



Australian Government
Department of Resources, Energy and Tourism

ENHANCING AUSTRALIA'S ECONOMIC PROSPERITY

Australia's inbound tourism statistics

Australia's inbound tourism statistics

What is inbound tourism?

Scope of inbound tourism:

- Short-term visitor arrivals are defined as overseas visitors who intend to stay in Australia for less than 12 months
- Statistics relate to the number of movements of travellers rather than the number of travellers
- Statistics exclude the movements of operational air and ships' crew, transit passengers who pass through Australia but are not cleared for entry, passengers on pleasure cruises commencing and finishing in Australia, and unauthorised arrivals
- Australia has a range of inbound collections that stand alone or complement each other

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Australia's inbound tourism statistics

Snapshot of Australia's inbound tourism sector...

Significant contribution within the economy:

- Australia's largest services export industry
- Contributes around one-quarter of tourism GDP
- Globally, 8th largest market in terms of travel credits
- A 'portfolio' of comprising of a range markets for a range of purposes
 - holiday, business, education, visiting friends and relatives, employment
 - 71% of visitors are from top-10 markets (35% from Asia)
 - 65% of expenditure are from top-10 markets

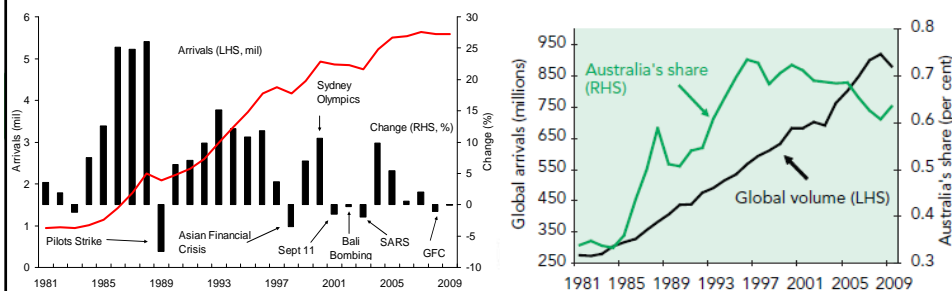
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Snapshot of Australia's inbound tourism sector...

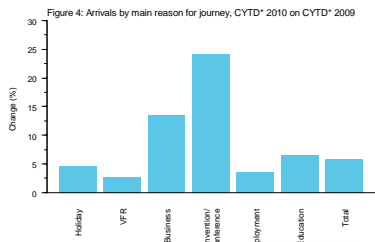
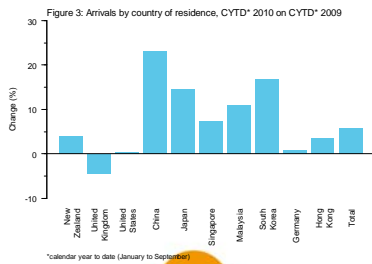
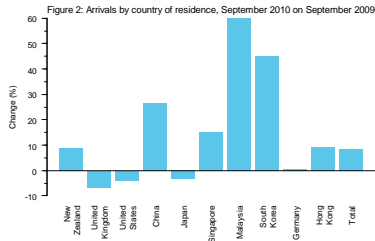
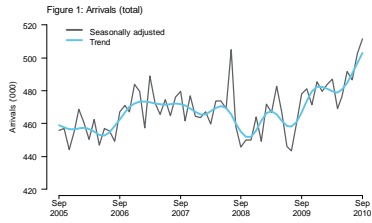
Over the past decade...

- Grown from 4.5 million in 1999 to 5.6m in 2009 (AAGR of 2.3%)
- Arrivals peaked in 2007 following declines in 2001 (9/11), 2002 (9/11, Bali), 2003 (SARS) and 2008 (GFC)
- Exports have grown from \$13.4b in 1997-98 to \$23.5b in 2008-09 (AAGR of 5.3%)



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Snapshot of Australia's inbound tourism sector...

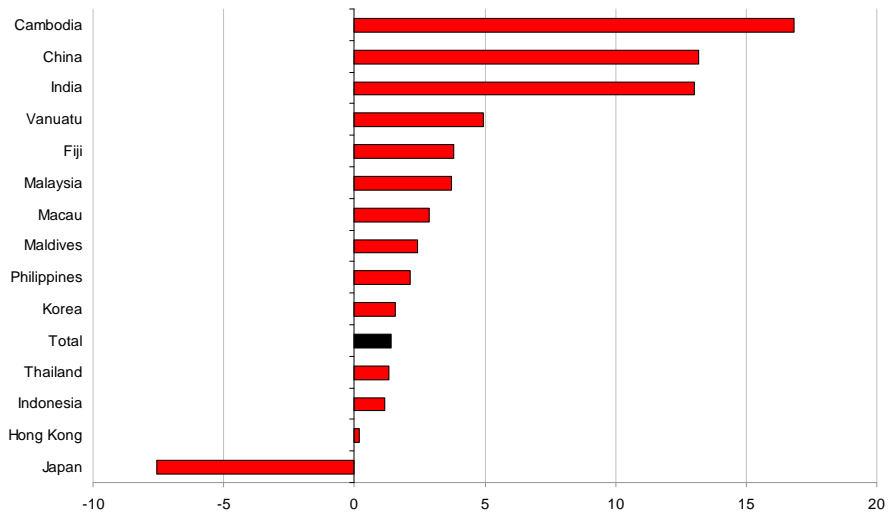


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Snapshot of Australia's inbound tourism sector...

Average annual growth over the last 10 years



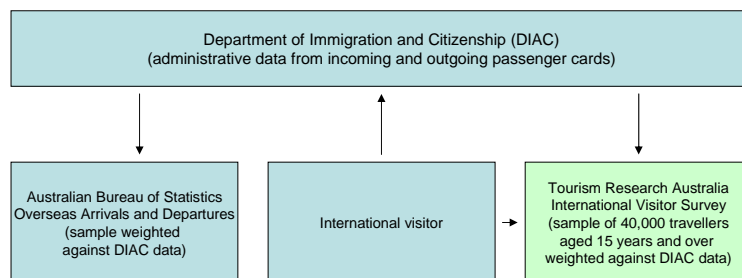
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Inbound tourism statistics

Key inbound collections:

- Overseas Arrivals and Departures, Australian Bureau of Statistics
- International Visitor Survey, Tourism Research Australia



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Australia's inbound tourism statistics

Collection and dissemination

Key government distributors of inbound data and analysis...

- Australian Bureau of Statistics
www.abs.gov.au
- Tourism Research Australia
www.ret.gov.au/tourism/tra
- Tourism Australia
www.tourism.australia.com
- Department of Resources, Energy and Tourism
www.ret.gov.au

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Australia's inbound tourism statistics

ABS Overseas Arrivals and Departures

Introduction

- Australian Bureau of Statistics (ABS catalogue number 3401.0)
 - Collection is managed by *Labour and Demography Statistics*
- Funding is met by the Commonwealth Government
- Primary information collected by the Department of Immigration and Citizenship on incoming and outgoing passenger cards
 - Datacards are fundamental to inbound statistics collections

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Australia's inbound tourism statistics

Passenger cards...

The image displays two forms used for collecting tourism statistics in Australia. The top form is the Incoming Passenger Card, and the bottom form is the Outgoing Passenger Card.

Incoming Passenger Card:

- YOUR CONTACT DETAILS IN AUSTRALIA:** Phone, E-mail, Address.
- EMERGENCY CONTACT DETAILS (FAMILY OR FRIEND):** Name, E-mail, Phone, Mail address.
- PLEASE COMPLETE IN ENGLISH:**
 - In which country did you board this flight or ship?
 - What is your usual occupation?
 - Nationality as shown on passport
 - Date of birth
- PLEASE X AND ANSWER A OR B OR C:**
 - A Migrating permanently to Australia:** Intended length of stay in Australia (Years, Months, Days), Country of residence, Main reason for coming to Australia (one only).
 - B Visitor or temporary entrant:** Intended length of stay in Australia (Years, Months, Days), Country of residence, Main reason for coming to Australia (one only).
 - C Resident returning to Australia:** Country where you spent most time abroad.
- MAKE SURE YOU HAVE COMPLETED BOTH SIDES OF THIS CARD. PRESENT THIS CARD ON ARRIVAL WITH YOUR PASSPORT.**
- Reference number: 11091507

Outgoing Passenger Card - Australia:

- PLEASE COMPLETE IN ENGLISH WITH A BLUE OR BLACK PEN:** Family name, Given names, Passport number, Flight number or name of ship, Country where you will get off this flight, Usual occupation, Nationality as shown on passport, Date of birth.
- PLEASE X AND ANSWER D OR E OR F:**
 - D Visitor or temporary entrant departing:** State where you spent most time, Intended length of stay overseas, Country where you will spend most time abroad, Country of Residence.
 - E Australian resident departing temporarily:** In which State do you live?, Intended length of stay overseas, Country where you will spend most time abroad, Main reason for overseas travel (one only).
 - F Australian resident departing permanently:** In which State did you live?, What is your country of future residence?
- DECLARATION:** The information I have given is true, correct and complete.
- TURN OVER THE CARD**

Australia's inbound tourism statistics

ABS Overseas Arrivals and Departures

An overview of collection methodology

- International visitor fills out card(s)
- cards are collected at border (Customs)
- cards are scanned to collect data (DIAC)
- some manual intervention may be required due to incorrect completion of cards or difficulty scanning (DIAC)
- a sample of passenger cards is used for the *Overseas Arrivals and Departures* data (ABS)
- survey results are weighted to information from the datacard using 'country of citizenship' as the benchmark variable (ABS using DIAC data)

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Overseas Arrivals and Departures

Dataset critical for evaluating the industry

Main variables available:

- age and gender
- airport/port of arrival
- arrival date
- category of travel
- citizenship and country of birth
- country of embarkation/disembarkation
- marital status (not available for New Zealand citizens)
- country of residence
 - Intended/actual length of stay
 - Main reason for journey
- state or territory of intended address/in which most time was spent

Comprehensive set of data used extensively by policy makers, investors, and industry

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ABS Overseas Arrivals and Departures

Dissemination

- data released monthly by the Australian Bureau of Statistics
- Six-week lag (e.g. September 2010 data released in November 2010)
- published data items:
 - Short-term visitor arrivals
 - country of residence
 - intended length of stay
 - main reason for journey
- Modelled indicators (seasonally adjusted, trend)
- Refer to www.abs.gov.au for key figures and time series spreadsheets

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Australia's inbound tourism statistics

TRA International Visitor Survey

Background

- Managed by Tourism Research Australia
- Current survey running since 1999
- CAPI survey of 40,000 departing Australia
- Jointly funded by Commonwealth, State and Territory governments under the guidance of the Australian Standing Committee on Tourism.
- The most comprehensive source of information on international visitors to Australia.



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Australia's inbound tourism statistics

TRA International Visitor Survey

Purpose and management

- To primarily collect “factual” based information on international visitors
 - some “attitudinal” information collected
- To understand what tourists do and how much they spend
- To assist determine tourism's economic contribution to the Australian economy
- Survey design and management is the responsibility of Tourism Research Australia (Survey Section) which closely with the consultants, key stakeholders and industry to develop and maintain high data quality and relevant outputs.

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Australia's inbound tourism statistics

TRA International Visitor Survey

Methodology

- Proportionate stratified sample of 40,000 short-term international visitors aged 15 years or older
- Survey conducted by Computer Assisted Personal Interviewing (CAPI) in lounges of eight major international airports
- 96 questions asked, using “show cards” to help the respondent answer some sections
- Interviews conducted in four languages: English, Japanese, Mandarin and Korean
- Results are weighted to data on international visitor numbers provided by the Department of Immigration and Citizenship

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Australia's inbound tourism statistics

TRA International Visitor Survey

Sample size

- Between 2001 and 2004 face-to-face interviews were conducted with approximately 20,000 international visitors aged 15 years and over as they were departing Australia.
- As part of the former Australian Government's tourism policy, *Tourism White Paper*, funding for research was increased in 2004.
- From 1 January 2005, the IVS sample was increased by 100% (to 40,000 visitors) in order to enhance the estimates for smaller States, Territories and regions.
- Weighting of sample has been extended to the regional level for various main markets

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TRA International Visitor Survey

Sample size by country of residence (year-ended June 2010)

Country of residence	June Quarter 2010	Year ended 30 June 2010
New Zealand	1 507	5 828
Japan	1 016	5 051
Hong Kong	282	1 085
Singapore	568	2 031
Malaysia	432	1 485
Indonesia	157	791
Taiwan	139	671
Thailand	207	775
Korea	457	1 792
China	735	2 963
India	254	897
Other Asia	322	1 188
USA	767	3 234
Canada	224	1 019
United Kingdom	1 003	4 626
Germany	287	1 228
Scandinavia	194	770
France	173	783
Italy	96	409
Netherlands	141	631
Switzerland	86	433
Other Europe	271	1 188
Other countries	722	2 812
Total	10 040	41 690

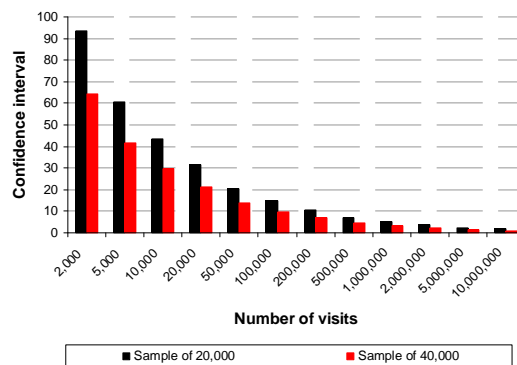
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TRA International Visitor Survey

Reliability (2010 versus 2004)

- Increasing the sample size of the IVS by 100% has improved the reliability of survey estimates...



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Australia's inbound tourism statistics

Tourism Research Australia database – inbound data

International Visitor Survey data items – just a sample...

- time series from 1999
- expenditure
- visitors and visitor nights
- state and territory visited
- reasons for trip
- activities (e.g. beach, sport, festivals, tourist attractions)
- transport
- length of visit
- demographics: country of residence, gender, age, marital status
- information sources and use of the internet
- backpackers

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Australia's inbound tourism statistics

TRA International Visitor Survey

Dissemination

- Data released quarterly with 3 month lag
 - E.g. September quarter 2010 will be released in December 2010
- Data available from four main sources
 - Publication available in PDF format from the Tourism Research Australia website
 - Tourism Research Australia's online database (TRAOnline, web-based interface available to subscribers only) where custom tables can be developed
 - CDMOTA (SuperCross tabulation software) where custom tables can be developed
 - Tourism Research Australia's Statistical Enquiry Service

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Australia's inbound tourism statistics

Tourism Research Australia database – inbound data

Dissemination

- allows paid subscribers access to real time information using Tourism Research Australia databases
- use data to generate tables which are relevant to specific needs
- immediate access to data on the day of release
- capability to store and update customised tables in a password protected online database
- access from any computer with internet service

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http://traonline.ret.gov.au/superweb/loadDatabase.do?db=IVS%20Trips%201999%20onwards - Windows Internet Explorer

http://traonline.ret.gov.au/superweb/loadDatabase.do?db=IVS%20Trips%201999%20onwards

File Edit View Favorites Tools Help

http://traonline.ret.gov.au/superweb/loadDa...

Tourism Australia

Save As Languages Logout Help Admin Tools

Databases Tables Fields

Counting

Reporting Period
Overnight Stopover
State visited
Reasons of trip
Activities
Transports
Length of visit
Demographics
Country of residence
Country of residence (2005 onwards)
Gender
Age group
Marital status (not asked in 1999)
Group tours
Package tours
Information / Internet
Other trip details
Conventions
Backpackers

Counting: Visitors, Visitor nights
Fields: Rolling annual by Counting
Layer: Filters

Counting	Visitors	Visitor nights
Rolling annual		
Year ending December 2000	4,566,551	119,164,111
Year ending December 2001	4,475,410	121,261,492
Year ending December 2002	4,462,796	121,547,586
Year ending December 2003	4,384,829	119,093,713
Year ending December 2004	4,796,861	131,400,473
Year ending December 2005	5,046,211	135,426,118
Year ending December 2006	5,098,759	155,020,108
Year ending December 2007	5,196,519	158,219,839
Year ending December 2008	5,166,843	167,844,845
Year ending December 2009	5,174,744	177,128,157

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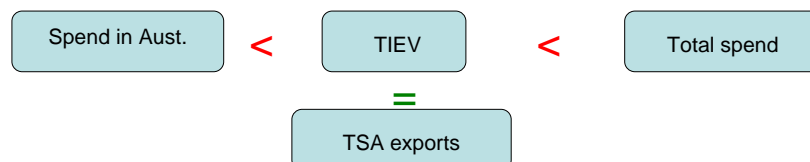
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Australia's inbound tourism statistics

TRA International Visitor Survey

International visitor expenditure

- Four main types of expenditure data presented in IVS:
 - Total trip expenditure
 - Spend in Australia only
 - Total Inbound Economic Value (TIEV) – a responsive proxy for exports benchmarked to ABS *Australian Tourism Satellite Account*
 - Regional expenditure
- There are subtle differences between each of these spend classifications

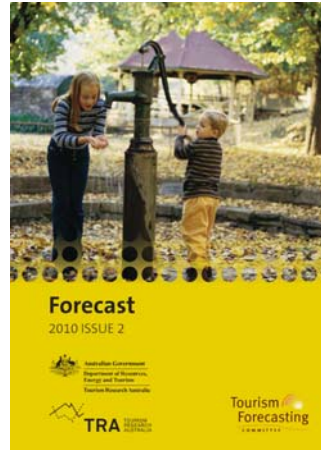


Australia's inbound tourism statistics

Tourism Forecasting Committee – inbound data

Introduction

- An independent forecasting body
- Forecasts inform tourism investors, industry and government
- 10 year forecasts for international, domestic and outbound tourism sectors
- Forecasts are not targets and represent the most likely outcome given:
 - past trends
 - current information
 - the impact of policy and industry changes



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Australia's inbound tourism statistics

Tourism Forecasting Committee – inbound data

Methodology

- Forecasts are derived via three iterations based on economic modelling and industry consultation

1 → 2 → 3

**Tourism Research Australia
(Forecasting Unit)**

- Economic modelling
- industry / aviation analysis
- policy analysis

**Tourism Forecasting
Committee
(Technical Committee)**

- review of forecasts by industry and government analysts

**Tourism Forecasting
Committee**

- Review and confirmation of forecasts by industry and government leaders

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Australia's inbound tourism statistics

Tourism Forecasting Committee – inbound data

Dissemination

- Forecasts are published twice a year – one full release with one update
- Published data for 25 key inbound markets:
 - visitor arrivals by purpose
 - total visitor nights and visitor nights by accommodation
 - Total Inbound Economic Value (exports)
- Data is available for free in PDF format from the Tourism Research Australia website (<http://www.ret.gov.au/tourism/tra>)

Australia's inbound tourism statistics

Tourism Forecasting Committee – inbound data

International visitors to Australia, 1979-2019

Snapshot – in 10 years...

- Visitors to increase by 47%
- China to be 2nd largest market
- Exports to increase 21%
- China to be largest market



Figure 2 Contribution to growth in international visitor arrivals, 2009 to 2019

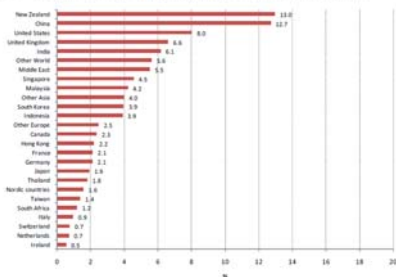


Figure 3 Contribution to growth in international visitor consumption, 2009 to 2019

