Australian Government
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TOURISM RESEARCH AUSTRALIA

# INTERNATIONAL VISITORS IN AUSTRALIA

YEAR ENDING DECEMBER 2019

| VISITORS ▲2% | NIGHTS ▶0% | SPEND ▲3% |
|---|---|---|
| 8.7 MILLION | 274 MILLION | $45.4 BILLION |

Note these results pre-date the major impacts on travel behaviour from the recent Australian bushfires and COVID-19 (novel coronavirus).

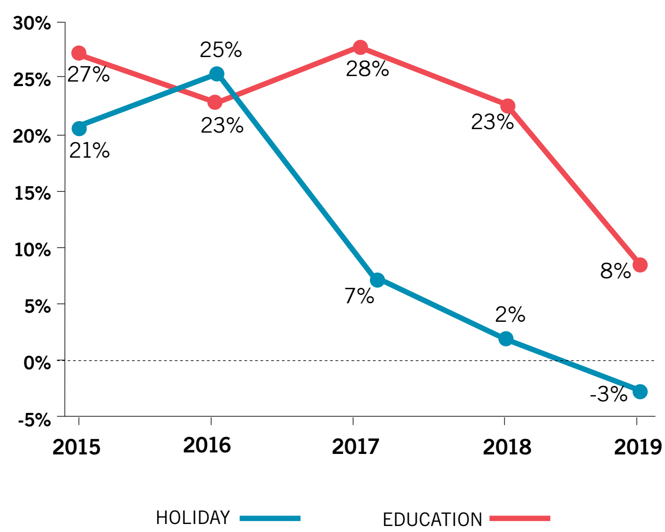
Australia continued to see record numbers of international visitors over 2019. There were 8.7 million visitor arrivals (aged 15 years and over), 2% more than the previous year. This supported a 3% growth in total trip spend, which reached a record $45.4 billion.

## TOP FIVE MARKETS

Our top 5 markets to Australia saw mixed results for the year. Growth for Japan remained strong with a boost to both visitation by 6% (458,000) and spend by 7% ($2.1 billion). The United States had solid gains of 3% for both visitors (767,000) and spend ($3.9 billion). There was also a 3% increase in visitors from New Zealand (1.3 million) and a moderate rise of 1% in their spend ($2.6 billion).

Despite double-digit percentage growth over much of the last decade, China saw a plateau in visitation over the year with numbers remaining steady at 1.3 million. This was largely due to a decline in holiday visitation which fell by 3% (or 22,000 visitors) over the last year (Figure 1). Despite this, spend from China increased by 6% to $12.4 billion due mainly to continued growth in high spending Chinese students (up 8%).

### FIGURE 1: GROWTH RATES FOR CHINESE HOLIDAY & EDUCATION VISITORS



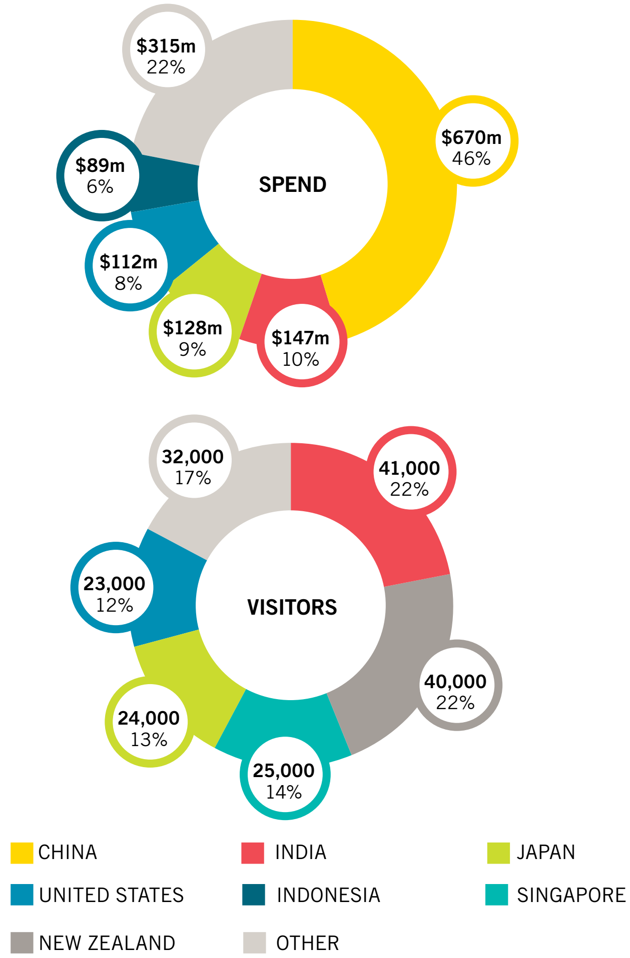

The United Kingdom continued to see a drop in visitors (672,000) and spend ($3.4 billion) over the year, both down 2%.

## GROWTH MARKETS

Growth in international tourism to Australia has come predominantly from our Asian neighbours. Asia contributed 88% of the additional $1.5 billion in tourism spend gained in 2019 and 69% of the 185,000 visitor increase.

The Asian markets contributing most to growth in spend were China, India, Japan and Indonesia (Figure 2). The leading Asian markets for visitor growth were India, Singapore and Japan, while the United States and New Zealand were the main contributors outside of Asia.

### FIGURE 2: TOP CONTRIBUTORS TO GROWTH IN 2019



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## PURPOSE OF TRAVEL

There was growth in visitation across all purposes of travel over the year. Leading the way was employment, up 4% to 212,000 visitors; and education and holiday travel up 3% to 594,000 and 4 million visitors respectively. This was complemented by strong growth in spend, with employment up 7% to $2.1 billion; education up 6% to $13.3 billion; and holiday up 5% to $17.2 billion. In contrast, business travel saw spend drop by 4% to $4.1 billion.

## HOLIDAY ACTIVITIES OF VISITORS BY ORIGIN

The most popular activities undertaken by holiday visitors to Australia were eating out (91%), shopping (81%), sightseeing (80%) and going to the beach (71%). Looking deeper, however, participation rates differed by visitor origin for a number of activities (Table 1).

Asian visitors were big on shopping, with the highest participation rate of all visitors. They also enjoyed going to the beach and markets, visiting national parks or botanical gardens, and seeing Australian wildlife and historical buildings and sites. However, they were less likely to participate in more physical and adventurous activities, such as bush walking and snorkelling. This may be due to their greater tendency to travel on a group tour (23% compared with 3% for others) which may allow less freedom to venture. They were also far less likely to visit pubs and clubs than other visitors.

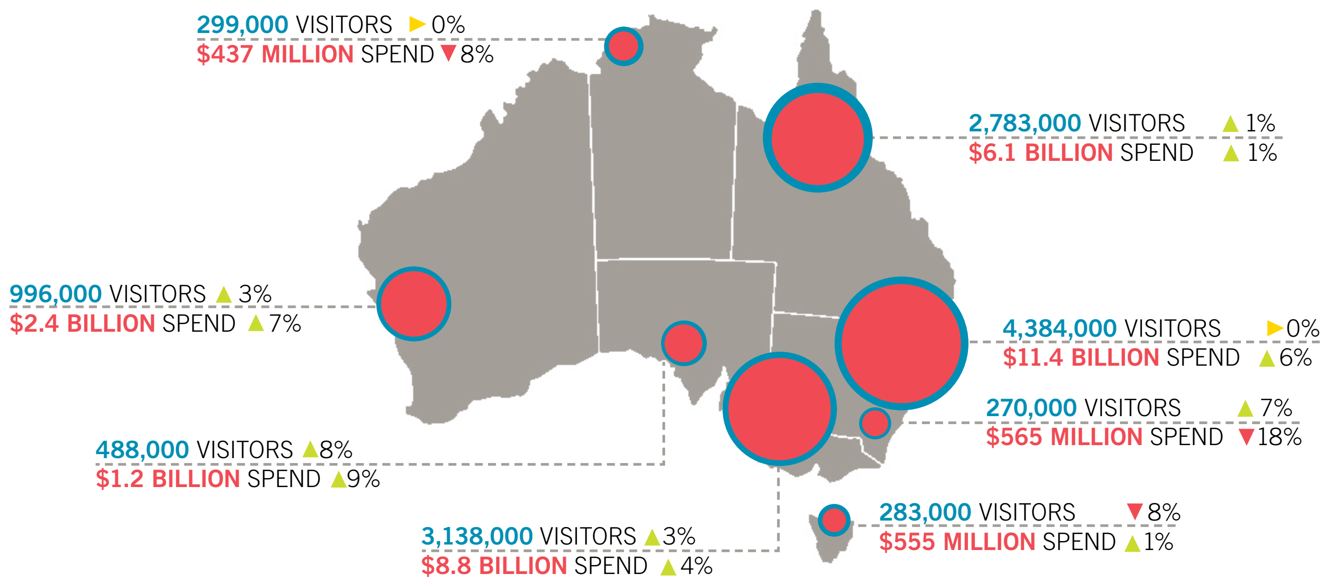
North American and European (incl. UK) visitors were the most adventurous holiday makers, with higher participation rates across most activities. They too engaged in activities enjoyed by our Asian visitors, although they were much more likely to visit museums and art galleries, and to go bushwalking and snorkelling. These visitors dispersed regionally more often (Europeans 54%, North Americans 40%, compared to other countries 27%) and Europeans tended to have a longer length of stay (40 nights on average, compared to 21 nights for all visitors). This provides more opportunity for participation in a variety of activities.

New Zealand visitors tended to participate in similar activities to Australian locals. Apart from the popular activities, they were more inclined to visit pubs and clubs and go to markets than other activities. This can be linked to their tendency to visit Australia more frequently, with most (77%) having visited three times or more, and to have shorter visits (9 days on average) given their proximity to Australia.

### TABLE 1: HOLIDAY VISITOR PARTICIPATION RATES IN SELECTED ACTIVITIES BY ORIGIN

| ACTIVITY | ASIA | NORTH AMERICA | EUROPE | NZ |
|---|---|---|---|---|
| EATING OUT | 91% | 89% | 92% | 91% |
| SHOPPING | 87% | 69% | 75% | 77% |
| SIGHTSEEING | 80% | 85% | 86% | 72% |
| GOING TO THE BEACH | 72% | 70% | 84% | 58% |
| VISITING NATIONAL PARKS | 59% | 57% | 72% | 28% |
| GOING TO MARKETS | 50% | 47% | 55% | 39% |
| VISITING BOTANICAL GARDENS | 43% | 50% | 63% | 24% |
| VISITING WILDLIFE | 49% | 51% | 47% | 22% |
| VISITING HISTORICAL BUILDINGS & SITES | 41% | 48% | 47% | 20% |
| VISITING MUSEUMS, GALLERIES | 33% | 40% | 45% | 24% |
| GOING TO PUBS & CLUBS | 16% | 44% | 63% | 50% |
| BUSHWALKING | 23% | 35% | 49% | 18% |
| SNORKELLING | 6% | 23% | 30% | 3% |
| SURFING | 2% | 7% | 15% | 1% |

### FIGURE 3*: INTERNATIONAL VISITOR NUMBERS AND SPEND BY STATE, YE DECEMBER 2019




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