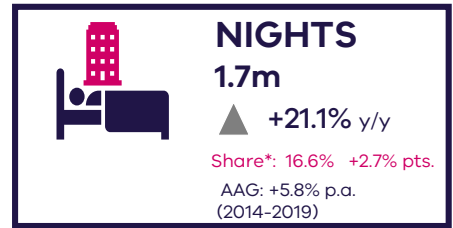
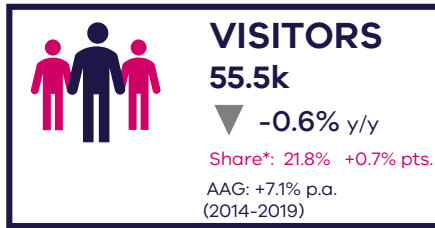
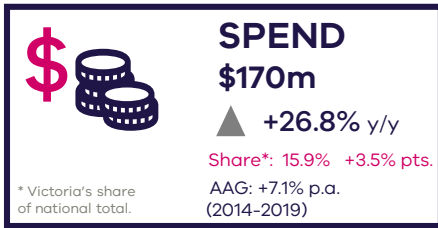


# International Tourism Summary: Korea

Year ending December 2019

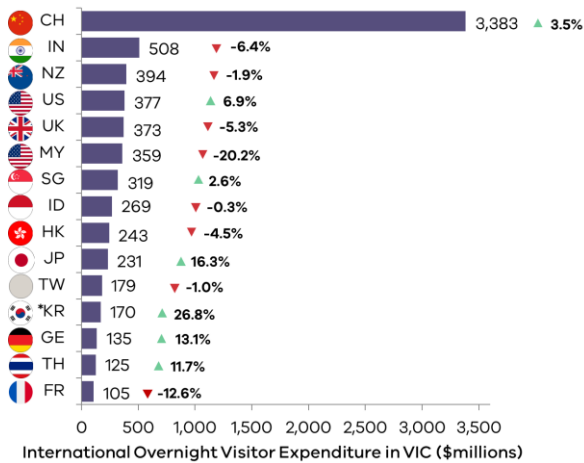


**55,500 Korean visitors spent 1.7 million nights and \$170 million on trips to Victoria in the year ending December 2019.**

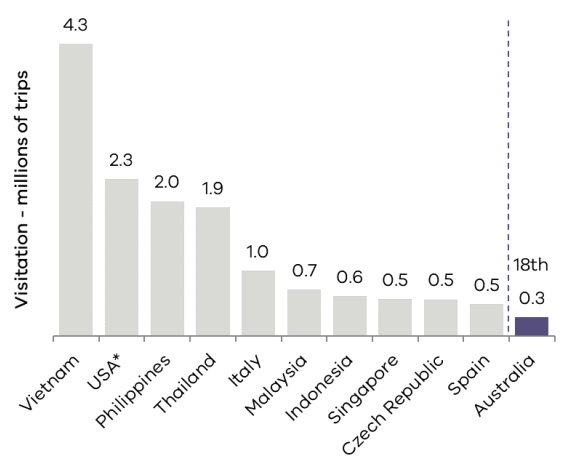


**Context:** In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

International Overnight Expenditure in Victoria (\$m)



Top 10 Out-of-Region Destinations for Korean Travellers



Korean visitors spent \$170 million on trips to Victoria in the year ending December 2019, a year-on-year increase of 26.8 per cent. This represents 1.9 per cent of all international overnight visitor spend in Victoria. Korea is ranked Victoria's 12<sup>th</sup> largest international market in terms of expenditure.

Australia was ranked #18 for visitation against other out-of-region destinations for Korean travellers in the year ending December 2019 (down from #15 in 2018).

\*USA including Hawaii Source: Tourism Economics, YE2019

\* In the year ending December 2019, all Korean visitors to Australia were from South Korea.

## AUSTRALIA



**\$1.1b** Spend  
 ▼ -1.4%  
**254k** Visitors  
 ▼ -3.7%  
**10.5m** Nights  
 ▲ +1.7%

## NEW SOUTH WALES



**\$558m** Spend  
 ▼ -7.6%  
**196k** Visitors  
 ▼ -4.3%  
**4.6m** Nights  
 ▼ -12.0%

## QUEENSLAND



**\$250m** Spend  
 ▲ +5.0%  
**74k** Visitors  
 ▼ -4.7%  
**3.2m** Nights  
 ▲ +24.4%

The growth of Korean expenditure on trips to Victoria (+26.8% year-on-year) was in contrast to the decline in the national average (-1.4%) and in New South Wales (-7.6%), and ahead of the growth in Queensland (+5.0%).

## MELBOURNE



**\$165m** Spend  
 ▲ +41.1%  
**54k** Visitors  
 ▲ +0.8%  
**1.6m** Nights  
 ▲ +34.7%

## REGIONAL VICTORIA

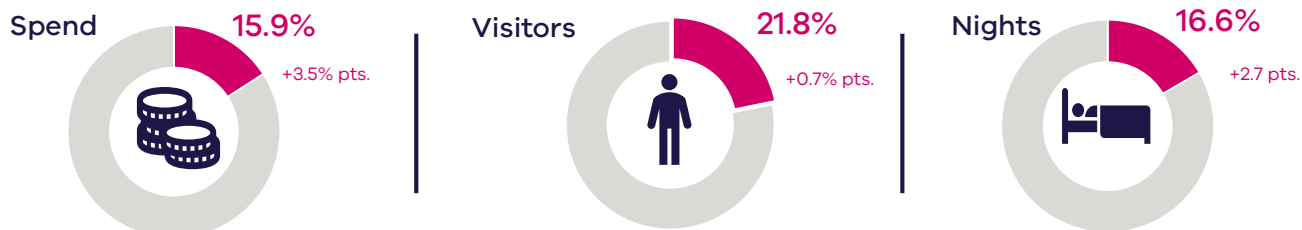


np  
 np  
 np

In the year ending December 2019, 54,000 Korean visitors spent 1.6 million nights and \$165 million on trips to Melbourne. Figures for regional Victoria are represented with 'np' as they are below publishable threshold.

## Korean Spend, Visitors and Nights by Key States Visited

Victoria's Market Share of Korean spend, visitors and nights



### Korean Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from Korea Year Ending December	Total Expenditure (\$ million)					Share of National %			Expenditure Per Night \$			Expenditure Per Visitor \$		
	2014	2018	2019	Av Ann 14-19	% Change 18-19	2014	2018	2019	2014	2018	2019	2014	2018	2019
New South Wales	409	604	558	6.4% p.a.	-7.6%	51.8%	55.7%	52.2%	88	117	123	2,804	2,947	2,844
<b>Victoria</b>	<b>121</b>	<b>134</b>	<b>170</b>	<b>7.1% p.a.</b>	<b>26.8%</b>	<b>15.3%</b>	<b>12.4%</b>	<b>15.9%</b>	<b>92</b>	<b>94</b>	<b>98</b>	<b>3,075</b>	<b>2,408</b>	<b>3,072</b>
Queensland	143	238	250	11.8% p.a.	5.0%	18.1%	22.0%	23.4%	63	92	78	3,052	3,059	3,371
<b>Australia</b>	<b>789</b>	<b>1,084</b>	<b>1,069</b>	<b>6.3% p.a.</b>	<b>-1.4%</b>				<b>78</b>	<b>105</b>	<b>102</b>	<b>4,221</b>	<b>4,106</b>	<b>4,204</b>

<b>Total VIC International Expenditure</b>	4,903	8,467	8,826	12.5% p.a.	4.2%
<b>Korea's Share of VIC International Expenditure</b>	2.5%	1.6%	1.9%		

AAG = Average Annual Growth

NB: Visitor expenditure includes expenditure on packages attributable to destination. Estimates may differ from those published by Tourism Australia

Source: Regional Expenditure Model, International Visitor Survey, December 2014-2019, Tourism Research Australia, Canberra.

Victoria received 15.9 per cent of Korean overnight visitors' expenditure in Australia in the year ending December 2019, behind key competitor states New South Wales (52.2%) and Queensland (23.4%). Korean visitors' expenditure per night in Victoria (\$98) was lower than the national average (\$102) and New South Wales (\$123) but higher than Queensland (\$78). Victoria received a higher total spend per visitor (\$3,072) than New South Wales (\$2,844) but lower than Queensland (\$3,371).

### Korean Overnight Visitation (000s) to Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19	Share of Visitors %
<b>Australia</b>	<b>187</b>	<b>208</b>	<b>258</b>	<b>276</b>	<b>264</b>	<b>254</b>	<b>6.3% p.a.</b>	<b>-3.7%</b>	
New South Wales	146	164	202	221	205	196	6.1% p.a.	-4.3%	77%
<b>Victoria</b>	<b>39</b>	<b>45</b>	<b>50</b>	<b>58</b>	<b>56</b>	<b>55</b>	<b>7.1% p.a.</b>	<b>-0.6%</b>	<b>22%</b>
Queensland	47	56	69	74	78	74	9.6% p.a.	-4.7%	29%

NB: Where there is a '-'; figures are unreliable and are unable to be published.

The year-on-year decline in Korean overnight visitor numbers to Victoria (-0.6%) was softer than the national average (-3.7%), Queensland (-4.7%) and New South Wales (-4.3%) in the year ending December 2019. Over the longer term (2014 to 2019), Korean overnight visitors to Victoria increased at an average annual rate of 7.1 per cent, ahead of the national average (+6.3% p.a.) and New South Wales (+6.1% p.a.) but behind Queensland (+9.6% p.a.).

### Korean Visitor Nights (000s) in Australia by Key States, 2014-2019

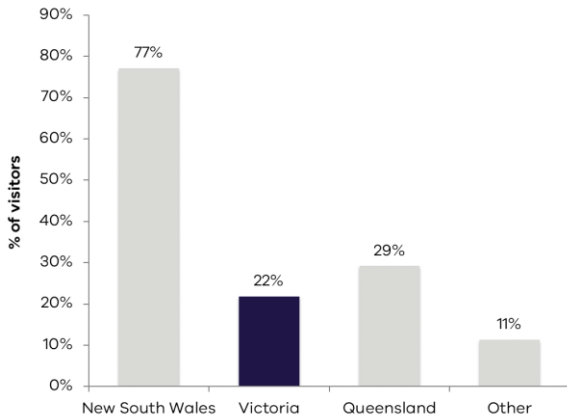
Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19	Share of Nights %
<b>Australia</b>	<b>10,129</b>	<b>11,256</b>	<b>12,491</b>	<b>10,557</b>	<b>10,294</b>	<b>10,467</b>	<b>0.7% p.a.</b>	<b>1.7%</b>	
New South Wales	4,621	5,238	5,766	5,089	5,177	4,554	-0.3% p.a.	-12.0%	44%
<b>Victoria</b>	<b>1,308</b>	<b>1,541</b>	<b>1,402</b>	<b>1,460</b>	<b>1,432</b>	<b>1,734</b>	<b>5.8% p.a.</b>	<b>21.1%</b>	<b>17%</b>
Queensland	2,273	2,910	3,329	2,793	2,585	3,215	7.2% p.a.	24.4%	31%

NB: Where there is a '-'; figures are unreliable and are unable to be published.

In the year ending December 2019, Korean visitor nights to Victoria increased strongly by 21.1 per cent year-on-year, above the national average (+1.7%) and New South Wales (-12.0%) but behind Queensland (+24.4%). Over the longer term (2014 to 2019), Korean visitor nights spent in Victoria increased at an average annual rate of 5.8 per cent, ahead of the national average (+0.7% p.a.) and New South Wales (-0.3% p.a.) but behind Queensland (+7.2% p.a.).

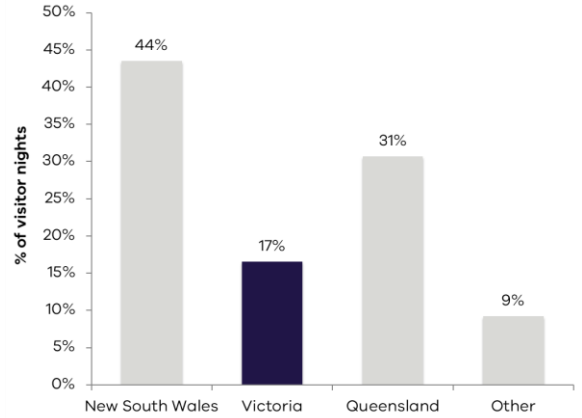
## Market Share by Key States<sup>1</sup>

Korean Overnight Visitors to Australia  
Year ending December 2019 – Market Share by Key States



In the year ending December 2019, 22 per cent of Korean visitors to Australia stayed overnight in Victoria; behind New South Wales (77%) and Queensland (29%).

Korean Visitor Nights to Australia  
Year ending December 2019 – Market Share by Key States



Victoria's market share of visitor nights spent by Korean travellers to Australia in the year ending December 2019 was 17 per cent; behind New South Wales (44%) and Queensland (31%).

## Main Purpose of Trip (000s) to Australia by Key States Visited and Market Share

Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Education	Total
New South Wales	143	21	165	12	8	196
Market Share %	84%	58%	79%	69%	57%	77%
<b>Victoria</b>	<b>33</b>	<b>8</b>	<b>41</b>	<b>7</b>	-	<b>55</b>
Market Share %	19%	21%	20%	38%	-	22%
Queensland	50	10	60	-	6	74
Market Share %	29%	26%	29%	-	38%	29%
<b>Australia</b>	<b>172</b>	<b>36</b>	<b>208</b>	<b>18</b>	<b>15</b>	<b>254</b>

\* Total Leisure = Holiday + VFR

NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Employment' and 'Other' visitors are unreliable and are unable to be published

In the year ending December 2019, 20 per cent of Korean leisure visitors to Australia stayed overnight in Victoria, including 19 per cent of holiday and 21 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of Korean leisure visitors was higher at 79 per cent, with Queensland's share also higher at 29 per cent. During the same period, Victoria's share of the Korean business visitor market was 38 per cent.

## Purpose of Visit to Victoria (and the Destinations Within)

Some international visitors to Victoria visit more than one destination in the state, and for different purposes. For example, a visitor might stay in Melbourne for education reasons, and visit the Great Ocean Road region for a holiday. As such, the percentages of international visitors who visited Victoria for each purpose total more than 100 per cent.

Korean Overnight Expenditure and Visitation to Victoria by Destination Purpose of Visit – Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Education	Total
<b>Overnight Expenditure (\$M)</b>	100	-	106	-	46	170
<b>Overnight Visitors (000s)</b>	39	7	46	7	-	55
<b>Visitor Nights (000s)</b>	1,246	-	1,300	-	321	1,734
<b>Average Length of Stay</b>	31.6	-	28.3	-	-	31.3
<b>Spend per Visitor</b>	2,548	-	2,305	-	-	3,072
<b>Spend per Night</b>	81	-	81	-	144	98

\* Total Leisure = Holiday + VFR (NB total leisure may equal more than the sum of holiday + VFR, since visitors can visit more than one destination in Victoria with more than one purpose)

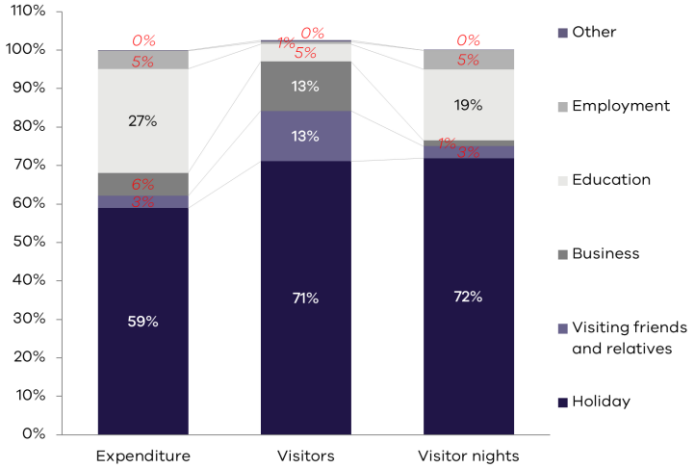
NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Employment' and 'Other' visitors are unreliable and are unable to be published

<sup>1</sup>NOTE: The proportion of Visitors to the States and Territories will not add up to 100% as visitors can travel to multiple destinations in one trip; while the proportion of Visitor Nights to the States and Territories will add to 100% as this measure is mutually exclusive.

## Korean Overnight Expenditure, Visitors and Nights to Victoria by Purpose of Visit

Year Ending December 2019



In the year ending December 2019, holiday visitors accounted for 59 per cent of Korean visitor expenditure in Victoria, while education visitors accounted for 27 per cent of expenditure.

During the same period, 71 percent of Korean visitors travelled to Victoria for holiday purposes, 13 per cent travelled for VFR and an additional 13 per cent travelled on business.

Seventy-two per cent (72%) of all nights spent in Victoria by Korean visitors in the year ending December 2019 were accounted for by holiday visitors, while education visitors accounted for 19 per cent of visitor nights.

Note: Percentages of visitors will not add up to 100% as visitors can travel to multiple destinations in Victoria with different purposes.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

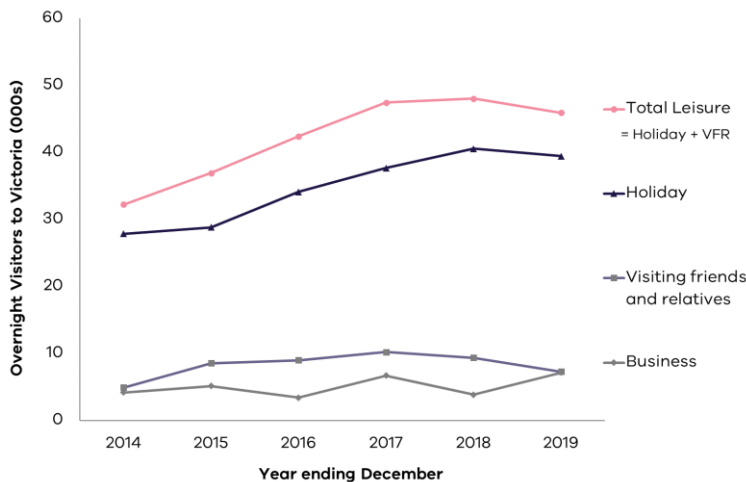
## Korean Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Holiday	28	29	34	38	41	39	7.2% p.a.	-2.7%
Visiting friends and relative	-	9	9	10	9	7	-	-22.2%
Total Leisure	32	37	42	47	48	46	7.4% p.a.	-4.4%
Business	-	5	-	7	-	7	-	-

NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

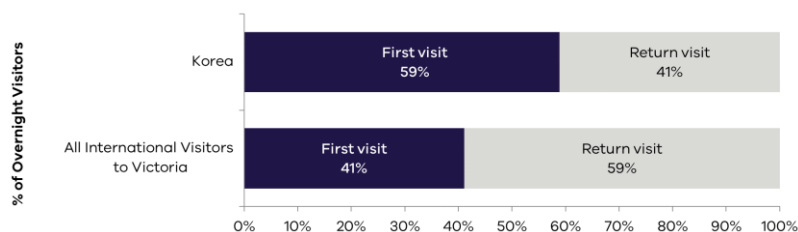
## Korean Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019



Of all the main purpose segments, the Korean leisure market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+7.4% p.a.). Holiday visitors have contributed strongly to this growth, increasing at an average annual rate of 7.2 per cent.

## Repeat Visitation to Australia

Repeat Visitation to Australia (% of Korean overnight visitors to Victoria vs all international overnight visitors to Victoria)



In the year ending December 2019, 59 per cent of overnight visitors from Korea to Victoria were visiting Australia for the first time, compared with 41 per cent of international overnight visitors to Victoria overall.

## Melbourne and Regional Victoria Overnight Visitation

### Korean Overnight Visitation (000s) to Victoria, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	38	44	48	57	54	54	7.4% p.a.	0.8%
<b>Victoria</b>	<b>39</b>	<b>45</b>	<b>50</b>	<b>58</b>	<b>56</b>	<b>55</b>	<b>7.1% p.a.</b>	<b>-0.6%</b>

NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for Regional Victoria are unreliable and are unable to be published

There were 54,000 Korean overnight visitors to Melbourne in the year ending December 2019, a 0.8 per cent increase over the previous year. Korean visitors to Melbourne have grown at an average annual rate of 7.4 per cent over the period 2014 to 2019.

### Korean Visitor Nights (000s) to Victoria, 2 years<sup>2</sup> (rolling), 2014-2019

2 Years Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	2,333	2,472	2,441	2,445	2,480	2,860	4.2% p.a.	15.3%
Regional Victoria	-	378	503	417	412	305	-	-25.8%
<b>Victoria</b>	<b>2,551</b>	<b>2,850</b>	<b>2,944</b>	<b>2,862</b>	<b>2,892</b>	<b>3,166</b>	<b>4.4% p.a.</b>	<b>9.5%</b>

NB: Where there is a '-', figures are unreliable and are unable to be published.

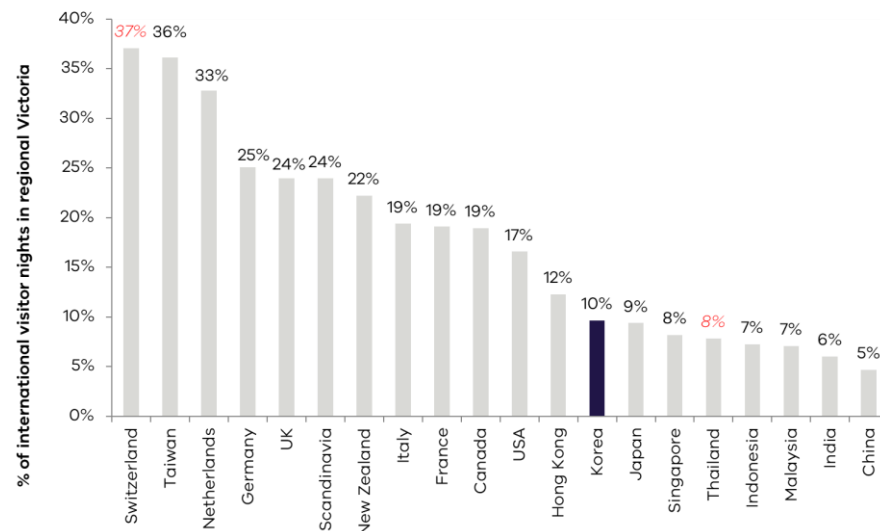
Korean visitors spent 2.9 million nights in Melbourne in the two years ending December 2019, an increase of 15.3 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum\*), visitor nights spent in Melbourne increased at an average annual rate of 4.2 per cent.

In the two years ending December 2019, Korean visitors spent 305,000 nights in regional Victoria, a decline of 25.8 per cent compared with the two years ending December 2018.

\* where 2014 includes years ending December 2013 and 2014 and 2019 includes years ending December 2018 and 2019.

## Regional Dispersal

### Regional Dispersal of Top 20 International Overnight Markets to Victoria – 2 Years Ending December 2019



Of the 3.2 million nights spent in Victoria by Korean visitors in the two years ending December 2019, 10 per cent (305,000) of them were spent in regional Victoria.

Korean visitors to Victoria have the 8<sup>th</sup> lowest rate of overnight dispersal of all the state's top 20 international markets.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

<sup>2</sup> Two years of data are used to increase reliability of the figures.

## Places Visited in Regional Victoria and Melbourne Attractions

### Places Visited in Regional Victoria – Year Ending December 2019

Selected Places Visited - Overnight Visit or Daytrip (% of all Overnight Visitors to Victoria)	Korea Visitors	All International Visitors
Ballarat, Sovereign Hill	-	6%
Bendigo	-	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	12%	9%
Great Ocean Road/Twelve Apostles	61%	33%
Healesville Sanctuary	-	2%
Mornington Peninsula	-	8%
Phillip Island/Penguin Parade	21%	17%
Puffing Billy and Dandenong Ranges	27%	10%
Victorian Snowfields	-	2%
Wilson's Promontory	-	3%
Yarra Valley	11%	12%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In the year ending December 2019, 61 per cent of Korean overnight visitors to Victoria spent time (daytrip or overnight) in the Great Ocean Road/Twelve Apostles region. This region is very popular generally, with 33 per cent of all international overnight visitors to Victoria travelling there.

Twenty-seven per cent (27%) of Korean overnight visitors to Victoria went to the Puffing Billy and Dandenong Ranges area (compared with 10 per cent of international overnight visitors to Victoria overall) and 21 per cent went to the Phillip Island/Penguin Parade area (compared with 17 per cent of international overnight visitors to Victoria overall).

### Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	Korea Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	-	4%
Brunswick Street	11%	10%
Chadstone Shopping Centre	11%	15%
Chapel Street	-	9%
Crown Casino/entertainment complex	30%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	24%	19%
Federation Square	30%	38%
Melbourne CBD Shopping Precinct	68%	63%
Melbourne Cricket Ground (MCG)	-	6%
Melbourne Museum (Royal Exhibition Building)	23%	16%
Melbourne Zoo	-	8%
National Gallery of Victoria (NGV)	23%	17%
Queen Victoria Market	64%	44%
Shrine of Remembrance	10%	12%
Southbank/Southgate	38%	26%
St Kilda	30%	28%

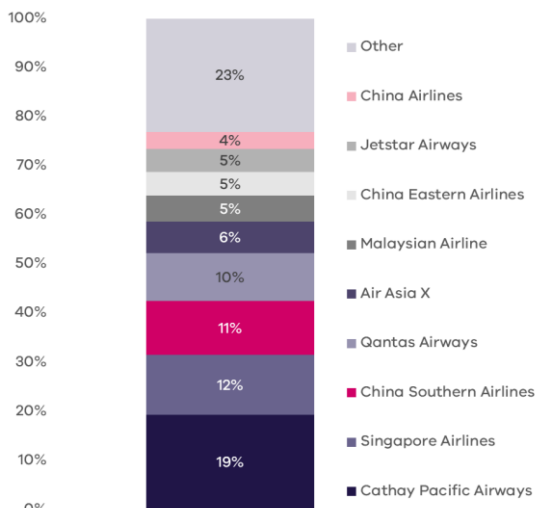
NB: Where there is a '-', figures are unreliable and are unable to be published.

The most visited Melbourne attractions by Korean overnight visitors to Victoria were the CBD shopping precinct (68 per cent compared with 63 per cent of international visitors overall) and Queen Victoria Market (64 per cent of Korean overnight visitors compared with 44 per cent of international visitors overall).

Other attractions that Korean visitors were more likely to visit compared to international visitors overall included Southbank/Southgate (38 per cent of Korean overnight visitors compared with 26 per cent of international overnight visitors to Victoria overall), St Kilda (30 per cent compared with 28 per cent of international overnight visitors overall), Crown Casino/entertainment complex (30 per cent compared with 19 per cent of international overnight visitors to Victoria overall), Docklands/Marvel Stadium (24 per cent compared with 19 per cent of international overnight visitors to Victoria overall), Melbourne Museum (23 per cent compared with 16 per cent of international overnight visitors to Victoria overall) and NGV (23 per cent compared with 17 per cent of international overnight visitors to Victoria overall).

## Aviation<sup>3</sup>

### Airline Market Share – Korean International Arrivals into Melbourne – Year ending December 2019



In the year ending December 2019, Cathay Pacific Airways (19%), Singapore Airlines (12%), China Southern Airlines (11%) and Qantas Airways (10%) had the greatest share of Korean international arrivals into Melbourne.

Note that none of these arrivals were on direct flights. The only Australian cities currently receiving direct flights from South Korea are Sydney, Brisbane and the Gold Coast (with a total of 335,000 available seats).

<sup>3</sup> Note: Aviation capacity is measured by "available seats", which includes international visitors and Australian residents returning home.

## Sources:

- International Visitor Survey (IVS), years ending December 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Regional Expenditure Model (REX) 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Tourism Australia Consumer Demand Project, Tourism Economics, April 2020
- International Airlines Operated Flights and Seats, year ending December 2019, Department of Infrastructure and Regional Development (BITRE)
- Visitor Arrivals and Departures, year ending December 2019, Tourism Research Australia

Base for IVS and Expenditure data: Only those trips where International visitors aged 15 years or over who have stayed in Australia for less than 12 months are in scope. Expenditure includes package expenditure.

Figures that are unreliable and unable to be published are represented by '-'. Figures might not add up due to rounding.

To view the full suite of 15 International Tourism Summaries (Victoria's top 15 international markets in terms of expenditure, visitors and nights), see <https://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

For further information on IVS and Expenditure data sources used please refer to our Guide to Tourism Data Sources and Definitions document found here: <https://www.business.vic.gov.au/tourism-industry-resources/research/teve-research>

For further information on Tourism Australia's Consumer Demand Project, see <http://www.tourism.australia.com/en/markets-and-research/reports/consumer-research.html>

Further information on international visitor statistics: <https://www.tra.gov.au/international>;  
<http://www.tourism.australia.com/en/markets-and-research/market-regions.html>

Factsheet produced by the TEVE Research Unit, May 2020.

Due care is taken in the production of this factsheet, however DJPR accepts no responsibility for the use of this information.