



INTERNATIONAL VISITORS IN AUSTRALIA

YEAR ENDING DECEMBER 2018

VISITORS ▲5%
8.5 MILLION

NIGHTS ▲4%
274 MILLION

SPEND ▲7%
\$43.9 BILLION

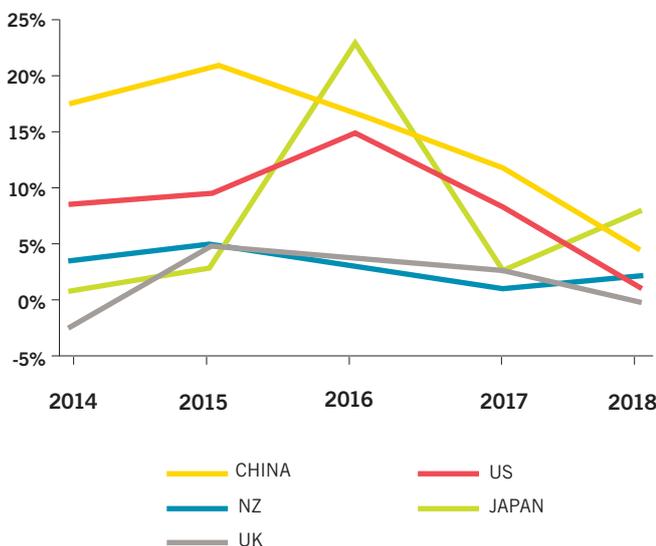
International visitation recorded solid growth during the year ending December 2018, with visitor arrivals for those aged 15 years and over up 5% to 8.5 million, and spend increasing 7% to reach \$43.9 billion.

TOP FIVE MARKETS

There were mixed results for arrivals from our top five markets during the year:

- China continued as the top market with 1.3 million visitors and spend of \$11.7 billion, an increase of 5% and 13%, respectively. While China has continued to grow, the rate of growth has been slowing.
- New Zealand remained the second largest market with 1.3 million visitors, up 2%, while spend increased to \$2.6 billion, up 4%.
- Japan recorded the strongest growth of the top five markets, with arrivals up 8% to 434,000 and spend up 11% to \$2 billion.
- The US market has seen softer results, recording 744,000 arrivals and spend of \$3.8 billion, increases of 1% and 2%, respectively.
- The UK's arrival numbers remained steady at 688,000, while spend fell 1% to \$3.4 billion.

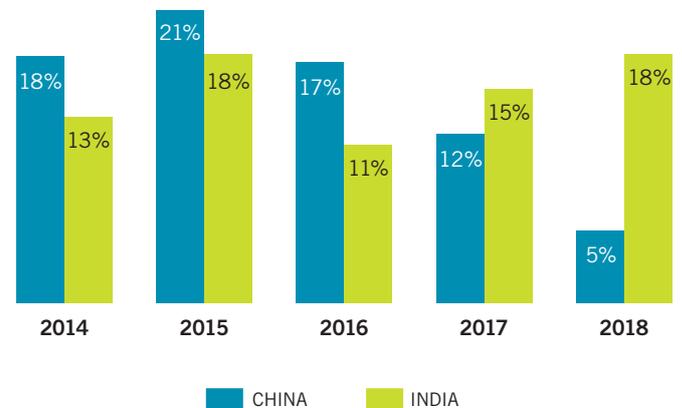
FIGURE 1: ANNUAL VISITOR GROWTH OF TOP FIVE MARKETS



OTHER MARKETS

India continues to be the strongest performing market, with arrivals up 18% to 336,000 and spend up 21% to \$1.7 billion. Arrivals from India for the purpose of visiting friends and relatives and education underpinned this growth, increasing 30% and 17%, respectively. These types of travellers are also more likely to stay longer - they contributed to a 30% increase in Indian nights for the year, which reached 20.5 million.

FIGURE 2: GROWTH IN CHINESE AND INDIAN VISITORS



Taiwan recorded strong growth with both visitor arrivals and spend increasing by 12% to reach 186,000 and \$1 billion respectively. Visitor arrivals from Hong Kong increased 9% to reach 280,000, while spend was up 5% to \$1.3 billion.

In terms of traditional markets, Canada experienced strong growth with a 9% increase in visitors to reach 172,000, while spend increased 10% to \$855 million. There was also strong growth in visitation from France, with visitor arrivals up 10% to 135,000 and spend up 13% to \$833 million.



AGE

The majority of the growth seen during the year was the result of increases in the number of older travellers. Ninety-three per cent of the growth in visitors was from increased travel by those aged 30 and over up by 6% (an additional 362,000 visitors). In contrast, visitors aged 15-29 only grew by 1% (an additional 26,000 visitors).

FIGURE 3: SHARE OF GROWTH BY AGE

AGE	GROWTH
 15-29	1%
 30-44	6%
 45-59	8%
 60+	4%
 TOTAL	5%

PURPOSE OF TRAVEL

During the year ending December 2018, the number of international visitors aged 15 years and over travelling to Australia for the purpose of business and education both increased by 7% to reach 996,000 and 577,000, respectively. Business travellers contributed \$4.2 billion in spend during the year, an increase of 11%, while education spend rose 17% to reach \$12.6 billion. Education accounts for 29% of all trip spend by international visitors.

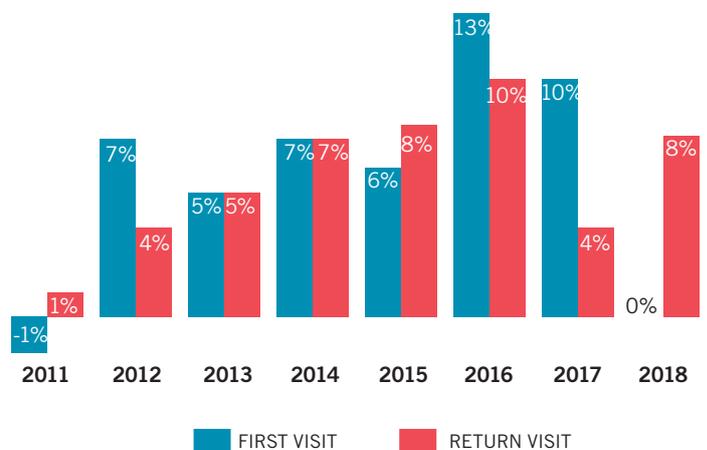
There was also solid growth in the number of visitors arriving for a holiday or to visit friends and relatives. Holiday visitors increased by 4% during the year to reach 3.9 million, spending a total of \$16.4 billion, up 5%. Those visiting friends and relatives grew 6% to reach 2.6 million, and spent a total of \$7.5 billion, up 7%.

OTHER KEY FACTS

The number of backpackers fell 4% during the year to 605,000.

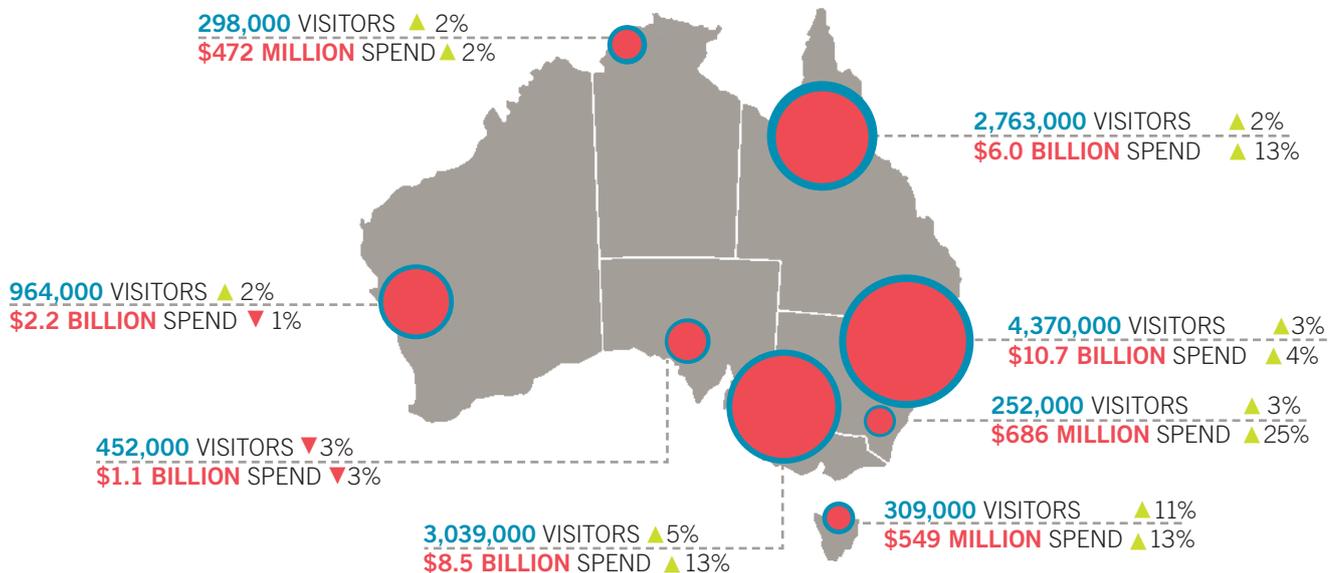
Growth in first-time visitors has slowed, with numbers remaining steady at 3.1 million. This is the lowest result since 2011 when the number fell by 1%. In contrast, repeat visitors increased by 8% to reach 5.4 million.

FIGURE 4: PER CENT CHANGE IN FIRST VERSUS REPEAT VISITATION



The fastest growing travel groups were business associates travelling together, where arrivals increased by 15% to reach 308,000, and family travelling together, which increased 13% to 1.1 million visitors.

FIGURE 5*: INTERNATIONAL VISITOR NUMBERS AND SPEND BY STATE, YE DECEMBER 2018



* Total number of visitors by state will be greater than total number of visitors for Australia