

Year ending December 2015

International Visitors to Australia

	Visitors	Annual change ¹	Avg Stay ²	Annual change
Holiday	3,684,000	10.4% ▲	20.9	(-3.2%) ▼
NZ	475,000	5.8%	9.2	3.4%
Asia ³	1,750,000	14.2%	17.3	(-7.0%)
North America ⁴	387,000	12.0%	18.4	10.8%
Europe ⁵	512,000	2.0%	38.2	(-6.4%)
UK	371,000	10.4%	31.4	2.6%

VFR ⁶	2,625,000	8.4% ▲	24.6	1.7% ▲
NZ	533,000	3.6%	10.2	(-8.1%)
Asia	1,007,000	14.9%	34.8	7.4%
North America	250,000	10.5%	18.3	(-7.1%)
Europe	270,000	(-0.0%)	21.5	(-6.9%)
UK	379,000	5.7%	21.4	(-3.6%)

Business	834,000	(-5.6%) ▼	11.9	(-5.6%) ▼
NZ	203,000	(-3.1%)	5.8	(-4.9%)
Asia	310,000	(-4.4%)	13.9	0.0%
North America	126,000	(-7.8%)	12.0	(-10.4%)
Europe	86,000	(-7.7%)	16.1	(-0.6%)
UK	57,000	(-6.6%)	18.1	(-14.6%)

TOTAL ⁷	6,764,000	8.1% ▲	36.6	3.1% ▲
NZ	1,160,000	4.9%	13.8	2.2%
Asia	3,085,000	12.3%	41.7	4.3%
North America	688,000	8.5%	26.9	4.3%
Europe	755,000	0.3%	51.7	(-1.1%)
UK	643,000	5.8%	41.3	0.5%

International Expenditure in Australia

EXPENDITURE ⁸	\$ million	Annual change
Australia	\$24,252.1m	18.9%

Total Travel to Australia Strengthens

The increase in international visitors to Australia continued for the year ending December 2015. There were an additional 504,000 international visitors to Australia over the year, or 8.1% growth, to a record 6.8 million international visitors. The growth was across the board with increases in almost every one of Australia's core international source markets.

The Asian Century continued with a 12.3% growth in visitors from Asia (including China) to Australia, which subsequently increased the Asian share of all international visitors to 46%. The number of visitors from continental Europe remained stable and North American visitors increased 8.5%.

China Surges

Whilst overall visitors from China increased 21.5%, the broad impact of Chinese visitation can be seen within this growth. The Chinese holiday and VFR market continued to perform well, which was complemented by the development of longer staying markets such as education and employment visitors. Chinese visitors to Australia spent a record \$6 billion over the past year, which represents growth of 45.6%.

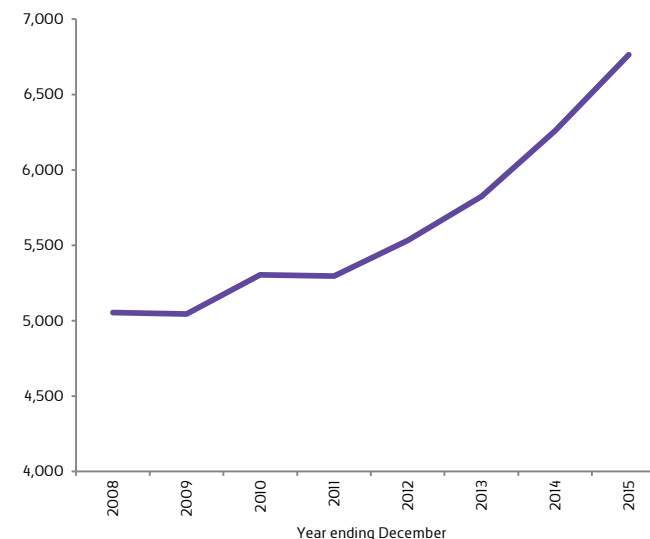
Purpose of Travel

The growth across the underlying purpose of travel was strong across all but one sector. Holiday visitors increased 10.4% to 3.7 million international visitors which represents a 54.5% share of all visitors to Australia. VFR also increased 8.4% with a share of 38.8% of all visitors. The long stay education and employment sectors also had solid growth. Education lifted 21.3% to reach a 7.4% share of international visitors and employment visitors increased 13.5% to reach a 4.5% share of total travellers to the nation.

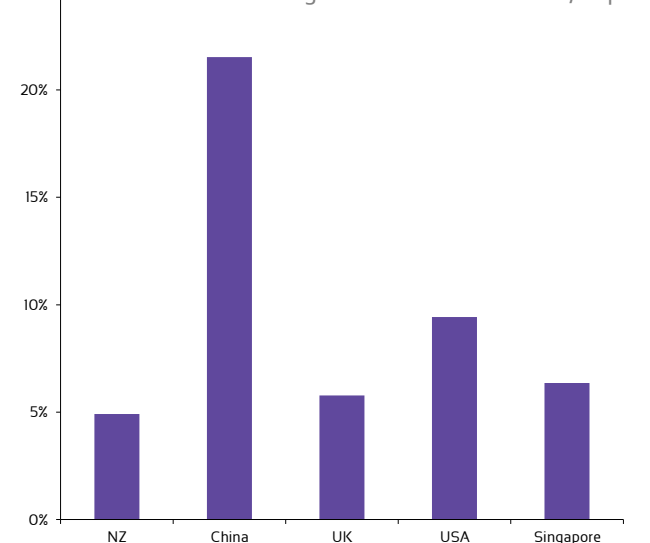
Expenditure Records

Records for expenditure fell across the board in the year to December 2015. Total international visitor expenditure for Australia reached a record \$24.3 billion. Importantly this included a record level average individual expenditure of \$3,535 per visitor. There was also record levels of expenditure for Queensland (\$4.9 billion), New South Wales (\$8.4 billion), and Victoria (\$6.5 billion).

International Visitors ('000) to Australia



Annual change in visitors to Australia, Top 5



Year ending December 2015

State Comparison

	Visitors	Annual change	Avg Stay	Annual change
Holiday				
Qld	1,577,000	7.5%	13.8	0.7%
NSW	1,975,000	8.6%	13.0	(-1.5%)
Vic	1,298,000	19.0%	10.7	(-1.8%)
Other States	912,000	8.7%	17.3	(-11.3%)
Australia	3,684,000	10.4%	20.9	(-3.2%)

VFR				
Qld	572,000	8.9%	21.5	11.4%
NSW	933,000	6.9%	23.1	3.1%
Vic	822,000	14.4%	20.9	(-7.9%)
Other States	588,000	6.1%	23.1	1.8%
Australia	2,625,000	8.4%	24.6	1.7%

Business				
Qld	164,000	(-2.4%)	7.6	(-1.3%)
NSW	379,000	(-7.7%)	9.0	(-10.9%)
Vic	258,000	(-10.3%)	9.6	4.3%
Other States	183,000	2.1%	15.5	(-7.2%)
Australia	834,000	(-5.6%)	11.9	(-5.6%)

TOTAL				
Qld	2,337,000	8.8%	22.7	4.6%
NSW	3,421,000	6.6%	25.1	5.9%
Vic	2,423,000	13.6%	24.0	2.6%
Other States	1,698,000	6.4%	29.8	(-4.5%)
Australia	6,764,000	8.1%	36.6	3.1%

Balanced Growth

Strong growth in international visitors and expenditure has generally been shared across the states. Queensland saw 8.8% growth in international visitors for the year ended December 2015, while New South Wales grew 6.6%. It was Victoria that drove overall growth in visitor numbers, with double digit growth of 13.6% achieved.

Spending is Trending

International visitor expenditure increased nationally, with all states (except WA and NT) recording increases. Queensland saw growth of 19%, which led to a record \$4.9 billion in the year to December 2015. New South Wales also recorded an expenditure increase of 19%, while Victoria surged ahead with 30% annual growth in international overnight visitor expenditure. Whilst holiday travel was the driver of expenditure for most states, a downturn in business related spend was felt nationally.

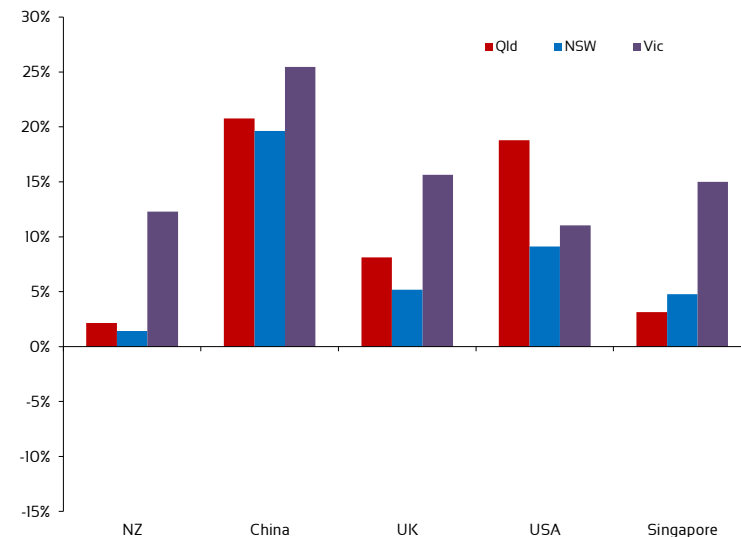
Share of Sectors

Of the larger states, Queensland had the strongest share of holiday visitors as a proportion of all international visitors at 67.5%. New South Wales was next with 57.7% followed by Victoria with 53.6%. The proportion of VFR visitors to Queensland was 24.5% of all international visitors, with New South Wales on 27.3% and Victoria reaching 33.9%. From a business perspective, Queensland's proportion of total visitors to the State was 7.0%, compared to 11.1% for New South Wales and 10.6% for Victoria.

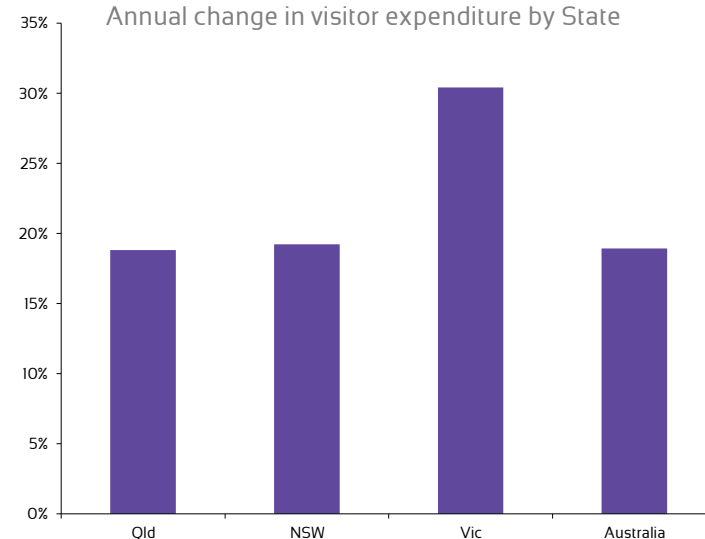
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Annual change by state in key markets



Annual change in visitor expenditure by State



Year ending December 2015

International Visitors to Queensland

	Visitors	Annual change	Avg Stay	Annual change
Holiday	1,577,000	7.5% ▲	13.8	0.7% ▲
NZ	204,000	(-4.0%)	10.1	12.2%
Asia	726,000	13.6%	11.6	(-6.5%)
North America	175,000	11.1%	10.1	(-3.8%)
Europe	240,000	(-0.9%)	21.7	3.3%
UK	155,000	11.1%	20.3	4.1%

VFR	572,000	8.9% ▲	21.5	11.4% ▲
NZ	189,000	3.6%	10.2	1.0%
Asia	149,000	22.7%	37.4	25.1%
North America	49,000	5.9%	17.8	14.1%
Europe	54,000	9.2%	19.9	(-9.1%)
UK	82,000	3.5%	20.2	(-2.4%)

Business	164,000	(-2.4%) ▼	7.6	(-1.3%) ▼
NZ	43,000	4.9%	5.7	16.3%
Asia	55,000	(-1.8%)	9.2	22.7%
North America	23,000	4.1%	8.0	(-27.3%)
Europe	15,000	(-18.4%)	8.2	(-25.5%)
UK	10,000	(-17.5%)	7.3	(-5.2%)

TOTAL	2,337,000	8.8% ▲	22.7	4.6% ▲
NZ	424,000	2.1%	12.6	6.8%
Asia	978,000	15.1%	24.1	3.0%
North America	250,000	12.8%	17.4	11.5%
Europe	297,000	(-0.6%)	29.9	1.7%
UK	227,000	8.1%	26.4	(-4.7%)

International Expenditure in Queensland

EXPENDITURE	\$ million	Annual change
Queensland	\$4,933.5m	18.8%

Happy Holidaying

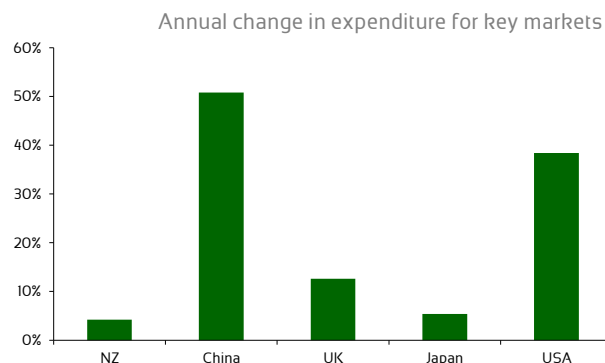
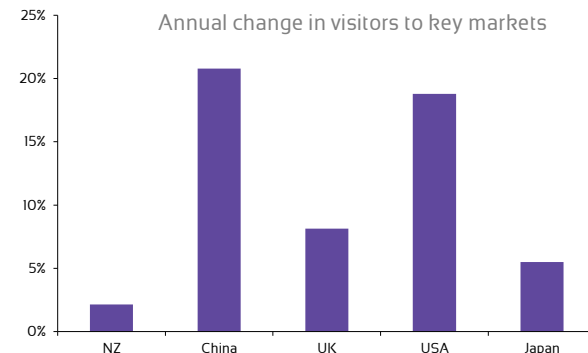
International overnight visitor expenditure in Queensland increased 19% to \$4.9 billion, which was a record result for the state. To complement this, international visitation to Queensland increased 8.8% to 2.3 million visitors in the year to December 2015, driven by growth from a majority of the State's key source markets. Holiday travel was the key contributor to this result, with the state welcoming 1.6 million international holidaymakers over the same period. Holiday travel represents 67.5% of total international visitation to the State. This growth in holiday travel was supported by 8.9% growth in VFR travel, while business travel declined 2.4%. 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 December 2015.

Market Mix

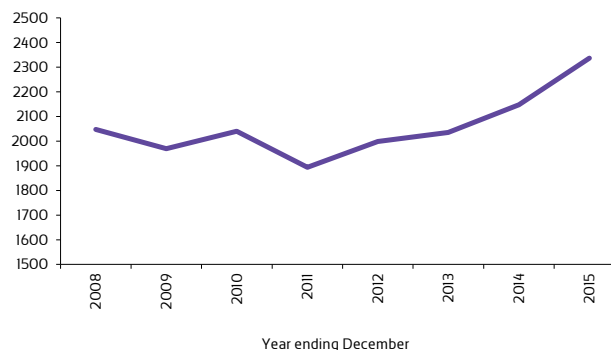
16 of Queensland's top 20 international markets recorded increases in overnight visitor expenditure, with strong growth from key source markets including China (up 51%), the US (up 38%), the UK (up 13%), Japan (up 5%) and New Zealand (up 4%). Smaller Asian markets such as Hong Kong, Singapore, Taiwan and India also recorded strong expenditure results.

China Churns

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 20.8% to 399,000, 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 50.8% to \$956.5 million.



International Visitors ('000) to Queensland



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Year ending December 2015

International Visitors by region

	Visitors	Annual change	Avg Stay	Holiday Visitors	Annual change
Brisbane	1,126,000	12.9%	22.1	583,000	14.3%
Gold Coast	902,000	6.4%	11.0	711,000	6.8%
Sunshine Coast	251,000	(-1.0%)	10.7	193,000	0.4%
Fraser Coast	127,000	0.0%	3.7	121,000	0.7%
SQC ⁹	50,000	(-0.5%)	35.1	20,000	9.3%
SGBR ¹⁰	137,000	4.0%	19.0	102,000	3.1%
Mackay	43,000	(-3.9%)	15.2	28,000	(-9.8%)
Whitsundays	208,000	0.5%	6.4	200,000	1.1%
Townsville	122,000	7.2%	13.8	91,000	1.1%
TNQ	781,000	5.7%	8.6	720,000	5.9%

	Visitors	Trend change ¹²	Avg Stay	Holiday Visitors	Trend change
Outback ¹¹	21,000	4.4%	14.9	15,000	4.2%

Expenditure in Queensland regions

	\$ million	Annual change	Spend per visitor	Spend per night
Brisbane	\$1,951.3m	28.4%	\$1,727.89	\$78.49
Gold Coast	\$1,227.3m	20.6%	\$1,360.56	\$123.31
Sunshine Coast	\$195.0m	(-11.2%)	\$778.38	\$72.47
Fraser Coast	\$36.0m	(-11.7%)	\$282.94	\$75.88
SQC ⁹	\$64.3m	(-12.1%)	\$1,275.28	\$36.33
SGBR ¹⁰	\$105.3m	20.2%	\$701.82	\$40.47
Mackay	\$26.1m	(-0.1%)	\$610.82	\$40.23
Whitsundays ¹²	\$171.9m	n/p	\$826.44	\$129.99
Townsville	\$104.5m	40.5%	\$859.62	\$62.15
TNQ	\$1,022.0m	10.6%	\$1,308.00	\$152.43

Brisbane

The number of international visitors to Brisbane increased 12.9%, 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 28.4% increase in international overnight visitor expenditure in the region.

Gold Coast

The Gold Coast recorded a 6.4% increase in international visitors in the year to December 2015, driven by growth from China, the United States and Taiwan. Declines from New Zealand and Canada restricted further growth. Visitor expenditure on the Gold Coast increased 20.6% to \$1.2 billion, which equates to an average spend per international visitor of \$1,360.

Tropical North Queensland

International travel to Tropical North Queensland increased 5.7% to 781,000 in the year to December 2015. This result was driven by growth from China, the United States and Japan. Increases from these key markets and a 4.3% increase in visitor nights caused overnight visitor expenditure to grow 10.6% to reach \$1 billion.

Sunshine Coast

International visitation to the Sunshine Coast was relatively stable at 251,000 in the year to December 2015, with both holiday and VFR travel remaining static. Whilst overall visitor numbers were stable, the average length of stay in the region declined by 0.5 nights, which caused a decline in overnight visitor expenditure. This result can also be partially attributed to an increase in the share of lower yielding travellers such as backpackers.

Whitsundays

The Whitsundays recorded a 0.5% increase in international visitation in the year to December 2015. Growth from the USA, and China was offset by declines from New Zealand, Japan and Canada. International expenditure to the Whitsundays increased to \$171.9 million in the same period.

Fraser Coast

International travel to the Fraser Coast remained stable at 127,000 visitors in the year to December 2015. Growth from Europe (including the UK) was offset by declines from North America. Visitor expenditure on the Fraser Coast declined, the result of fewer international nights spent in the region.

Townsville

The number of international visitors to Townsville increased 7.2% to 122,000 in the year to December 2015, driven by growth from the United Kingdom, Germany and North America. International visitor expenditure increased strongly to 104.5 million, which is a recovery from a weaker result in 2014.

Southern Great Barrier Reef

International travel to the SGBR increased 4% to 137,000 in the year to December 2015, which contributed to a 20.2% increase in expenditure. Visitation from New Zealand drove overall growth.

Southern Queensland Country

International visitors to SQC decreased marginally (-0.5%), with growth in holiday and VFR travel offset by a softer business sector.

Mackay

The number of international visitors to Mackay declined by 3.9% in the year to December 2015, with growth from New Zealand and Germany unable to offset declines from North America.

Outback

International visitation to the Outback increased 4.4% in the three years to December 2015, driven by growth from New Zealand.

Year ending December 2015

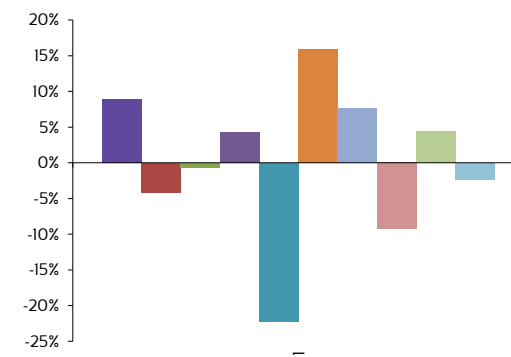
Region comparison by source market

NZ	Visitors	% Chg
Brisbane	186,000	8.9%
Gold Coast	185,000	(-4.1%)
Sunshine Coast	61,000	(-0.7%)
Fraser Coast	8,000	4.3%
SQC	9,000	(-22.2%)
SGBR	20,000	15.9%
Mackay	8,000	7.7%
Whitsundays	10,000	(-9.3%)
Townsville	11,000	4.4%
Outback ^{II}	n/p	n/p
TNQ	37,000	(-2.4%)
Queensland	424,000	2.1%

China	Visitors	% Chg
Brisbane	185,000	27.3%
Gold Coast	242,000	19.9%
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	13,000	n/p
Townsville	n/p	n/p
Outback ^{II}	n/p	n/p
TNQ	174,000	10.9%
Queensland	399,000	20.8%

UK	Visitors	% Chg
Brisbane	121,000	7.1%
Gold Coast	65,000	5.8%
Sunshine Coast	54,000	1.9%
Fraser Coast	34,000	7.0%
SQC	10,000	58.1%
SGBR	24,000	5.8%
Mackay	6,000	5.9%
Whitsundays	48,000	0.1%
Townsville	25,000	8.1%
Outback ^{II}	n/p	n/p
TNQ	91,000	4.0%
Queensland	227,000	8.1%

Annual change in NZ visitation by region

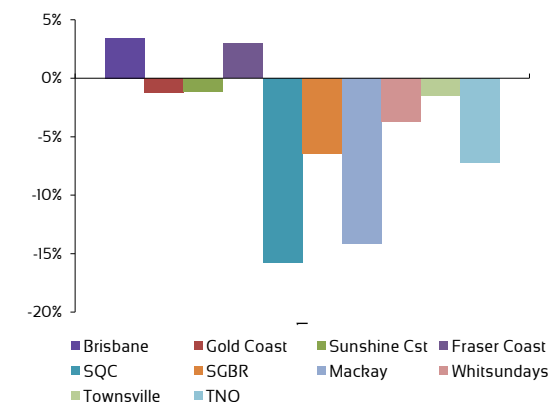


Europe ⁵	Visitors	% Chg
Brisbane	178,000	3.4%
Gold Coast	84,000	(-1.2%)
Sunshine Cst	82,000	(-1.1%)
Fraser Coast	67,000	3.0%
SQC	10,000	(-15.8%)
SGBR	53,000	(-6.4%)
Mackay	16,000	(-14.2%)
Whitsundays	86,000	(-3.7%)
Townsville	53,000	(-1.5%)
Outback ^{II}	8,000	2.7%
TNQ	151,000	(-7.3%)
Queensland	297,000	(-0.6%)

Japan	Visitors	% Chg
Brisbane	33,000	18.8%
Gold Coast	53,000	2.7%
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	6,000	(-31.9%)
Townsville	n/p	n/p
Outback ^{II}	n/p	n/p
TNQ	91,000	5.2%
Queensland	165,000	5.5%




















Nth America	Visitors	% Chg
Brisbane	106,000	13.6%
Gold Coast	48,000	8.6%
Sunshine Coast	24,000	(-7.4%)
Fraser Coast	11,000	(-24.0%)
SQC	n/p	n/p
SGBR	16,000	(-6.1%)
Mackay	n/p	n/p
Whitsundays	27,000	(-1.0%)
Townsville	15,000	16.2%
Outback ^{II}	n/p	n/p
TNQ	124,000	8.4%
Queensland	250,000	12.8%

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



International Tourism Snapshot

Year ending December 2015

	Qld		NSW		Vic		Australia	
	Visitors	Annual change	Visitors	Annual change	Visitors	Annual change	Visitors	Annual change
 New Zealand	424,000	2.1%	401,000	1.4%	328,000	12.3%	1,160,000	4.9%
Total Asia	978,000	15.1%	1,541,000	11.6%	1,220,000	18.8%	3,085,000	12.3%
 Japan	165,000	5.5%	128,000	(-9.0%)	47,000	11.9%	308,000	3.1%
 Hong Kong	58,000	13.5%	105,000	8.0%	83,000	12.5%	200,000	9.0%
 Singapore	61,000	3.1%	116,000	4.8%	113,000	15.0%	343,000	6.4%
 Malaysia	44,000	(-5.2%)	80,000	1.2%	126,000	12.6%	302,000	5.1%
 Indonesia	18,000	5.6%	57,000	(-0.8%)	52,000	3.2%	134,000	1.9%
 Taiwan	60,000	20.5%	64,000	9.8%	46,000	13.9%	122,000	8.4%
 Thailand	13,000	(-3.8%)	33,000	(-10.5%)	27,000	13.1%	71,000	1.7%
 Korea	58,000	21.2%	166,000	13.7%	45,000	14.0%	211,000	12.5%
 China	399,000	20.8%	567,000	19.6%	490,000	25.5%	946,000	21.5%
 India	59,000	34.5%	112,000	22.9%	104,000	24.1%	216,000	18.2%
Other Asia	43,000	25.2%	112,000	25.9%	88,000	19.9%	231,000	20.5%
Nth America	250,000	12.8%	448,000	8.2%	226,000	9.7%	688,000	8.5%
 USA	197,000	18.8%	362,000	9.1%	178,000	11.0%	556,000	9.4%
 Canada	52,000	(-5.2%)	87,000	4.4%	47,000	4.8%	132,000	4.8%
Total Europe	524,000	3.0%	812,000	0.4%	528,000	5.5%	1,398,000	2.7%
 UK	227,000	8.1%	348,000	5.2%	228,000	15.6%	643,000	5.8%
 Germany	82,000	0.3%	117,000	(-2.6%)	77,000	(-0.2%)	181,000	1.6%
Scandinavia	40,000	(-9.7%)	60,000	(-3.4%)	34,000	4.5%	95,000	1.1%
 France	43,000	1.3%	73,000	(-1.6%)	46,000	9.0%	112,000	0.8%
 Italy	24,000	3.2%	39,000	(-10.2%)	31,000	(-8.7%)	69,000	(-1.5%)
 Netherlands	17,000	(-5.8%)	25,000	(-5.4%)	18,000	(-13.1%)	44,000	(-0.3%)
 Switzerland	22,000	5.3%	33,000	(-0.7%)	23,000	20.5%	51,000	3.9%
Other Europe	71,000	1.1%	116,000	(-1.3%)	72,000	(-8.4%)	203,000	(-1.6%)
Other	161,000	5.6%	219,000	5.0%	121,000	11.8%	433,000	5.0%
TOTAL	2,337,000	8.8%	3,421,000	6.6%	2,423,000	13.6%	6,764,000	8.1%

State expenditure comparison

	Qld	NSW	Vic	Australia
Expenditure (\$ million)	\$4,933.5m	\$8,449.4m	\$6,520.4m	\$24,252.1m
Annual change	18.8%	19.2%	30.4%	18.9%
Share of expenditure	20.3%	34.8%	26.9%	100.0%
Spend per Visitor	\$2,107.89	\$2,414.99	\$2,683.60	\$3,535.84

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. SQC - 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.
12. A low response rate for the Whitsundays caused expenditure results to be below acceptable publishing guidelines. Expenditure estimates should be used with caution.

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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