

Year ending June 2015

International Visitors to Australia

	Visitors	Annual change ¹	Avg Stay ²	Annual change
Holiday	3,476,000	7.6% ▲	21.5	(-1.8%) ▼
NZ	461,000	4.2%	8.9	(-3.3%)
Asia ³	1,607,000	10.7%	17.9	(-4.3%)
North America ⁴	360,000	8.2%	18.7	16.1%
Europe ⁵	511,000	4.3%	39.1	(-9.3%)
UK	351,000	0.4%	33.3	16.8%

VFR ⁶	2,498,000	4.2% ▲	24.3	2.5% ▲
NZ	522,000	3.4%	10.6	1.0%
Asia	927,000	9.2%	34.2	10.3%
North America	233,000	4.3%	18.4	(-2.6%)
Europe	269,000	2.4%	20.9	(-18.0%)
UK	367,000	(-3.3%)	21.9	(-3.5%)

Business	869,000	2.1% ▲	12.3	0.8% ▲
NZ	207,000	1.3%	6.1	(-7.6%)
Asia	321,000	2.4%	13.9	7.8%
North America	136,000	6.6%	12.6	(-8.7%)
Europe	90,000	(-4.2%)	16.6	(-7.3%)
UK	58,000	(-3.7%)	19.6	14.0%

TOTAL ⁷	6,470,000	6.6% ▲	36.3	1.7% ▲
NZ	1,129,000	3.8%	14.1	6.0%
Asia	2,882,000	9.9%	41.2	3.0%
North America	658,000	7.9%	27.1	5.9%
Europe	750,000	2.0%	51.3	(-8.1%)
UK	622,000	0.2%	41.8	2.2%

International Expenditure in Australia

EXPENDITURE ⁸	\$ million	Annual change
Australia	\$22,114.7m	11.3%

National Record Growth

The recent surge in international visitors to Australia continued for the year ending June 2015. Over the year, there were an additional 400,000 international visitors on the year prior or 6.6% growth to a record 6.5 million visitors. Each of Australia's core international source markets contributed through growth or remaining stable except for Thailand, Italy and Netherlands.

The overall Asian market had the strongest growth of 9.9% followed by North America with 7.9% growth and then Europe (incl UK) with 1.2% growth. This resulted in record international visitor expenditure of \$22.1 billion, which was 11.3% higher than the year prior. In addition, average expenditure per international visitor reached a record high of \$3,367 per person.

China Accelerates

The Chinese source market has accelerated further with 21.9% growth over the year to 857,000 visitors or 13.3% of all international visitors to Australia. This meant the total expenditure for Chinese visitors in Australia reached a record \$5.1 billion with 33.7% growth on the year prior. In addition, individual average expenditure for Chinese visitors also reached a record of \$5,917 per visitor.

Asia Follows China

Asia continued to follow closely behind China with strong growth of 5.5% to 2 million visitors. This flowed through to expenditure which increased 7.4% to a record \$6.9 billion. Asia (excluding China) now accounts for 31.3% of all international visitors to Australia.

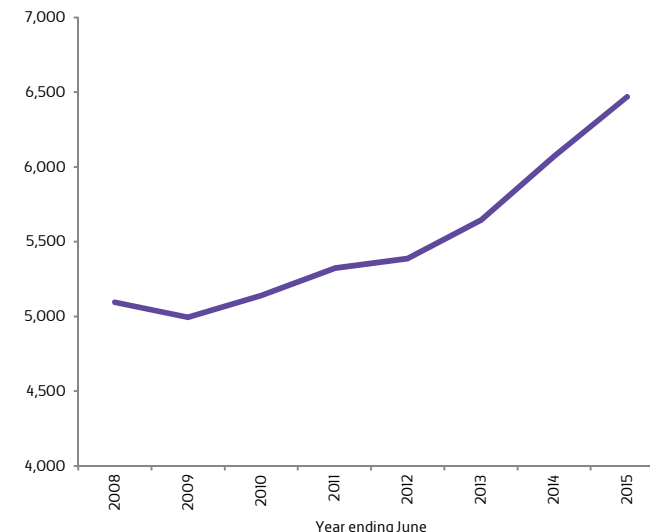
Diversity and Growth

The growth in international visitor nights was universal across travel purpose. The increasing diversity of international visitors was led by the strong growth in Employment and Education long stay visitors. Employment increased 18.4% and Education grew 16.1%, with Education visitors now accounting for 7.1% of all international visitors to the country. VFR (4.2% growth) and Business (2.1% growth) were comparatively subdued over the year. The number of holiday visitors increased 7.6% to 3.5 million over the year. As the purpose for international visitors diversifies, Holiday visitors accounted for 53.7% of all international visitors compared to 58.8% for the year ended June 2007.

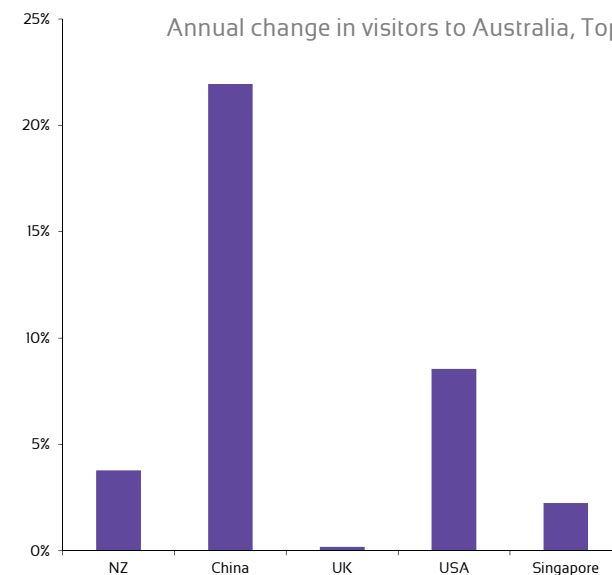
Spend Sectors

Within the record expenditure for international visitors to Australia, were additional records in the level of both Holiday, VFR and Education expenditure. Holiday expenditure grew 13.8% to a record \$8.1 billion and VFR grew 2.1% to a record \$3.4 billion. Holiday expenditure accounted for 36.9% of all international visitor expenditure. The expenditure of long stay Education visitors which includes educations fees etc, grew 15.9% to a

International Visitors ('000) to Australia



Annual change in visitors to Australia, Top 5



Year ending June 2015

State Comparison

	Visitors	Annual change	Avg Stay	Annual change
Holiday				
Qld	1,511,000	6.7%	13.6	(-2.2%)
NSW	1,894,000	8.6%	12.9	(-5.8%)
Vic	1,193,000	14.0%	11.1	0.0%
Other States	882,000	8.0%	18.8	(-0.5%)
Australia	3,476,000	7.6%	21.5	(-1.8%)

VFR				
Qld	541,000	4.7%	20.3	6.3%
NSW	898,000	1.6%	21.9	0.0%
Vic	752,000	6.3%	23.0	5.0%
Other States	564,000	1.2%	22.8	5.1%
Australia	2,498,000	4.2%	24.3	2.5%

Business				
Qld	176,000	11.5%	7.8	(-1.3%)
NSW	393,000	(-0.9%)	10.2	9.7%
Vic	278,000	4.3%	9.1	1.1%
Other States	181,000	(-2.4%)	15.7	(-4.3%)
Australia	869,000	2.1%	12.3	0.8%

TOTAL				
Qld	2,229,000	7.7%	22.4	0.9%
NSW	3,308,000	6.0%	24.1	(-0.4%)
Vic	2,274,000	10.8%	24.0	3.0%
Other States	1,642,000	5.0%	30.8	0.3%
Australia	6,470,000	6.6%	36.3	1.7%

Stated Growth

The record levels of international visitors and expenditure nationally has generally been shared across the states. Queensland saw 7.7% growth in international visitors for the year and New South Wales grew 6.0%. Tasmania had very strong growth of 21.8% and Northern Territory increased 7.3%. Victoria had 10.8% growth over the year, which included 14.0% growth in Holiday visitors.

Money Talks

The record national international visitor expenditure also increased across all States. Four states also had record international visitor expenditure - Queensland, New South Wales, Victoria and South Australia. This was sustained by double digit growth for Queensland (14.8%), New South Wales (10.3%) and Victoria (15.1%). New South Wales and Victoria also had record expenditure for international holiday visitors.

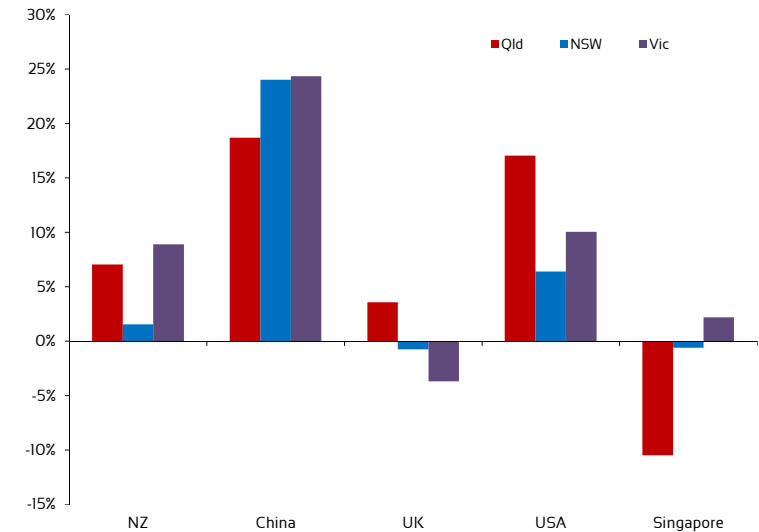
Share Markets

Queensland had the strongest share of Holiday visitors as a proportion of all international visitors with 67.8%. New South Wales was next with 57.3% followed by Victoria with 52.5%. The proportion of VFR visitors to Queensland was 24.3% of all international visitors, with New South Wales on 27.2% and Victoria reaching 33.1%. All states had a similar proportion of Education visitors with Queensland on 4.4%, New South Wales on 5.0%, and Victoria on 5.9%.

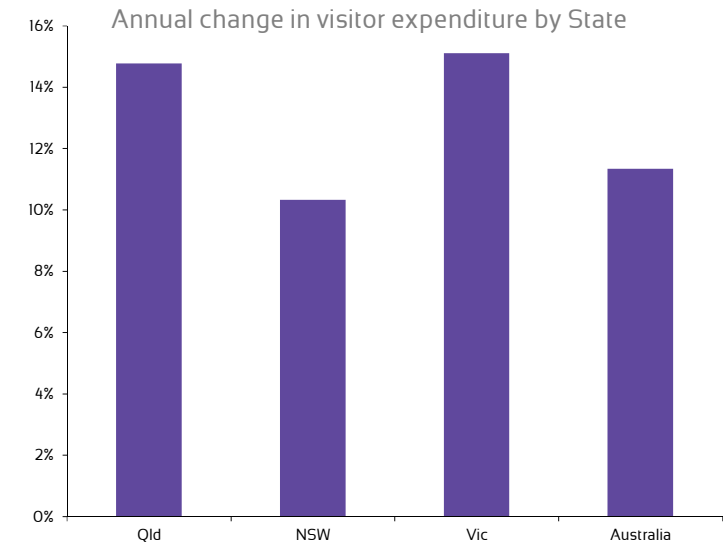
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Annual change by state in key markets



Annual change in visitor expenditure by State



Year ending June 2015

International Visitors to Queensland

	Visitors	Annual change	Avg Stay	Annual change
Holiday	1,511,000	6.7% ▲	13.6	(-2.2%) ▼
NZ	210,000	4.8%	8.7	(-11.2%)
Asia	660,000	5.0%	11.9	(-0.8%)
North America	165,000	11.0%	10.4	6.1%
Europe	246,000	9.8%	20.1	(-13.7%)
UK	148,000	4.5%	22.2	19.4%

VFR	541,000	4.7% ▲	20.3	6.3% ▲
NZ	187,000	6.4%	9.8	0.0%
Asia	128,000	5.7%	34.4	19.9%
North America	48,000	10.7%	17.6	7.3%
Europe	52,000	8.0%	21.8	(-4.8%)
UK	79,000	(-1.1%)	19.6	(-4.9%)

Business	176,000	11.5% ▲	7.8	(-1.3%) ▼
NZ	44,000	9.6%	4.9	(-16.9%)
Asia	58,000	16.9%	9.0	16.9%
North America	27,000	41.4%	9.4	(-9.6%)
Europe	16,000	(-19.9%)	10.2	(-5.6%)
UK	11,000	1.2%	6.3	(-19.2%)

TOTAL	2,229,000	7.7% ▲	22.4	0.9% ▲
NZ	421,000	7.0%	11.8	0.9%
Asia	891,000	7.4%	24.4	5.2%
North America	236,000	12.2%	17.3	12.3%
Europe	303,000	7.1%	28.6	(-13.9%)
UK	217,000	3.5%	29.3	8.9%

International Expenditure in Queensland

EXPENDITURE	\$ million	Annual change
Queensland	\$4,582.7m	14.8%

Queensland's Record Result

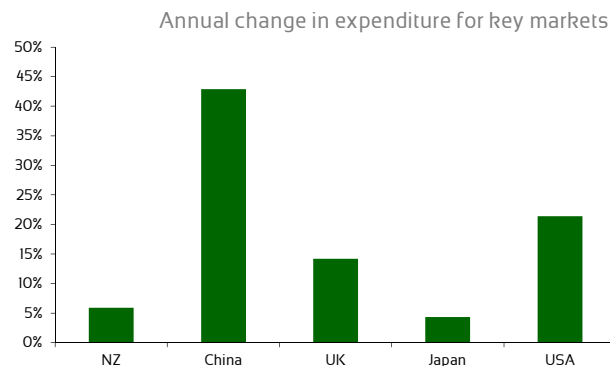
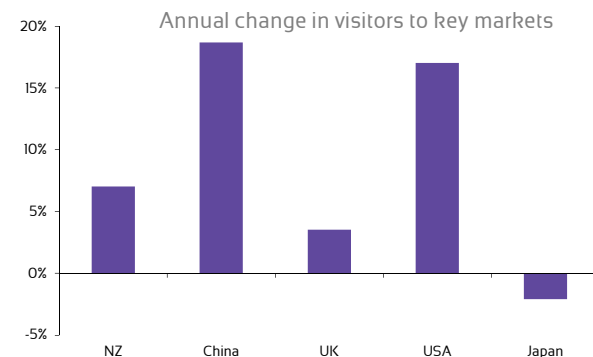
International overnight visitor expenditure in Queensland increased 14.8% to \$4.6 billion, which was a record result for the state. To complement this, international visitation to Queensland increased 7.7% to 2.2 million visitors in the year to June 2015, driven by growth from a majority of the State's key source markets. Holiday travel was the key contributor to this result, with the state welcoming 1.5 million international holidaymakers over the same period. Holiday travel represents 68% of total international visitation to the State. This growth in holiday travel was supported by 4.7% growth in VFR travel, while business travel increased 11.5%. The net result of international visitor growth to Queensland was an increase in international visitation to a majority of Queensland's tourism regions in the year to June 2015.

Momentum in Market

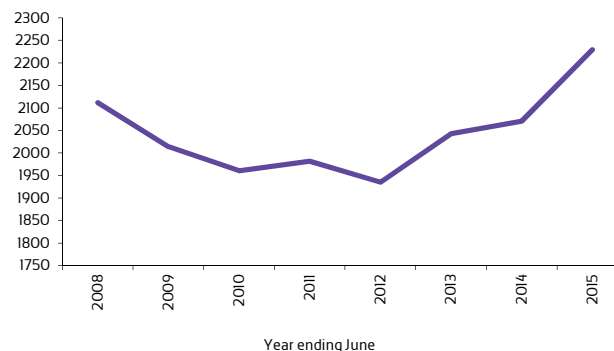
Eleven of Queensland's top 20 international markets recorded increases, with strong growth from key source markets including China, New Zealand, Germany and the United States. Smaller Asian markets such as Taiwan and India also recorded strong growth. Visitation from the United Kingdom increased 3.5% which was above the national growth rate. German travel to Queensland increased 19.4% to 84,000 visitors which continues recent strong results seen from Germany.

China Surges

China remained Queensland's largest source market in terms of visitor expenditure and second largest market by visitor numbers (behind New Zealand). Visitation from China to Queensland increased 18.7% to 359,000, with the beneficiaries of this growth being Brisbane, the Gold Coast, Tropical North Queensland and the Whitsundays. Expenditure by Chinese visitors to Queensland also grew 43%.



International Visitors ('000) to Queensland



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Year ending June 2015

International Visitors by region

	Visitors	Annual change	Avg Stay	Holiday Visitors	Annual change
Brisbane	1,066,000	9.8%	21.6	547,000	10.9%
Gold Coast	861,000	6.2%	10.1	677,000	5.5%
Sunshine Coast	257,000	10.6%	9.8	194,000	10.4%
Fraser Coast	135,000	14.1%	4.8	127,000	12.9%
SQC ⁹	51,000	5.6%	34.0	18,000	(-1.0%)
SGBR ¹⁰	137,000	10.8%	17.7	104,000	14.0%
Mackay	45,000	(-0.1%)	16.4	31,000	7.0%
Whitsundays	210,000	10.2%	7.2	201,000	9.8%
Townsville	123,000	26.7%	11.7	97,000	28.2%
TNQ	759,000	9.8%	9.0	694,000	9.2%

	Visitors	Trend change ¹²	Avg Stay	Holiday Visitors	Trend change
Outback ¹¹	22,000	4.9%	17.5	17,000	3.6%

Expenditure in Queensland regions

	\$ million	Annual change	Spend per visitor	Spend per night
Brisbane	\$1,781.5m	16.8%	\$1,665.75	\$77.25
Gold Coast	\$1,102.1m	13.4%	\$1,278.50	\$126.95
Sunshine Coast	\$193.6m	(-10.3%)	\$754.22	\$76.83
Fraser Coast	\$46.8m	21.0%	\$347.31	\$73.03
SQC ⁹	\$85.5m	38.9%	\$1,665.60	\$48.99
SGBR ¹⁰	\$96.8m	18.2%	\$606.21	\$39.54
Mackay	\$31.8m	16.0%	\$705.97	\$42.99
Whitsundays	\$146.9m	14.3%	\$700.31	\$96.89
Townsville	\$78.8m	0.1%	\$639.47	\$54.51
TNQ	\$1,000.0m	18.2%	\$1,317.89	\$147.04

Brisbane

The number of international visitors to Brisbane increased 9.8%, which was driven by growth from China, New Zealand the United States and India. This growth was complemented by an increase in visitors from the UK. These visitors to Brisbane also increased their nights spent in the region, which contributed to a 16.8% increase in international overnight visitor expenditure in the region.

Gold Coast

The Gold Coast recorded a 6.2% increase in international visitors in the year to June 2015, driven by growth from China, Germany and the UK. Declines from Japan and Singapore restricted further growth. Visitor expenditure on the Gold Coast increased 13.4% to \$1.1 billion, which equates to an average spend per international visitor of \$1,279.

Tropical North Queensland

International travel to Tropical North Queensland increased 9.8% to 759,000 in the year to June 2015. This result was driven by growth from China, the United States and the United Kingdom. Increases from these key markets and a 9% spike in visitor nights caused overnight visitor expenditure to grow 18.2% to reach \$1 billion.

Sunshine Coast

International visitors to the Sunshine Coast increased 10.6% to 257,000 in the year to June 2015, driven by strong growth in both the VFR and holiday sector. Whilst overall visitor numbers increased, the average length of stay in the region declined by two nights, which caused a decline in overnight visitor expenditure. This result can also be partially attributed to an increase in the share of backpackers, who are typically lower yielding visitors.

Whitsundays

The Whitsundays recorded a 10.2% increase in international visitation in the year to June 2015. Whilst New Zealand, the UK and Germany drove overall growth to the Whitsundays, China recorded 12,000 visitors for the first time, which is a welcome result for the region. Growth in both visitation and nights contributed to a 14.3% increase in international expenditure.

Fraser Coast

International travel to the Fraser Coast increased 14.1% to 135,000 in the year to June 2015, driven by growth from Germany and the UK. Visitor expenditure on the Fraser Coast increased 21% to \$46.8 million.

Townsville

The number of international visitors to Townsville increased 26.7% to 123,000 in the year to June 2015, driven by growth from the United Kingdom and Germany. International visitor expenditure increased marginally to \$78.8 million.

Southern Great Barrier Reef

International travel to the SGBR increased 10.8% to 137,000 in the year to June 2015, which contributed to an 18.2% increase in expenditure. Germany was the major driver of this growth.

Southern Queensland Country

International visitors to SQC increased 5.6% due to strong growth in international VFR and business travel. The number of nights spent in the region grew at an even stronger rate, which caused a spike in overnight visitor expenditure, reaching \$85.5 million.

Mackay

The number of international visitors to Mackay remained stable in the year to June 2015. Those that did visit spent considerably more, with expenditure increasing 16% over the same period.

Outback

International visitation to the Outback increased 4.9% in the three years to June 2015, driven by growth from Europe.

Year ending June 2015

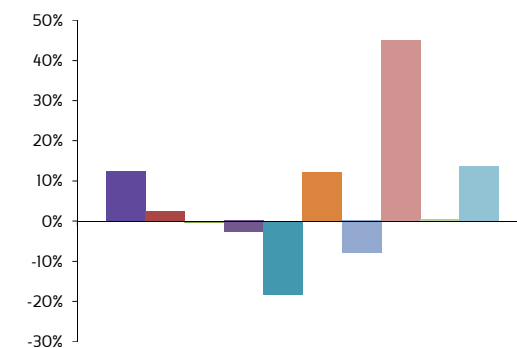
Region comparison by source market

NZ	Visitors	% Chg
Brisbane	184,000	12.3%
Gold Coast	189,000	2.5%
Sunshine Coast	58,000	(-0.3%)
Fraser Coast	7,000	(-2.8%)
SQC	11,000	(-18.4%)
SGBR	18,000	12.2%
Mackay	8,000	(-7.9%)
Whitsundays	12,000	44.9%
Townsville	10,000	0.3%
Outback ^{II}	n/p	n/p
TNQ	36,000	13.7%
Queensland	421,000	7.0%

China	Visitors	% Chg
Brisbane	165,000	25.9%
Gold Coast	212,000	13.1%
Sunshine Coast	n/p	n/p
Fraser Coast	n/p	n/p
SQC	n/p	n/p
SGBR	n/p	n/p
Mackay	n/p	n/p
Whitsundays	12,000	n/p
Townsville	n/p	n/p
Outback ^{II}	n/p	n/p
TNQ	165,000	16.1%
Queensland	359,000	18.7%

UK	Visitors	% Chg
Brisbane	121,000	3.3%
Gold Coast	67,000	10.2%
Sunshine Coast	59,000	23.7%
Fraser Coast	36,000	13.8%
SQC	8,000	24.6%
SGBR	24,000	(-4.2%)
Mackay	n/p	n/p
Whitsundays	49,000	11.5%
Townsville	25,000	29.7%
Outback ^{II}	n/p	n/p
TNQ	92,000	13.6%
Queensland	217,000	3.5%

Annual change in NZ visitation by region

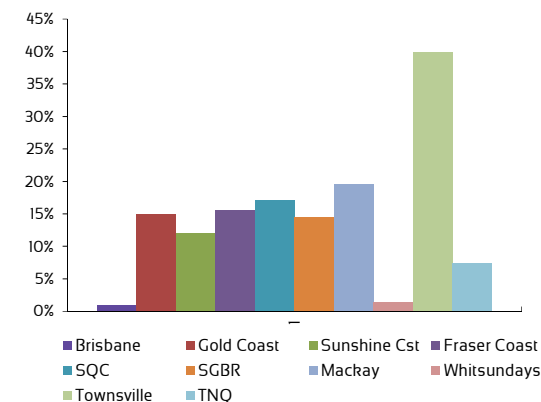


Europe ⁵	Visitors	% Chg
Brisbane	172,000	1.0%
Gold Coast	86,000	14.9%
Sunshine Cst	84,000	12.0%
Fraser Coast	68,000	15.6%
SQC	11,000	17.1%
SGBR	55,000	14.5%
Mackay	19,000	19.6%
Whitsundays	86,000	1.4%
Townsville	58,000	40.0%
Outback ^{II}	9,000	2.7%
TNQ	158,000	7.4%
Queensland	303,000	7.1%




















Japan	Visitors	% Chg
Brisbane	27,000	5.3%
Gold Coast	48,000	(-13.7%)
Sunshine Coast	n/p	n/p
Fraser Coast	n/p	n/p
SQC	n/p	n/p
SGBR	n/p	n/p
Mackay	n/p	n/p
Whitsundays	8,000	(-2.9%)
Townsville	n/p	n/p
Outback ^{II}	n/p	n/p
TNQ	88,000	3.1%
Queensland	153,000	(-2.1%)

Nth America	Visitors	% Chg
Brisbane	103,000	16.5%
Gold Coast	47,000	7.9%
Sunshine Coast	25,000	6.7%
Fraser Coast	14,000	25.2%
SQC	7,000	20.3%
SGBR	17,000	19.1%
Mackay	n/p	n/p
Whitsundays	26,000	2.3%
Townsville	12,000	(-5.9%)
Outback ^{II}	n/p	n/p
TNQ	118,000	11.8%
Queensland	236,000	12.2%

Annual change in European (excl UK)⁵ visitation by region



Year ending June 2015

	Qld		NSW		Vic		Australia	
	Visitors	Annual change	Visitors	Annual change	Visitors	Annual change	Visitors	Annual change
 New Zealand	421,000	7.0%	398,000	1.5%	313,000	8.9%	1,129,000	3.8%
Total Asia	891,000	7.4%	1,459,000	10.2%	1,114,000	15.4%	2,882,000	9.9%
 Japan	153,000	(-2.1%)	137,000	(-5.7%)	45,000	17.7%	297,000	(-0.2%)
 Hong Kong	51,000	0.3%	99,000	(-0.9%)	76,000	8.0%	186,000	3.1%
 Singapore	57,000	(-10.5%)	109,000	(-0.6%)	98,000	2.2%	323,000	2.2%
 Malaysia	46,000	(-2.1%)	79,000	3.3%	116,000	8.3%	290,000	4.9%
 Indonesia	16,000	(-21.0%)	60,000	4.3%	54,000	23.3%	134,000	1.3%
 Taiwan	54,000	9.2%	54,000	(-10.5%)	40,000	0.4%	114,000	4.8%
 Thailand	12,000	(-10.0%)	36,000	3.9%	26,000	7.7%	70,000	(-2.3%)
 Korea	53,000	3.6%	158,000	8.9%	40,000	0.2%	197,000	7.3%
 China	359,000	18.7%	526,000	24.0%	439,000	24.3%	857,000	21.9%
 India	50,000	15.7%	103,000	19.6%	98,000	20.8%	204,000	19.6%
Other Asia	39,000	26.1%	97,000	15.1%	81,000	14.1%	210,000	15.4%
Nth America	236,000	12.2%	423,000	6.0%	213,000	9.4%	658,000	7.9%
 USA	183,000	17.0%	338,000	6.4%	166,000	10.0%	527,000	8.5%
 Canada	53,000	(-1.8%)	85,000	4.3%	47,000	7.1%	131,000	5.2%
Total Europe	520,000	5.6%	810,000	0.5%	514,000	0.5%	1,372,000	1.2%
 UK	217,000	3.5%	339,000	(-0.8%)	210,000	(-3.7%)	622,000	0.2%
 Germany	84,000	19.4%	120,000	8.6%	79,000	8.3%	180,000	5.9%
Scandinavia	43,000	8.5%	60,000	3.5%	32,000	1.4%	94,000	1.4%
 France	42,000	(-12.1%)	75,000	(-0.4%)	45,000	7.5%	111,000	3.4%
 Italy	23,000	(-6.3%)	41,000	(-6.4%)	32,000	(-3.5%)	69,000	(-1.6%)
 Netherlands	17,000	(-4.3%)	25,000	(-6.9%)	19,000	(-6.5%)	43,000	(-4.9%)
 Switzerland	22,000	12.6%	33,000	1.4%	21,000	22.4%	50,000	6.8%
Other Europe	72,000	13.6%	116,000	(-0.6%)	75,000	(-0.2%)	204,000	0.0%
Other	162,000	11.6%	219,000	9.9%	120,000	27.4%	429,000	8.4%
TOTAL	2,229,000	7.7%	3,308,000	6.0%	2,274,000	10.8%	6,470,000	6.6%

State expenditure comparison

	Qld	NSW	Vic	Australia
Expenditure (\$ million)	\$4,582.7m	\$7,667.5m	\$5,657.7m	\$22,114.7m
Annual change	14.8%	10.3%	15.1%	11.3%
Share of expenditure	20.7%	34.7%	25.6%	100.0%
Spend per Visitor	\$2,051.57	\$2,266.15	\$2,476.07	\$3,367.43

Notes:

1. Annual change refers to the percentage change between the year covered by this snapshot compared to the year prior.
2. Avg stay: Average length of stay expressed in nights.
3. Asia includes Japan, China, Korea, Singapore, Malaysia, Hong Kong, India, Indonesia, Taiwan, Thailand and Other Asia.
4. North America includes United States of America and Canada.
5. Europe includes Germany, France, Scandinavia, Netherlands, Italy, Switzerland and Other Europe.
6. Visiting friends or relatives (VFR).
7. Total includes those visitors classified as 'Other'. Therefore, the sum of Holiday, VFR, and Business visitors may not equal to 'Total'.
8. All expenditure figures include package expenditure (\$m).
9. SJC - Southern Qld Country region is comprised of Toowoomba, Southern and Western Downs regions.
10. SGBR - Southern Great Barrier Reef region is comprised of Capricorn, Bundaberg and Gladstone regions.
11. To stabilise some results, Trend is used to average data over three years. Trend change is the average change over three years rather than a year on year comparison.

n/p - not published for technical reasons

For Further Information:
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Website: www.te.queensland.com/research

Data Source: International Visitor Survey, Tourism Research Australia. The information included in this report was extracted from the International Visitor Survey (IVS), conducted by Newton Wayman Chong Research on behalf of Tourism Research Australia (TRA). IVS information is collected by personal interviews with short-term international visitors to Australia in the departure lounges at eight Australian airports prior to departure. The IVS is weighted to total figures supplied by the Australian Bureau of Statistics' Overseas Arrivals and Departures and does not include persons aged under 15 years. For this publication data has been adjusted to conform to Tourism and Events Queensland's destinations, which may differ slightly from ABS Tourism Regions.

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