

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

I OVERVIEW OF THAI VISITORS TO AUSTRALIA

I.1 Trends

Total Visitation from Thailand to Australia, 2000-2010

Year Ending							Av Annual	Av Annual	% change
	December	2000	2006	2007	2008	2009	2010	% change	
Visitors (000s)	66	68	76	74	76	78	1.7%	3.6%	2.4%
Visitor Nights (000s)	2,239	2,912	3,261	3,324	4,028	4,113	6.3%	9.0%	2.1%
Average Length of Stay	34.0	42.9	42.7	45.1	52.7	52.5			

Thailand generated 78,000 visitors to Australia in the year ending December 2010, an increase of 2.4% on the previous year. The number of visitors from Thailand coming to Australia has increased at a rate of 1.7% per annum over the period 2000-2010. Thai visitors to Australia are also spending more nights in the country. In 2010, they spent 4.1 million nights in Australia, a 2.1% increase from the previous year. Visitor nights have grown at a rate of 6.3% per annum between 2000 and 2010. The average length of stay in Australia by Thai visitors was 52.5 nights.

I.2 Main Purpose of Trip

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

Year Ending							Av Annual	Av Annual	% change
	December	2000	2006	2007	2008	2009	2010	% change	
Holiday	36	26	28	26	27	27	-2.6%	1.4%	3.6%
Visiting friends and relatives	9	11	13	13	16	16	5.8%	9.4%	-0.3%
Business	11	16	18	17	16	18	5.5%	2.4%	12.6%
Education	9	13	14	14	16	15	5.1%	2.9%	-6.9%

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

27,000 visitors came to Australia from Thailand in 2010 for holiday purposes, an increase of 3.6% from the previous year. 16,000 Thai visitors came to Australia to visit friends and relatives (VFR), a decrease of 0.3% from the previous year. Over the longer term (2000 - 2010) the VFR segment has experienced growth, increasing by an average of 5.8% per annum. Holiday visitation has decreased at an annual average rate of 2.6% over the same period.

The business travel sector has experienced growth at an annual average rate of 5.5% since 2000 to reach 18,000 visitors in 2010. The education sector has also experienced growth. This segment has grown at an average annual rate of 5.1% since 2000 to reach 15,000 Thai visitors in 2010.

1.3 States/Territories Visited

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

Year Ending							Av Annual	Av Annual	
	December	2000	2006	2007	2008	2009	2010	% change 2000-2010	% Change 2006-2010
Australia	66	68	76	74	76	78	1.7%	3.6%	2.4%
New South Wales	36	34	40	40	43	37	0.4%	2.4%	-13.2%
Victoria	17	20	24	22	22	29	5.3%	9.9%	31.6%
Queensland	11	14	11	10	8	10	-0.8%	-7.6%	28.3%
Western Australia	11	10	13	10	11	15	2.9%	12.2%	33.8%
Other States & Territories	10	9	10	8	12	12	1.4%	6.4%	-0.5%

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

There were 29,000 Thai overnight visitors to Victoria in 2010, a 31.6% increase over the previous year. Thai visitation to Victoria has increased by an average rate of 5.3% per annum since 2000, which was above the growth rate of New South Wales (+0.4% p.a.) and Queensland (-0.8% p.a.) as well as the national average (+1.7% p.a.).

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

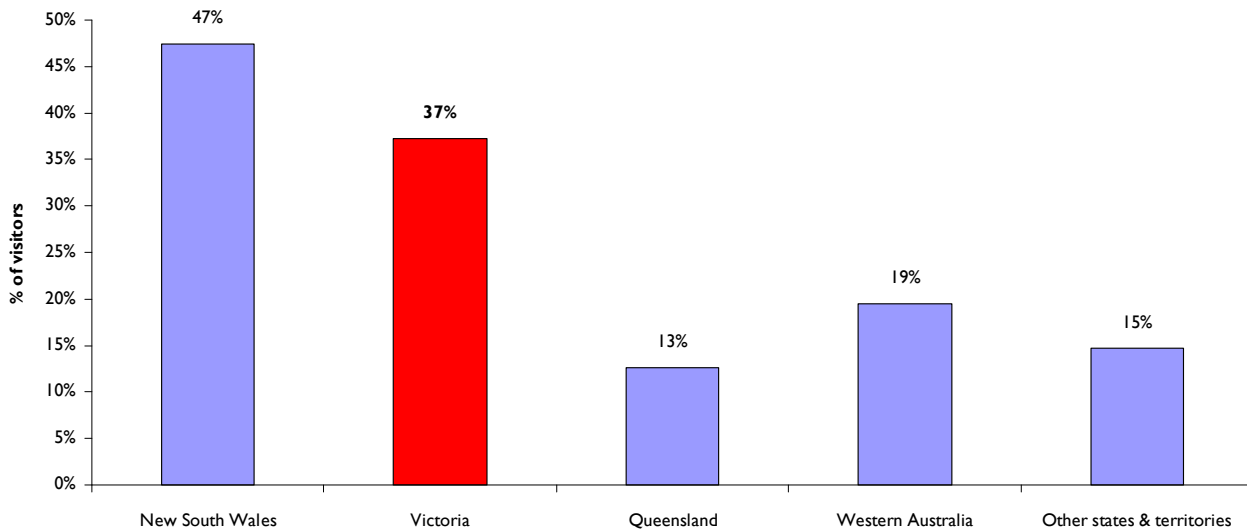
Year Ending							Av Annual	Av Annual	
	December	2000	2006	2007	2008	2009	2010	% change 2000-2010	% Change 2006-2010
Australia	2,239	2,912	3,261	3,324	4,028	4,113	6.3%	9.0%	2.1%
New South Wales	825	1,096	1,305	1,374	1,657	1,476	6.0%	7.7%	-10.9%
Victoria	562	764	1,091	973	1,065	1,238	8.2%	12.8%	16.2%
Western Australia	-	-	-	-	635	738	-	-	16.2%
Other States & Territories	602	672	521	556	669	659	0.9%	-0.5%	-1.5%

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

In 2010, the number of visitor nights spent in Victoria by Thai visitors increased by 16.2% compared to the previous year equating to 1.2 million visitor nights. Over the longer term, visitor nights spent by Thai visitors in Victoria has grown by an average of 8.2% per annum (2000-2010).

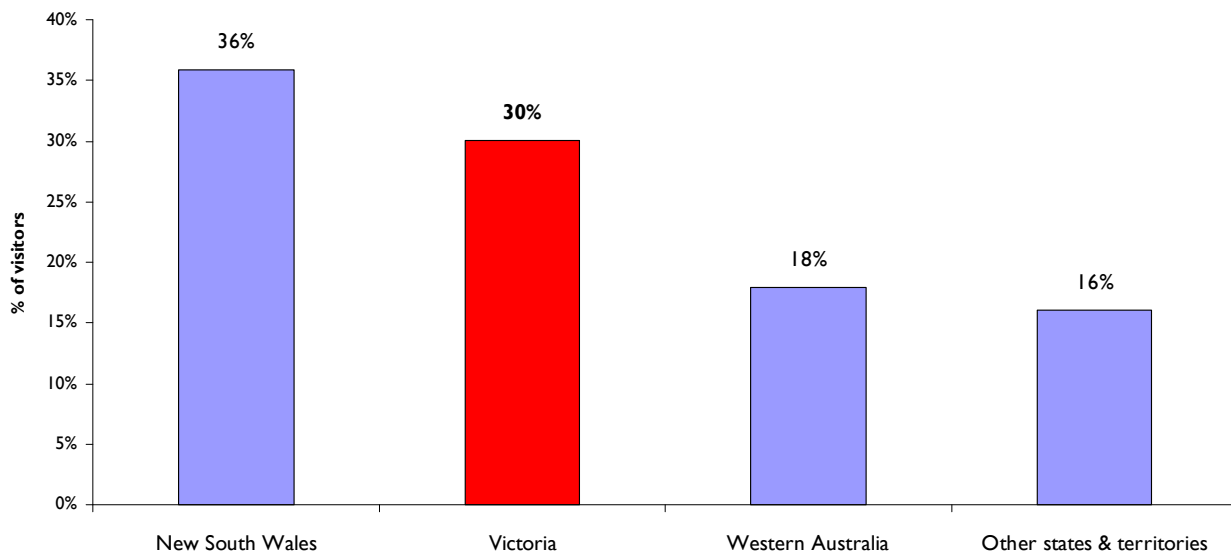
1.4 Market Share by State

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



37% of Thai visitors to Australia in 2010 stayed overnight in Victoria, compared to 47% in New South Wales.

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



Victoria's market share of visitor nights spent by Thai travellers in 2010 was 30%, six percentage points below New South Wales (36%).

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

Thai 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	
							2000-2010	2006-2010	09-10
Holiday	8	7	8	8	10	10	2.4%	8.6%	6.1%
Education	-	-	6	-	6	5	-	-	-2.3%

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

In 2010, there were 10,000 Thai overnight holiday visitors to Victoria, a 6.1% increase over the previous year and 2.4% average annual increase from 2000 to 2010. Victoria also experienced a year-on-year decrease in overnight education (-2.3%) visitors from Thailand.

1.6 Melbourne Visitation

Thai 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	2006	2007	2008	2009	2010	2000-2010	2006-2010	2009-2010
Melbourne	33	38	42	44	43	47	3.6%	5.8%	11.5%

There were 47,000 Thai overnight visitors to Melbourne in the two year period ending December 2010, an 11.5% increase over the previous period. Thai overnight visitation to Melbourne has grown at an annual average rate of 3.6% over the longer term (2000 to 2010).

Thai 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	2006	2007	2008	2009	2010	2000-2010	2006-2010	2009-2010
Melbourne	861	1,564	1,744	1,954	1,918	2,066	9.1%	7.2%	7.7%

The number of visitor nights spent in Melbourne by Thai visitors increased by 7.7% from the previous period to 2.1 million visitor nights in the two year period ending December 2010. Between 2000 and 2010, visitor nights spent in Melbourne increased at an annual average rate of 9.1% p.a.

International Market Profile

Thailand

Year Ending December 2010

1.7 Visitor Expenditure

Expenditure by Thai Visitors	Total Expenditure					Expenditure Share			Expenditure Per Night			Expenditure Per Visitor		
	Nominal (\$ million)		Av Ann % Change	% Change	00-10	%			\$			\$		
	2000	2009				2010	2000	2009	2010	2000	2009	2010	2000	2009
New South Wales	np	143	147	np	2.8%	np	2.3%	2.3%	np	86	100	np	3344	3962
Victoria	np	107	125	np	16.8%	np	2.8%	3.2%	np	100	101	np	4,829	4,286
Queensland	np	22	19	np	-13.6%	np	0.6%	0.5%	np	85	68	np	2,843	1,914
Western Australia	np	49	52	np	6.1%	np	2.8%	2.7%	np	77	70	np	4,304	3,415
Australia	205	351	382	6.4%	8.8%	1.8%	2.1%	2.2%	92	87	93	3,117	4,593	4,880

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 2000-2010 International Visitor Survey data.

Between 2000 and 2010, expenditure by Thai visitors in Australia increased at an annual average rate of 6.4% to reach \$382 million in 2010. This represents a 2.2% share of total international expenditure in Australia. Thai visitors spent \$125 million in Victoria in 2010, a 16.8% increase on 2009.

1.8 Visitor Forecasts

Thai 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)	37%	29	24	25	27	28	29	30	32	33	34	35	4.3%	
Visitor Nights (000s)	30%	1,238	994	1,035	1,079	1,116	1,153	1,186	1,217	1,248	1,278	1,307	1.9%	

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

Average annual growth for arrivals from Thailand is forecast at 4.3% over the period 2009-2020. Victoria is expected to receive 35,000 visitors from Thailand 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 THAI LEISURE VISITORS TO VICTORIA & AUSTRALIA

The main focus of this analysis will be on overnight leisure travellers from Thailand 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 consistently be undertaken.

Thai Visitation for Leisure, 2000-2010

Year Ending							Av Annual	Av Annual	
	December	2000	2006	2007	2008	2009	2010	% change 2000-2010	% Change 2006-2010
Visitors to Victoria (000s)	11	11	12	11	13	17	4.2%	11.8%	28.4%
Visitors to Australia (000s)	45	37	41	39	42	43	-0.3%	4.0%	2.1%
% Market Share	24%	29%	30%	29%	30%	38%			

17,000 Thai leisure visitors stayed overnight in Victoria in 2010, an increase of 28.4% from the previous year. Victoria has experienced a relatively steady number of leisure visitors from this market for the period 2000-2010, increasing at an average annual rate of 4.2%.

Thai '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	47%	45%	48%	51%
New South Wales	54%	43%	46%	50%
Victoria	40%	63%	48%	46%
Queensland	56%	42%	43%	60%
South Australia	31%	65%	61%	67%
Western Australia	44%	42%	44%	53%
Tasmania	39%	92%	70%	54%
Northern Territory	71%	87%	86%	67%
Australian Capital Territory	40%	73%	55%	48%

Of Thai overnight leisure visitors to Victoria, 46% can be defined as part of the Tourism Australia "Experience Seekers" segment in 2010. This was lower than the proportion of Thai leisure travellers to Australia generally (51%), and also for key competitors New South Wales (50%) and Queensland (60%). Over time, this proportion has increased 6 percentage points, from 40% of visitors to Victoria in 2007.

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

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

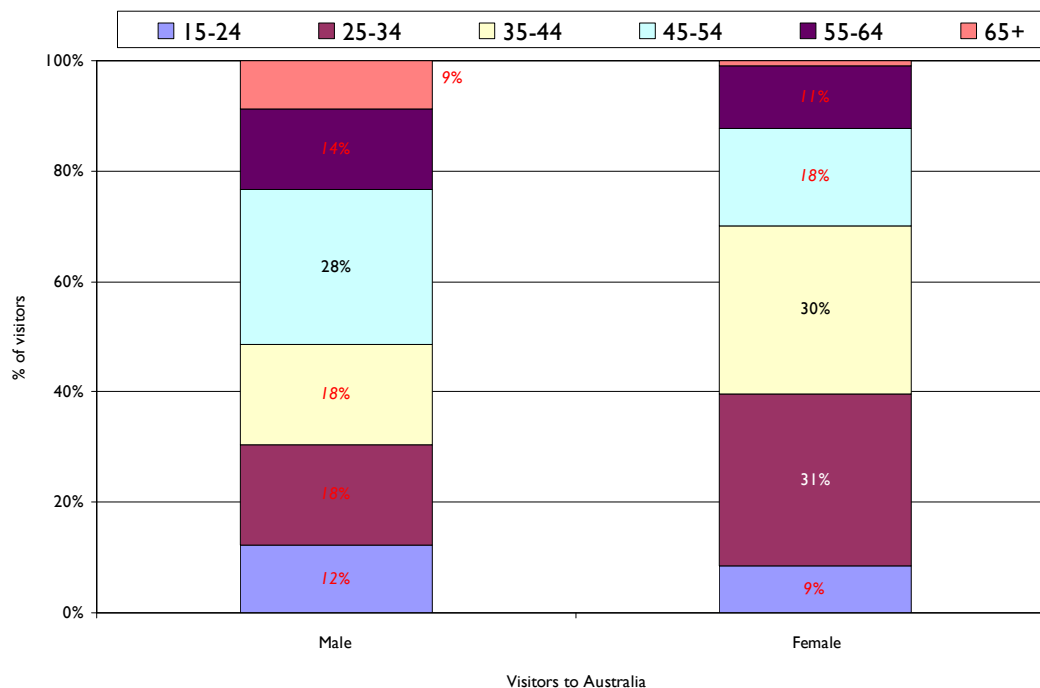
2.1 Visitation to Melbourne Attractions

Selected Places Visited - Melbourne Attractions (% of Leisure Overnight Visitors to Victoria)	All	
	Thailand Visitors	International Visitors
Crown Casino/entertainment complex	36%	33%
Federation Square	35%	50%
Queen Victoria Market	50%	51%
Southbank/Southgate	-	31%
Melbourne Museum (Royal Exhibition Building)	-	23%
Docklands/Telstra Dome	33%	28%
National Gallery of Victoria (NGV)	-	17%
Melbourne Cricket Ground (MCG)	-	11%

Of the Melbourne attractions visited 50% of Thai overnight leisure visitors to Victoria went to the Queen Victoria Markets, while 36% went to Crown Casino and/or Crown Entertainment Complex, 35% to Federation Square and 33% to the Docklands/Telstra Dome. The highest result for all the listed Melbourne Attractions for international overnight visitors to Victoria generally was the Queen Victoria Markets (51% of overnight international leisure visitors to Victoria).

2.2 Demographic Profiling

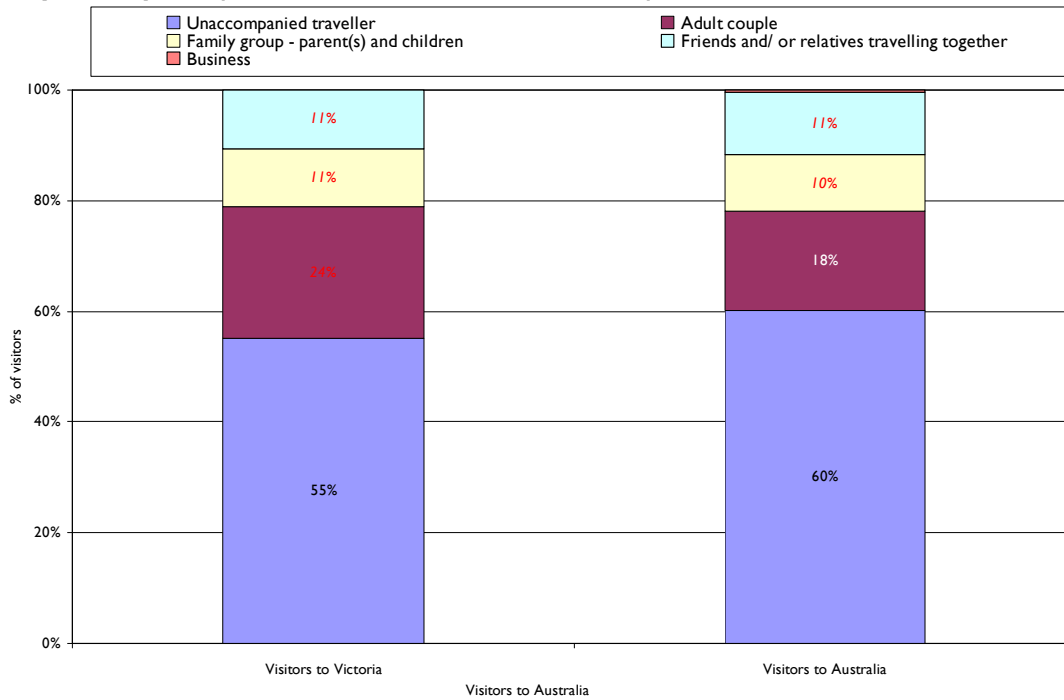
Age Group & Gender (% of leisure visitors from Thailand)



In 2010, 58% of leisure visitors from Thailand to Australia were female and 42% were male. The largest proportion of Thai leisure visitors to Australia belonged to the 45-54 male age group (28%) and 25-44 female age group (61%).

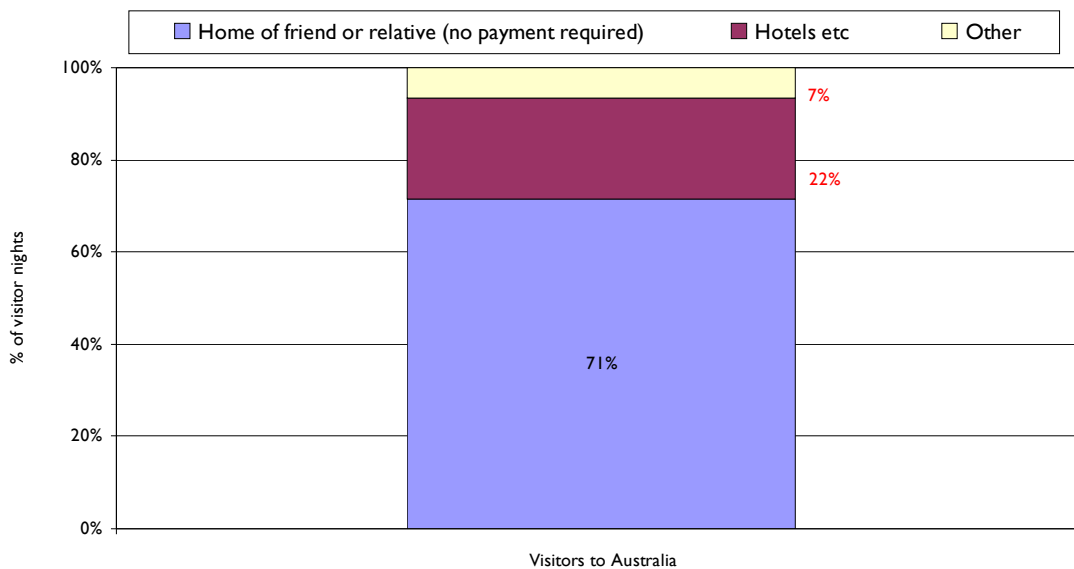
2.3 Detailed Visitor Behaviour

Travel Party Description (% of leisure visitors from Thailand)



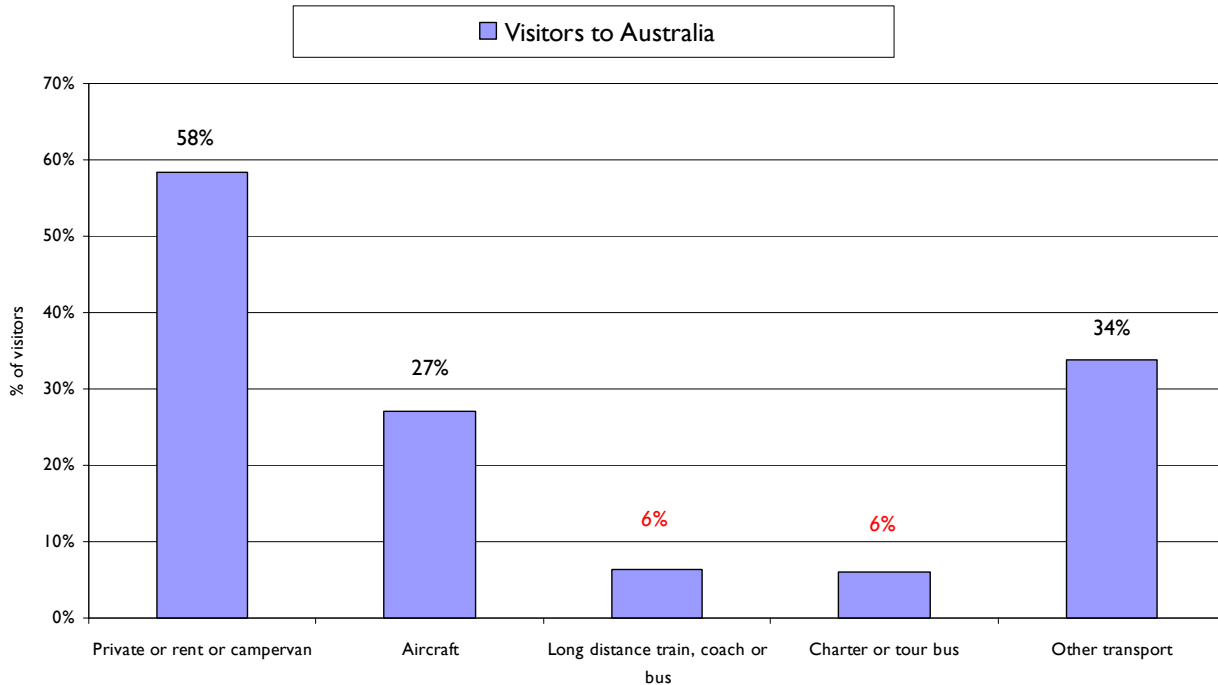
The majority of overnight leisure visitors to Victoria from Thailand in 2010 were unaccompanied travellers (55%). Similarly, Thai leisure visitors to Australia were largely solo travellers (60%).

Accommodation (% of visitor nights spent by Thai leisure visitors)



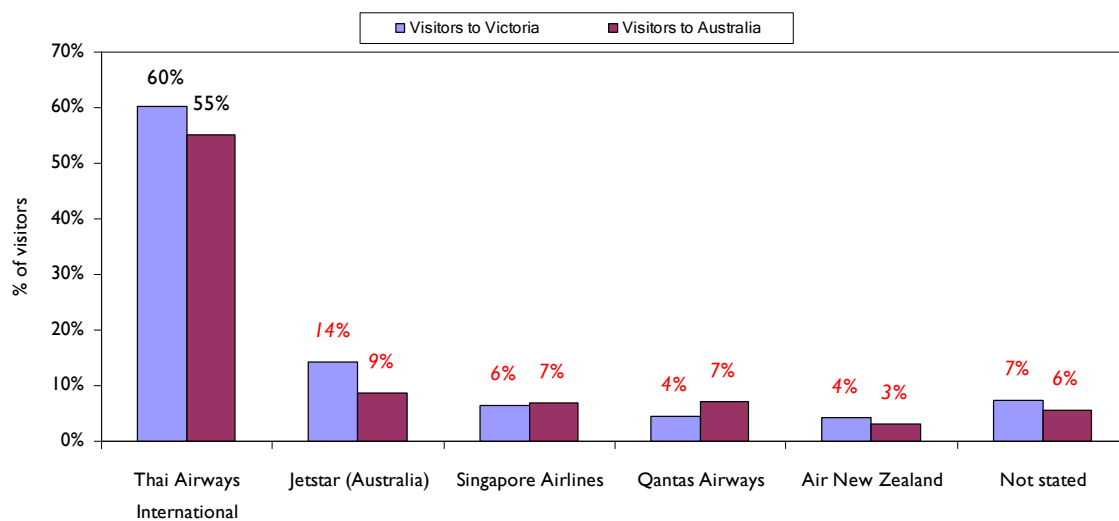
In 2010, 71% of nights in Australia by Thai leisure visitors were spent in the home of a friend or relative.

Transportation used (% of leisure visitors from Thailand)



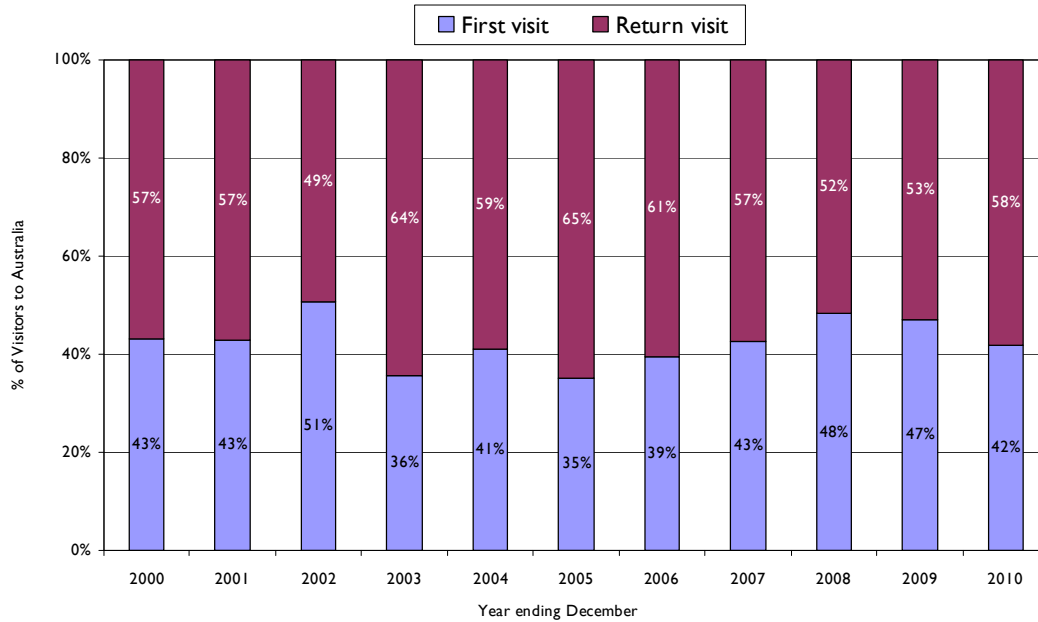
In 2010, 58% of Thai leisure visitors to Australia used a private or rental car, campervan or motor-home, 34% used other forms of transport and 27% used an aircraft.

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



Of overnight leisure visitors to Victoria from Thailand in 2010 the most popular airline used was Thai Airlines (60%) when departing Australia following their holiday. Leisure visitors to Australia also had a high propensity to use Thai Airlines (55%).

Repeat Visitation to Australia (% of leisure visitors from Thailand)

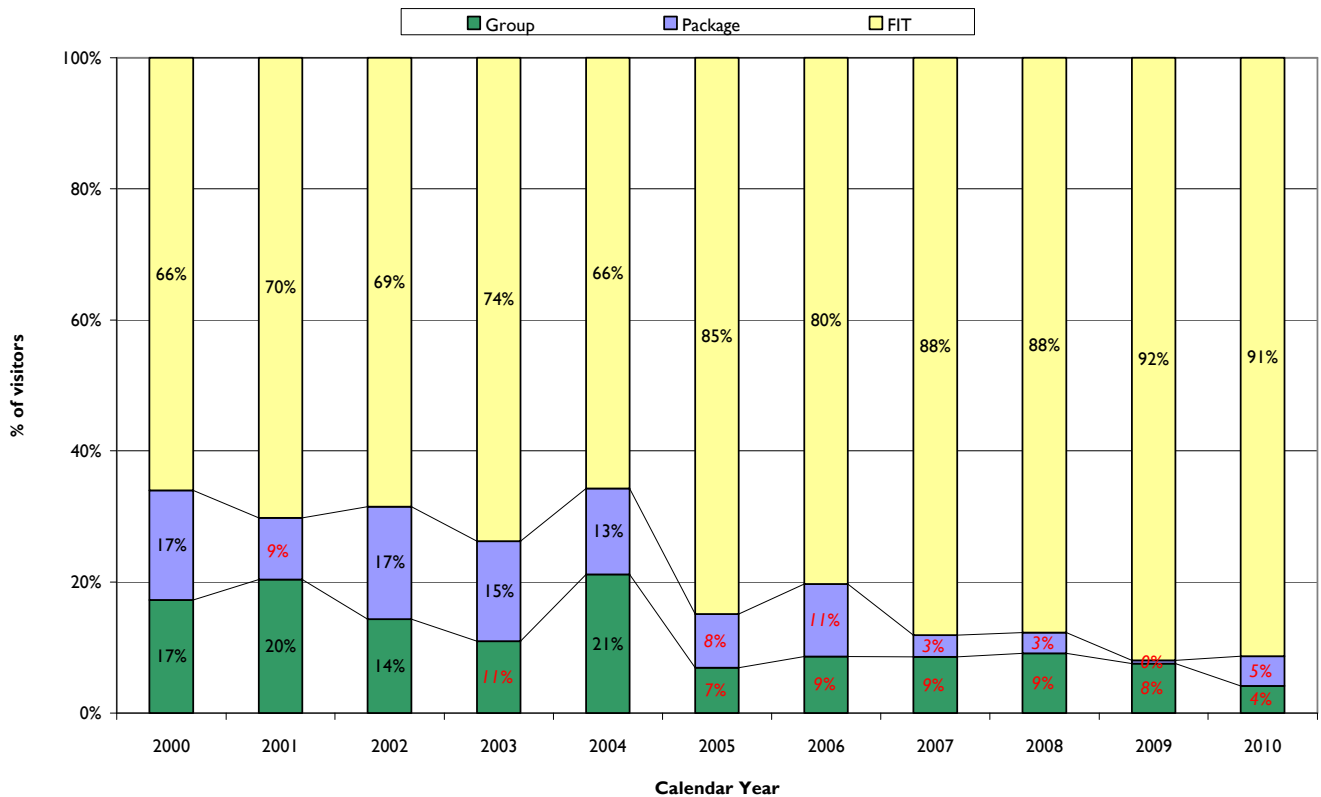


In 2010, the proportion of visitors from Thailand to Australia who were visiting for the first time was 42%, similar to in 2000 (43%).

3 TRAVEL STYLE

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

Trends in Group, Package and FIT travel among Thai Leisure Visitors to Australia, 2000-2010



The maturity of the Thai leisure travel market is reflected in the increasing proportion of FIT travellers, up from 66% in 2000 to 91% in 2010. Over time there has been a decrease in both group and package travel.

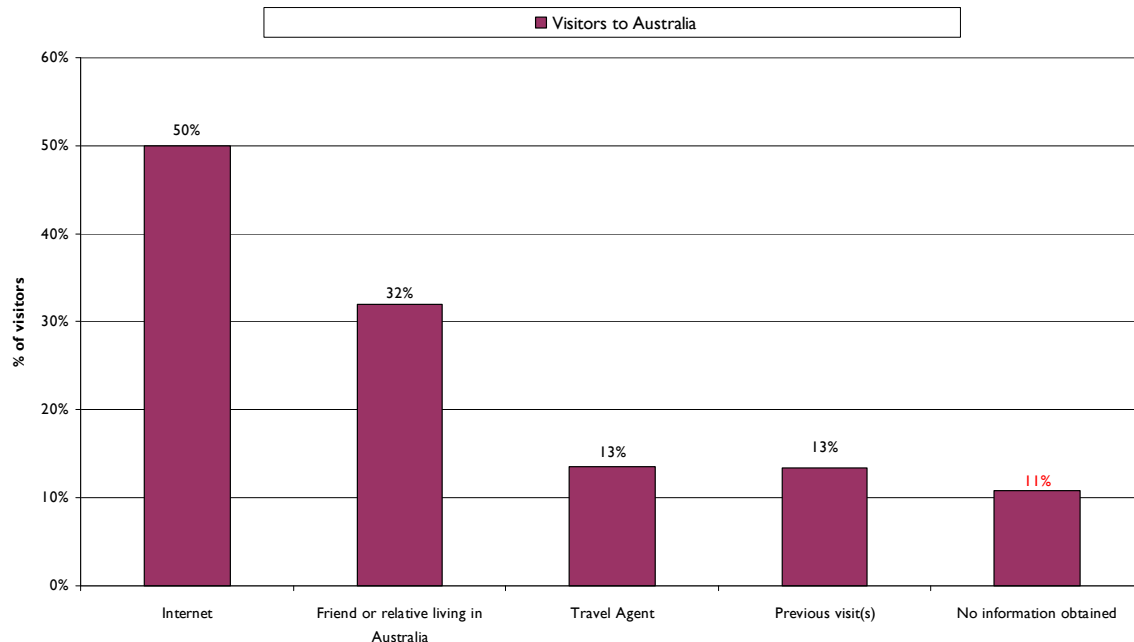
* NOTE: Group, Package and FIT are derived using the following method.

'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 Thai Leisure Visitors to Australia, 2010



Base: Valid responses

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

Among Thai leisure visitors to Australia in 2010, the leading information source used was the internet (50%), followed by word of mouth from an Australian resident (32%).

4.2 Internet Booking

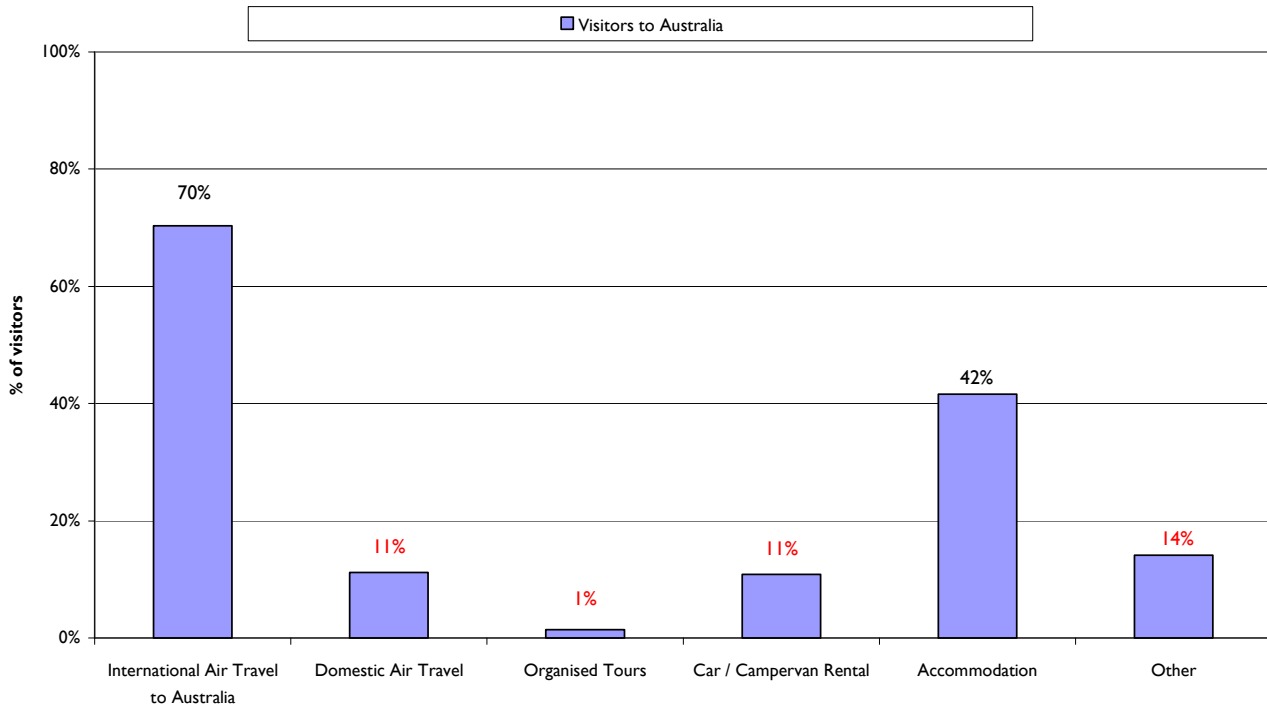
Incidence of Online Booking among Thai Leisure Visitors to Australia, 2005-2010



Base: Valid responses

The incidence of online booking among Thai leisure visitors to Australia increased from 16% in 2005 to 51% in 2010. There was a year-on-year increase in the incidence of online booking among Thai overnight leisure visitors to Victoria from 49% to 63% (a 14 percentage point increase), with a similar increase seen by Thai leisure visitors to Australia (up 18 percentage points).

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



Base: Booked on-line

Among Thai leisure visitors to Australia that booked travel online, international air travel to Australia (70%), followed by accommodation (42%) were the most frequently purchased components.

4.3 Planning and Booking Horizons, 2010

	Visitors to Australia
Planning Horizon (average weeks)	9.0
Booking Horizon (average weeks)	6.1

Among leisure visitors to Australia from Thailand, the average planning horizon was 9.0 weeks. However, 48% of visitors to Australia indicated a lead time of less than four weeks for planning.

Flight booking occurred an average of 6.1 weeks prior to departure. 59% 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.