	25.4%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, the number of visitor nights spent in Australia by Taiwanese visitors increased by 7.4% from the previous year to reach 4.6 million visitor nights.

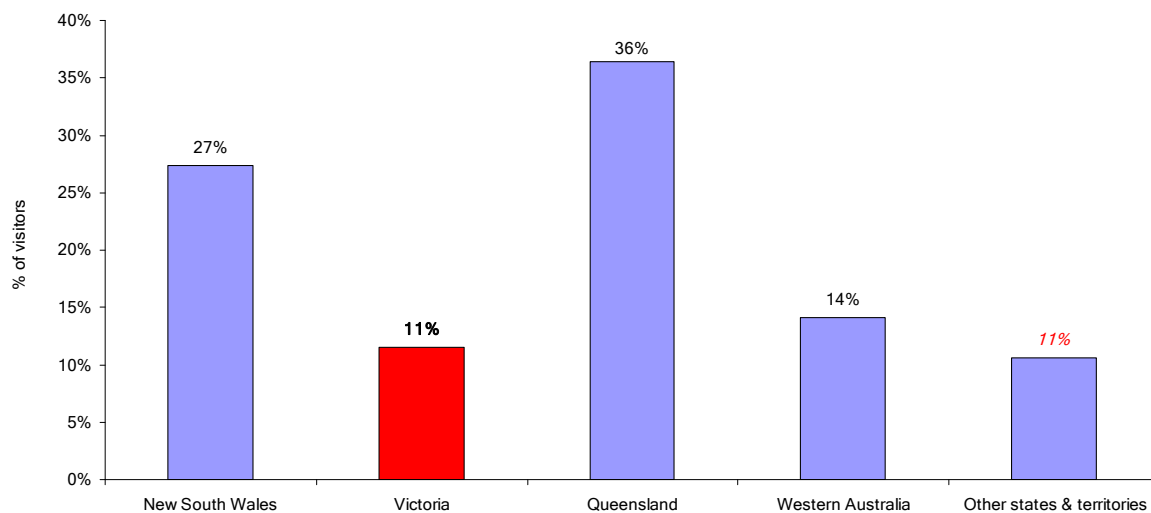
I.4 Market Share by State

Taiwanese Overnight Visitors¹ to Australia, Year ending December 2010 – by State



32% of Taiwanese visitors to Australia stayed overnight in Victoria in 2010, compared to 65% in New South Wales and 58% in Queensland.

Taiwanese Visitor Nights to Australia, Year ending December 2010 – Market Share by State



Victoria's market share of visitor nights spent by Taiwanese travellers in 2010 was 11%, 25 percentage points below Queensland (36%) and 16 percentage points below New South Wales (27%).

¹ NOTE: The proportion of Visitors to the States and Territories will not add up to 100% as visitors can travel to multiple destinations in one trip; while the proportion of Visitor Nights to the States and Territories will add to 100% as this measure is mutually exclusive.

1.5 Main Purpose of Visit – Visitors to Victoria

Taiwanese Visitation (000s) to Victoria by Main Purpose of Visit, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	% change
							2000-2010	2006-2010	09-10
Holiday	40	17	18	15	22	21	-6.4%	5.2%	-8.0%

In 2010, there were 21,000 Taiwanese overnight holiday visitors to Victoria, representing a 8.0% decrease over the previous year and a 6.4% average annual decrease over the longer term (2000 to 2010), with average annual growth of 5.2% over the medium term (2006 to 2010).

1.6 Melbourne Visitation

Taiwanese Visitation (000s) to Melbourne, 2 years (rolling) ending 2000-2010

	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change	% change	2009-2010
							2000-2010	2006-2010	2009-2010
Melbourne	95	44	46	43	45	50	-6.2%	3.5%	11.5%

There were 50,000 Taiwanese overnight visitors to Melbourne in the two years ending December 2010, a 11.5% increase from the previous period. Taiwanese overnight visitation to Melbourne has declined at an annual average rate of 6.2% over the longer term (2000 to 2010).

Taiwanese Visitor Nights (000s) in Melbourne, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change	% change	2009-2010
							2000-2010	2006-2010	2009-2010
Melbourne	733	-	863	957	794	787	0.7%	-	-0.8%

The number of visitor nights spent in Melbourne by Taiwanese visitors decreased by 0.8% from the previous period to 787,000 visitor nights in the two years ending December 2010. Between 2000 and 2010, visitor nights spent in Melbourne increased marginally at an annual average rate of .0.7% p.a.

1.7 Visitor Expenditure

Expenditure by Taiwanese Visitors	Total Expenditure					Expenditure Share			Expenditure Per Night			Expenditure Per Visitor		
	Nominal (\$ million)			Av Ann % Change		%			\$			\$		
Year Ending December	2000	2009	2010	00-10	09-10	2000	2009	2010	2000	2009	2010	2000	2009	2010
New South Wales	np	115	116	np	0.9%	np	1.9%	1.8%	np	92	92	np	1916	2215
Victoria	np	36	38	np	5.6%	np	1.0%	1.0%	np	75	72	np	1,388	1,481
Queensland	np	139	123	np	-11.5%	np	3.6%	3.3%	np	82	73	np	2,766	2,653
Western Australia	np	np	30	np	np	np	np	1.5%	np	np	46	np	np	5,311
Australia	255	344	328	2.5%	-4.7%	2.3%	2.0%	1.9%	118	80	71	2,118	3,723	4,075

np: denotes figures not published by TRA.

NB: Visitor expenditure includes expenditure on packages attributable to destination.

Source: Tourism Research Australia expenditure allocation method applied to 2000-2006 International Visitor Survey data.

Between 2000 and 2010, expenditure by Taiwanese visitors in Australia increased at an annual average rate of 2.5% to \$328 million in 2010. Expenditure in Victoria by Taiwanese visitors was \$38 million in 2010 representing 1.0% of total international expenditure in Victoria.

1.8 Visitor Forecasts to Victoria

Taiwanese Forecasts	2010	ACTUAL 2010	FORECAST										Ave Annual Growth Rate (2009 - 2020)
	Vic Mkt Share		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	
Visitor Numbers (000s)	32%	26	26	28	29	30	31	32	33	34	35	36	3.0%
Visitor Nights (000s)	11%	531	536	550	548	553	554	551	546	541	536	532	0.9%

Note 1: Based on visitors aged 15 years or over.

Note 2: Victorian estimates based on market share of visitor nights (IVS, year ending December 2010) and assumes market share remains constant.

Note 3: Slight variations in calculations are due to rounding.

Sources: Tourism Forecasting Committee, November 2010 Issue 2 and *International Visitor Survey*, year ending December 2010, Tourism Research Australia

Visitors from Taiwan are forecast to increase at an average annual rate of 3.0% over the period 2009-2020. Victoria is expected to receive 36,000 visitors from Taiwan by 2020.

For general information on tourism forecasting, market performance and economic commentary, please refer to the source at:

<http://www.ret.gov.au/tourism/tra/traforecasts/publications/Pages/default.aspx>

2 OVERVIEW OF TAIWANESE LEISURE VISITORS TO VICTORIA

The main focus of this analysis will be on overnight leisure travellers from Taiwan to Australia. Leisure travellers are those who travelled for holiday purposes or to visit friends and relatives (VFR). Due to low sample sizes, detailed analysis for visitation to Victoria could not be undertaken.

Taiwanese Visitation for Leisure, 2000-2010

Year Ending							Av Annual	Av Annual		
	December	2000	2006	2007	2008	2009	2010	% change 2000-2010	% Change 2006-2010	% change 09-10
Visitors to Victoria (000s)	41	18	19	16	23	22		-6.3%	5.4%	-5.5%
Visitors to Australia (000s)	101	70	68	57	76	63		-4.6%	-2.5%	-17.3%
% Market Share	41%	25%	27%	28%	30%	35%		-1.7%	8.2%	14.3%

22,000 Taiwanese leisure visitors stayed overnight in Victoria in 2010, a decrease of 5.5% from the previous year. Over the longer term (2000-2010) Victoria has experienced an average annual decline from this market of 6.3%.

Taiwanese 'Experience Seekers' – Proportion by State/ Territory, 2007-2010

Tourism Australia defines the Experience Seekers as "looking for unique, involving and personal experiences from their holidays. Experience Seekers are long haul travellers who are less affected by the traditional barriers to travel of distance, time and cost. They are more informed, interested and curious about potential travel destinations. Experience Seekers can be found among all age groups, income levels and geographic locations."

Year ending				
December	2007	2008	2009	2010
Total	24%	30%	32%	24%
New South Wales	27%	26%	29%	20%
Victoria	26%	30%	40%	27%
Queensland	23%	27%	32%	22%
South Australia	14%	36%	51%	34%
Western Australia	41%	49%	50%	45%
Tasmania	13%	56%	64%	24%
Northern Territory	26%	45%	55%	38%
Australian Capital Territory	49%	27%	55%	31%

Of Taiwanese overnight leisure visitors to Victoria, 27% can be defined as part of the Tourism Australia "Experience Seekers" segment in 2010. This was higher than the proportion of Taiwanese leisure travellers to Australia generally (24%), and also for key competitors New South Wales (20%) and Queensland (22%). This proportion has decreased 13 percentage points, from 40% of overnight visitors to Victoria in 2009.

For more detailed information on the Experience Seekers segment, please refer to:

<http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>

2.1 Places Visited in Regional Victoria and Melbourne Attractions

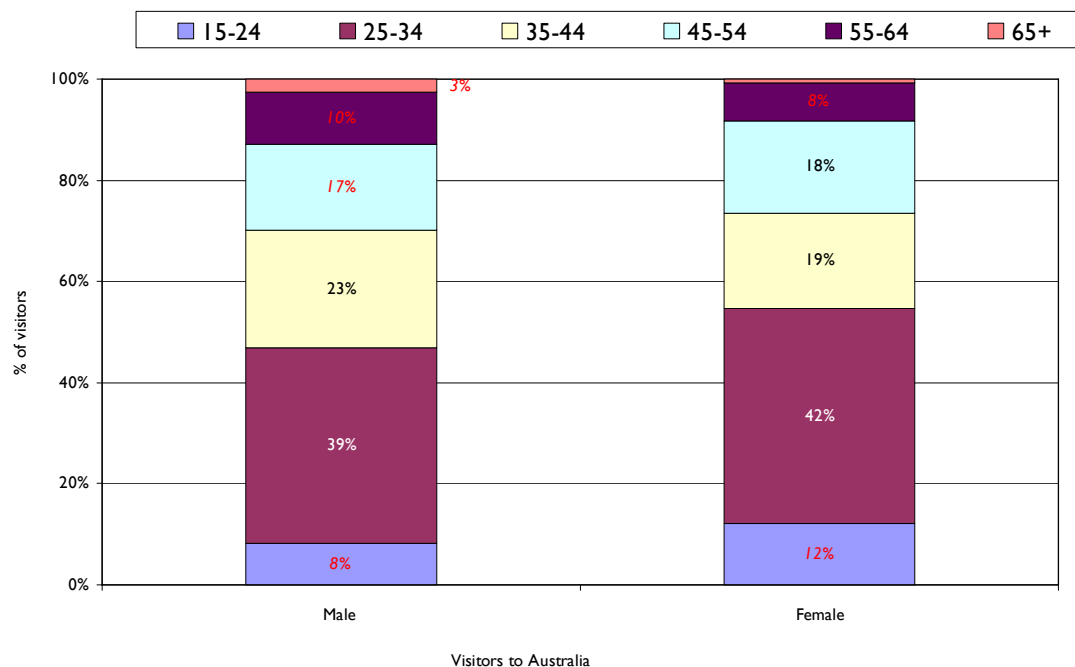
Selected Places Visited - Overnight Visit or Daytrip (% of all Leisure Overnight Visitors to Victoria)	Taiwanese Visitors	All International Visitors	Selected Places Visited - Melbourne Attractions (% of Leisure Overnight Visitors to Victoria)	Taiwanese Visitors	All International Visitors
Phillip Island, penguin parade	66%	20%	Crown Casino/entertainment complex	66%	33%
Ballarat, Sovereign Hill	-	12%	Federation Square	62%	50%
Dandenongs, Puffing Billy, Healesville Sanctuary	34%	14%	Queen Victoria Market	47%	51%
Great Ocean Road or Twelve Apostles	29%	34%	Southbank/Southgate	26%	31%
Mornington Peninsula	-	9%	Melbourne Museum (Royal Exhibition Building)	35%	23%
Daylesford, Hepburn Springs, Macedon	-	2%	Docklands/Telstra Dome	-	28%
Yarra Valley	-	12%	National Gallery of Victoria (NGV)	38%	17%
Bendigo	-	5%	Melbourne Cricket Ground (MCG)	-	11%

Of the Victorian places visited (for an overnight visit or daytrip) 66% of Taiwanese overnight leisure visitors to Victoria spent time in Phillip Island and/or the Penguin Parade. This region is popular generally with 20% of all international overnight leisure visitors to Victoria travelling there.

Of the Melbourne attractions visited, 66% of Taiwanese overnight leisure visitors to Victoria went to Crown Casino and/or Crown Entertainment Complex, while 62% went to Federation Square and 47% to the Queen Victoria Market. The highest attendance for all the listed Melbourne Attractions among international overnight visitors to Victoria generally was the Queen Victoria Markets (51% of overnight international leisure visitors to Victoria).

2.2 Demographic Profiling

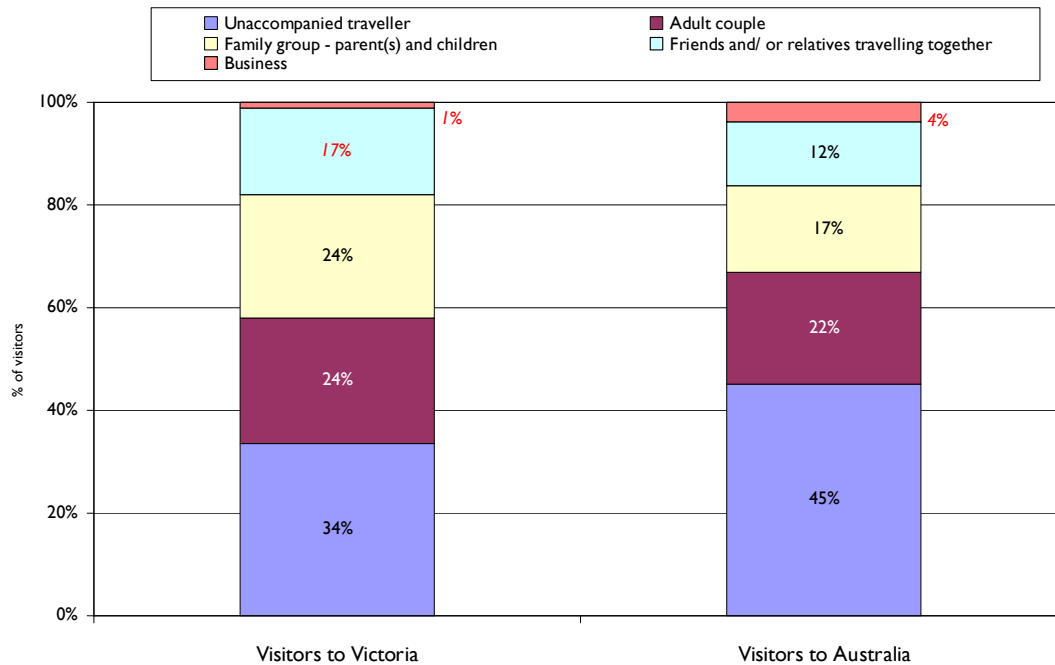
Age Group & Gender (% of overnight leisure visitors from Taiwan)



In 2010, 62% of overnight leisure visitors from Taiwan to Australia were female and 38% were male. The largest proportion of male and female visitors belonged to the 25-34 age group (39% and 42% respectively).

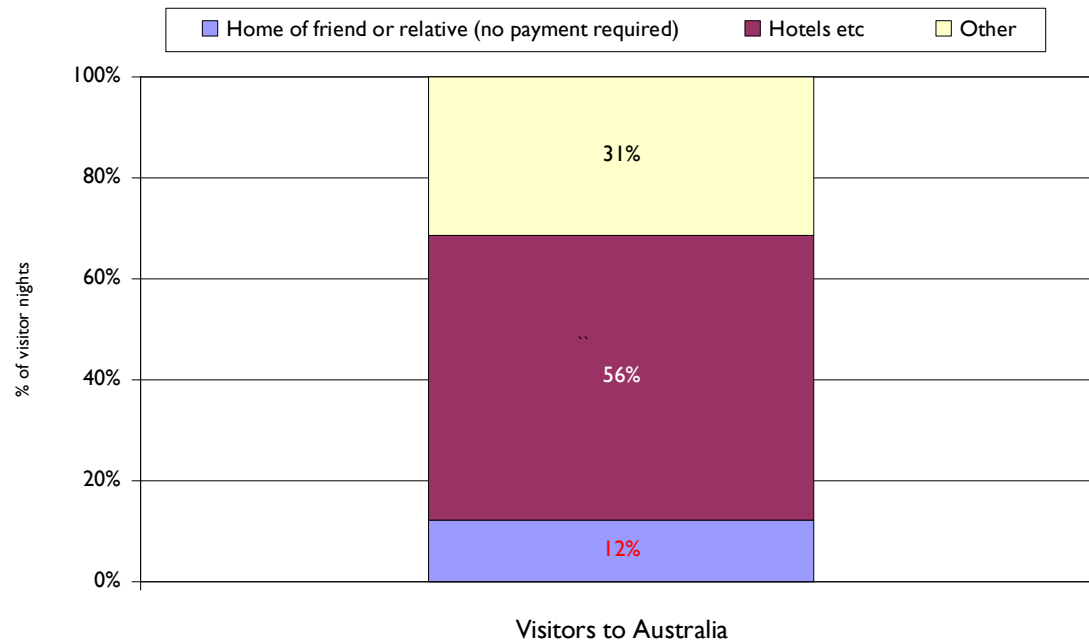
2.3 Detailed Visitor Behaviour

Travel Party Description (% of overnight leisure visitors from Taiwan)



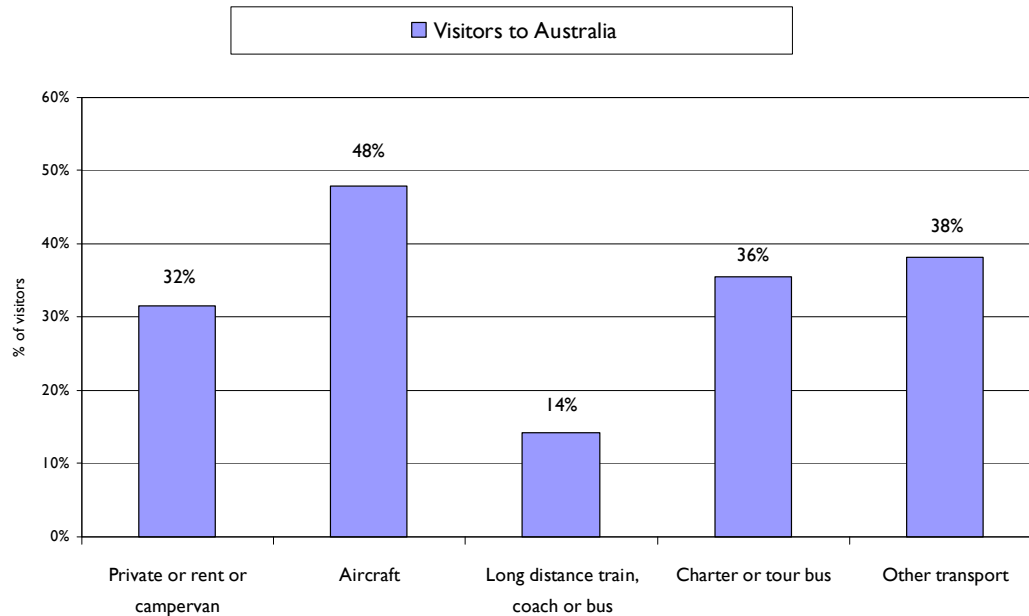
Over half of the overnight leisure travellers visiting Australia from Taiwan in 2010 either travelled alone (45%) or as an adult couple (22%). Solo travellers spent more nights in Australia than any other group (78%).

Accommodation (% of visitor nights spent by Taiwanese overnight leisure visitors)



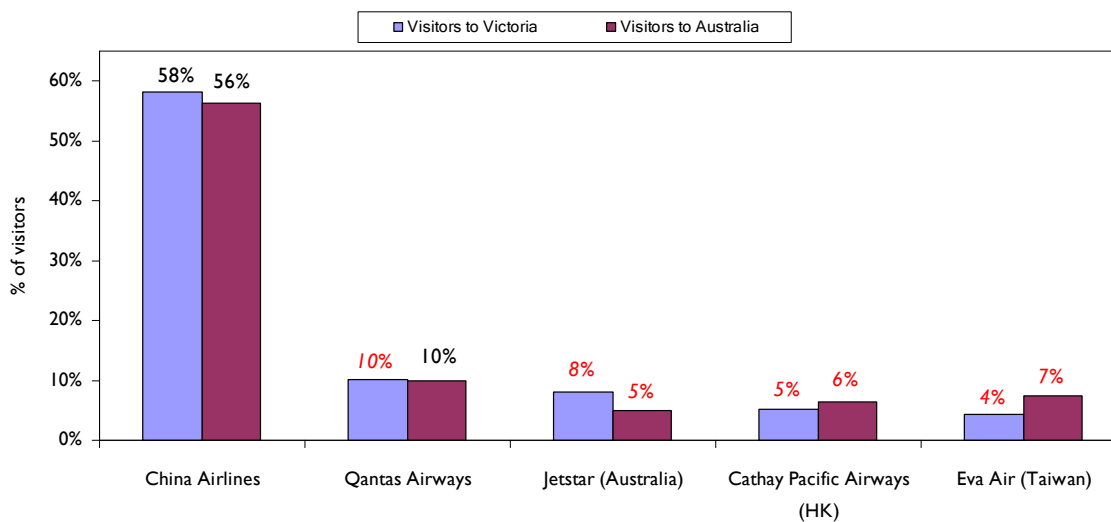
In 2010, 56% of all visitor nights spent in Australia by Taiwanese leisure visitors were spent at hotels, apartments, B&Bs or rented accommodation and 31% were spent at other accommodation (excluding home or a relative or friend etc).

Transportation used (% of overnight leisure visitors from Taiwan)



Of the 63,000 Taiwanese leisure visitors who visited Australia in 2010, 48% flew by aircraft, 32% used a private or rental vehicle, 36% travelled by charter or tour bus and 38% used other forms of transport (such as public transport or ship/boat/ferry).

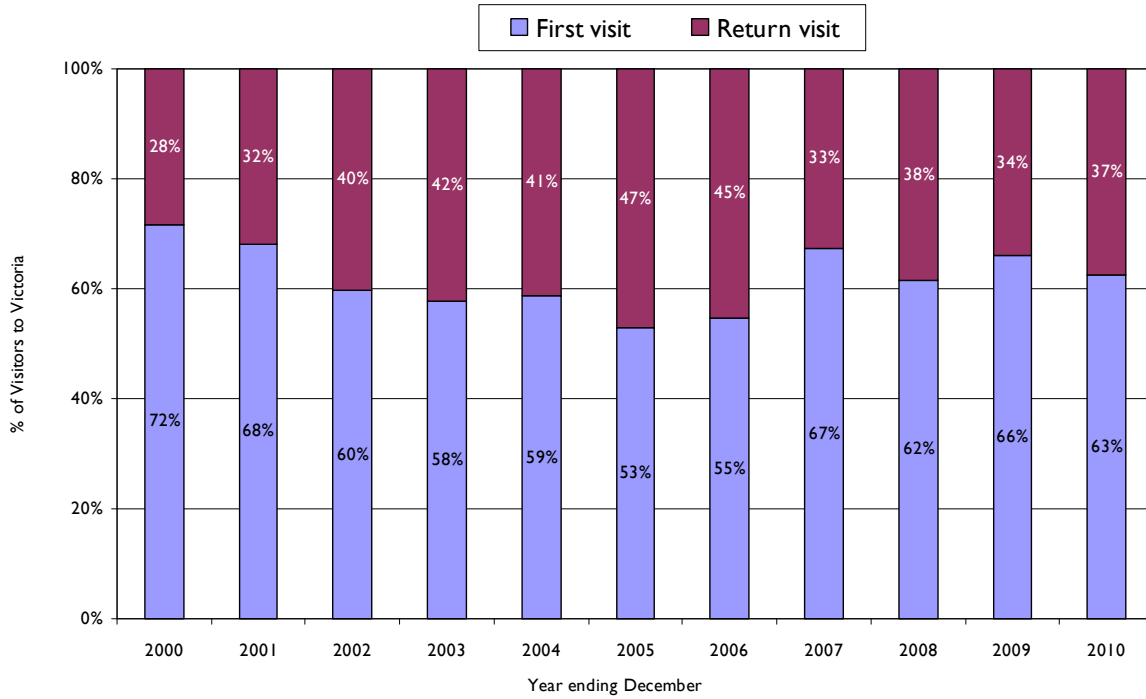
Departure Airline used (% of overnight leisure visitors from Taiwan)



Of overnight leisure visitors to Victoria from Taiwan in 2010 the most popular airline used was China Airlines (58%) when departing Australia following their holiday. Leisure visitors to Australia from Taiwan were also more likely to use China Airlines (56%) followed by Qantas Airways (10%).



Repeat Visitation to Victoria (% of overnight leisure visitors from Taiwan)

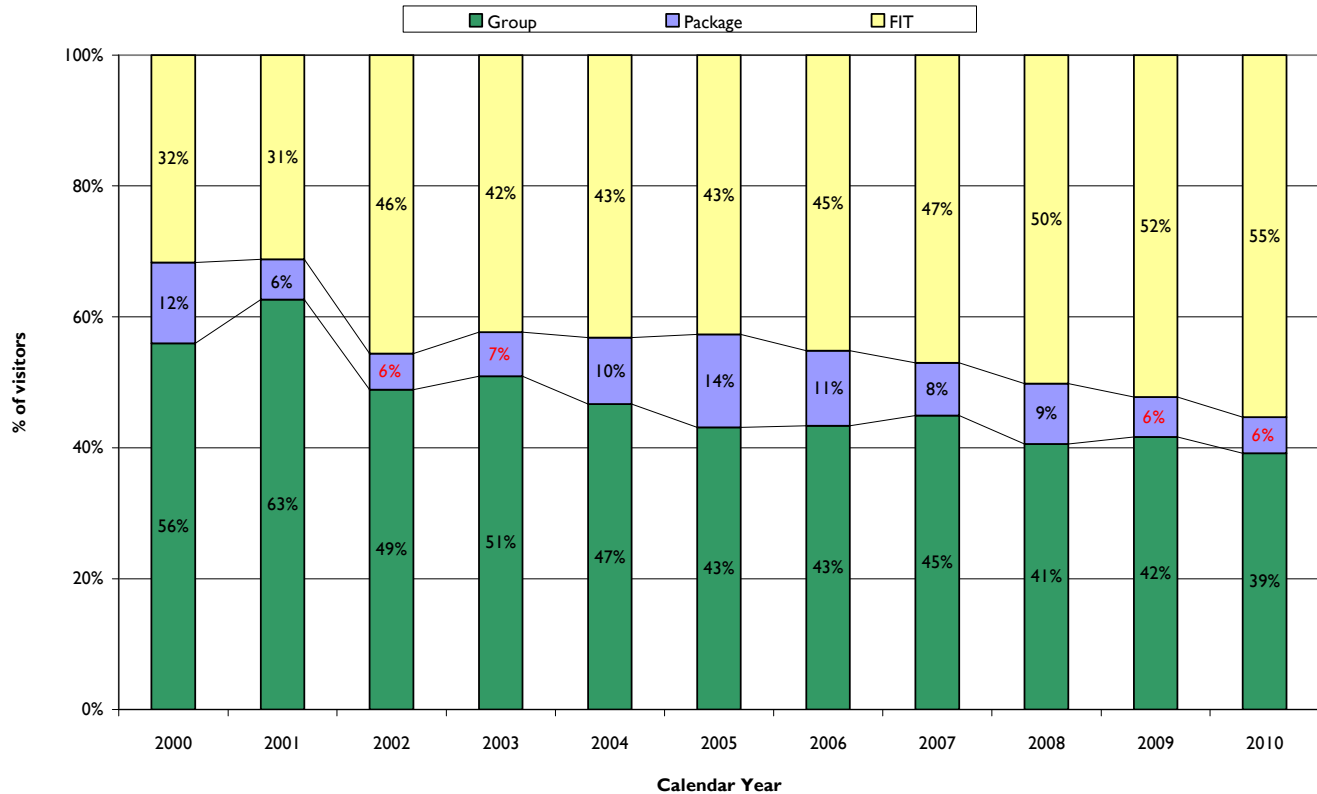


In 2010 the proportion of visitors from Taiwan to Australia who were visiting for the first time was 63%, a decrease from 2000 (72%).

3 TRAVEL STYLE

3.1 Group, package & Fully Independent Travel (FIT) travel

Trends in Group, Package and FIT travel among Taiwanese leisure visitors to Australia, 2000-2010



The FIT segment has grown from 32% in 2000 to 55% in 2010, with group travel decreasing from 56% to 39% over the same period. Package travel has fluctuated considerably over the last decade and made up 6% all visitors in 2010.

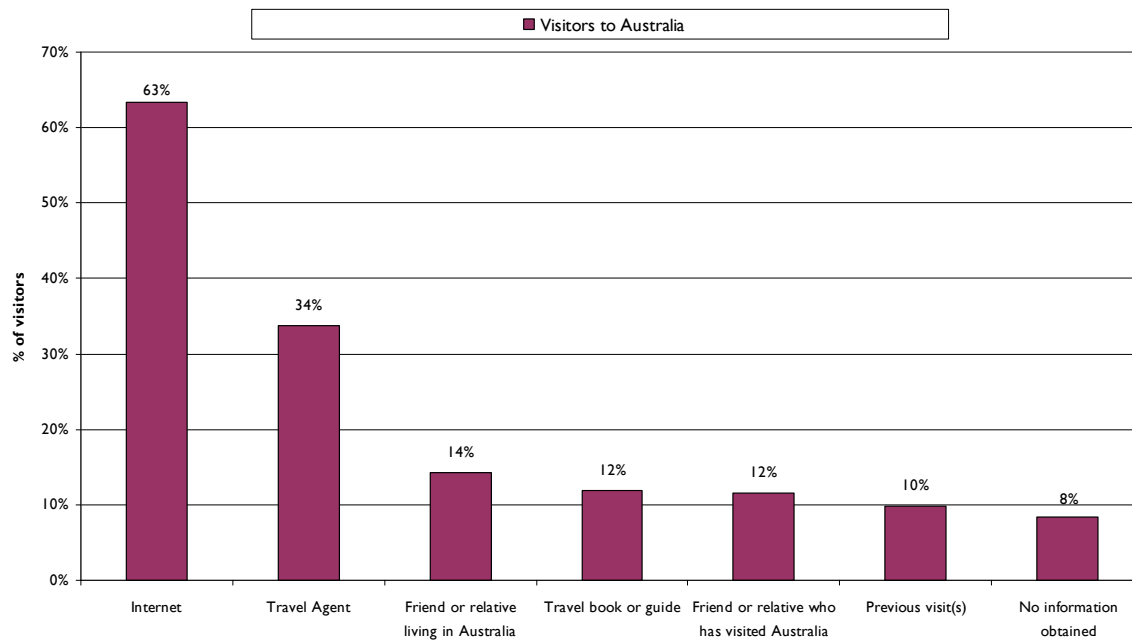
* NOTE: Group, Package and FIT are derived using the following method.

'Group' travellers refer to those who responded yes to question "Did you travel to Australia on a group tour?". 'Package' travellers refer to those who responded yes to question "Did you arrive in Australia on a travel package?" (minus 'Group' travellers). The remaining travellers who were not 'group' or 'package' are referred to as 'FIT' travellers.

4 INFORMATION SOURCES & BOOKING METHODS

4.1 Information Sources

Information Sources by Taiwanese Visitors to Australia, 2010



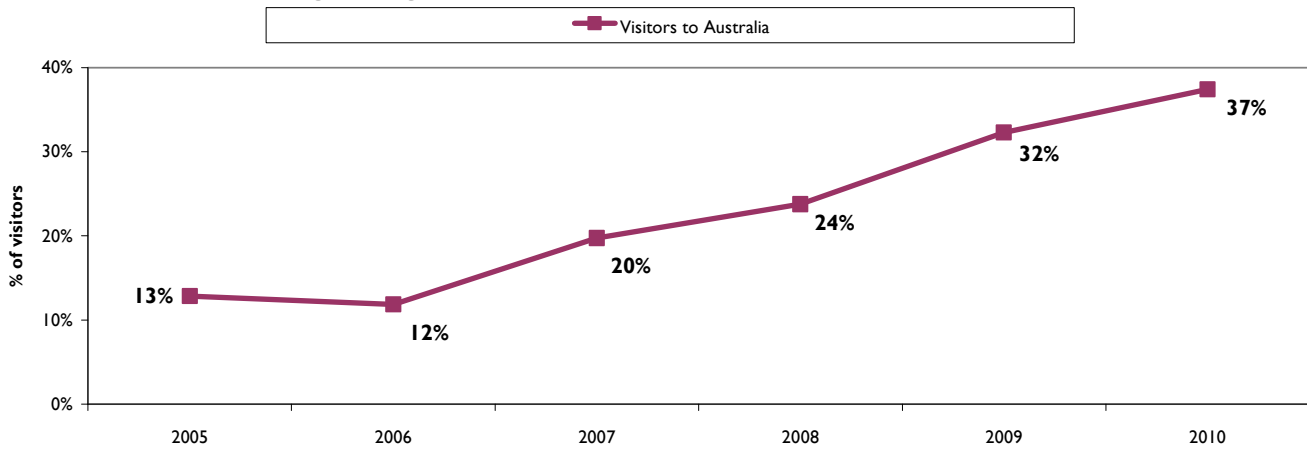
Base: Valid responses

NB: Information Sources with a value below 2% have been omitted.

Among Taiwanese leisure visitors to Australia in 2010, the leading information source used was the Internet (63%), followed by travel agents (34%).

4.2 Internet Booking

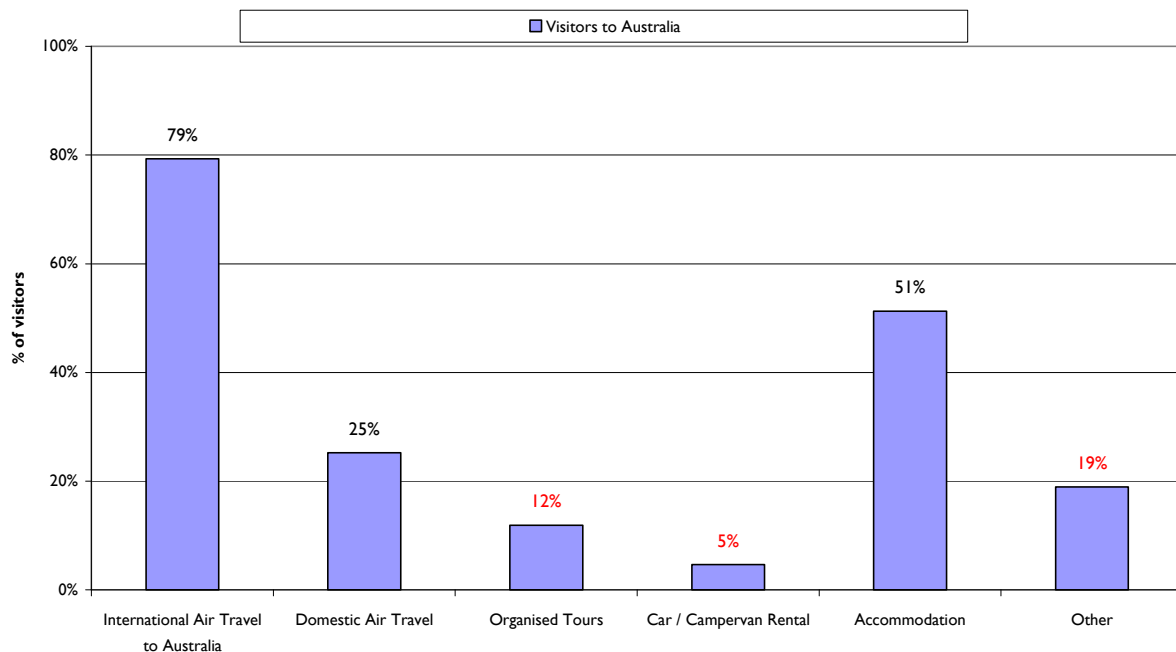
Incidence of Online Booking among Taiwanese Leisure Visitors to Australia, 2005-2010



Base: Valid responses

The incidence of online booking among Taiwanese leisure visitors to Australia has increased from 13% in 2005 to 37% in 2010.

Trip Components Booked Online among Taiwanese Leisure Visitors to Australia, 2010



Base: Booked on-line

Among the 37% of visitors booking travel online, air travel to Australia (79%) followed by accommodation (51%) were the most frequently booked components online.

4.3 Planning and Booking Horizons, 2010

	Visitors to Australia
Planning Horizon (average weeks)	7.7
Booking Horizon (average weeks)	4.3

Among leisure visitors to Australia from Taiwan, the average planning horizon was 7.7 weeks. However, 54% of visitors to Australia indicated a lead time of less than 4 weeks for planning.

Flight booking occurred an average of 4.3 weeks prior to departure. 64% of flight bookings to Australia occurred within a month of departure.

Sources:

- *International Visitor Survey*, year ending December 2000-2010, Tourism Research Australia
- *International Tourism Expenditure in Australia's regions 2000-2010*, Tourism Research Australia
- Tourism Forecasting Committee Forecast 2010: Issue 1 (June 2010) and Issue 2 (November 2010).
- Tourism Australia Corporate Website: <http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>, February 2010.

Further information: www.tourism.australia.com/Markets.asp
www.tourism.vic.gov.au/facts-and-figures/

Figures that are unreliable and unable to be published are represented by '-'. Percentages in red italics are unreliable and should be used with caution.

Figures might not add up due to rounding.