

IVFR

international visiting friends and relatives



WHY DO THE RESEARCH?

Attempting to access international visitor markets can be very expensive, and Canberra and the ACT have to compete with many destinations for their share of these markets. The domestic Visiting Friends and Relatives (VFR) market is very important for Canberra and the ACT, and access to this market can be facilitated by the friends and relatives who live here. This research was designed to assess what opportunities might exist to access and grow international VFR markets.

WHAT WAS DONE?

Data from the International Visitor Survey (1998-2002) was analysed to identify international visitors to Canberra and the ACT who included 'visiting friends or relatives' as a purpose of visit. Data from the Census of Population and Housing (1996 and 2001) was used to identify potential IVFR markets based on the country of origin of local residents. These results were compared to similar analyses of IVFR markets in Sydney, Melbourne, and regional New South Wales to determine whether Canberra performed better or worse in terms of accessing IVFR markets.

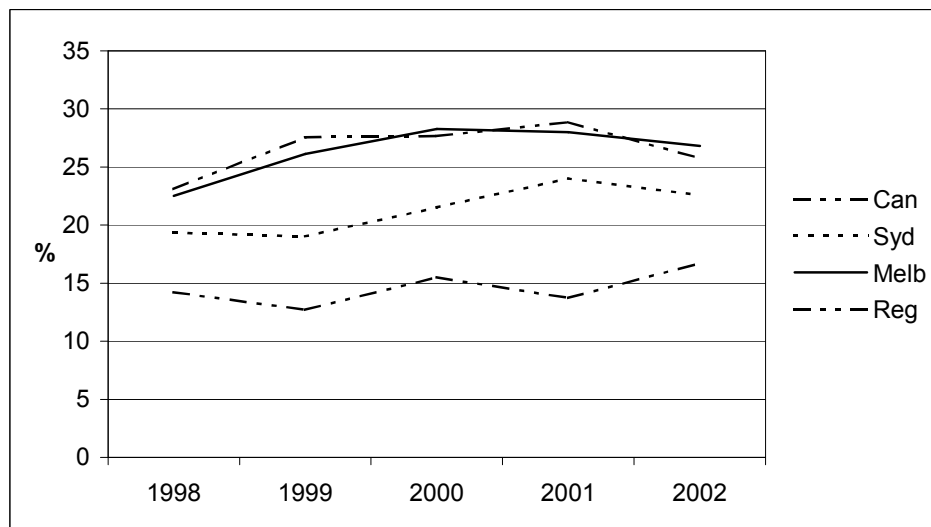


Figure 1: Comparison of VFR Visitors as Percentage of International Visitation

Contact:
Fiona Richards
Research Manager
Australian Capital Tourism
Phone: 02 6205 0696
Fax: 02 6205 0629
E-mail: fiona.richards@act.gov.au
Web: www.visitcanberra.com.au

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WHAT WERE THE RESULTS?

- Canberra and the ACT performed relatively poorly in terms of access to IVFR markets when compared with Sydney and regional New South Wales. 15% of international visitors to Canberra were IVFR in 2002, compared with around 20% in these other destinations;
- The key IVFR markets to Canberra in 2002 were: Canada; the United Kingdom; New Zealand; and the United States of America;

COUNTRY OF ORIGIN	PERCENTAGE OF TOTAL INTERNATIONAL VFR					NUMBER of IVFR (2002)
	1998	1999	2000	2001	2002	
United Kingdom	21.19	13.08	22.92	12.95	26.73	7,803
New Zealand	13.08	5.00	10.10	21.98	15.22	4,441
USA	18.63	9.18	14.48	7.50	9.80	2,861
Canada	10.27	6.69	2.10	3.65	6.35	1,852
Germany	3.06	5.12	8.59	2.67	4.80	1,401
Japan	0.94	3.21	5.50	9.38	5.13	1,496
Malaysia	Na	2.55	2.35	3.92	0.36	104
Hong Kong	1.38	4.94	2.91	1.00	0.95	276
Singapore	1.21	3.14	4.94	0.82	0.67	195
China	0.29	2.06	3.33	2.62	2.11	616
Thailand	1.25	0.86	1.81	1.98	1.65	481
Indonesia	0.61	Na	0.44	Na	2.39	697
Korea	0.48	Na	2.31	0.48	1.13	331
Taiwan	0.27	1.37	1.27	Na	1.30	380
Other Asia	5.16	4.92	8.33	3.31	3.90	1,139
Other Europe	4.27	19.76	4.73	20.92	12.70	3,706
Other Countries	17.92	13.02	3.87	6.82	4.83	1,409
Total	100	100	100	100	100	29,187

- Strong growth in IVFR markets from Asia in the late 1990s (approximately 10,500 visitors in 2000) had declined rapidly in 2001 and 2002 (approximately 5,600 visitors in 2002)
- Approximately 80% of IVFR visitors to Canberra travelled without children;

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- IVFR markets in Canberra tended to not use commercial accommodation, and to undertake fewer activities than other international visitors.

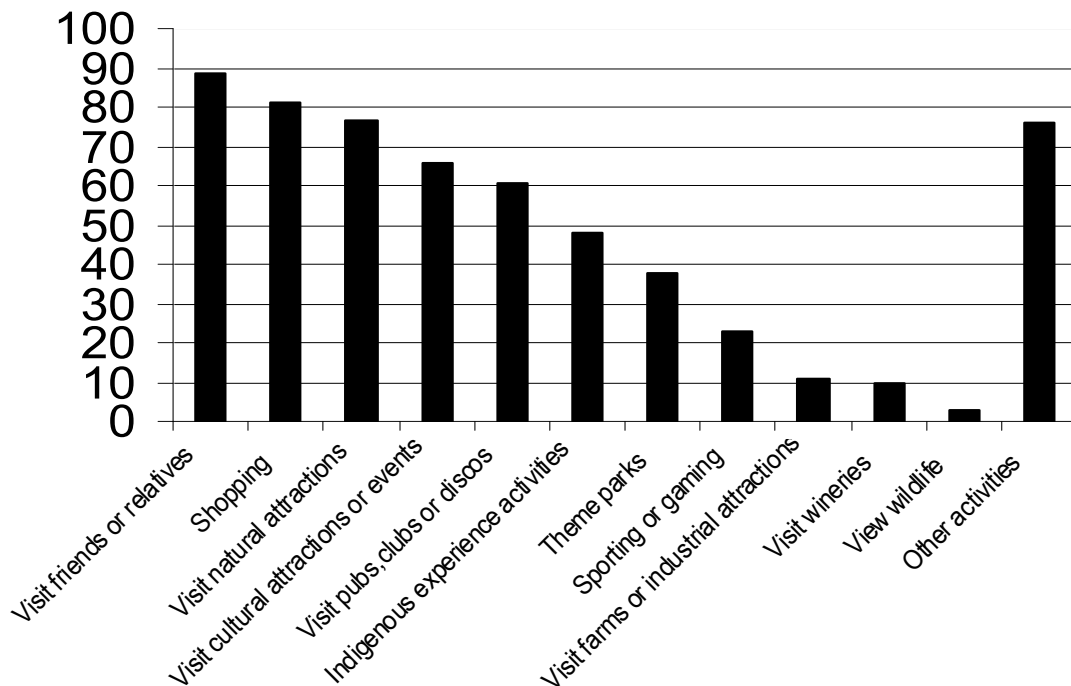


Figure 2: IVFR Participation Rates for Visitors to Canberra in 2002

HOW CAN THE RESULTS BE USED?

- Members of the local community could be encouraged to invite overseas friends and relatives to visit them in Canberra through increasing community knowledge of tours and activities available in the region;
- Australian Capital Tourism can access international markets through campaigns to IVFR in Sydney and, to a lesser extent, Melbourne and regional New South Wales;
- Potential 'friends and relatives' can be targeting in Canberra and Sydney through embassy and other foreign national staff and ex-patriot clubs and associations.
- Repeating this study over time will enable assessment of the success of campaigns targeting IVFR markets.

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