

This fact sheet provides a summary of the latest tourism data for visitors from the United Kingdom 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 UK VISITORS TO AUSTRALIA

### I.1 Trends

#### Total UK Visitation to Australia, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change 09-10
							% change 2000-2010	% Change 2006-2010	
<b>Visitors (000s)</b>	556	686	643	632	625	609	0.9%	-2.9%	-2.6%
<b>Visitor Nights (000s)</b>	24,258	23,371	21,318	20,846	22,577	21,929	-1.0%	-1.6%	-2.9%
<b>Average Length of Stay</b>	43.6	34.1	33.1	33.0	36.1	36.0			

The United Kingdom generated 609,000 visitors to Australia in the year ending December 2010. The number of visitors from the UK coming to Australia has increased at a rate of 0.9% per annum over the period 2000-2010, but has seen decreases over recent years with a decline of 2.6% from 2009. In 2010 these visitors spent 21.9 million nights in Australia. Visitor nights have also declined 2.9% year-on-year and 1.0% per annum between 2000 and 2010. The average length of stay in Australia by UK visitors was 36.0 nights in 2010.

### I.2 Main Purpose of Trip

#### UK Visitors (000s) to Australia by Purpose of Trip, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change 09-10
							% change 2000-2010	% Change 2006-2010	
<b>Holiday</b>	276	367	324	310	298	277	0.0%	-6.8%	-7.0%
<b>Visiting friends &amp; relatives</b>	205	233	235	236	247	243	1.7%	1.0%	-1.8%
<b>Business</b>	46	53	52	52	46	53	1.3%	-0.3%	15.4%
<b>Education</b>	-	-	5	-	5	6	-	-	3.7%
<b>Employment</b>	10	15	15	17	15	18	5.7%	3.8%	17.2%
<b>Other</b>	15	14	13	13	13	13	-1.7%	-2.4%	-4.6%

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

Both of the leisure segments from the UK experienced short term declines in 2010. 277,000 visitors came to Australia from the UK in 2010 for holiday purposes, a decrease of 7.0% over the previous year, while 243,000 UK visitors came to Australia to visit friends and relatives (VFR), a decrease of 1.8%.

More positively, the business travel sector has experienced a year-on-year increase of 15.4% to 53,000 visitors in 2010. Similarly, the employment sector also experienced an increase to 18,000 visitors in 2010, a 17.2% increase on the previous year.

### 1.3 States/Territories Visited

#### UK Overnight Visitation (000s) to Australia by State/Territory, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual % change 2000-2010	Av Annual % Change 2006-2010	% change 09-10
<b>Australia</b>	<b>556</b>	<b>686</b>	<b>643</b>	<b>632</b>	<b>625</b>	<b>609</b>	<b>0.9%</b>	<b>-2.9%</b>	<b>-2.6%</b>
New South Wales	366	439	407	386	377	357	-0.3%	-5.0%	-5.3%
<b>Victoria</b>	<b>170</b>	<b>239</b>	<b>212</b>	<b>209</b>	<b>201</b>	<b>197</b>	<b>1.5%</b>	<b>-4.7%</b>	<b>-2.3%</b>
Queensland	250	300	260	251	247	238	-0.5%	-5.6%	-3.7%
South Australia	77	83	74	78	73	63	-2.0%	-6.7%	-13.7%
Western Australia	138	171	162	161	157	152	1.0%	-3.0%	-3.4%
Tasmania	22	31	27	28	22	20	-0.9%	-10.2%	-6.8%
Northern Territory	91	83	65	60	65	50	-5.8%	-11.8%	-23.3%
ACT	23	30	22	30	23	20	-1.4%	-9.3%	-10.6%

There were 197,000 overnight UK visitors to Victoria in 2010, a 2.3% decrease over the previous year. Nationally, UK visitation to Australia also decreased by 2.6% from 2009 to 2010, as did key competitors of New South Wales (-5.3%) and Queensland (-3.7%).

Over the longer term UK overnight visitation to Victoria has grown at an annual average rate of 1.5% between 2000 and 2010, outperforming the growth rates of New South Wales (-0.3%), Queensland (-0.5%) and Australia (0.9%).

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

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual % change 2000-2010	Av Annual % Change 2006-2010	% change 09-10
<b>Australia</b>	<b>24,258</b>	<b>23,371</b>	<b>21,318</b>	<b>20,846</b>	<b>22,577</b>	<b>21,929</b>	<b>-1.0%</b>	<b>-1.6%</b>	<b>-2.9%</b>
New South Wales	9,302	8,110	7,142	6,441	7,462	7,025	-2.8%	-3.5%	-5.9%
<b>Victoria</b>	<b>2,712</b>	<b>4,157</b>	<b>3,502</b>	<b>3,542</b>	<b>3,663</b>	<b>3,738</b>	<b>3.3%</b>	<b>-2.6%</b>	<b>2.0%</b>
Queensland	5,110	5,367	5,053	4,796	5,467	5,214	0.2%	-0.7%	-4.6%
South Australia	1,227	954	1,010	1,131	1,070	929	-2.7%	-0.7%	-13.2%
Western Australia	3,665	3,562	3,551	3,632	3,805	3,850	0.5%	2.0%	1.2%
Northern Territory	1,522	560	511	-	541	619	-8.6%	2.6%	14.4%
Other States & Territories	-	550	-	742	-	-	-	-	-

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 UK visitors increased by 2.0% from the previous year to 3.7 million visitor nights. Over the same period, visitor nights spent by UK visitors in Australia decreased by 2.9% to 21.9 million nights.

### 1.4 Market Share by State

#### UK Overnight Visitors<sup>1</sup> to Australia, Year ending December 2010 – by State



32% of UK visitors to Australia in 2010 stayed overnight in Victoria, compared to 59% in New South Wales and 39% in Queensland.

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



Victoria's market share of visitor nights spent by UK travellers in 2010 was 17%, 15 percentage points behind New South Wales (32%) and seven percentage points behind Queensland (24%).

<sup>1</sup> 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

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

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual % change 2000-2010	Av Annual % Change 2006-2010	% change 09-10
<b>Holiday</b>	94	143	120	115	116	104	1.0%	-7.7%	-10.6%
<b>Visiting friends &amp; relatives</b>	54	65	67	68	65	66	2.0%	0.5%	2.1%
<b>Total Leisure</b>	148	208	187	183	181	170	1.4%	-4.9%	-6.0%
<b>Business</b>	14	18	13	14	13	16	1.5%	-2.0%	23.8%
<b>Other</b>	8	13	11	12	7	11	2.5%	-5.3%	42.9%

In 2010, there were 170,000 UK overnight leisure visitors to Victoria, a 6.0% decline over the previous year but a 1.4% average annual increase over the longer term. This decline was mainly due to decreases in the overnight holiday market to Victoria (-10.6% decline year-on-year).

The business sector experienced positive change year-on-year with an increase of 23.8%, with 16,000 UK visitors in 2010.

### 1.6 Regional Dispersal<sup>2</sup> – Visitor Nights (000s), 2000 - 2010

UK	2000	2006	2007	2008	2009	2010	Ave. Annual Change (%) 2000-2010	Ave. Annual Change (%) 2006-2010	% change 2009-2010
<b>Regional Victoria - Nights (000s)</b>	<b>523</b>	<b>1,021</b>	<b>798</b>	<b>936</b>	<b>845</b>	<b>1,022</b>	<b>6.9%</b>	<b>0.0%</b>	<b>20.9%</b>
<b>% of total nights in State</b>	<b>19.3%</b>	<b>24.6%</b>	<b>22.8%</b>	<b>26.4%</b>	<b>23.1%</b>	<b>27.3%</b>			
Regional NSW - Nights (000s)	1,634	1,616	1,524	1,590	1,570	1,764	0.8%	2.2%	12.4%
% of total nights in State	17.6%	19.9%	21.3%	24.7%	21.0%	25.1%			
Regional Qld - Nights (000s)	2,992	3,185	3,087	2,784	2,878	2,902	-0.3%	-2.3%	0.8%
% of total nights in State	58.5%	59.3%	61.1%	58.0%	52.6%	55.7%			
Regional Australia - Nights (000s)	7,407	7,357	6,835	6,862	6,895	7,209	-0.3%	-0.5%	4.6%
% of total nights in Aust	30.5%	31.5%	32.1%	32.9%	30.5%	32.9%			

In 2010, 1.0 million visitor nights were spent by UK visitors in regional Victoria, an increase of 20.9% over the previous year. Over the period 2000-2010, the number of visitor nights spent by UK visitors in regional Victoria has grown at an annual average rate of 6.9%. Both of these short and long term growth rates have outperformed the national regional rate as well as regional New South Wales and regional Queensland.

<sup>2</sup> "Regional" is defined as non capital city nights for each state with the exception of the Gold Coast. For example, Regional Queensland excludes nights spent in both Brisbane and the Gold Coast.

### 1.7 Melbourne and Victorian Regions Visited

#### UK Visitation (000s) to Victoria, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change 2000-2010	% change 2006-2010	2009-2010
Daylesford & Macedon Ranges	-	-	6	-	-	6	-	-	-
Gippsland	21	30	32	29	28	26	2.1%	-3.3%	-8.5%
Goldfields	15	15	14	15	13	13	-1.0%	-3.3%	2.8%
Grampians	16	16	16	16	16	16	-0.2%	-1.1%	-1.7%
Great Ocean Road	57	78	78	75	76	74	2.7%	-1.2%	-2.3%
<b>Melbourne</b>	<b>296</b>	<b>398</b>	<b>408</b>	<b>380</b>	<b>365</b>	<b>351</b>	<b>1.7%</b>	<b>-3.1%</b>	<b>-3.7%</b>
Mornington Peninsula	14	18	19	22	25	24	5.1%	7.7%	-6.0%
Murray	16	19	19	16	14	14	-1.7%	-8.1%	-3.7%
Phillip Island	9	12	13	16	15	12	2.8%	0.5%	-17.5%
Victoria's High Country	14	9	10	10	10	9	-3.8%	2.1%	-8.8%
Yarra Valley & Dandenong Ranges	5	14	13	16	17	14	10.0%	0.1%	-18.5%
<b>Regional Victoria</b>	<b>113</b>	<b>147</b>	<b>151</b>	<b>146</b>	<b>146</b>	<b>141</b>	<b>2.2%</b>	<b>-1.0%</b>	<b>-3.3%</b>

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

There were 351,000 UK overnight visitors to Melbourne in the two years ending December 2010, a 3.7% decrease over the previous period. UK overnight visitation to Melbourne has grown at an annual average rate of 1.7% over the longer term (2000 to 2010). Similarly, regional Victoria has experienced a short term decline (-3.3%), but longer term growth from the market since 2000 (+2.2%).

#### UK Visitor Nights (000s) in Victoria, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change 2000-2010	% change 2006-2010	2009-2010
Melbourne	4,056	5,758	5,841	5,310	5,423	5,534	3.2%	-1.0%	2.0%
Regional Victoria	1,047	1,837	1,818	1,734	1,781	1,867	6.0%	0.4%	4.8%

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

The number of visitor nights spent in Melbourne by UK visitors increased by 2.0% from the previous period to reach 5.5 million visitor nights in the period two years ending December 2010. Visitor nights spent in regional Victoria also increased in the short term (+4.8%).

### I.8 Visitor Expenditure

Expenditure by UK Visitors	Total Expenditure					Expenditure Share			Expenditure Per Night			Expenditure Per Visitor		
	Nominal (\$ million)			Av Ann % Change	% Change	%			\$			\$		
Year Ending December	2000	2009	2010	00-10	09-10	2000	2009	2010	2000	2009	2010	2000	2009	2010
New South Wales	592	672	613	0.3%	-8.8%	13.8%	11.0%	9.8%	64	90	87	1617	1783	1717
<b>Victoria</b>	<b>168</b>	<b>289</b>	<b>296</b>	<b>5.8%</b>	<b>2.4%</b>	<b>10.0%</b>	<b>7.7%</b>	<b>7.5%</b>	<b>62</b>	<b>79</b>	<b>79</b>	<b>987</b>	<b>1,435</b>	<b>1,504</b>
Queensland	422	466	431	0.2%	-7.5%	14.0%	12.0%	11.4%	83	85	83	1,690	1,886	1,810
South Australia	59	81	75	2.4%	-7.4%	15.2%	12.3%	10.2%	48	76	81	766	1,111	1,191
Western Australia	200	284	294	3.9%	3.5%	18.1%	16.1%	15.2%	55	75	76	1,454	1,810	1,940
Tasmania	np	30	23	np	-23.3%	np	10.9%	8.2%	np	106	86	np	1,367	1,124
Northern Territory	95	77	60	-4.5%	-22.1%	22.6%	17.1%	16.2%	62	142	97	1,048	1,181	1,200
Australian Capital Territory	7	10	14	7.2%	40.0%	5.6%	4.3%	4.9%	50	61	73	300	439	687
<b>Australia</b>	<b>1,561</b>	<b>1,908</b>	<b>1,805</b>	<b>1.5%</b>	<b>-5.4%</b>	<b>14.0%</b>	<b>11.2%</b>	<b>10.3%</b>	<b>65</b>	<b>85</b>	<b>82</b>	<b>2,808</b>	<b>3,053</b>	<b>2,964</b>

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.

UK visitor expenditure in Victoria reached \$296 million to 2010, an increase of 2.4% year-on-year and representing 7.5% of total international expenditure in Victoria. Since 2000, expenditure by UK visitors in Australia has increased at an annual average rate of 1.5% to \$1.8 billion in 2010.

### I.9 Visitor Forecasts

UK Forecasts	2010		FORECAST										Ave Annual Growth Rate (2009 - 2020)
	Vic Mkt Share	ACTUAL 2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	
Visitor Numbers (000s)	32%	197	204	210	216	221	226	231	236	240	244	248	1.9% p.a.
Visitor Nights (000s)	17%	3,738	3,632	3,705	3,774	3,798	3,810	3,814	3,812	3,804	3,791	3,776	0.3% p.a.

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

Note 2: Slight variations in calculations are due to rounding.

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

Average annual growth for arrivals to Australia from the UK is forecast at 1.9% over the period 2009-2020. Victoria is estimated to receive 248,000 overnight visitors from the UK by 2020. The global financial crisis and weak outlook for household spending, along with the Icelandic volcanic ash cloud (April 2010) and extreme weather events (December 2010), have closed airports and hampered growth in arrivals from the UK market particularly over the recent year. The economic value from this market also experienced falls mainly due to a reduction in holiday and business travel. In aviation, changes to the Air Passenger Duty (APD) arrangements have been delayed until April 2012 but still may cause some uncertainty with consumers regarding duties and taxes. Positively however, aviation capacity between the UK and Australia is expected to increase in 2010/11 with the expansion plans of the Gulf based carriers, and also likely to be supported by the Ashes cricket series of late 2010/early 2011.

Source: Tourism Forecasting Committee Forecast 2010 Issue 1, June 2010.

For more detailed 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 UK LEISURE VISITORS TO VICTORIA

The main focus of this analysis will be on leisure travellers from the UK to Victoria. Leisure travellers are those who travelled to Australia for holiday purposes or to visit friends and relatives (VFR).

### UK Visitation to Victoria for Leisure, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	
							% change	% Change	% change
							2000-2010	2006-2010	09-10
<b>Visitors (000s)</b>	148	208	187	183	181	170	1.4%	-4.9%	-6.0%
% Market Share	31%	35%	33%	34%	33%	31%			
<b>Visitor Nights (000s)</b>	2,362	3,127	2,815	2,830	2,944	2,775	1.6%	-2.9%	-5.8%
% Market Share	11%	16%	16%	16%	17%	14%			
<b>Average Length of Stay</b>	16.0	15.1	15.1	15.5	16.3	16.3			

In 2010, there were 170,000 UK leisure visitors who stayed in Victoria, a 6.0% decline over the previous year and 1.4% average annual increase over the longer term. This segment spent over 2.8 million nights in Victoria, a decrease of 5.8% from 2009 while average length of stay was unchanged year-on-year, with 16.3 nights in 2010.

### UK '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
<b>Total</b>	60%	62%	63%	62%
New South Wales	61%	62%	62%	62%
<b>Victoria</b>	63%	65%	64%	62%
Queensland	63%	64%	62%	63%
South Australia	62%	61%	62%	65%
Western Australia	60%	63%	60%	62%
Tasmania	63%	59%	61%	57%
Northern Territory	64%	62%	60%	61%
Australian Capital Territory	61%	70%	53%	60%

Of UK overnight leisure visitors to Victoria, 62% can be defined as part of the Tourism Australia defined segment "Experience Seekers" in 2010. This is similar to the proportion of UK leisure travellers to Australia generally (62%), and also for key competitors New South Wales (62%) and Queensland (63%).

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)	All International		Selected Places Visited - Melbourne Attractions (% of Leisure Overnight Visitors to Victoria)	All International	
	UK Visitors	Visitors		UK Visitors	Visitors
Phillip Island, penguin parade	21%	20%	Crown Casino/entertainment complex	28%	33%
Ballarat, Sovereign Hill	11%	12%	Federation Square	59%	50%
Dandenongs, Puffing Billy, Healesville Sanctuary	18%	14%	Queen Victoria Market	46%	51%
Great Ocean Road or Twelve Apostles	38%	34%	Southbank/Southgate	41%	31%
Mornington Peninsula	16%	9%	Melbourne Museum (Royal Exhibition Building)	24%	23%
Daylesford, Hepburn Springs, Macedon	3%	2%	Docklands/Telstra Dome	32%	28%
Yarra Valley	18%	12%	National Gallery of Victoria (NGV)	16%	17%
Bendigo	6%	5%	Melbourne Cricket Ground (MCG)	21%	11%

Of the Victorian places visited (for an overnight visit or daytrip) 38% of UK overnight leisure visitors to Victoria spent time in the Great Ocean Road region and/or the Twelve Apostles. This region is very popular generally with 34% of all international overnight leisure visitors travelling there.

Of the Melbourne attractions visited 59% of UK overnight leisure visitors to Victoria spent time at Federation Square, compared to 50% of all international overnight leisure visitors to Victoria. The highest result for all the listed Melbourne Attractions for international overnight leisure visitors generally was the Queen Victoria Markets (51% of overnight leisure visitors to Victoria).

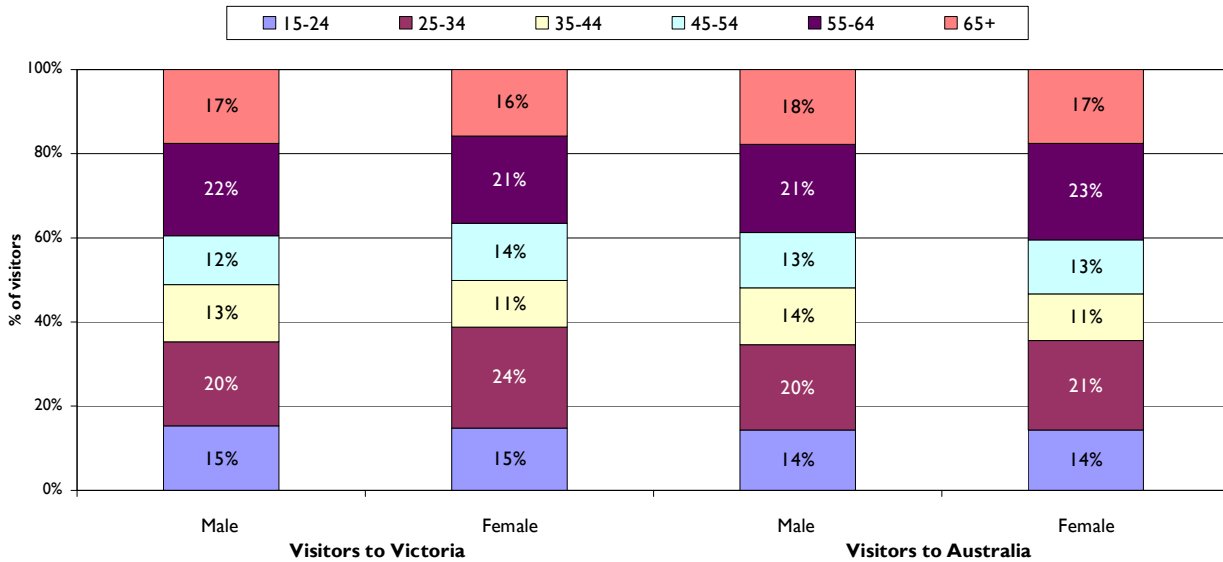
## 2.2 UK Region of Origin

UK Regions	Visitors to Victoria	Visitors to Australia	Visitors to New South Wales	Visitors to Queensland
England	78%	80%	80%	80%
Scotland	9%	8%	8%	8%
Wales	3%	4%	3%	4%

In 2010, 78% of UK overnight leisure visitors to Victoria live in England (as their usual place of residence), followed by Scotland (9%) and Wales (3% of visitors).

**2.3 Demographic Profiling**

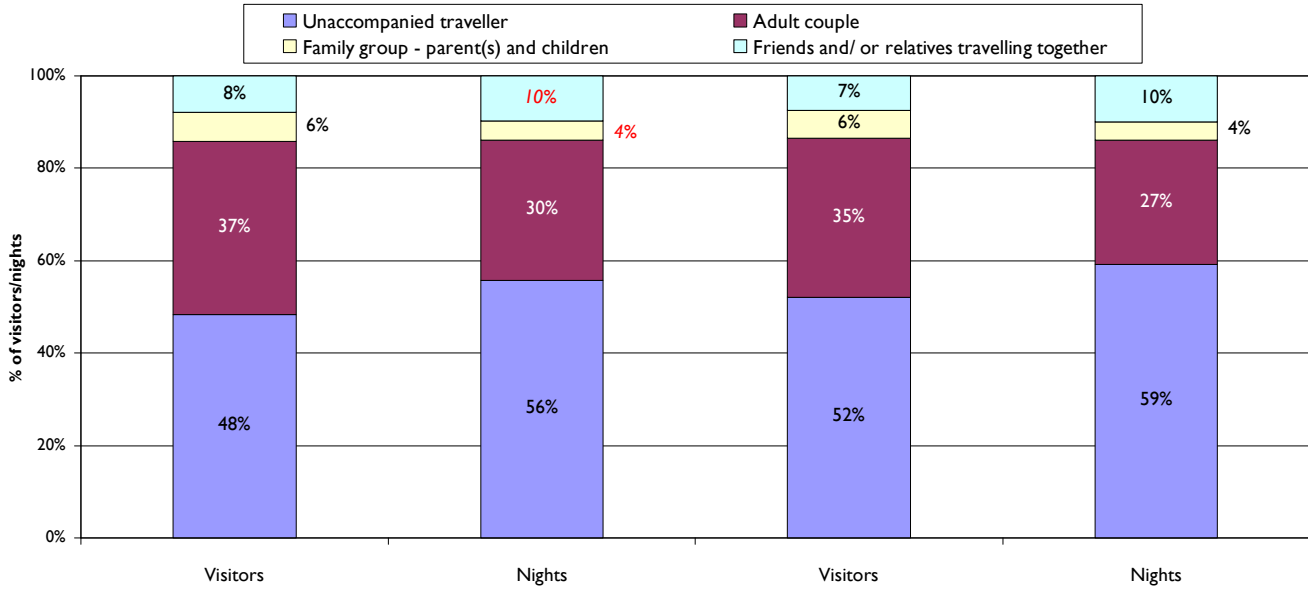
**Age Group & Gender (% of overnight leisure visitors from the UK)**



In 2010, 49% of overnight leisure visitors from the UK to Victoria were male and 51% were female, similar to leisure visitors to Australia (both 50%). Overnight leisure visitors to Victoria from the UK were quite evenly spread across the age groups, with slight skew for the over 55 years group with 39% of males and 37% of females.

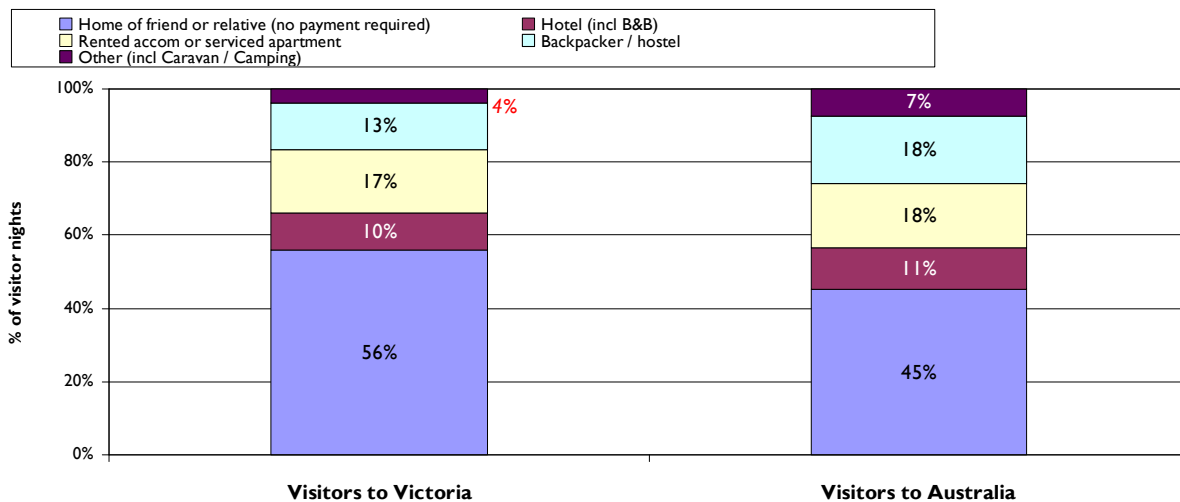
**2.4 Detailed Visitor Behaviour**

**Travel Party Description (% of overnight leisure visitors from the UK)**



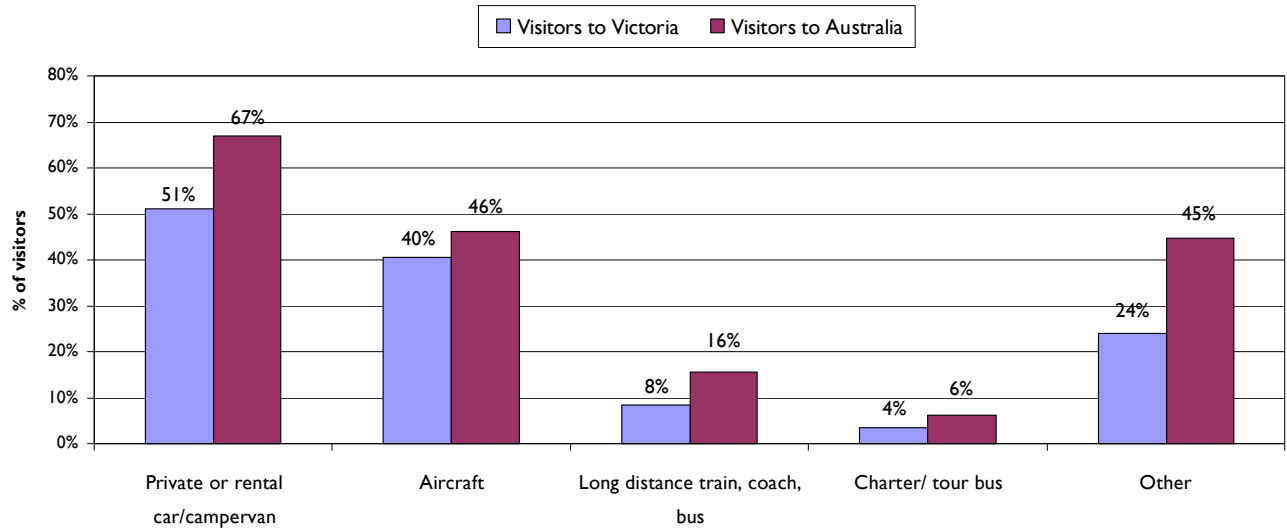
Most overnight leisure travellers to Victoria from the UK, travel alone (48%) or as part of an adult couple (37%). In 2010 solo UK leisure visitors to Victoria accounted for 56% of visitor nights. The travel party profile of UK leisure visitors to Australia was similar.

**Accommodation (% of visitor nights spent by UK leisure visitors)**



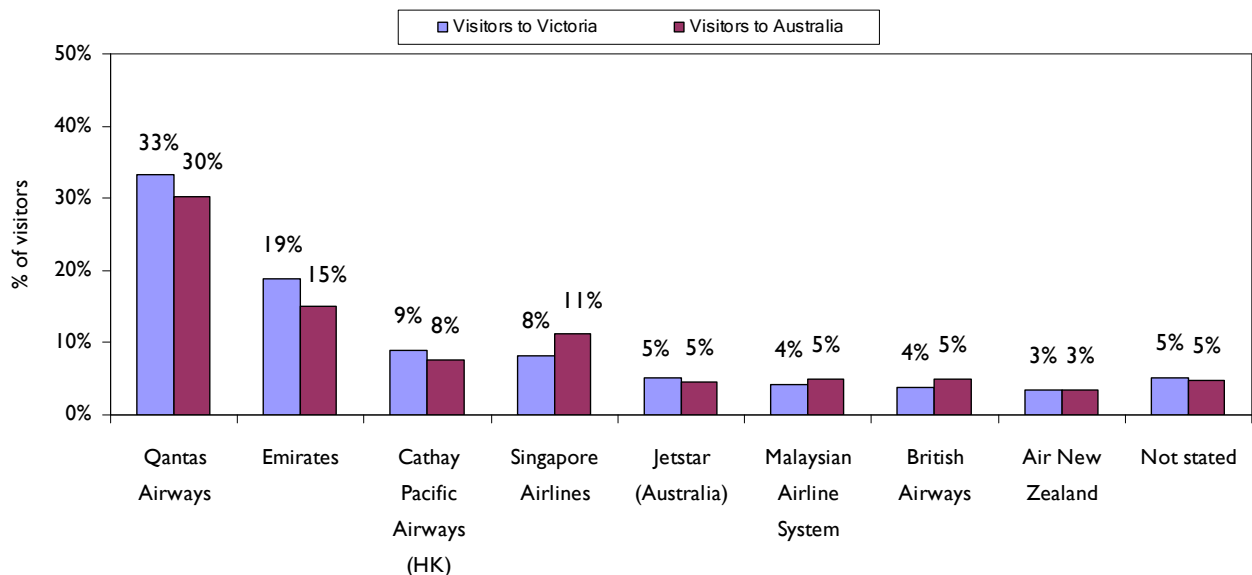
UK leisure visitors spent 56% of all visitor nights in Victoria with friends or relatives in 2010. 17% were spent in rented accommodation or serviced apartments, 13% in a backpacker establishment or hostel and 10% in a hotel or B&B. In comparison, UK leisure visitors to Australia were more likely to spend visitor nights in backpacker or hostel accommodation (18%), and less likely to stay with friends or relatives (45%).

**Transportation used (% of overnight leisure visitors from the UK)**



Of the 170,000 UK leisure visitors who stayed overnight in Victoria in 2010, 51% used a private or rental car, campervan or a motor-home on their trip, while 40% used an aircraft. These modes of transport were also popular with UK leisure visitors travelling to Australia, with 67% using a private or rental car, campervan or motor-home and 46% using an aircraft.

**Departure Airline used (% of overnight leisure visitors from UK)**



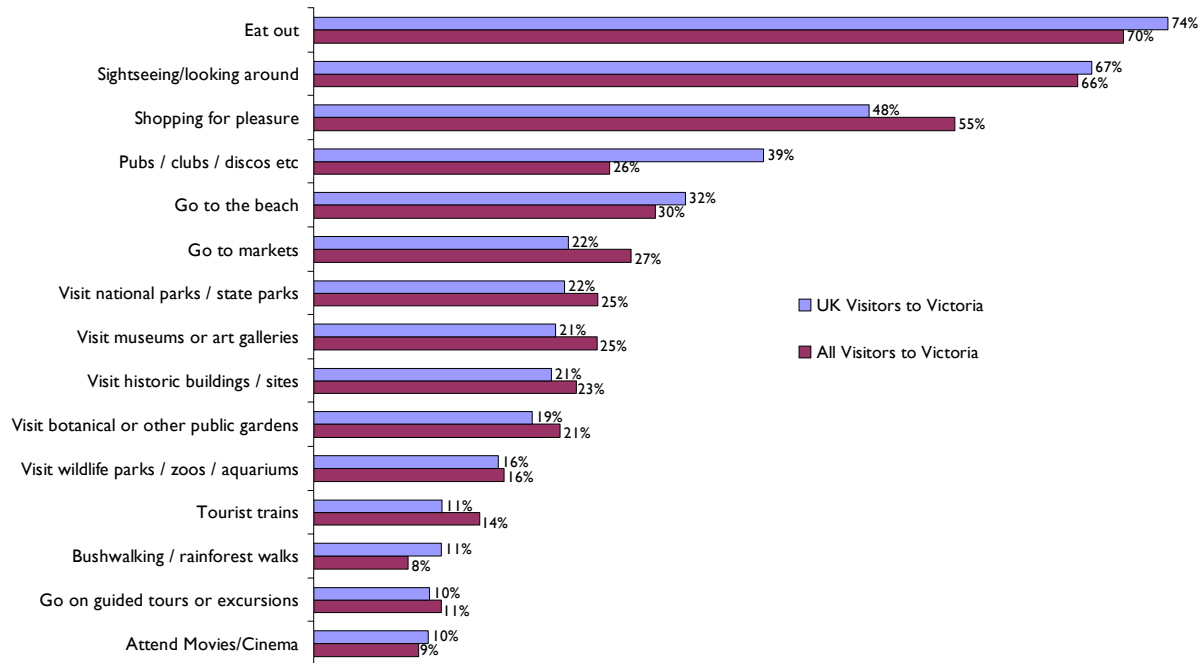
Among UK leisure visitors to Australia in 2010, the leading airlines used for departure were Qantas (30%), Emirates (15%) and Singapore Airlines (11%). For overnight leisure visitors to Victoria, Qantas was also the most popular (33%) followed by Emirates (19%) and Cathay Pacific Airways (9%).

### Repeat Visitation to Victoria (% of overnight leisure visitors from the UK)



The UK leisure travel market is a gradually maturing one. In 2010 the proportion of overnight visitors from the UK to Victoria who were visiting for the first time was 48%, a decrease of seven percentage point from 2000 (55%). In comparison 42% of UK leisure visitors to Australia were first time visitors in 2010.

### Top 15 Activities (% of overnight leisure visitors from the UK)



Note: UK visitor activities are based on three years to December 2010.

UK leisure visitors to Victoria enjoyed a mix of indoor and outdoor activities on their trip.

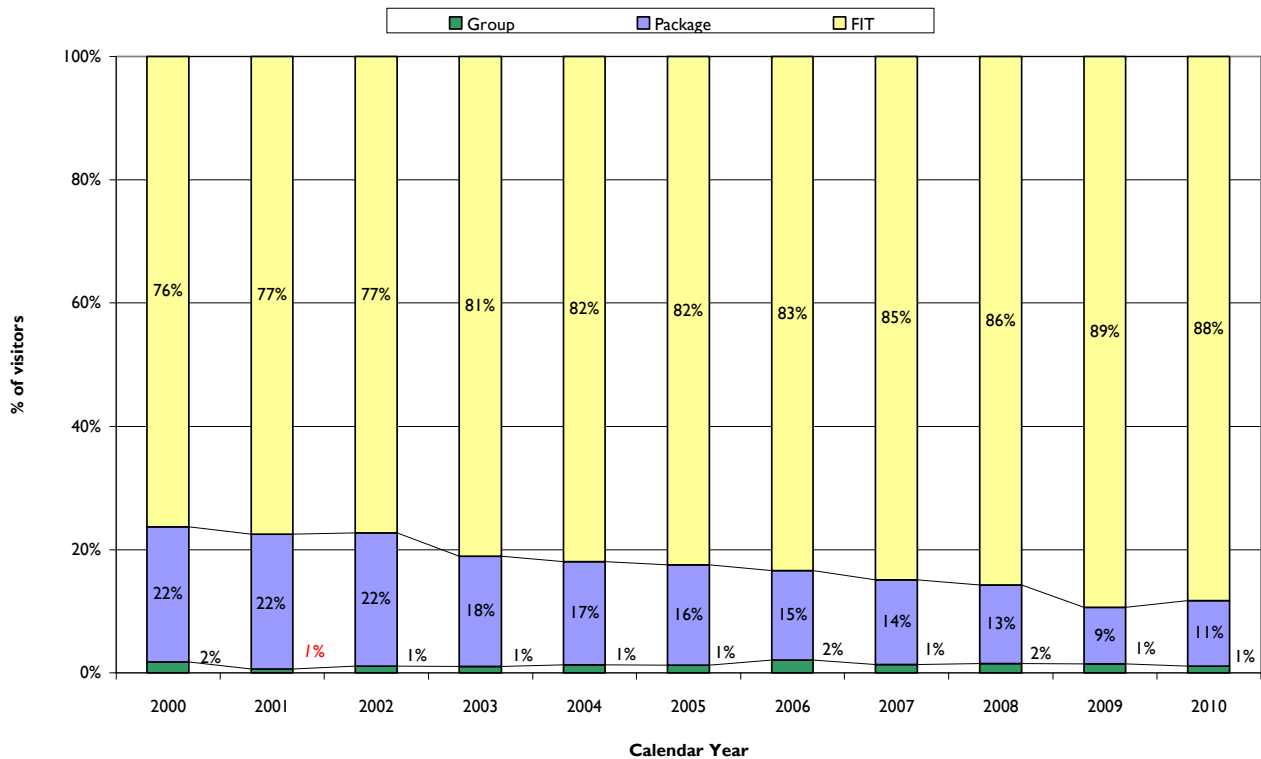
Of the most common activities on their trip as listed above, UK overnight leisure visitors are slightly more likely to enjoy going to pubs, clubs and discos (39% compared to 26%), and to enjoy dining out (74% compared to 70%) than all international overnight leisure visitors to Victoria generally. And although shopping is still popular for this market, they are actually less likely (48% compared to 55%) than all overnight leisure visitors to Victoria to do this activity.

Unlike some markets, the UK leisure market does not display a greater likelihood to do a number of particular activities than the average international overnight leisure visitor to Victoria. There are many possible reasons that this is the case including the high repeat visitation of the market and their familiarity with Australia and Victoria, the high number of travellers who are visiting and staying with family and friends on their trip, or the varied interests of the market generally when they travel.

### 3 TRAVEL STYLE

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

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



Since 2000 the FIT market has continued to account for approximately 76% to 89% of UK leisure visitors to Australia, reflecting the maturity of the market. In 2010 the FIT market was 88%, with the package market experiencing a slight increase of 2 percentage points from the previous year (9% to 11%).

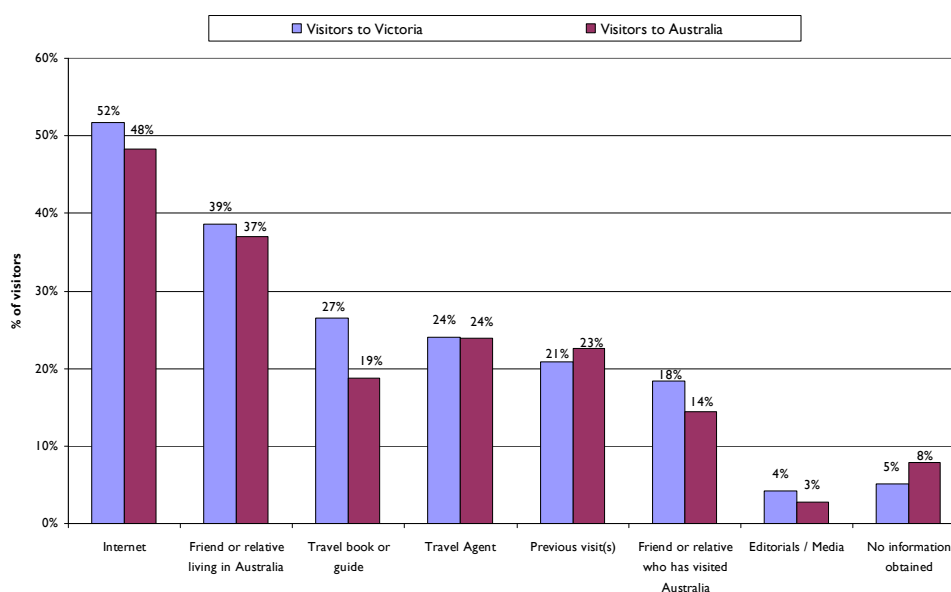
\* NOTE: Group, Package and FIT are derived using the following method.

'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 UK Leisure Visitors to Australia and Victoria, 2010

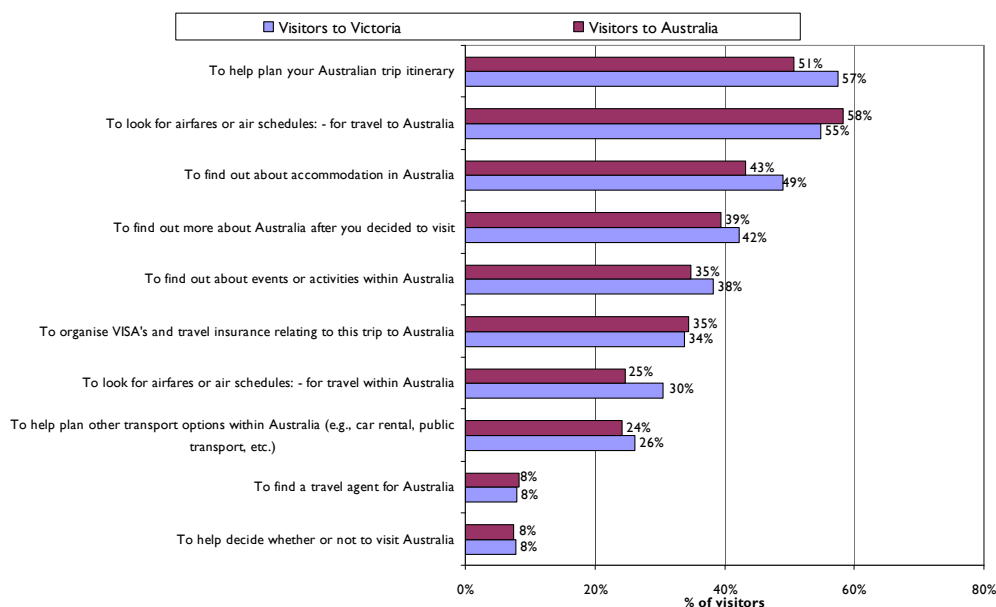


Base: Valid responses

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

Among leisure visitors from the United Kingdom to Australia in 2010, the leading information source used was the internet (48%), followed by word of mouth referral from an Australian resident (37%), and travel agents (24%). Overnight leisure visitors to Victoria were similar and were more likely to have used the internet (52%), advice from an Australian resident (39%) and travel books (27% compared to 19%).

#### Reasons for using the Internet by UK Leisure Visitors to Australia and Victoria, 2010

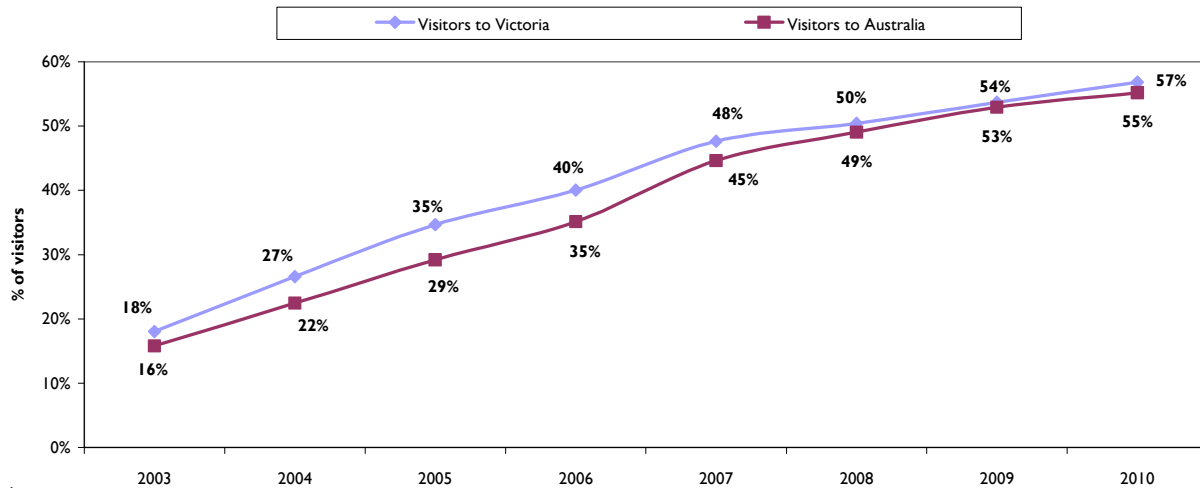


Base: Those who used the Internet as an Information Source.

Of the UK overnight leisure visitors to Victoria who used the internet in their holiday planning, 57% used it to help plan an itinerary and 55% used it to look for airfares and schedules for their trip to Australia. Other uses included looking for accommodation (49%), to find out more about Australia after making the decision to travel (42%), and find out about events and activities (38%).

### 4.2 Internet Booking

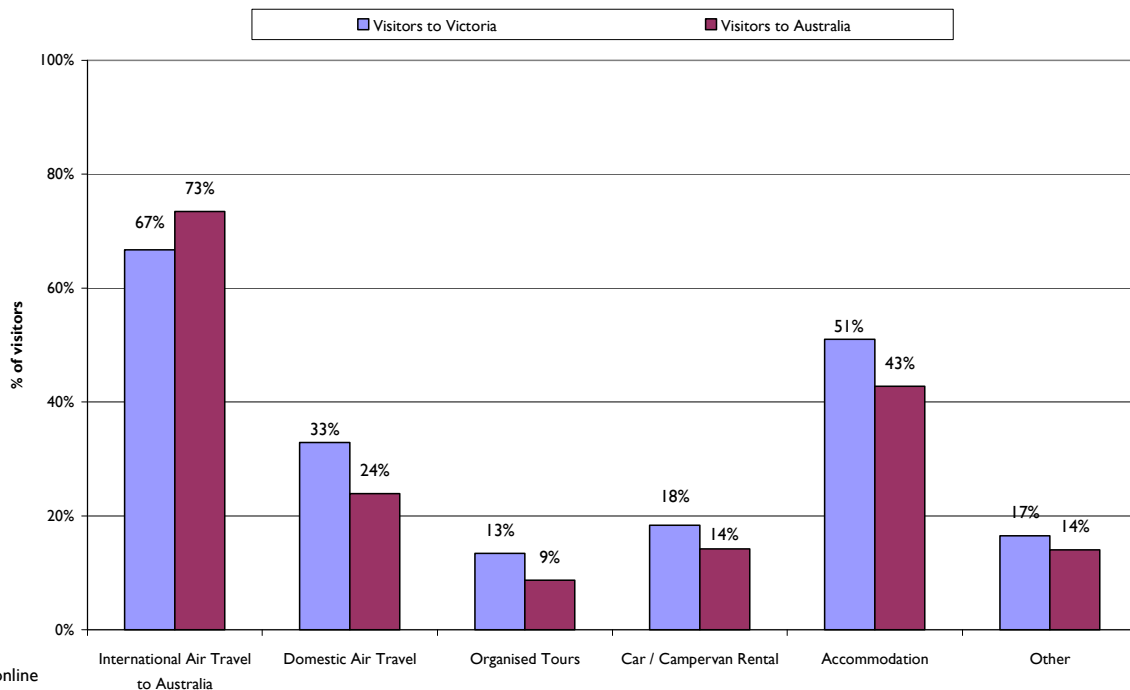
#### Incidence of Online Booking among UK Overnight Leisure Visitors, 2003-2010



Base: Valid responses

Strong growth in the incidence of online booking among leisure visitors from the UK to Australia is evident, increasing from 16% in 2003 to 55% in 2010. Overnight leisure visitors to Victoria from the UK were slightly more likely to book at least one component of the trip online, with 57% reporting usage of online booking methods in 2010.

#### Trip Components Booked Online among UK Overnight Leisure Visitors, 2010



Base: Booked online

Among leisure visitors from the UK to Australia booking travel online, international air fares (73%) and accommodation (43%) were the most frequently purchased components. Visitors to Victoria were more likely to have booked domestic air fares (33% compared to 24%) and accommodation on-line (51% compared to 43%).

### 4.3 Planning and Booking Horizons

	Visitors to Australia	Visitors to Victoria
Planning Horizon (average weeks)	21.2	21.5
Booking Horizon (average weeks)	16.1	16.7

Among UK leisure visitors to Australia, the average planning horizon was 21.2 weeks, with a slightly longer horizon for visitors to Victoria (21.5 weeks). The most popular lead times for visitors from the UK to Victoria were between 3 and 6 months (27%).

Flight booking occurred an average of 16.1 weeks prior to departure for leisure visitors to Australia and 16.7 weeks for overnight leisure visitors to Victoria. Only 20% of flight bookings to Australia and 18% of flight bookings among overnight leisure visitors to Victoria 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 (December 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](http://www.tourism.australia.com/Markets.asp)  
[www.tourism.vic.gov.au/facts-and-figures/](http://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.