

International Market Profile

United States of America

Year Ending December 2010

This fact sheet provides a summary of the latest tourism data for visitors from the United States of America (USA) 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 USA VISITORS TO AUSTRALIA

I.1 Trends

Total USA Visitation to Australia, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	
							2000-2010	2006-2010	09-10
Visitors (000s)	457	428	429	429	450	440	-0.4%	0.7%	-2.3%
Visitor Nights (000s)	9,975	10,358	9,919	9,300	9,913	9,591	-0.4%	-1.9%	-3.2%
Average Length of Stay	21.8	24.2	23.1	21.7	22.0	21.8			

In the year ending December 2010, the United States of America generated 440,000 visitors to Australia who spent 9.6 million nights in the country. The number of visitors from the USA to Australia has increased at a rate of 0.7% per annum over the period 2006-2010, while visitor nights have decline at a rate of 1.9% per annum during this period. The average length of stay in Australia by USA visitors was 21.8 nights in 2010.

I.2 Main Purpose of Trip

USA Visitors (000s) to Australia by Purpose of Trip, 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	211	188	176	173	193	174	-1.9%	-1.9%	-10.2%
Visiting friends & relatives	93	84	82	84	103	97	0.4%	3.7%	-5.9%
Business	95	101	111	110	94	114	1.9%	3.0%	21.1%
Education	19	32	34	28	31	28	3.7%	-3.8%	-10.2%
Employment	-	8	9	12	10	10	-	-	-5.4%
Other	34	15	17	21	18	18	-6.4%	4.2%	-3.1%

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

174,000 visitors came to Australia from the USA for a holiday in 2010, a decrease of 10.2% over the previous year. 97,000 visitors from the USA came to Australia to visit friends and relatives (VFR), a decrease of 5.9% from the previous year.

More positively, the business sector experienced good growth with a 21.1% increase from the previous year to 114,000 visitors in 2010. Meanwhile, the education sector experienced a year-on-year decline of 10.2% to 28,000 visitors in 2010.

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I.3 States/Territories Visited

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

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	
							2000-2010	2006-2010	09-10
Australia	457	428	429	429	450	440	-0.4%	0.7%	-2.3%
New South Wales	336	294	288	295	305	299	-1.2%	0.5%	-1.9%
Victoria	141	131	133	130	130	126	-1.1%	-1.1%	-3.0%
Queensland	183	175	174	160	157	148	-2.1%	-4.0%	-5.8%
South Australia	56	33	35	34	33	30	-6.2%	-2.4%	-9.1%
Western Australia	37	36	43	42	42	41	1.1%	3.0%	-2.3%
Tasmania	21	24	19	24	16	18	-1.5%	-6.6%	11.4%
Northern Territory	71	37	42	36	33	26	-9.4%	-7.9%	-19.2%
ACT	27	18	21	18	18	21	-2.5%	3.9%	15.6%

There were 126,000 overnight visitors from the USA to Victoria in 2010, a 3.0% decrease over the previous year. Key competitors New South Wales and Queensland also experienced declines (-1.9% and -5.8% respectively), as did the national figure (-2.3%).

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

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	
							2000-2010	2006-2010	09-10
Australia	9,975	10,358	9,919	9,300	9,913	9,591	-0.4%	-1.9%	-3.2%
New South Wales	3,838	4,126	3,607	3,799	3,916	3,749	-0.2%	-2.4%	-4.2%
Victoria	2,058	1,781	1,811	1,643	1,855	1,630	-2.3%	-2.2%	-12.1%
Queensland	1,842	1,969	2,124	1,915	2,115	2,071	1.2%	1.3%	-2.1%
Western Australia	607	759	1,069	910	903	835	3.2%	2.4%	-7.6%
Other States & Territories	1,534	1,690	1,257	959	1,038	1,232	-2.2%	-7.6%	18.6%

In 2010, the number of visitor nights spent in Victoria by USA visitors decreased by 12.1% from 2009 to 1.6 million visitor nights. Between 2000 and 2010 visitor nights spent in Victoria by USA travellers declined at an average annual rate of 2.3%.

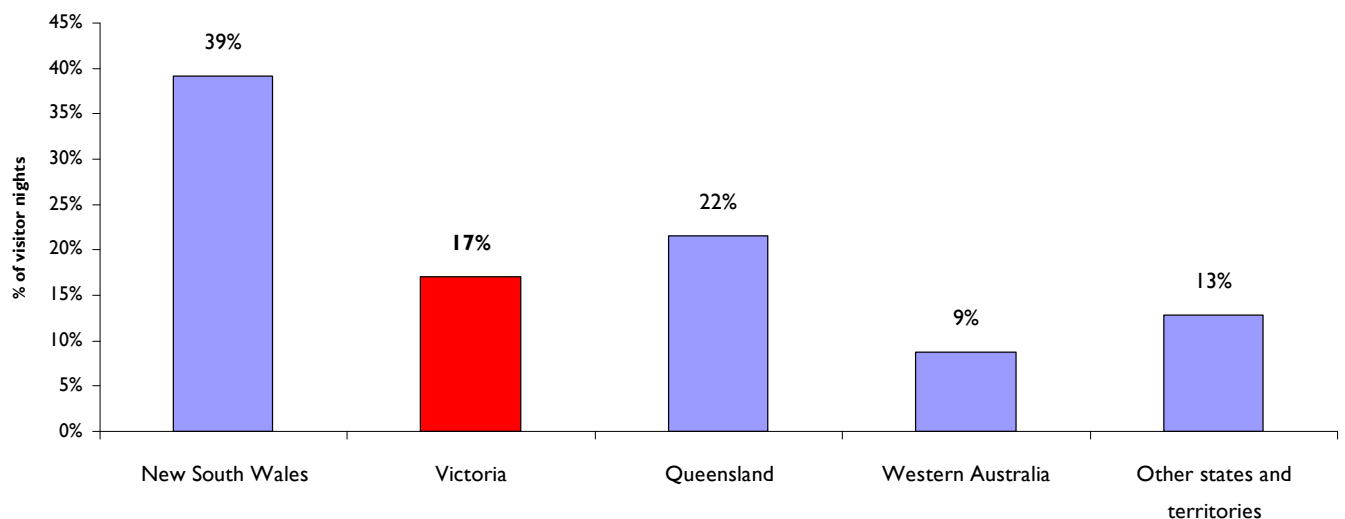
1.4 Market Share by State

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



29% of USA visitors to Australia in 2010 stayed overnight in Victoria, compared to 68% in New South Wales and 34% in Queensland.

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



Victoria's market share of visitor nights spent by USA travellers in 2010 was 17%, 22 percentage points behind New South Wales (39%) and 5 percentage points behind Queensland (22%).

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.

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I.5 Main Purpose of Visit – Visitors to Victoria

USA 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 09-10
							% change 2000-2010	% Change 2006-2010	
Holiday	72	58	58	56	57	52	-3.2%	-3.0%	-9.1%
Visiting friends & relatives	28	26	25	25	31	28	0.1%	1.9%	-9.5%
Total Leisure	100	85	82	81	88	80	-2.2%	-1.4%	-9.3%
Business	27	32	35	34	26	34	2.4%	1.0%	30.1%
Education	8	9	9	8	10	9	0.7%	-1.1%	-11.8%
Other (incl Employment)	6	-	6	7	5	-	-	-	-

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

In 2010, there were 80,000 USA overnight leisure visitors to Victoria, a 9.3% decrease over the previous year and a 2.2% average annual decrease over the longer term (2000-2010). Victoria experienced a year-on-year increase in the overnight business sector of 30.1% and a longer term average annual increase of 2.4% since 2000.

I.6 Regional Dispersal² – Visitor Nights (000s), 2 years (rolling) ending 2000 - 2010

USA	2 Years Ending December						Ave. Annual	Ave. Annual	% change 2009-2010
	2000	2006	2007	2008	2009	2010	Change (%) 2000-2010	Change (%) 2006-2010	
Regional Victoria - Nights (000s)	-	697	686	640	605	-	-	-	-
% of total nights in State	-	20.6%	19.1%	18.5%	17.3%	-	-	-	-
Regional NSW - Nights (000s)	1,576	1,679	1,558	1,596	1,636	1,701	0.8%	0.3%	3.9%
% of total nights in State	24.5%	22.2%	20.1%	21.6%	21.2%	22.2%	-	-	-
Regional Qld - Nights (000s)	2,541	2,344	2,226	2,226	2,209	2,183	-1.5%	-1.8%	-1.2%
% of total nights in State	59.7%	59.2%	54.4%	55.1%	54.8%	52.1%	-	-	-
Regional Australia - Visitor Nights (000s)	6,048	5,838	5,973	5,988	5,702	5,693	-0.6%	-0.6%	-0.2%
% of total nights in Aust	32.8%	30.4%	29.5%	31.2%	29.7%	29.2%	-	-	-

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

USA visitors spent 5.7 million nights in regional Australia in the period two years ending December 2010, a decrease of 0.2% from the previous period. Nights in regional New South Wales experienced a short term increase of 3.9% to 1.7 million nights in the recent period.

² "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.

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1.7 Melbourne and Victorian Regions Visited

USA 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	% change 2009-2010
Daylesford & Macedon Ranges	-	-	-	-	-	-	-	-	-
Gippsland	12	8	8	9	8	9	-2.8%	3.1%	15.6%
Goldfields	16	7	6	7	6	5	-10.3%	-5.8%	-14.5%
Grampians	13	-	6	7	-	-	-	-	-
Great Ocean Road	35	29	32	31	28	28	-2.1%	-0.8%	1.2%
Melbourne	244	237	248	247	244	238	-0.2%	0.1%	-2.4%
Mornington Peninsula	-	-	-	7	7	5	-	-	-22.0%
Murray	13	7	7	6	6	8	-5.1%	1.8%	31.1%
Phillip Island	6	-	-	-	-	-	-	-	-
Victoria's High Country	6	5	5	-	-	-	-	-	-
Yarra Valley & Dandenong Ranges	-	6	5	6	5	-	-	-	-
Regional Victoria	67	57	58	59	59	57	-1.6%	0.0%	-2.9%

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

There were 238,000 USA overnight visitors to Melbourne in the two years ending December 2010, a 2.4% decrease over the previous period. Similarly, regional Victoria has experienced a short term decline (-2.9%) to 57,000 visitors in the two year period.

USA 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	% change 2009-2010
Melbourne	3,028	2,678	2,906	2,814	2,893	2,988	-0.1%	2.8%	3.3%
Regional Victoria	-	697	686	640	605	-	-	-	-

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

The number of visitor nights spent in Melbourne by USA visitors increased by 3.3% from the previous period to reach 3.0 million visitor nights for the two years ending December 2010.

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1.8 Visitor Expenditure

Expenditure by US Visitors	Total Expenditure					Expenditure Share			Expenditure Per Night			Expenditure Per Visitor			
	Nominal (\$ million)			Av Ann	% Change	%			\$			\$			
	Year Ending December	2000	2009	2010	00-10	% Change	09-10	2000	2009	2010	2000	2009	2010	2000	2009
New South Wales	np	544	518	np	-4.8%		np	8.9%	8.2%	np	139	138	np	1784	1731
Victoria	np	220	212	np	-3.6%		np	5.9%	5.4%	np	119	130	np	1,699	1,688
Queensland	np	285	250	np	-12.3%		np	7.3%	6.6%	np	135	121	np	1,813	1,688
South Australia	np	43	34	np	-20.9%		np	6.5%	4.6%	np	108	100	np	1,310	1,140
Western Australia	np	83	86	np	3.6%		np	4.7%	4.4%	np	92	103	np	1,988	2,107
Tasmania	np	26	25	np	-3.8%		np	9.5%	9.0%	np	167	95	np	1,614	1,394
Northern Territory	np	np	36	np	np		np	np	9.7%	np	np	87	np	np	1,362
Australian Capital Territory	np	14	19	np	35.7%		np	6.0%	6.7%	np	67	88	np	766	900
Australia	1,211	1,262	1,180	-0.3%	-6.5%		10.9%	7.4%	6.7%	123	127	123	2,649	2,802	2,680

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.

Since 2000, expenditure by USA visitors in Australia has decreased at an annual average rate of 0.3% to \$1.2 billion in 2010. USA visitor expenditure in Victoria was \$212 million in 2010, representing 5.4% of total international expenditure in Victoria. In 2010, Victoria achieved the second highest expenditure per night result (\$130p/nt) of all states and territories behind New South Wales (\$138 p/nt).

1.9 Visitor Forecasts

USA Forecasts	2010	ACTUAL	FORECAST										Ave Annual Growth Rate (2009 - 2020)
	Vic Mkt Share		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Visitor Numbers (000s)	29%	126	138	144	150	155	160	165	169	173	177	181	3.1% p.a.
Visitor Nights (000s)	17%	1,630	1,914	1,981	2,046	2,099	2,147	2,189	2,224	2,257	2,289	2,319	2.1% 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 USA is forecast at 3.1% over the period 2009-2020. Victoria is estimated to receive 181,000 overnight visitors from the USA by 2020. Despite a recession in the USA market, arrivals to Australia continue to rise and direct aviation capacity has increased. Similarly, departures by Australian residents to the USA rose along with the strengthening of the Australian dollar against the US dollar.

Aviation capacity increases are mainly attributed to V Australia and Delta Airlines' entry on the trans-Pacific routes in 2009. Qantas has also boosted capacity with the upgrade to the A380 aircraft on a number of services.

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>

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2 OVERVIEW OF USA LEISURE VISITORS TO VICTORIA

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

USA Visitation to Victoria for Leisure, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual % change 2000-2010	Av Annual % Change 2006-2010	% change 09-10
Visitors (000s)	100	85	82	81	88	80	-2.2%	-1.4%	-9.3%
% Market Share	33%	31%	32%	31%	30%	29%			
Visitor Nights (000s)	1,047	861	883	791	1,051	833	-2.3%	-0.8%	-20.7%
% Market Share	17%	18%	19%	18%	20%	16%			
Average Length of Stay	10.5	10.2	10.7	9.8	11.9	10.4			

80,000 US leisure visitors stayed in Victoria in 2010, a decrease of 9.3% over the previous year. In 2010, this segment spent 833,000 visitor nights in Victoria, a 20.7% decrease over the previous year. Average length of stay was 10.4 nights in the year ending December 2010.

USA '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	60%	57%	54%	57%
New South Wales	59%	52%	50%	55%
Victoria	60%	57%	59%	56%
Queensland	60%	58%	56%	57%
South Australia	62%	57%	56%	61%
Western Australia	72%	62%	57%	60%
Tasmania	74%	62%	55%	71%
Northern Territory	63%	49%	42%	57%
Australian Capital Territory	67%	37%	57%	49%

Of USA overnight leisure visitors to Victoria, 56% can be defined as part of the Tourism Australia "Experience Seekers" segment in 2010. This is similar to the proportion of "Experience Seeker" USA leisure travellers to Australia generally (57%), and also for key competitors New South Wales (55%) and Queensland (57%).

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

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

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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	
	USA Visitors	Visitors		USA Visitors	Visitors
Phillip Island, penguin parade	24%	20%	Crown Casino/entertainment complex	27%	33%
Ballarat, Sovereign Hill	7%	12%	Federation Square	56%	50%
Dandenongs, Puffing Billy, Healesville Sanctuary	15%	14%	Queen Victoria Market	52%	51%
Great Ocean Road or Twelve Apostles	35%	34%	Southbank/Southgate	27%	31%
Mornington Peninsula	7%	9%	Melbourne Museum (Royal Exhibition Building)	23%	23%
Daylesford, Hepburn Springs, Macedon	-	2%	Docklands/Telstra Dome	30%	28%
Yarra Valley	17%	12%	National Gallery of Victoria (NGV)	15%	17%
Bendigo	-	5%	Melbourne Cricket Ground (MCG)	10%	11%

Of the Victorian places visited (for an overnight visit or daytrip) 35% of USA 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 56% of USA 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).

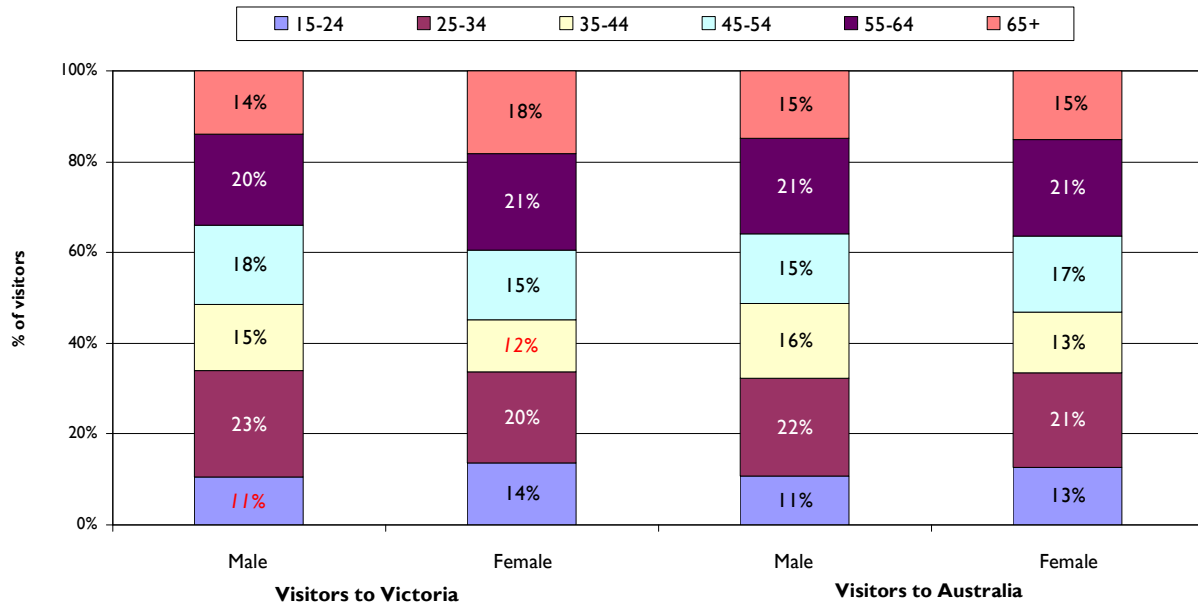
2.2 USA Region of Origin

US Regions	Visitors to Victoria	Visitors to Australia	Visitors to New South Wales	Visitors to Queensland
California	25%	25%	26%	23%
New York	7%	6%	6%	5%
Washington	4%	4%	4%	5%
Colorado	4%	4%	4%	5%
Texas	4%	5%	5%	5%
Florida	4%	5%	5%	4%
Illinois	3%	3%	3%	3%

In 2010, 25% of USA overnight leisure visitors to Victoria live in California (usual place of residence), followed by New York (7%), Washington and Colorado (both 4% of visitors). Leisure visitors to Australia from the USA are similar with a slightly higher proportion from Texas and Florida (both 5% compared to 4% for visitors to Victoria).

2.3 Demographic Profiling

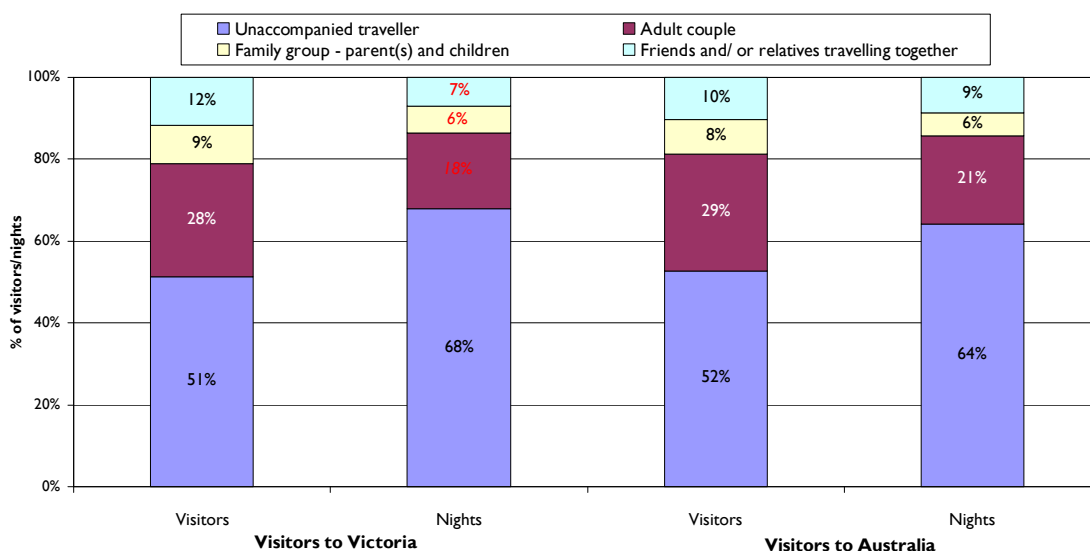
Age Group & Gender (% of overnight leisure visitors from the USA)



In 2010, overnight leisure visitors to Victoria from the USA were slightly skewed toward females at 53%. Visitation to Australia was similarly divided (48% males and 52% females). Overnight leisure visitors to Victoria from the USA were evenly distributed over the age brackets, with a high proportion over the age of 45 (52% of male visitors and 54% of female visitors).

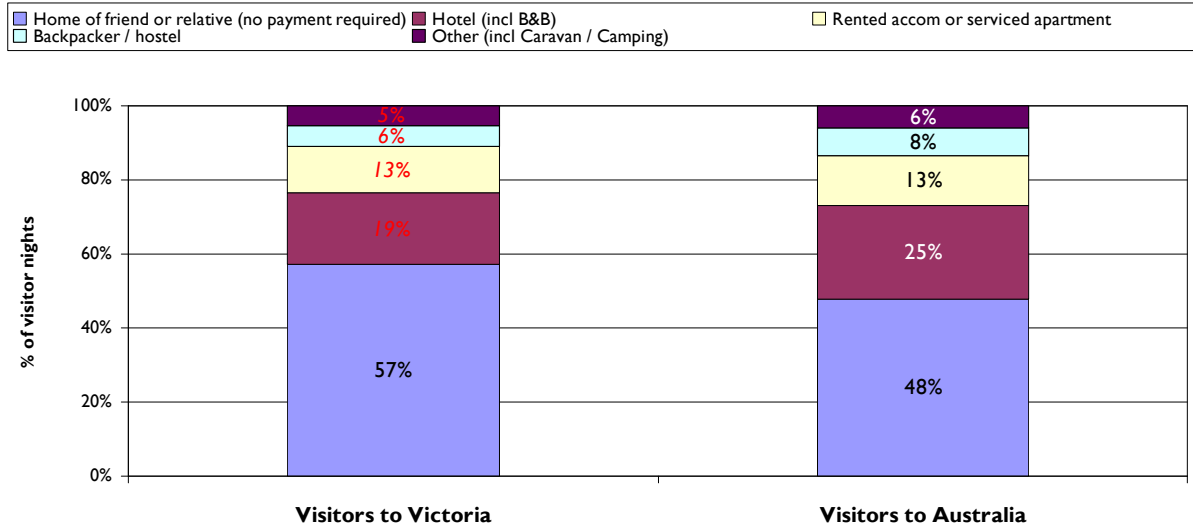
2.4 Detailed Visitor Behaviour

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



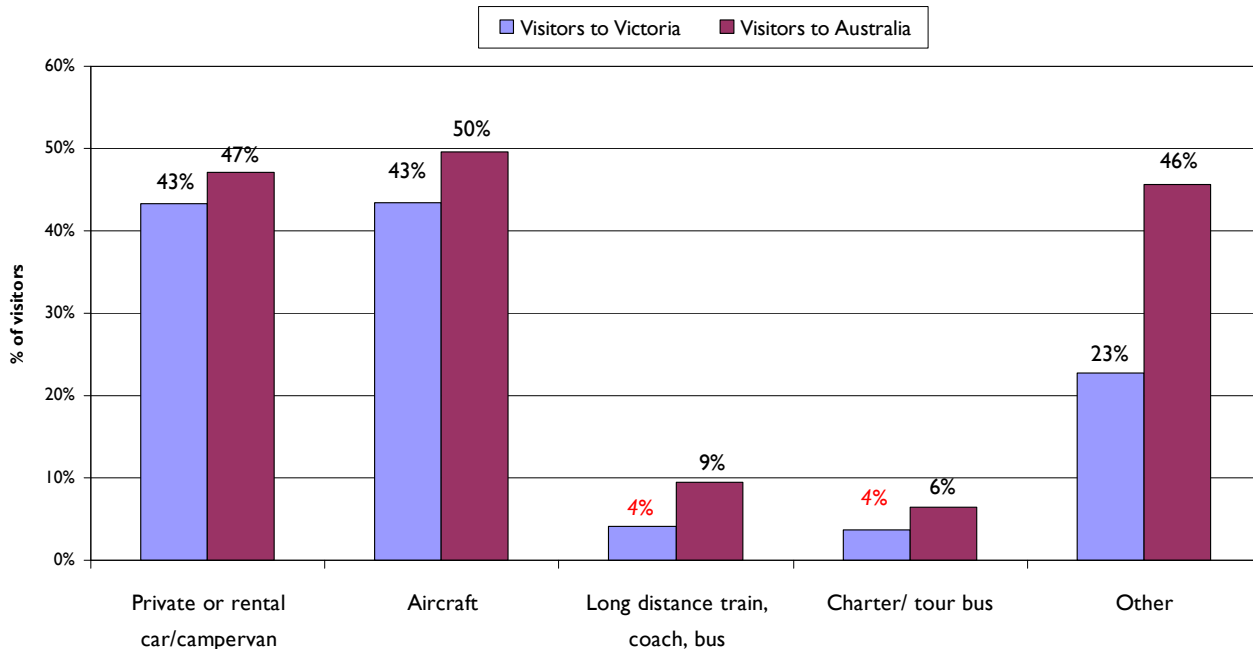
The majority of overnight leisure travellers visiting Victoria from the USA in 2010 travelled alone (51%) or in a couple (28%). Similarly, 52% of USA leisure visitors to Australia travelled alone, while 29% travelled in adult couples. Solo travellers spent more nights in Victoria than any other segment (68%).

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



In 2010, 57% of nights spent by leisure visitors to Victoria from the USA were spent with friends or relatives, while 32% of visitor nights were spent at hotels (including B&Bs) or rented accommodation/ serviced apartments. In comparison, 48% of nights spent by leisure visitors to Australia from the USA were with friends or relatives, 25% were at hotels (including B&Bs), 13% in rented accommodation or serviced apartments, 8% in backpacker or hostel accommodation and 6% in other accommodation including caravan parks and camping.

Transportation used (% of overnight leisure visitors from the USA)

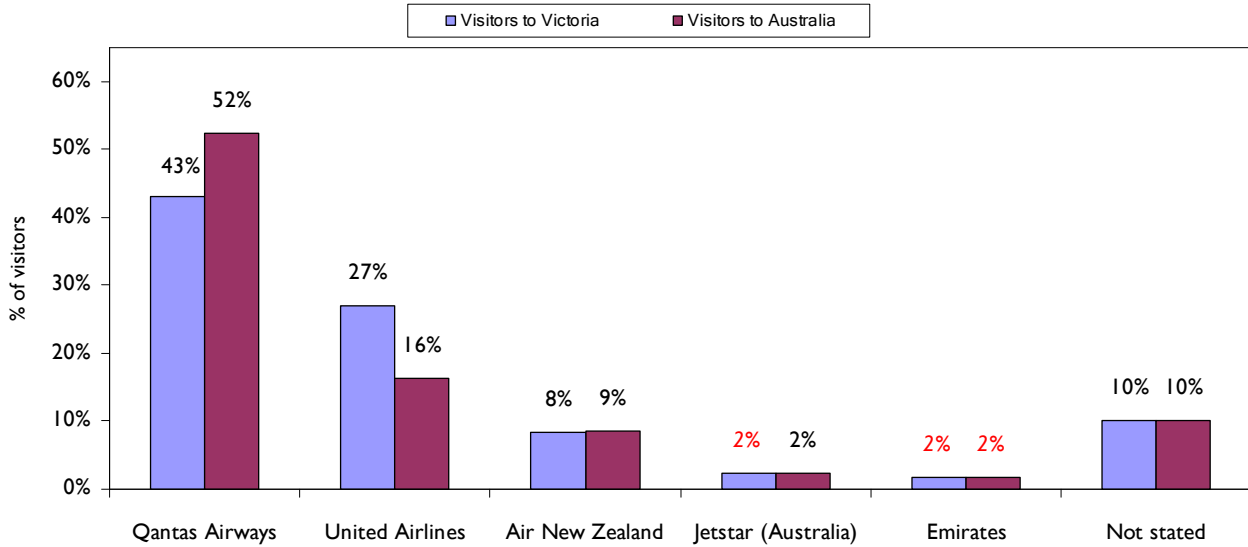


Of the 80,000 leisure visitors from the USA who stayed overnight in Victoria in 2010, 43% used an aircraft and 43% used a private or rental car, campervan or a motor-home on their trip. These modes of transport were also popular with USA leisure visitors travelling to Australia, with 50% using an aircraft and 47% using a private or rental car, campervan or motor-home.

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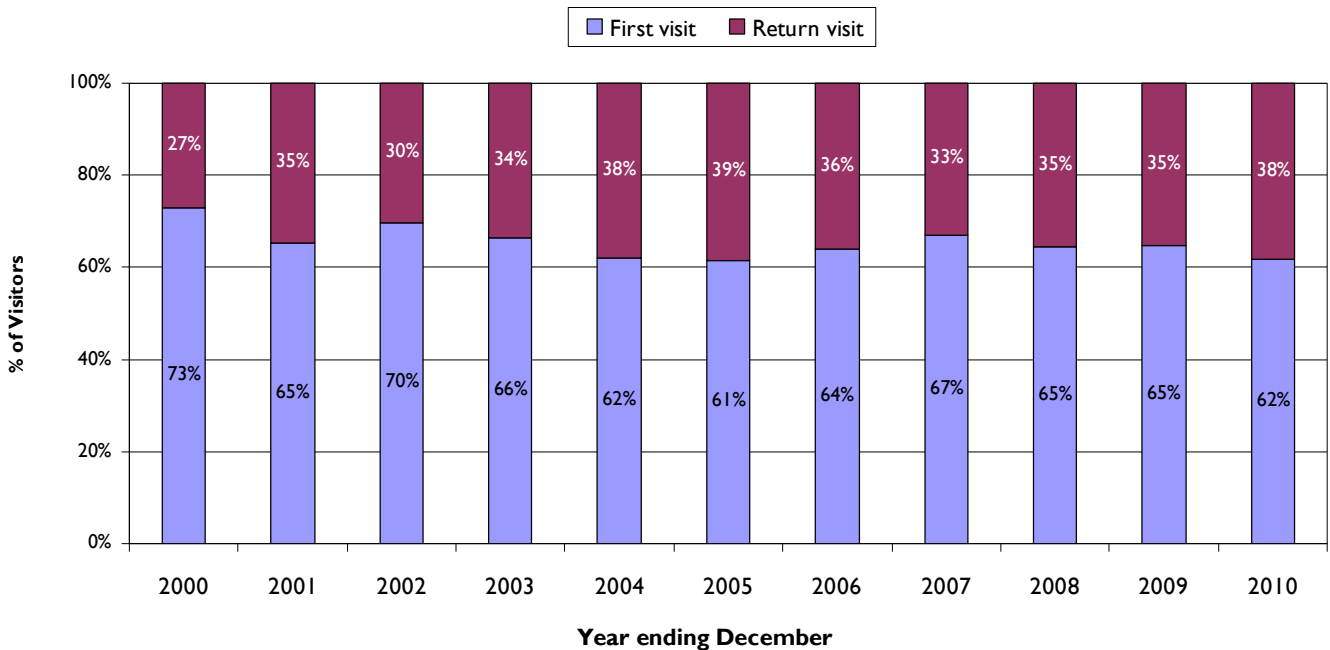


Departure Airline used (% of overnight leisure visitors from USA)



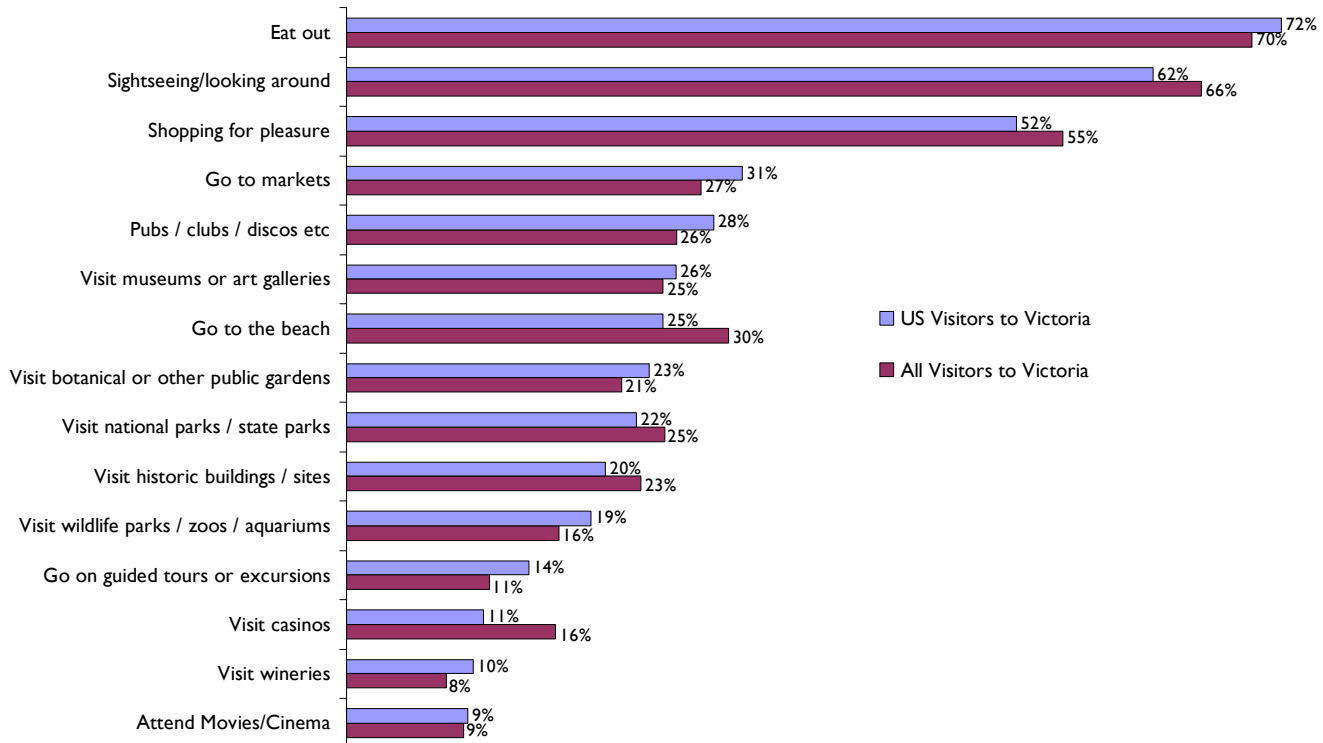
Among USA leisure visitors to Australia in 2010, the leading airline used for departure was Qantas (52%). For overnight leisure visitors to Victoria, Qantas was also the most popular (43%), followed by United Airlines (27%).

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



In 2010, the proportion of overnight leisure visitors from the USA to Victoria who were visiting for the first time was 62%, down 3 percentage points from the previous year. In comparison 58% of USA leisure visitors to Australia were first time visitors in 2010.

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



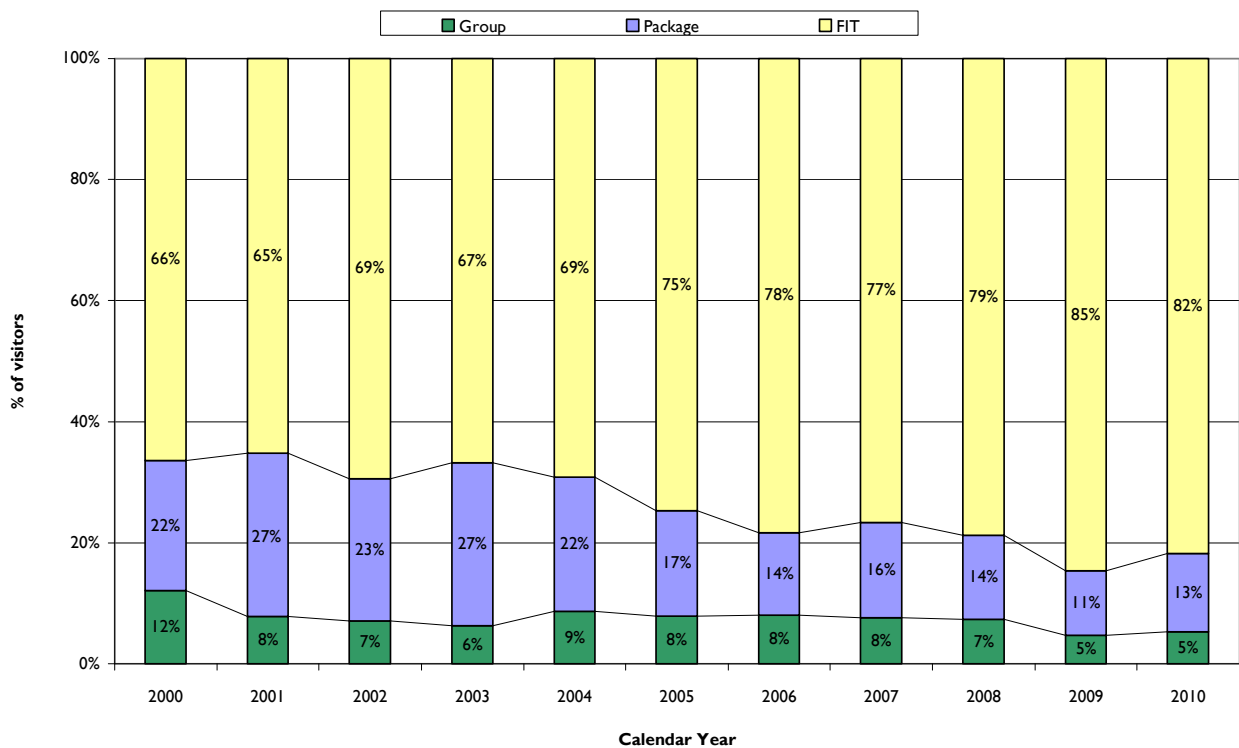
Note: USA visitor activities are based on three years to December 2010.

Of the most common activities on their trip as listed above, USA overnight leisure visitors were slightly more likely to enjoy dining out (72% compared to 70%), go to the markets (31% compared to 27%), and to pubs, clubs and discos (28% compared to 26%) than all international overnight leisure visitors to Victoria generally. Although going to the beach is popular for this market, they are less likely (25% compared to 30%) than all overnight leisure visitors to Victoria to do this activity. The USA market is also less likely to visit a casino while on their trip (11% compared to 16%).

3 TRAVEL STYLE

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

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



The maturity of the USA leisure travel market is reflected in the large proportion of FIT travellers who accounted for 82% of the market in 2010. There was some growth in the utilisation of package travel in the past year (up 2 percentage points to 13%), however the group travel market continue to remain minimal (5%).

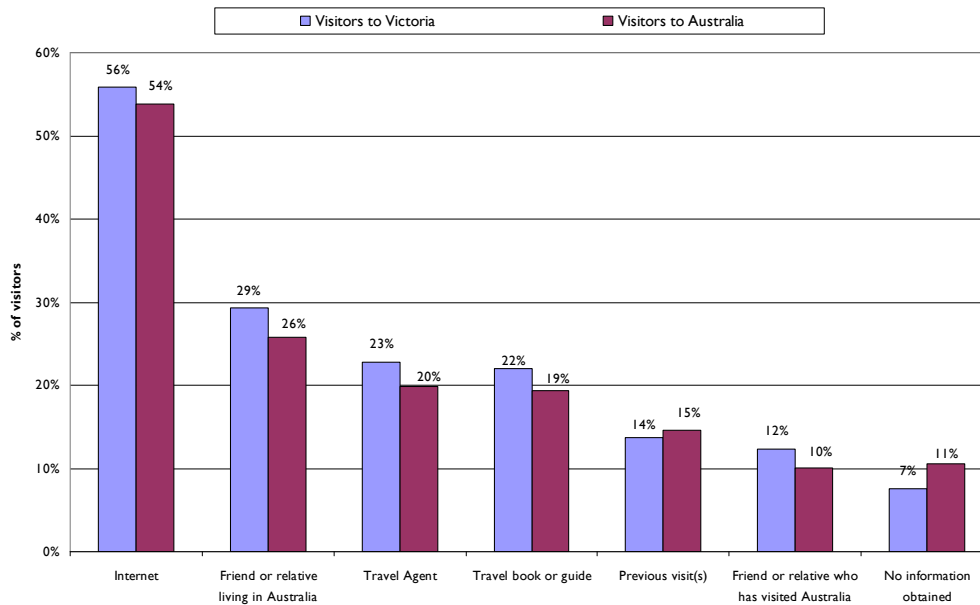
* NOTE: Group, Package and FIT are derived using the following method.

'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 USA Leisure Visitors to Australia and Victoria, 2010

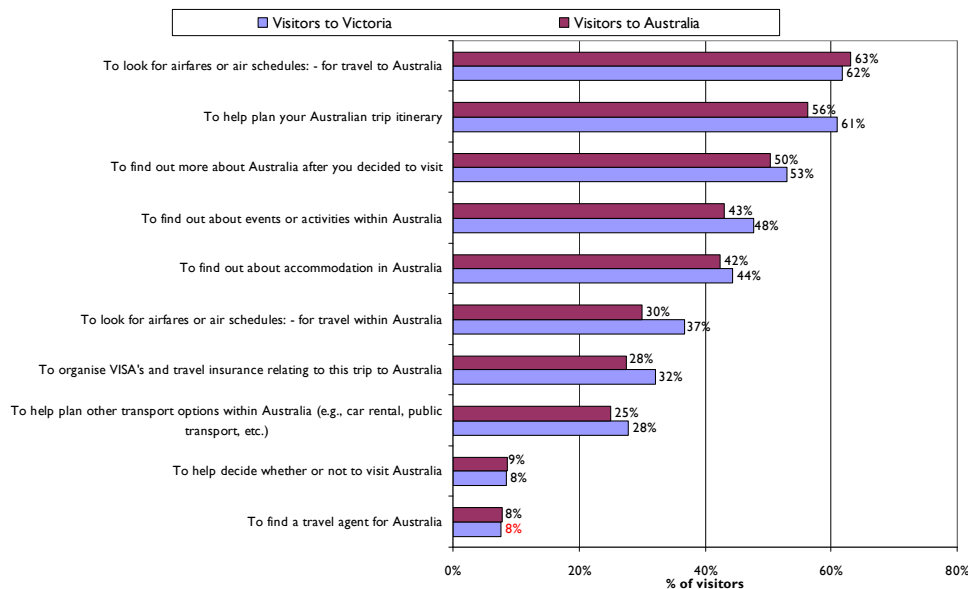


Base: Valid responses

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

Among leisure visitors from the United States to Australia in 2010, the leading information source used was the internet (54%), followed by word of mouth referral from an Australian resident (26%) and their travel agent (20%). Overnight leisure visitors to Victoria were similar with the leading sources being the internet (56%), word of mouth referral from an Australian resident (29%) and travel agent (23%).

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

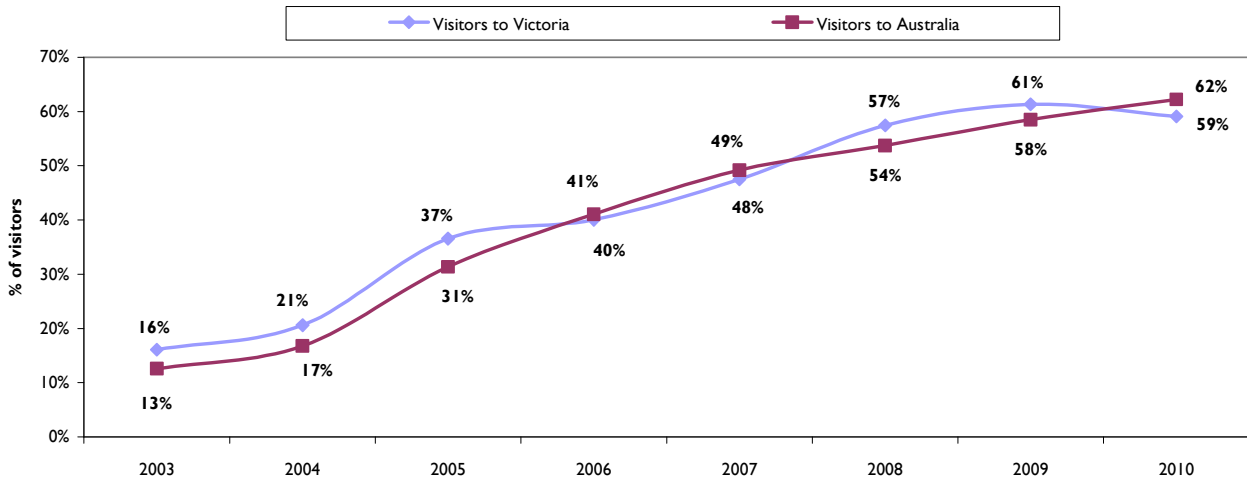


Base: Those who used the Internet as an Information Source.

Of the USA overnight leisure visitors to Victoria who used the internet in their holiday planning, 62% used it to look for airfares or air schedules for their trip to Australia and 61% to help plan their trip itinerary. Other uses included to find out more about Australia after deciding to visit (53%), to find out about events and activities (48%), and looking for accommodation (44%).

4.2 Internet Booking

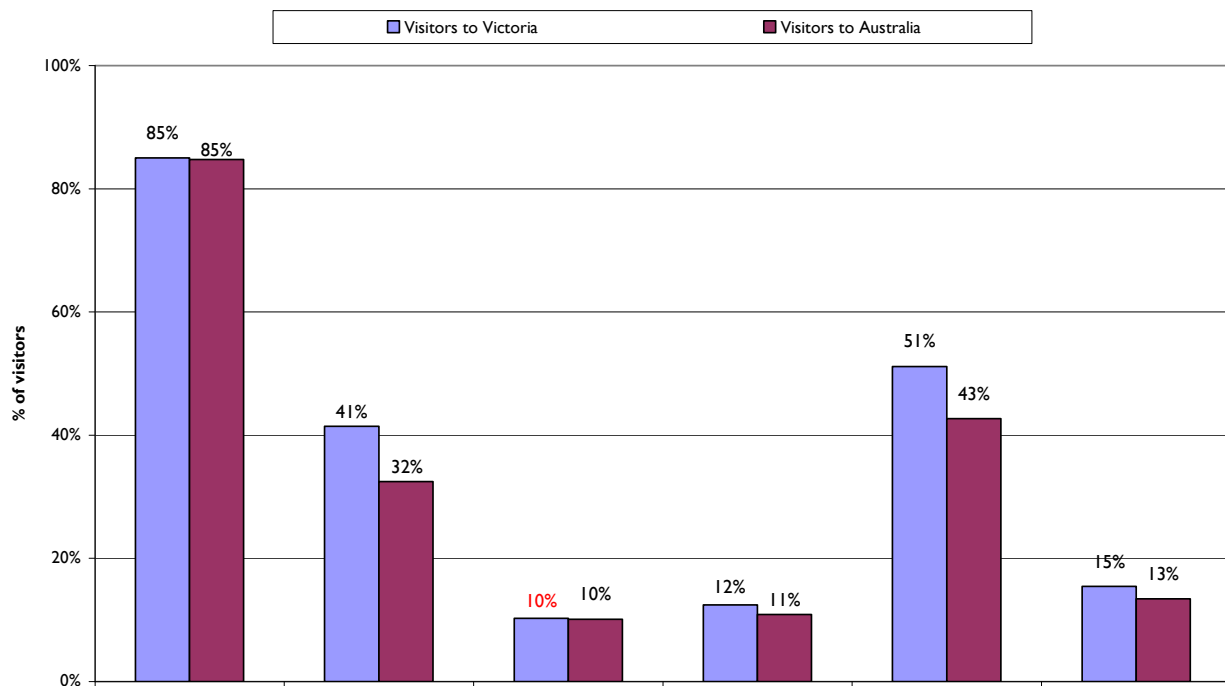
Incidence of Online Booking among USA Overnight Leisure Visitors, 2003-2010



Base: Valid responses

Strong growth in the incidence of online booking among leisure visitors from the USA to Australia is evident, up from 13% in 2003 to 62% in 2010. Overnight leisure visitors to Victoria from the USA were slightly less likely than the national average to book at least one component of the trip online, with 59% reporting usage of online booking methods in 2010.

Trip Components Booked Online among USA Overnight Leisure Visitors, 2010



Base: Booked online

Among leisure visitors from the USA booking travel online, international air fares (85%) and accommodation (43%) were the most frequently purchased components for visitors to Australia. Overnight leisure visitors to Victoria from the USA were very similar, booking international air fares (85%), accommodation (51%) and domestic air fares (41%) online.

4.3 Planning and Booking Horizons

	Visitors to Australia	Visitors to Victoria
Planning Horizon (average weeks)	16.6	16.5
Booking Horizon (average weeks)	11.9	11.9

Among USA leisure visitors to Australia, the average planning horizon was 16.6 weeks, with a slightly shorter horizon for visitors to Victoria (16.5 weeks). However, 24% of visitors to Australia indicated a lead time of less than 4 weeks for planning (25% of visitors to Victoria).

For leisure visitors to Australia, flight booking occurred an average of 11.9 weeks prior to departure, with overnight leisure visitors to Victoria recording the same lead time (also 11.9 weeks). 32% of flight bookings to Australia (and 32% of flight bookings among Victorian overnight leisure visitors) 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
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.