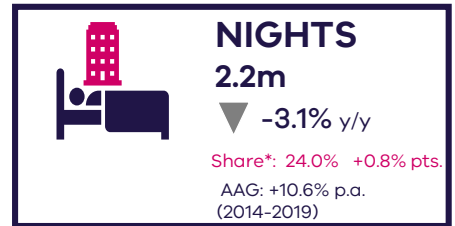
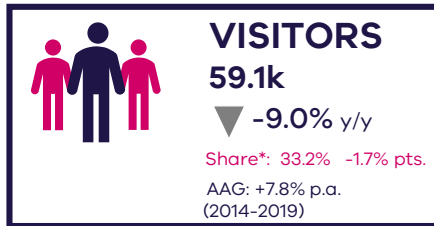
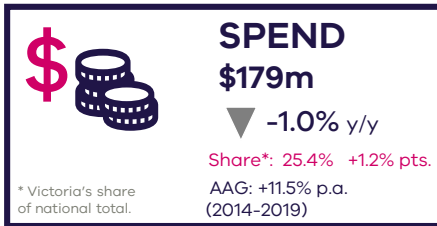


International Tourism Summary: Taiwan

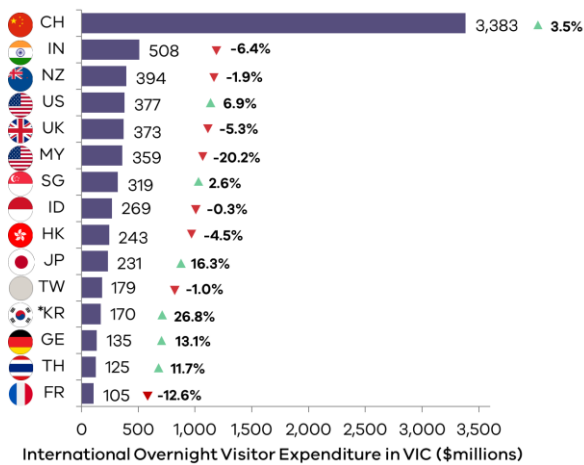
Year ending December 2019

59,100 Taiwanese visitors spent 2.2 million nights and \$179 million on trips to Victoria in the year ending December 2019.

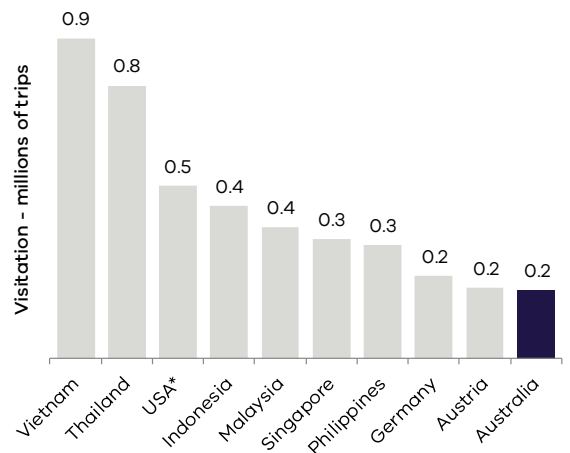


Context: In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

International Overnight Expenditure in Victoria (\$m)



Top 10 Out-of-Region Destinations for Taiwanese Travellers



Taiwanese visitors spent \$179 million on trips to Victoria in the year ending December 2019, a year-on-year decline of 1.0 per cent. This represents 2.0 per cent of all international overnight visitor spend in Victoria. Taiwan is ranked Victoria's 11th largest international market in terms of expenditure.

Australia was ranked #10 for visitation against other out-of-region destinations for Taiwanese travellers in the year ending December 2019 (down from #9 in 2018).

*USA including Hawaii Source: Tourism Economics, YE2019

* In the year ending December 2019, all Korean visitors to Australia were from South Korea.

AUSTRALIA



Spend
\$706m ▼ -5.6%
Visitors
178k ▼ -4.4%
Nights
9.2m ▼ -6.3%

NEW SOUTH WALES



Spend
\$243m ▲ 3.7%
Visitors
83k ▼ -8.3%
Nights
3.0m ▲ 16.4%

QUEENSLAND



Spend
\$208m ▼ -11.6%
Visitors
81k ▲ 1.1%
Nights
2.7m ▼ -21.1%

The rate of decline of Taiwanese expenditure on trips to Victoria (-1.0% year-on-year) was less than the national average (-5.6%) and Queensland (-11.6%), and in contrast to growth for New South Wales (+3.7%).

MELBOURNE



Spend
\$141m ▼ -6.7%
Visitors
57k ▼ -6.8%
Nights
1.3m ▼ -16.5%

REGIONAL VICTORIA



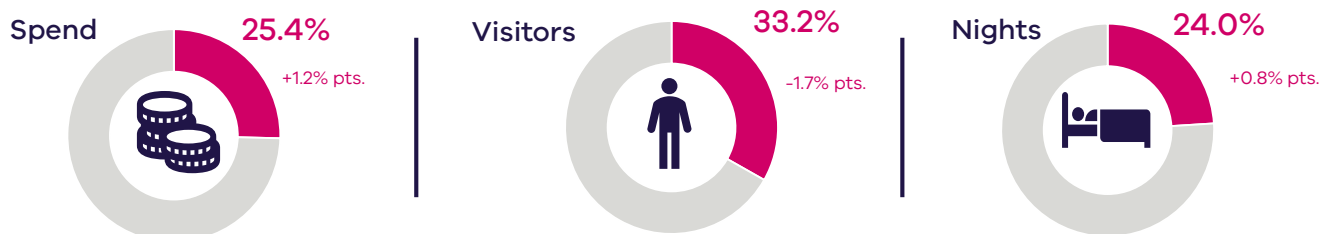
Spend
\$38m ▲ 27.0%
Visitors
10k ▼ -18.4%
Nights
909k ▲ 26.2%

In the year ending December 2019:

- 57,000 Taiwanese visitors spent 1.3 million nights and \$141 million on trips to Melbourne
- 10,000 Taiwanese visitors stayed 909,000 nights and \$38 million in regional Victoria.

Taiwanese Spend, Visitors and Nights by Key States Visited

Victoria's Market Share of Taiwanese spend, visitors and nights



Taiwanese Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from Taiwan Year Ending December	Total Expenditure (\$ million)					Share of National %			Expenditure Per Night \$			Expenditure Per Visitor \$		
	2014	2018	2019	Av Ann 14-19	% Change 18-19	2014	2018	2019	2014	2018	2019	2014	2018	2019
New South Wales	139	235	243	11.9% p.a.	3.7%	27.6%	31.4%	34.5%	65	91	81	2,991	2,598	2,939
Victoria	104	181	179	11.5% p.a.	-1.0%	20.7%	24.2%	25.4%	78	79	81	2,560	2,791	3,034
Queensland	150	235	208	6.7% p.a.	-11.6%	29.8%	31.4%	29.4%	58	68	76	2,992	2,951	2,579
Australia	503	749	706	7.0% p.a.	-5.6%				62	76	76	4,424	4,020	3,966

Total VIC International Expenditure	4,903	8,467	8,826	12.5% p.a.	4.2%
Taiwan's Share of VIC International Expenditure	2.1%	2.1%	2.0%		

AAG = Average Annual Growth

NB: Visitor expenditure includes expenditure on packages attributable to destination. Estimates may differ from those published by Tourism Australia

Source: Regional Expenditure Model, International Visitor Survey, December 2014-2019, Tourism Research Australia, Canberra.

Victoria received 25.4 per cent of Taiwanese overnight visitors' expenditure in Australia in the year ending December 2019, behind New South Wales (34.5%) and Queensland (29.4%). Taiwanese visitors' expenditure per night in Victoria (\$81) was higher than the national average (\$76) and Queensland (\$76), and in line with New South Wales (\$81). Victoria received a higher total spend per visitor (\$3,034) compared with New South Wales (\$2,939) and Queensland (\$2,579).

Taiwanese Overnight Visitation (000s) to Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19	Share of Visitors %
Australia	114	123	153	167	186	178	9.4% p.a.	-4.4%	
New South Wales	58	63	72	85	90	83	7.3% p.a.	-8.3%	47%
Victoria	41	45	55	58	65	59	7.8% p.a.	-9.0%	33%
Queensland	50	59	71	73	80	81	9.9% p.a.	1.1%	45%

Taiwanese overnight visitor numbers to Victoria declined by 9.0% in the year ending December 2019, a higher rate than the national average decrease (-4.4%) and key competitor New South Wales (-8.3%) and in contrast to growth for Queensland (+1.1%). Over the longer term (2014 to 2019), Taiwanese overnight visitors to Victoria increased at an average annual rate of 7.8 per cent, behind the national average (+9.4% p.a.) and Queensland (+9.9% p.a.) but ahead of New South Wales (+7.3% p.a.).

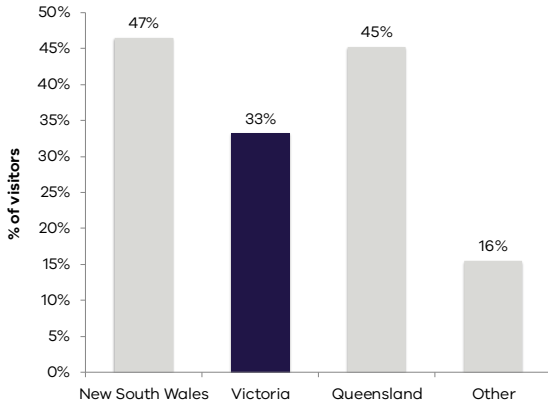
Taiwanese Visitor Nights (000s) in Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19	Share of Nights %
Australia	8,091	9,701	9,218	9,883	9,859	9,242	2.7% p.a.	-6.3%	
New South Wales	2,128	2,258	2,382	2,833	2,584	3,008	7.2% p.a.	16.4%	33%
Victoria	1,341	2,016	1,807	2,124	2,290	2,219	10.6% p.a.	-3.1%	24%
Queensland	2,598	3,006	3,223	3,129	3,444	2,718	0.9% p.a.	-21.1%	29%

In the year ending December 2019, Taiwanese visitor nights to Victoria declined by 3.1 per cent year-on-year, behind a larger decline nationally (-6.3%) and in Queensland (-21.1%) and in contrast to growth in New South Wales (+16.4%). Over the longer term (2014 to 2019), Taiwanese visitor nights spent in Victoria increased at an average annual rate of 10.6 per cent, ahead of the national average (+2.7% p.a.), New South Wales (+7.2% p.a.) and Queensland (+0.9% p.a.).

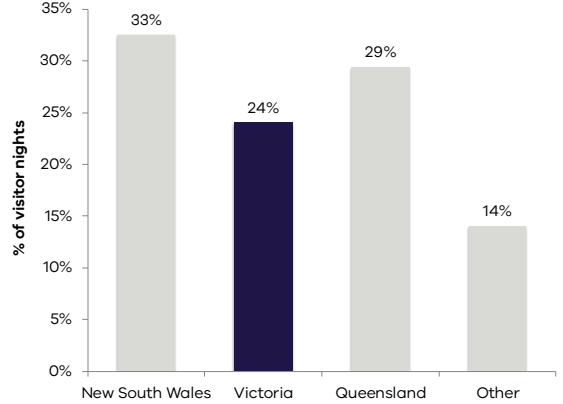
Market Share by Key States¹

Taiwanese Overnight Visitors to Australia
Year ending December 2019 – Market Share by Key States



In the year ending December 2019, 33 per cent of Taiwanese visitors to Australia stayed overnight in Victoria; behind New South Wales (47%) and Queensland (45%).

Taiwanese Visitor Nights to Australia
Year ending December 2019 – Market Share by Key States



Victoria's market share of visitor nights spent by Taiwanese travellers to Australia in the year ending December 2019 was 24 per cent; behind New South Wales (33%) and Queensland (29%).

Main Purpose of Trip (000s) to Australia by Key States Visited and Market Share Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Total
New South Wales	57	12	69	83
Market Share %	49%	38%	47%	47%
Victoria	40	9	50	59
Market Share %	35%	31%	34%	33%
Queensland	59	11	70	81
Market Share %	51%	36%	48%	45%
Australia	117	30	147	178

* Total Leisure = Holiday + VFR

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

NB: Figures for 'Business', 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

In the year ending December 2019, 34 per cent of Taiwanese leisure visitors to Australia stayed overnight in Victoria, including 35 per cent of holiday and 31 per cent of visiting friends and relatives (VFR) visitors. Queensland's share of Taiwanese leisure visitors was higher at 48 per cent, as was New South Wales' share at 47 per cent.

Purpose of Visit to Victoria (and the Destinations Within)

Some international visitors to Victoria visit more than one destination in the state, and for different purposes. For example, a visitor might stay in Melbourne for education reasons, and visit the Great Ocean Road region for a holiday. As such, the percentages of international visitors who visited Victoria for each purpose total more than 100 per cent.

Taiwanese Overnight Expenditure and Visitation to Victoria by Destination Purpose of Visit – Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Education	Total
Overnight Expenditure (\$M)	84	25	109	52	179
Overnight Visitors (000s)	44	12	52	-	59
Visitor Nights (000s)	1,257	368	1,625	388	2,219
Average Length of Stay	28.8	30.3	31.0	-	37.5
Spend per Visitor	1,928	2,060	2,087	-	3,034
Spend per Night	67	68	67	135	81

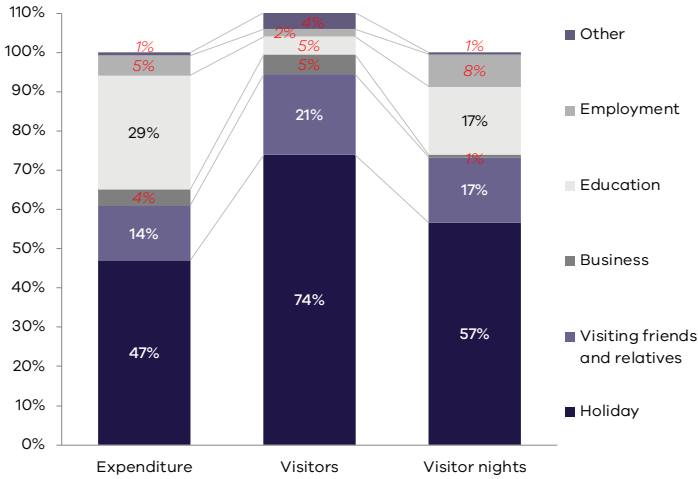
* Total Leisure = Holiday + VFR (NB total leisure may equal more than the sum of holiday + VFR, since visitors can visit more than one destination in Victoria with more than one purpose)

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

NB: Figures for 'Business', 'Employment' and 'Other' visitors are unreliable and are unable to be published

¹NOTE: 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.

Taiwanese Overnight Expenditure, Visitors and Nights to Victoria by Purpose of Visit Year Ending December 2019



In the year ending December 2019, leisure visitors accounted for 61 per cent of Taiwanese visitor expenditure in Victoria, comprising 47 per cent of spend by holiday visitors and 14 per cent spend by VFR visitors*. Education visitors contributed a further 29 per cent of spend.

During the same period, 74 percent of Taiwanese visitors travelled to Victoria for holiday purposes and 21 per cent travelled to VFR.

More than half (57%) of all nights spent in Victoria by Taiwanese visitors in the year ending December 2019 were by holiday visitors, while VFR visitors and education visitors each accounted for 17 per cent of visitor nights.

*Figures might not add up due to rounding.

Note: Percentages of visitors will not add up to 100% as visitors can travel to multiple destinations in Victoria with different purposes.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

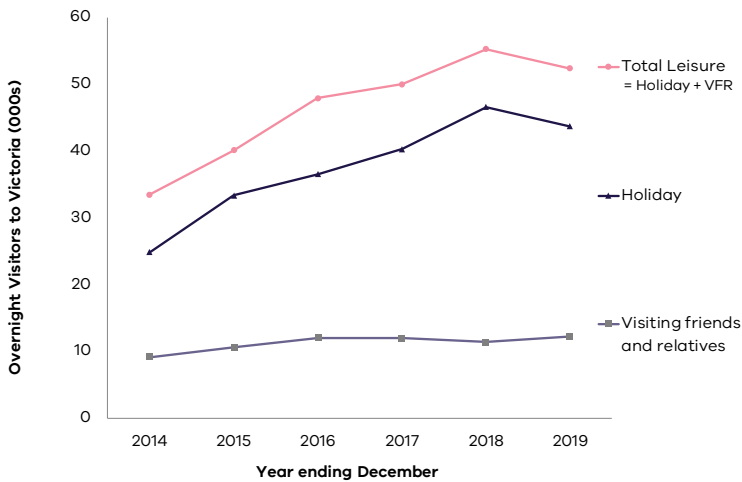
Taiwanese Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual	
							% change 14/19	% change 18/19
Holiday	25	33	37	40	47	44	11.9% p.a.	-6.3%
Visiting friends and relatives	9	11	12	12	11	12	5.9% p.a.	6.9%
Total Leisure	33	40	48	50	55	52	9.4% p.a.	-5.3%

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

NB: Figures for 'Business', 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

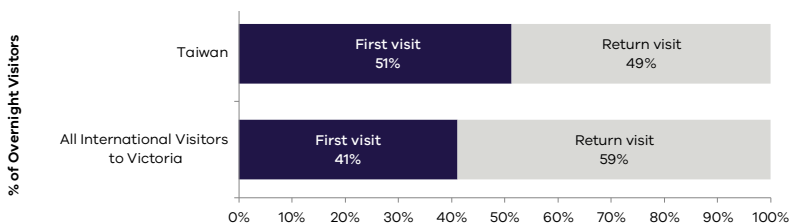
Taiwanese Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019



Of all the main purpose segments, the Taiwanese holiday market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+11.9% p.a.), with VFR (+5.9% p.a.) also increasing over that time. Overall, overnight Taiwanese leisure visitors to Victoria have increased at an average annual rate of 9.4 per cent per annum over the period 2014-2019.

Repeat Visitation to Australia

Repeat Visitation to Australia (% of Taiwanese overnight visitors to Victoria vs all international overnight visitors to Victoria)



In the year ending December 2019, 51 per cent of overnight visitors from Taiwan to Victoria were visiting Australia for the first time, compared with 41 per cent of international overnight visitors to Victoria overall.

Melbourne and Regional Victoria Overnight Visitation

Taiwanese Overnight Visitation (000s) to Victoria, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	40	43	53	54	61	57	7.4% p.a.	-6.8%
Regional Victoria	-	9	5	10	13	10	-	-18.4%
Victoria	41	45	55	58	65	59	7.8% p.a.	-9.0%

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

There were 57,000 Taiwanese overnight visitors to Melbourne in the year ending December 2019, a 6.8 per cent decline over the previous year. Taiwanese visitors to Melbourne have grown at an average annual rate of 7.4 per cent over the period 2014 to 2019.

In the year ending December 2019, there were 10,000 Taiwanese overnight visitors to regional Victoria, an 18.4 per cent decline year-on-year.

Taiwanese Visitor Nights (000s) to Victoria, 2 years² (rolling), 2014-2019

2 Years Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	2,412	2,660	2,913	3,043	3,245	2,879	3.6% p.a.	-11.3%
Regional Victoria	553	697	910	889	1,169	1,630	24.1% p.a.	39.4%
Victoria	2,965	3,357	3,824	3,931	4,414	4,509	8.7% p.a.	2.2%

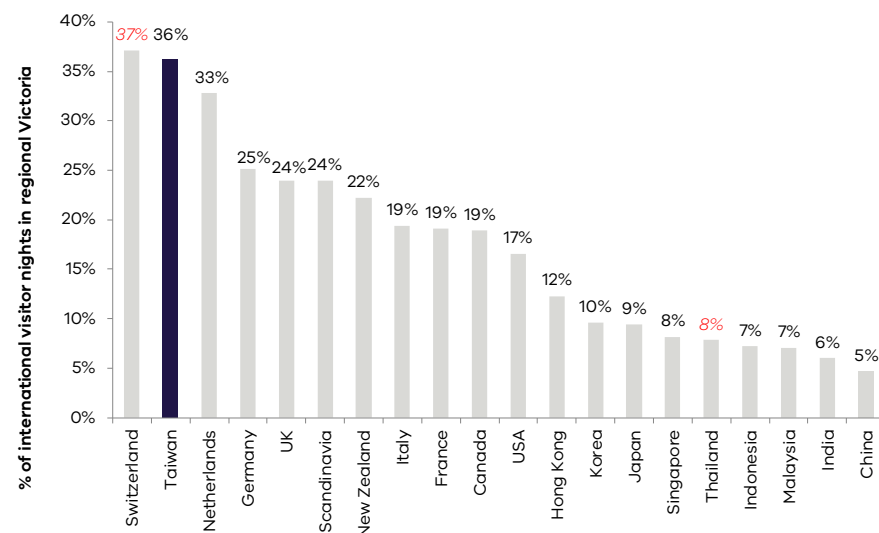
Taiwanese visitors spent 2.9 million nights in Melbourne in the two years ending December 2019, a decline of 11.3 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum*), visitor nights spent in Melbourne increased at an average annual rate of 3.6 per cent.

In the two years ending December 2019, Taiwanese visitors spent 1.6 million nights in regional Victoria, representing an increase of 39.4 per cent compared with the two years ending December 2018, and an average annual increase of 24.1 per cent in the period 2014 to 2019 (using two years of data per annum*).

* where 2014 includes years ending December 2013 and 2014 and 2019 includes years ending December 2018 and 2019

Regional Dispersal

Regional Dispersal of Top 20 International Overnight Markets to Victoria – 2 Years Ending December 2019



Of the 4.5 million nights spent in Victoria by Taiwanese visitors in the two years ending December 2019, 36 per cent (1.6 million) of them were spent in regional Victoria.

Taiwanese visitors to Victoria have the second highest rate of overnight dispersal of all the state's top 20 international markets.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

² Two years of data are used to increase reliability of the figures.

Places Visited in Regional Victoria and Melbourne Attractions

Places Visited in Regional Victoria – Year Ending December 2019

Selected Places Visited - Overnight Visit or Daytrip (% of all Overnight Visitors to Victoria)	Taiwan Visitors	All International Visitors
Ballarat, Sovereign Hill	-	6%
Bendigo	-	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	-	9%
Great Ocean Road/Twelve Apostles	30%	33%
Healesville Sanctuary	-	2%
Mornington Peninsula	-	8%
Phillip Island/Penguin Parade	39%	17%
Puffing Billy and Dandenong Ranges	32%	10%
Victorian Snowfields	-	2%
Wilson's Promontory	-	3%
Yarra Valley	13%	12%

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

In the year ending December 2019, 39 per cent of Taiwanese overnight visitors to Victoria spent time (daytrip or overnight) went to the Phillip Island/Penguin Parade. This is well above the 17 per cent of all international overnight visitors to Victoria travelling there.

Thirty-two per cent (32%) of Taiwanese overnight visitors to Victoria went to Puffing Billy and Dandenong Ranges (compared with 10 per cent of international overnight visitors to Victoria overall) and 30 per cent went to in the Great Ocean Road/Twelve Apostles region (compared with 33 per cent of international visitors overall).

Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	Taiwan Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	-	4%
Brunswick Street	-	10%
Chadstone Shopping Centre	23%	15%
Chapel Street	-	9%
Crown Casino/entertainment complex	29%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	11%	19%
Federation Square	54%	38%
Melbourne CBD Shopping Precinct	81%	63%
Melbourne Cricket Ground (MCG)	-	6%
Melbourne Museum (Royal Exhibition Building)	20%	16%
Melbourne Zoo	12%	8%
National Gallery of Victoria (NGV)	24%	17%
Queen Victoria Market	59%	44%
Shrine of Remembrance	19%	12%
Southbank/Southgate	24%	26%
St Kilda	26%	28%

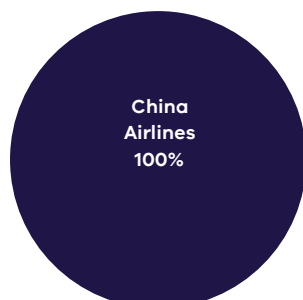
NB: Where there is a '-', figures are unreliable and are unable to be published.

The most visited Melbourne attractions by Taiwanese overnight visitors to Victoria were the CBD shopping precinct (81 per cent compared with 63 per cent of international visitors overall), the Queen Victoria Market (59 per cent compared with 44 per cent per cent of international visitors overall) and Federation Square (54 per cent compared with 38 per cent per cent of international visitors overall).

Other attractions that Taiwanese visitors were more likely to visit compared to international visitors overall included Crown Casino/entertainment complex (29 per cent of Taiwanese overnight visitors compared with 19 per cent of international visitors overall), National Gallery of Victoria (NGV) (24 per cent compared with 17 per cent of international overnight visitors overall), Chadstone Shopping Centre (23 per cent compared with 15 per cent of international overnight visitors overall) and Melbourne Museum (20 per cent compared with 16 per cent of international visitors overall).

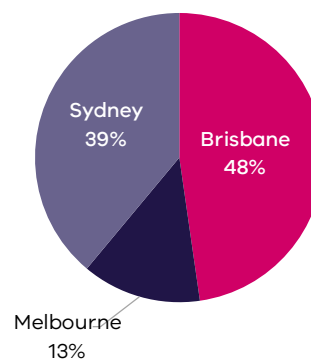
Aviation³

Airline Market Share – Direct Seats into Melbourne from Taiwan – Year ending December 2019



In the year ending December 2019, China Airlines was the only airline with direct flights from Taiwan to Melbourne, with 50,200 available seats.

Direct Flight Market Share – Direct Seats into Australian Airports from Taiwan – Year ending December 2019



In the year ending December 2019, Melbourne received 13 per cent of the 375,700 available seats on direct flights from Taiwan to Australia. Brisbane received the highest share (48%) of available seats on direct flights from Taiwan to Australia, followed by Sydney (39%).

³ Note: Aviation capacity is measured by "available seats", which includes international visitors and Australian residents returning home.

Sources:

- International Visitor Survey (IVS), years ending December 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Regional Expenditure Model (REX) 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Tourism Australia Consumer Demand Project, Tourism Economics, April 2020
- International Airlines Operated Flights and Seats, year ending December 2019, Department of Infrastructure and Regional Development (BITRE)
- Visitor Arrivals and Departures, year ending December 2019, Tourism Research Australia

Base for IVS and Expenditure data: Only those trips where International visitors aged 15 years or over who have stayed in Australia for less than 12 months are in scope. Expenditure includes package expenditure.

Figures that are unreliable and unable to be published are represented by '-'. Figures might not add up due to rounding.

To view the full suite of 15 International Tourism Summaries (Victoria's top 15 international markets in terms of expenditure, visitors and nights), see <https://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

For further information on IVS and Expenditure data sources used please refer to our Guide to Tourism Data Sources and Definitions document found here: <https://www.business.vic.gov.au/tourism-industry-resources/research/teve-research>

For further information on Tourism Australia's Consumer Demand Project, see <http://www.tourism.australia.com/en/markets-and-research/reports/consumer-research.html>

Further information on international visitor statistics: <https://www.tra.gov.au/international>;
<http://www.tourism.australia.com/en/markets-and-research/market-regions.html>

Factsheet produced by the TEVE Research Unit, May 2020.

Due care is taken in the production of this factsheet, however DJPR accepts no responsibility for the use of this information.