

Tasmanian Tourism Snapshot

Year ending June 2009

Total Visitation to Tasmania

According to the latest results of the Tasmanian Visitor Survey (TVS), Tasmania continues to lead the nation as a domestic travel destination, with the State recording its fourth consecutive period of visitor growth. In the 12 months to June 2009; overall visitor numbers to Tasmania increased by 7% compared to the same period last year, with 907,200 visitors arriving on scheduled air or sea services. Visitors to Tasmania are also staying longer and spending more, with the total number of visitor nights up 10% to 7.86 million nights, the average length of stay up to 8.7 nights, and total spending up 4% to \$1.45 billion. In contrast, the year ending June 2009 results of the National Visitor Survey (NVS) reveal that across Australia, there has been a decline in interstate overnight visitors (-6%), visitor nights (-9%) and visitor spend (-8%).

Tasmania also continues to grow its appeal as a holiday and leisure destination, with holiday visitors accounting for 48% (436,000) of all visitors to the State, an increase of 10% on the previous year. In addition, despite the impact of the Global Financial Crisis, the June 2009 quarter showed signs of a rebounding business travel sector for Tasmania. Travel to Tasmania for business purposes was up 19% on the same quarter last year, with the conference and convention sector reporting growth of 17% for the quarter ending June 2009. These results signal a strong performance for Tasmania and the tourism industry, which continues to show its resilience in a volatile global economy, and its ability to respond to the demands of a dynamic tourism market.

Interstate Visitation (Tasmanian Visitor Survey)

There was a 4% growth in the number of people from interstate who visited Tasmania in the year ending June 2009, resulting in 775,900 interstate visitors to the State. The increase was driven by strong growth in the number of interstate holiday visitors (+7%) to the State, while travel for VFR¹ purposes increased only marginally (+1%), resulting in an increase in leisure² visitation of 5%. Convention/conference visitation increased 24% (29,700) in comparison with the year ending June 2008, while business visitor numbers declined 5% to 134,700, despite a strong performance in the June quarter 2009.

Interstate visitor nights increased 4% to 6.3 million, while the average length of stay of interstate visitors remained unchanged from the previous year at 8.1 nights. The average stay of interstate holiday visitors increased marginally to 9.0 nights (was 8.9 nights). Expenditure by interstate visitors remained steady at \$1.23 billion in the year ending June 2009. The average spend by each interstate visitor declined to \$1,585 (was \$1,647) while the average spend per night decreased to \$195 (was \$202). The average spend per interstate holiday visitor was \$2,575, down from \$2,437 (-5%) compared with the year ending June 2008.

While visitors from Victoria continue their strong growth in number to increase 7% (362,100), it was the number of visitors from New South Wales that has rebounded after a soft period during 2008 to increase by 30% to 174,100 in the year ending June 2009. Visitor numbers from the other states declined including Queensland (QLD) (-2%), South Australia (-25%), Western Australia (-22%) and the Australian Capital Territory (-11%). The bulk of these declines came from holiday visitors, particularly during the June quarter 2009. Visitor numbers from QLD have remained relatively steady during the year to June 2009, despite the loss of a direct flight between Hobart and Brisbane from July 2008.

¹ VFR – Visiting friends and/or relatives

² Leisure Visitation – visitation for holiday or VFR purposes.

International Visitation (International Visitor Survey)

International tourism demand for Australia has fallen further due to the impact of the global economic recession. International visitor numbers into Australia declined marginally (-1%) over the year to June 2009, leaving the overall volume at the lowest level recorded in two years. Following the national trend, Tasmania recorded a 4% decline in international visitors over the year to June 2009 with 149,500 international travellers visiting the State during the period. Consequently Tasmania's share of all international visitors to Australia dropped marginally from 3.0% to 2.9%. Total visitor nights stayed in the State also decreased over the year, down 7% to 2.85 million nights. Total spend by international visitors increased 3% over the year to \$253 million, marking a return to positive growth after the reduction posted in the year ending March 2009. With fewer international arrivals staying for shorter periods, but spending more, the average spend per visitor and per night in the year to June 2009 in Tasmania grew to \$1,692 (+8%) and \$94 (+17%) respectively.

In contrast to the decline in international holiday travel into Australia (-5%), the number of international holiday visitors to Tasmania remained unchanged from the previous year, the first optimistic result after three consecutive negative quarterly results. Tasmania weathered the national holiday decline better than any other State in Australia, with all states/territories (except Tasmania) recording a decrease in international holiday visitors.

Visitors from Asia, Europe, North America, and the United Kingdom (UK) remain Tasmania's largest sources of international visitors during the year to June 2009. Increases were recorded in visitors from New Zealand (+8%), Hong Kong (+15%), Singapore (+29%), Malaysia (+18%), Indonesia and Taiwan (+128%). However, these increases were offset by declines out of Japan (-34%), Korea (-59%) and China (-35%), and hence a key influence in the fall in total international visitors to Tasmania.³ Similarly, after two consecutive quarters of positive growth, there were decreases out of the UK (-2%) and the USA (-2%). Despite fewer visitors, the UK (+15%) and the USA (+22%) each recorded a significant increase in the total spend of international visitors in the State, along with visitors from New Zealand (+25%).

Intrastate Visitation (National Visitor Survey)

Total trips (5.2 million) taken by Tasmanians in their home state remained stable in the year to June 2009 compared with the previous year. This was due to an increase in day trips (+4%), while the number of overnight trips taken by Tasmanians in the State decreased by 14% over the period. Most of the decline in overnight intrastate travel was from the holiday (-9%) and VFR (-26%) markets, yet an increase in overnight business travel (+6%) helped offset a greater decline in overnight travel. The increase in Tasmanians undertaking day travel in the State was a result of growth in the VFR (+2%), business (+15%) markets in particular.

Along with a decrease in visitor numbers (-14%) and nights (-18%), the total spend of overnight intrastate visitors also decreased to \$281 million (-12%). Total day travel expenditure reached \$417 million in the year to June 2009, up 12% on the previous year.

Cruise and Navy Ship Visitation

The 2008-09 Tasmanian cruise ship season commenced at the start of November 2008 and finished in early April 2009. During that time there were over 105,400 cruise ship passengers and crew who visited the State, an increase of 27% or 22,400 more visitors than the 2007-08 cruise ship season. Around 70% of cruise ship visitors

³ Note: Individual country visitor numbers are based on relatively small estimates and as a consequence percentage changes from year to year can be quite volatile.

were passengers and 30% were crew members. Of the visitors surveyed by Tourism Tasmania 75% were from overseas, of which 36% were from the USA and 12% from the United Kingdom. In addition to cruise ship visitors, there were 1,460 navy ship passengers that came to Tasmania in the year to June 2009, a decrease from the previous year (4,190).

Marketing Performance (Holiday Tracking Survey)

Without any prompting on advertising for holidays and travel, 16.2% of all Australians (interstate and intrastate residents) had read, seen or heard some form of Tasmanian holiday/travel advertising in the year ending June 2009, down from 17.0% of all Australians recorded in the previous year. Tasmania had the second highest level of prompted advertising awareness for the year at 28.2%, following Queensland (51.7%).

When asked where you would like to go on holidays in the next two years, 17.6% of all Australians had a preference to travel to/within Tasmania an increase of 0.4% on the previous year, whilst 4.6% of all Australians intended to travel to/within the State in the next two years (down from 4.7% to the year ending June 2008). An estimated 12.2% of all Australians indicated they had an awareness of Tasmania's current advertising tagline 'Island of Inspiration', launched in January 2007.

Interstate Visitors to Tasmania

	12 months ending June 08	12 months ending June 09	% Change
Interstate Visitor numbers			
Day visitors	17,200	14,800	▼ -14%
Overnight visitors	727,200	761,000	▲ 5%
Total visitors	744,300	775,900	▲ 4%
Interstate Nights			
Total nights	6,055,300	6,304,300	▲ 4%
Average length of stay (nights)	8.1	8.1	► 0%
Expenditure (\$'000s)			
All expenditure	\$1,225,800	\$1,229,500	► 0%
Average spend per visitor	\$1,647	\$1,585	▼ -4%
Average spend per night	\$202	\$195	▼ -4%
Market Share *			
Visitor market share	3.7%	3.7%	►
Nights market share	4.9%	4.9%	►
Expenditure market share	5.1%	4.9%	▼
Mode of departure			
Air visitors	630,100	659,700	▲ 5%
Sea visitors	114,200	116,200	▲ 2%
Purpose for visiting Tasmania			
Holiday	327,900	351,000	▲ 7%
Visit friends or relatives (VFR)	213,500	215,900	▲ 1%
Total Leisure (Holiday & VFR)	541,400	567,000	▲ 5%
Business or employment	142,300	134,600	▼ -5%
Convention / conference / seminar	23,900	29,700	▲ 24%
Event / festival (incl sporting event)	22,900	31,300	▲ 37%
Some other	5,000	7,200	▲ 44%
No Response	8,800	6,200	▼ -30%
Total interstate visitors to Tasmania	744,300	775,900	▲ 4%

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Market share source: National Visitor Survey, Tourism Research Australia

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

Interstate Visitors to Tasmania

Table 2. Origin of Interstate Visitors to Tasmania

State of origin	All Visitors			Leisure Visitors (Holiday + VFR)*		
	12 months ending June 08	12 months ending June 09	% Change	12 months ending June 08	12 months ending June 09	% Change
Victoria	338,100	362,100	▲ 7%	238,700	262,800	▲ 10%
N.S.W.	133,900	174,100	▲ 30%	102,700	129,200	▲ 26%
Queensland	115,500	113,100	▼ -2%	92,900	86,400	▼ -7%
South Australia	61,500	46,000	▼ -25%	47,400	35,300	▼ -26%
Western Australia	51,500	40,100	▼ -22%	39,000	31,700	▼ -19%
A.C.T.	19,900	17,800	▼ -11%	12,300	12,500	▲ 2%
N.T.	5,000	5,700	▲ 14%	3,900	4,400	▲ 13%
Australia - no state given	19,000	17,100	▼ -10%	4,400	4,600	▲ 5%
Total interstate visitors to Tasmania	744,300	775,900	▲ 4%	541,400	567,000	▲ 5%

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

Table 3. Origin of Interstate Visitor Nights

State of origin	All Nights			Leisure Nights (Holiday + VFR)*		
	12 months ending June 08	12 months ending June 09	% Change	12 months ending June 08	12 months ending June 09	% Change
Victoria	2,209,100	2,133,100	▼ -3%	1,557,100	1,614,300	▲ 4%
N.S.W.	1,115,100	1,474,500	▲ 32%	931,600	1,192,700	▲ 28%
Queensland	1,254,700	1,298,400	▲ 3%	1,045,400	1,063,700	▲ 2%
South Australia	527,900	433,800	▼ -18%	426,100	342,500	▼ -20%
Western Australia	569,900	579,300	▲ 2%	468,600	421,800	▼ -10%
A.C.T.	141,300	148,700	▲ 5%	109,200	115,300	▲ 6%
N.T.	58,000	77,000	▲ 33%	48,700	63,100	▲ 30%
Australia - no state given	179,400	159,500	▼ -11%	56,600	61,300	▲ 8%
Total interstate visitors to Tasmania	6,055,300	6,304,300	▲ 4%	4,643,200	4,874,600	▲ 5%
Average Length of Stay (nights)	8.1	8.1	► 0%	8.6	8.6	► 0%

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

Interstate Visitors to Tasmania

Table 4. Origin of Interstate Visitor Expenditure

State of origin	All Expenditure			Leisure Expenditure (Holiday + VFR)*		
	12 months ending June 08	12 months ending June 09	% Change	12 months ending June 08	12 months ending June 09	% Change
	(\$'000s)					
Victoria	\$436,400	\$485,500	▲ 11%	\$356,600	\$400,500	▲ 12%
N.S.W.	\$243,300	\$309,900	▲ 27%	\$210,400	\$255,700	▲ 22%
Queensland	\$271,000	\$213,600	▼ -21%	\$224,000	\$183,800	▼ -18%
South Australia	\$90,800	\$86,500	▼ -5%	\$78,800	\$76,100	▼ -3%
Western Australia	\$128,600	\$85,100	▼ -34%	\$104,300	\$69,600	▼ -33%
A.C.T.	\$27,200	\$27,600	▲ 1%	\$22,400	\$24,600	▲ 10%
N.T.	\$9,400	\$11,000	▲ 17%	\$8,100	\$7,300	▼ -10%
Australia - no state given	\$19,200	\$10,300	▼ -46%	\$6,500	\$6,400	▼ -2%
Total interstate visitors to Tasmania	\$1,225,800	\$1,229,500	► 0%	\$1,011,100	\$1,023,900	▲ 1%
Average spend per visitor	\$1,647	\$1,585	▼ -4%	\$1,867	\$1,805	▼ -3%
Average spend per night	\$202	\$195	▼ -4%	\$218	\$210	▼ -4%

Source: Tasmanian Visitor Survey, Tourism Tasmania

* Leisure Visitors: Visitors whose main purpose of visit is for a holiday or to visit friends and relatives

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

International Visitors to Tasmania

	12 months ending June 08	12 months ending June 09	% Change	
International visitors	155,900	149,500	▼	-4
International nights	3,057,400	2,851,600	▼	-7
Average Length of Stay (nights)	20	19	▼	-3
Expenditure - <u>excluding</u> package expenditure (\$million)	\$245	\$253	▲	3
Expenditure - <u>including</u> package expenditure (\$million)	\$258	\$268	▲	4
Average expenditure per visitor ¹	\$1,572	\$1,692	▲	8
Average expenditure per night ¹	\$80	\$94	▲	17
Market Share				
Visitors	3.0%	2.9%	▼	
Nights	1.9%	1.6%	▼	
Expenditure ¹	1.6%	1.6%	►	
International Purpose of visit ²				
Holiday	106,500	106,600	►	0
Visit friends or relatives	32,200	28,000	▼	-13
Business	19,400	12,100	▼	-38
Education	9,200	7,800	▼	-15
Employment	1,900	3,000	▲	58
Other reason	1,000	3,600	▲	260
Total international visitors	155,900	149,500	▼	-4

Source: International Visitor Survey, Tourism Research Australia

¹ Average spend per visitor, spend per night and expenditure market share is calculated using expenditure excluding package spend

² Sum of components for Tasmania may be greater than the total as a visitor can give more than one reason for visiting Tasmania.

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

International Visitors to Tasmania

Table 6. Origin of international visitors to Tasmania

Country of residence	Visitors		
	12 months ending June 08	12 months ending June 09	% Change
United Kingdom	27,100	26,500	▼ -2
New Zealand	14,700	15,900	▲ 8
Total Asia:	43,200	40,500	▼ -6
Japan	8,800	5,800	▼ -34
Other Asia	34,400	34,700	▲ 1
North America:	30,100	28,600	▼ -5
USA	20,500	20,200	▼ -1
Canada	9,500	8,400	▼ -12
Total Europe:	32,800	30,200	▼ -8
Germany	8,800	8,800	► 0
Other Europe	24,000	21,300	▼ -11
Other Countries	8,100	7,700	▼ -5
Total international visitors	155,900	149,500	▼ -4

Source: International Visitor Survey, Tourism Research Australia

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

Table 7. International visitor nights spent in Tasmania

Country of residence	Nights					
	12 months ending June 08	12 months ending June 09	% Change	Average Stay Jun 08	Average Stay Jun 09	
United Kingdom	363,000	365,700	▲ 1	13.4	13.8	▲
New Zealand	146,600	231,300	▲ 58	10.0	14.5	▲
Total Asia:	1,480,100	1,378,800	▼ -7	34.3	34.0	▼
Japan	303,300	156,900	▼ -48	34.5	27.1	▼
Other Asia	1,176,800	1,221,900	▲ 4	34.2	35.2	▲
North America:	308,900	251,400	▼ -19	10.3	8.8	▼
USA	180,100	151,700	▼ -16	8.8	7.5	▼
Canada	128,800	99,700	▼ -23	13.6	11.9	▼
Total Europe:	528,800	440,800	▼ -17	16.1	14.6	▼
Germany	168,000	175,200	▲ 4	19.1	19.9	▲
Other Europe	360,800	265,600	▼ -26	15.0	12.5	▼
Other Countries	230,000	183,600	▼ -20	28.4	23.8	▼
Total international visitors	3,057,400	2,851,600	▼ -7	19.6	19.1	▼

Source: International Visitor Survey, Tourism Research Australia

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

International Visitors to Tasmania

Table 8. Expenditure of international visitors in Tasmania

Country of residence	Expenditure									
	12 months	12 months	% Change	Average spend per visitor Jun 08	Average spend per visitor Jun 09	Average spend per night Jun 08	Average spend per night Jun 09			
	ending June 08	ending June 09						\$million	\$million	\$
United Kingdom	\$26	\$30	▲	15	\$959	\$1,132	▲	\$72	\$82	▲
New Zealand	\$16	\$20	▲	25	\$1,088	\$1,258	▲	\$109	\$86	▼
Total Asia:	np	np	np	np	np	np	np	np	np	np
Japan	\$14	\$11	▼	-21	\$1,591	\$1,897	▲	\$46	\$70	▲
Other Asia	np	np	np	np	np	np	np	np	np	np
North America:	\$28	\$28	►	0	\$930	\$979	▲	\$91	\$111	▲
USA	\$18	\$22	▲	22	\$878	\$1,089	▲	\$100	\$145	▲
Canada	\$10	\$6	▼	-40	\$1,053	\$714	▼	\$78	\$60	▼
Total Europe:	np	np	np	np	np	np	np	np	np	np
Germany	\$11	\$10	▼	-9	\$1,250	\$1,136	▼	\$65	\$57	▼
Other Europe	\$5	np	np	np	np	np	np	np	np	np
Other Countries	\$19	\$17	▼	-11	\$2,346	\$2,208	▼	\$83	\$93	▲
Total international visitors	\$245	\$253	▲	3	\$1,572	\$1,692	▲	\$80	\$89	▲

Source: International Visitor Survey, Tourism Research Australia

n.p. not published due to data reliability

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

Intrastate Travel in Tasmania

	12 months ending June 08	12 months ending June 09		% Change
Intrastate Visitors ('000s)				
Day Visitors	4,125	4,283	▲	4
Overnight Visitors	1,160	1,000	▼	-14
Total intrastate visitors	5,285	5,283	►	0
Intrastate Nights ('000s)				
Total Nights	2,980	2,445	▼	-18
Average Length of Stay (nights)	2.6	2.4	▼	-5
Intrastate Expenditure				
Expenditure (\$million)	\$318	\$281	▼	-12
Average spend per overnight visitor	\$274	\$281	▲	3
Average spend per night	\$107	\$115	▲	8
Overnight Intrastate Market Share				
Visitors	2.3%	2.2%	▼	-4
Nights	2.0%	1.7%	▼	-15
Expenditure	1.7%	1.6%	▼	-6
Purpose of Overnight Trip ('000s)				
Holiday	570	517	▼	-9
Visit friends or relatives	343	253	▼	-26
Business	178	188	▲	6
Other	74	40	▼	-46
Total Overnight Intrastate Visitors	1,160	1,000	▼	-14

Source: National Visitor Survey, Tourism Research

Intrastate travel refers to travel undertaken in Tasmania by Tasmanian residents

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

Intrastate Travel in Tasmania

	12 months ending June 08	12 months ending June 09	% Change	
Intrastate Day Visitors ('000s)	4,125	4,283	▲	4
Intrastate Day Trip Expenditure (\$million) ¹	\$373	\$417	▲	12
Average spend per day visitor	\$90	\$97	▲	8
Intrastate Day Trip Market Share:				
Visitors	3.1%	3.2%	▲	3
Expenditure	2.6%	2.9%	▲	12
Purpose of Intrastate Day Trip ('000s)				
Holiday	2,272	2,282	▲	0
Visit friends or relatives	999	1,015	▲	2
Business	413	476	▲	15
Other	441	511	▲	16
Total Day Trip Intrastate Visitors	4,125	4,283	▲	4

Source: National Visitor Survey, Tourism Research Australia

Intrastate travel refers to travel undertaken in Tasmania by Tasmanian residents

1. Expenditure consists of 1% interstate and 99% intrastate expenditure

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

Marketing Performance

	12 months ending June 08	12 months ending June 09	% pt change	
¹ Advertising Awareness (Unprompted)	16.5	15.9	▼	-1
¹ Advertising Awareness (Prompted)	31.4	27.4	▼	-4
⁴ Preference to visit Tasmania	16.7	16.9	▲	0.2
³ Intention to visit Tasmania	4.1	4.0	▼	-0.1
⁴ Behaviour	3.9	4.1	▲	0.2
⁵ Tagline Awareness - 'Island of Inspiration'	12.9	12.0	▼	-0.9

	12 months ending June 08	12 months ending June 09	% pt change	
¹ Advertising Awareness (Unprompted)	35.5	30.1	▼	-5.4
¹ Advertising Awareness (Prompted)	65.7	60.8	▼	-4.9
⁴ Preference to visit Tasmania	37.2	43.3	▲	6.1
³ Intention to visit Tasmania	27.0	31.6	▲	4.6
⁴ Behaviour	42.9	43.0	▲	0.1
⁵ Tagline Awareness - 'Island of Inspiration'	24.8	21.2	▼	-3.6

	12 months ending June 08	12 months ending June 09	% pt change	
¹ Advertising Awareness (Unprompted)	17.0	16.2	▼	-0.8
¹ Advertising Awareness (Prompted)	32.2	28.2	▼	-4.0
⁴ Preference to visit Tasmania	17.2	17.6	▲	0.4
³ Intention to visit Tasmania	4.7	4.6	▼	-0.1
⁴ Behaviour	4.8	5.0	▲	0.2
⁵ Tagline Awareness - 'Island of Inspiration'	13.2	12.2	▼	-1.0

Source: Holiday Tracking Survey, Roy Morgan Research

¹ Advertising Awareness - Percentage of Australians with un-prompted & prompted advertising awareness for holidays in Tasmania.

² Preference - Percentage of Australians that would like to visit Tasmania in the next 2 years.

³ Intention - Percentage of Australians planning or intending to visit Tasmania on their next trip.

⁴ Behaviour - Percentage of Australians that visited Tasmania in the last 12 months.

⁵ Tagline Awareness - Percentage of Australians with an awareness of Tasmania's advertising tagline "Island of Inspiration" launched in Jan 07.

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

Cruise and Navy Visitors

Table 14. Cruise and Navy Ship visitors to Tasmania

	12 months ending June 08	12 months ending June 09	% Change	
Cruise ship visitors (passengers and crew)*	83,000	105,400	▲	27
Navy ship visitors**	4,190	1,460	▼	-65

*Source: Tasmanian Ports Corporation

**Source: Navy Headquarters - Tasmania

▲ Increase on year ending June 08, ▼ Decrease on year ending June 08, ► No change on year ending June 08

Where do the statistics come from?

The primary sources of information on visitors to Tasmania published in this document are:

- Tasmanian Visitor Survey (Tourism Tasmania) for interstate visitor figures;
- International Visitor Survey (Tourism Research Australia) for international visitor figures;
- National Visitor Survey (Tourism Research Australia) for intrastate visitor figures (travel by Tasmanians in Tasmania);
- Holiday Tracking Survey (Roy Morgan Research) for information on Tasmania's marketing performance and preference and intention of Australians to visit Tasmania;

For further information please contact:

Research Unit, Tourism Tasmania, Email: statistics@tourism.tas.gov.au, Ph: (03) 62308231