

# Market Snapshot

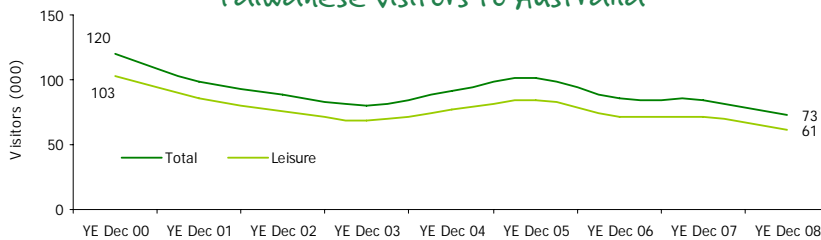
Year ended December 2008



## Taiwan

	Australia	Change Dec 07 to Dec 08	Share of international visitors	Queensland	Change Dec 07 to Dec08	Share of visitors to Qld
<b>Total visitors</b>	73,000	-14% ▼	1%	42,000	-16% ▼	2%
Total ALOS <sup>1</sup> (nights)	45.0	13.4 ▲		36.3	14.9 ▲	
<b>Leisure<sup>2</sup> visitors</b>	61,000	-15% ▼	2%	37,000	-16% ▼	2%
Leisure ALOS	32.0	13.2 ▲		22.8	10.2 ▲	
<b>Expenditure (\$m)<sup>3</sup></b>	254	5% ▲	2% (share of expenditure)	107	2% ▲	3% (Share of Expenditure)

### Taiwanese visitors to Australia



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After a peak in 2005, Taiwanese numbers to Australia have continued to decline.

First time visitors to Australia accounted for 57% of the Taiwanese market, this market declined by 21% over the year to December 2008.

Repeat visitors also declined (down 3%) over the same period.

Just over half (52%) of Taiwanese visitors travel alone (lower than the average total international market of 55%).

Taiwanese visitors to Australia travelling on a package accounted for 41% of the Taiwanese market. This market declined by 21% over the year to December 2008.

### Taiwanese visitors to Queensland



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First time visitors (to Australia) accounted for 61% of the Taiwanese market to Queensland. This market declined by 23% over the year to December 2008.

The Brisbane and the Gold Coast were the State's most visited regions for Taiwanese visitors. 65% of went to Brisbane, while 43% had a stop over at the Gold Coast. Taiwanese visitors to Brisbane declined by 16% over the last year, while visitors to the Gold Coast declined by 23% over the same period.

Taiwanese visitors spent \$107 million in Queensland in the year to December 2008. This was a decline of 2% on the same period last year.

Taiwanese spend per visitor in Queensland was \$2,549, higher than the total international total average spend (\$1,975).

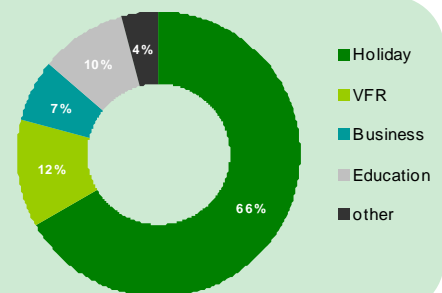
### Main purpose of visitation to Australia

The holiday market accounted for more than three in five of all Taiwanese visitors to Australia. This market declined by 18% over the year to December 2008.

Taiwanese holiday visitor nights however, increased over the year to December 2008. Their average length of stay was 35.4 nights.

The business market declined by 7% over the year to December 2008, business visitor nights however, increased over the same period (up 16%).

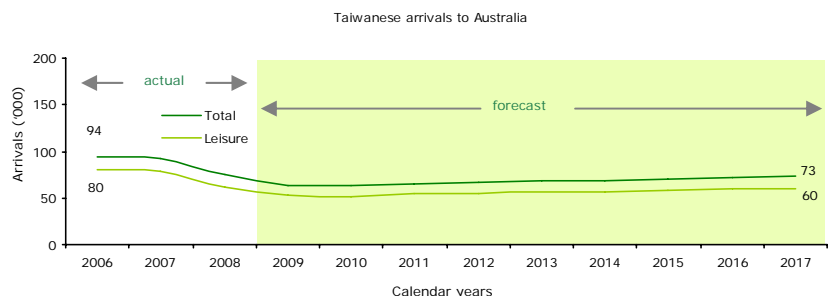
Education visitors increased by 3% and visitor nights increased by 4% over the year to December 2008. This market's average length of stay was 152.9 nights and this influenced the overall Taiwanese visitor length of stay.



### Taiwanese arrivals forecast <sup>4</sup>

Natural disasters and recurring political instability have reduced growth in outbound travel in recent years. Low cost carriers with competitive airfares to rival destinations have sharply reduced Australia's market share of the Taiwanese outbound market.

Arrivals to Australia from Taiwan are forecast to increase by an average of 2% each year from 2012 to reach 73,000 arrivals in 2017.



- Average length of stay
- Leisure is holiday and visiting friends or relatives (VFR) combined
- Expenditure data is sourced from Tourism Research Australia and is inclusive of package expenditure
- Tourism Forecasting Committee 2008 Issue 2

Note All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2008