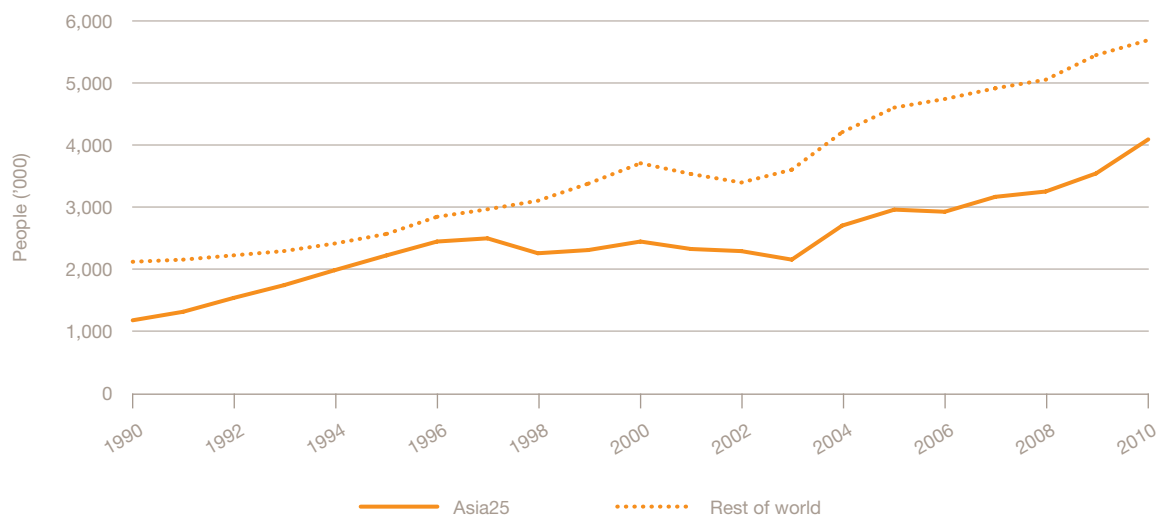


Tourism

The Tourism component of engagement with Asia grew by 15.7% in 2010, with over 4 million traveller movements. While both inflows and outflows rose, growth in outflows was stronger at 18.4%. Outgoing movements made up 61% of total traveller movements in 2010, compared with just 37% in 2005, suggesting that the strength of the Australian dollar is encouraging Australians to travel.

This development is also confirmed by the ROW Tourism component, with the outflow of travellers up by 9.7% in 2010 to more than 3 million – exceeding the inflow from the ROW countries for the third consecutive year. The relative weakness of economic growth in the ROW countries in 2010, notably in the United States and Europe, is also reflected in this data.

Figure 10: Tourism component



Inbound travel from the ROW was 61% higher than that from Asia in 2010. The major source countries for visitors were, in order, New Zealand, the United Kingdom and the United States, followed by Japan then China.

Table 7: Trends for Tourism component (inward/outward, '000 persons)

	1990	1995	2000	2005	2009	2010	% change 2009–10
Asia25							
Inflow	650.1	1,564.2	1,529.2	1,641.5	1,426.3	1,591.9	11.6
Outflow	537.7	640.9	905.6	1,316.4	2,114.8	2,504.2	18.4
Total	1,187.8	2,205.1	2,434.8	2,957.9	3,541.1	4,096.1	15.7
ROW							
Inflow	1,047.8	1,403.9	2,124.5	2,448.9	2,581.4	2,558.4	-0.9
Outflow	1,080.8	1,168.3	1,576.1	2,146.2	2,855.4	3,133.7	9.7
Total	2,128.6	2,572.2	3,700.6	4,595.1	5,436.8	5,692.1	4.7

Table 8: Number of working holiday makers entering Australia

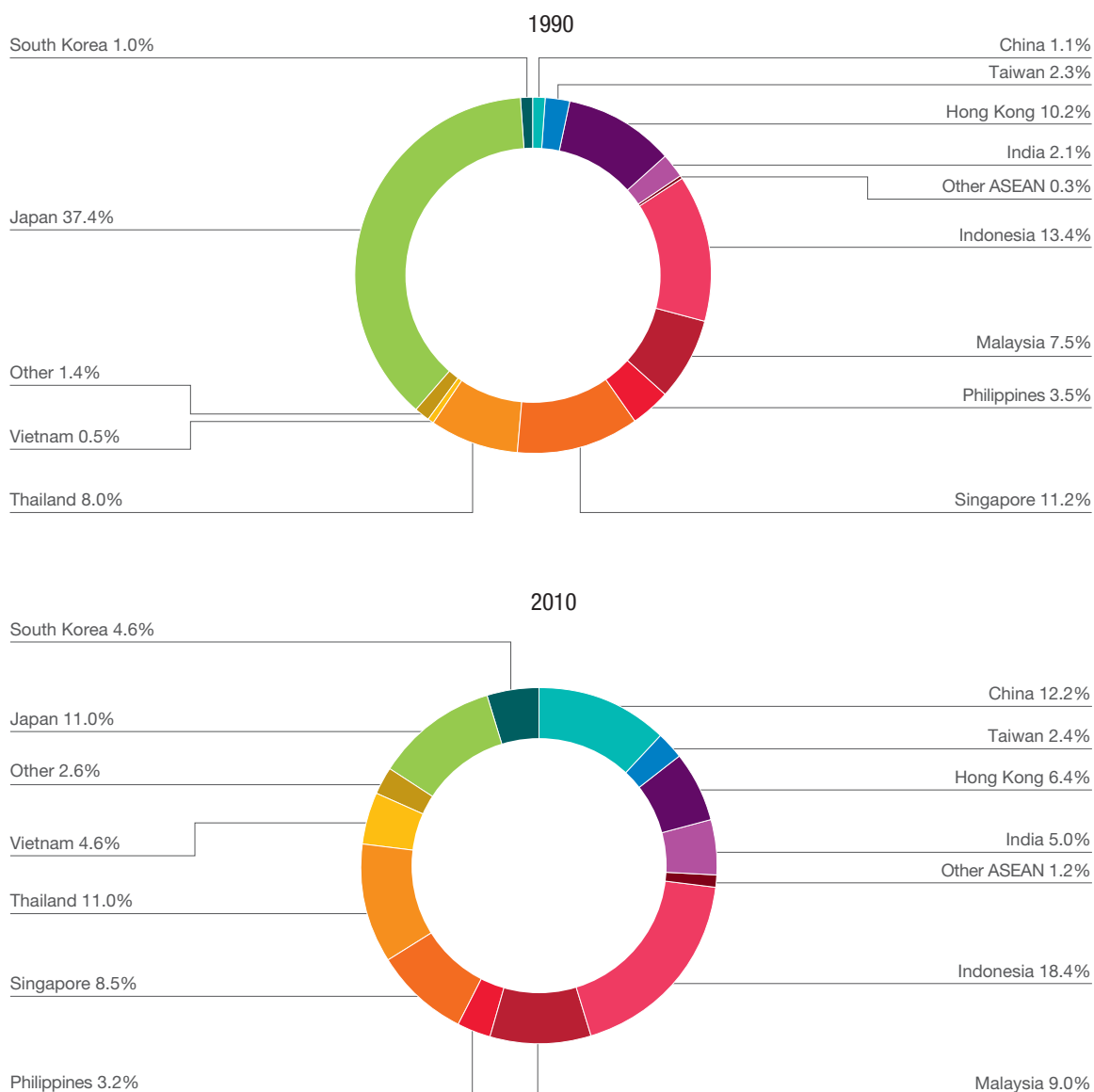
	1990	1995	2000	2005	2009	2010	% change 2009–10
Asia25	6,692	7,562	11,117	28,161	61,115	57,532	-5.9
ROW	40,691	31,301	68,122	76,463	132,990	125,631	-5.5

Key findings for Tourism component

- Short-term holidays are the biggest component of Tourism Engagement, with combined inflows and outflows accounting for 74% of the overall 4.1 million traveller movements between Asia25 and Australia, and 64% of total movements between Australia and the ROW, in 2010.
- Within Asia25, the countries which account for the largest shares of tourism engagement with Australia are Indonesia, China, Japan and Thailand.
- There was a 40% increase in the number of Australians taking a short-term holiday in Indonesia in 2010. China was also popular with Australian holiday makers – there was a 30% increase in short- (and long-) term visits to China in 2010. Australian tourist operators reported a spike in travel to China related to the Shanghai Expo during May–October.
- Short-term visits to Thailand and Japan rose by 16% and 10% respectively in 2010.
- Japan remained Australia's largest source of total incoming tourists with movements of 325,000, exceeding China by 15% in 2010. Having said this, the number of tourists coming to Australia from Japan has fallen significantly from its peak of 740,000 in 1996.
- The number of Chinese tourists coming to Australia has been growing at an average rate of around 20% per year since 1990.
- There was a 15% increase in short-term holiday visits by Australians to the ROW in 2010.
- Although inbound travel to Australia from the ROW fell by 0.9% in 2010, it nevertheless still accounted for around 62% of total tourist movements into Australia.
- Following strong growth of 19.5% in 2009, the number of working holiday makers from Asia25 entering Australia fell by 5.9% in 2010. This would seem to reflect a broader trend decline, given that there was also a 5.5% decline in working holiday makers arriving from the ROW.

Tourism shares (both outgoing and incoming) by country are shown below. The two areas that stand out are the decline of Japan’s engagement share and the increase in China’s.

Figure 11: Tourism shares by economy¹⁷



What ‘Tourism’ measures

This component comprises data on:

- short-term visits (less than one year) to/from Australia from/to Asia (by country) for holiday
- short-term visits (less than one year) to/from Australia from/to Asia (by country) to visit friends or family
- long-term visits (more than one year) to/from Australia from/to Asia (by country) for holiday
- long-term visits (more than one year) to/from Australia from/to Asia (by country) to visit friends or family
- the number of visas granted for working holiday makers in Australia from Asia (by country).

¹⁷ ‘Other ASEAN’ includes Burma, Laos, Cambodia and Brunei Darussalam. ‘Other’ includes Sri Lanka, Maldives, East Timor, Macau, Bhutan, Nepal, Mongolia, Bangladesh and Pakistan.