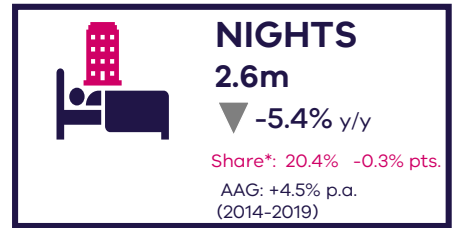
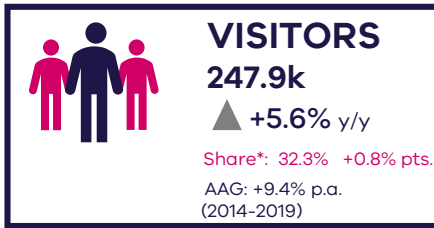
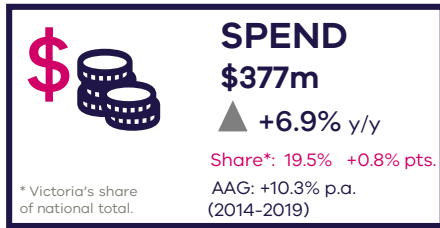


# International Tourism Summary: USA

Year ending December 2019

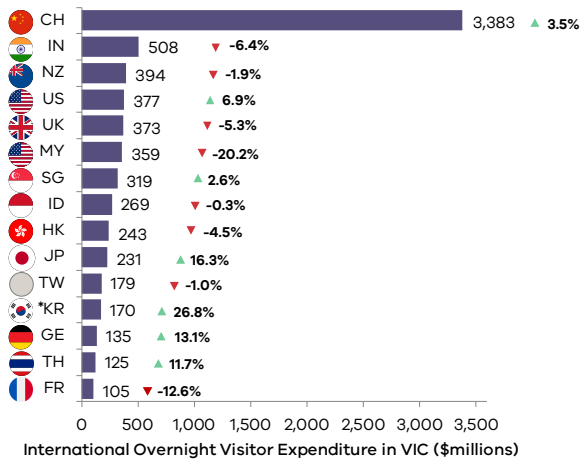


**247,900 visitors from the United States (US) spent 2.6 million nights and \$377 million on trips to Victoria in the year ending December 2019.**

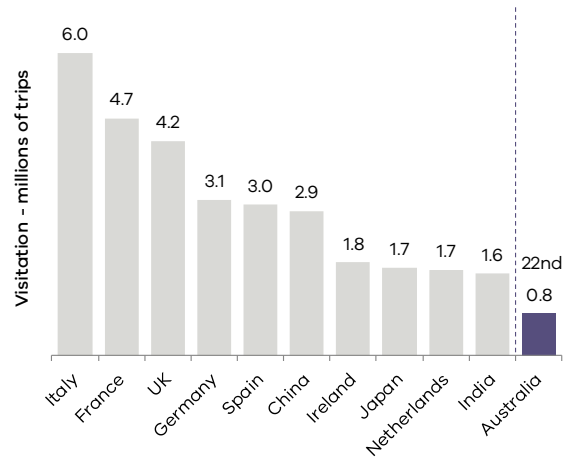


**Context:** In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

## International Overnight Expenditure in Victoria (\$m)



## Top 10 Out-of-Region Destinations for US Travellers



US visitors spent \$377 million on trips to Victoria in the year ending December 2019, a year-on-year increase of 6.9 per cent. This represents 4.3 per cent of all international overnight visitor spend in Victoria. The United States of America (USA) is ranked Victoria's 4<sup>th</sup> largest international market in terms of expenditure.

Australia was ranked #22 for visitation against other out-of-region destinations for US travellers in the year ending December 2019 (up from #25 in 2018).

Source: Tourism Economics, YE2019

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

### AUSTRALIA



**\$1.9b** Spend  
▲ 2.7%  
**767k** Visitors  
▲ 3.1%  
**12.9m** Nights  
▼ -3.9%

### NEW SOUTH WALES



**\$826m** Spend  
▲ 8.4%  
**523k** Visitors  
▲ 5.6%  
**5.3m** Nights  
▲ 8.5%

### QUEENSLAND



**\$419m** Spend  
▲ 1.0%  
**236k** Visitors  
▲ 3.0%  
**2.5m** Nights  
▼ -6.3%

The rate of growth of US expenditure on trips to Victoria (+6.9% year-on-year) was ahead of the national average (+2.7%) and Queensland (+1.0%), but behind New South Wales (+8.4%).

### MELBOURNE



**\$345m** Spend  
▲ 7.8%  
**233k** Visitors  
▲ 4.8%  
**2.2m** Nights  
▼ -8.1%

### REGIONAL VICTORIA



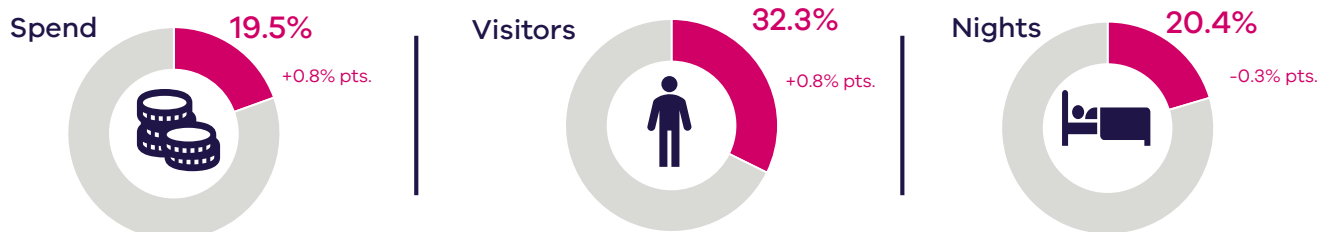
**\$32m** Spend  
▼ -1.0%  
**44k** Visitors  
▼ -4.5%  
**467k** Nights  
▲ 9.3%

In the year ending December 2019:

- 233,000 US visitors spent 2.2 million nights and \$345 million on trips to Melbourne
- 44,000 US visitors spent 467,000 nights and \$32 million in regional Victoria.

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

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



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

Expenditure by Visitors from United States of America Year Ending December	Total Expenditure (\$ million)				Share of National %			Expenditure Per Night \$			Expenditure Per Visitor \$			
	2014	2018	2019	Av Ann 14-19	18-19	2014	2018	2019	2014	2018	2019	2014	2018	2019
New South Wales	527	762	826	9.4% p.a.	8.4%	39.9%	40.5%	42.8%	122	157	157	1,571	1,538	1,579
<b>Victoria</b>	<b>231</b>	<b>353</b>	<b>377</b>	<b>10.3% p.a.</b>	<b>6.9%</b>	<b>17.5%</b>	<b>18.8%</b>	<b>19.5%</b>	<b>110</b>	<b>127</b>	<b>144</b>	<b>1,462</b>	<b>1,502</b>	<b>1,521</b>
Queensland	259	415	419	10.1% p.a.	1.0%	19.6%	22.1%	21.7%	114	154	166	1,566	1,809	1,773
<b>Australia</b>	<b>1,321</b>	<b>1,880</b>	<b>1,931</b>	<b>7.9% p.a.</b>	<b>2.7%</b>				<b>107</b>	<b>140</b>	<b>150</b>	<b>2,481</b>	<b>2,526</b>	<b>2,518</b>

<b>Total VIC International Expenditure</b>	4,903	8,467	8,826	12.5% p.a.	4.2%
<b>United States of America's Share of VIC International Expenditure</b>	4.7%	4.2%	4.3%		

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 19.5 per cent of US overnight visitors' expenditure in Australia in the year ending December 2019, behind key competitor states New South Wales (42.8%) and Queensland (21.7%). US visitors' expenditure per night in Victoria (\$144) was lower than the national average (\$150), Queensland (\$166) and New South Wales (\$157). Victoria received a lower total spend per visitor (\$1,521) compared with Queensland (\$1,773) and New South Wales (\$1,579).

## US 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>533</b>	<b>586</b>	<b>675</b>	<b>734</b>	<b>744</b>	<b>767</b>	<b>7.6% p.a.</b>	<b>3.1%</b>	
New South Wales	335	366	425	471	495	523	9.3% p.a.	5.6%	68%
<b>Victoria</b>	<b>158</b>	<b>173</b>	<b>203</b>	<b>232</b>	<b>235</b>	<b>248</b>	<b>9.4% p.a.</b>	<b>5.6%</b>	<b>32%</b>
Queensland	166	202	227	234	229	236	7.4% p.a.	3.0%	31%

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

Year-on-year growth in US overnight visitor numbers to Victoria (+5.6%) was ahead of the national average (+3.1%) and Queensland (+3.0%), and in line with New South Wales (+5.6%) in the year ending December 2019. Further, over the longer term (2014 to 2019), US overnight visitors to Victoria increased at an average annual rate of 9.4 per cent, ahead of the national average (+7.6% p.a.), New South Wales (+9.3% p.a.) and Queensland (+7.4% p.a.).

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

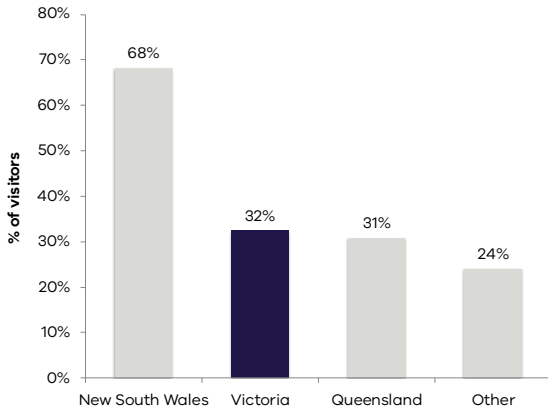
Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19	Share of Nights %
<b>Australia</b>	<b>12,379</b>	<b>14,481</b>	<b>15,320</b>	<b>14,233</b>	<b>13,380</b>	<b>12,861</b>	<b>0.8% p.a.</b>	<b>-3.9%</b>	
New South Wales	4,324	5,003	5,206	5,137	4,857	5,271	4.0% p.a.	8.5%	41%
<b>Victoria</b>	<b>2,100</b>	<b>2,196</b>	<b>2,761</b>	<b>2,727</b>	<b>2,773</b>	<b>2,622</b>	<b>4.5% p.a.</b>	<b>-5.4%</b>	<b>20%</b>
Queensland	2,282	3,244	3,134	2,708	2,693	2,523	2.0% p.a.	-6.3%	20%

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

In the year ending December 2019, US visitor nights to Victoria declined by 5.4 per cent year-on-year, a slower decline than in Queensland (-6.3%), but behind the national average (-3.9%) and growth in New South Wales (+8.5%). Over the longer term (2014 to 2019), US visitor nights spent in Victoria increased at an average annual rate of 4.5 per cent, ahead of the national average (+0.8% p.a.), Queensland (+2.0% p.a.) and New South Wales (+4.0% p.a.).

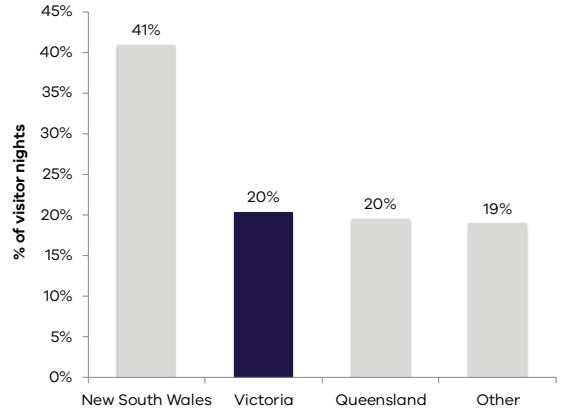
## Market Share by Key States<sup>1</sup>

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



In the year ending December 2019, 32 per cent of US visitors to Australia stayed overnight in Victoria; ahead of Queensland (31%) but behind New South Wales (68%).

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



Victoria's market share of visitor nights spent by US travellers to Australia in the year ending December 2019 was 20 per cent; in line with Queensland (20%) but behind New South Wales (41%).

## 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	294	109	403	80	16	523
Market Share %	79%	57%	71%	55%	72%	68%
<b>Victoria</b>	<b>131</b>	<b>59</b>	<b>190</b>	<b>46</b>	<b>6</b>	<b>248</b>
Market Share %	<b>35%</b>	<b>31%</b>	<b>34%</b>	<b>31%</b>	<b>28%</b>	<b>32%</b>
Queensland	141	48	189	31	10	236
Market Share %	38%	25%	33%	21%	48%	31%
<b>Australia</b>	<b>373</b>	<b>193</b>	<b>565</b>	<b>146</b>	<b>21</b>	<b>767</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, 34 per cent of US leisure visitors to Australia stayed overnight in Victoria, including 35 per cent of holiday and 31 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of US leisure visitors was higher at 71 per cent, while Queensland's share was slightly lower at 33 per cent. During the same period, Victoria's share of the US business visitor market was 31 per cent and the education market share was 28 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.

US 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>	177	65	242	72	40	377
<b>Overnight Visitors (000s)</b>	146	65	198	46	-	248
<b>Visitor Nights (000s)</b>	985	839	1,823	294	274	2,622
<b>Average Length of Stay</b>	6.7	12.8	9.2	6.4	-	10.6
<b>Spend per Visitor</b>	1,207	994	1,224	1,565	-	1,521
<b>Spend per Night</b>	179	78	133	245	147	144

\* 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)

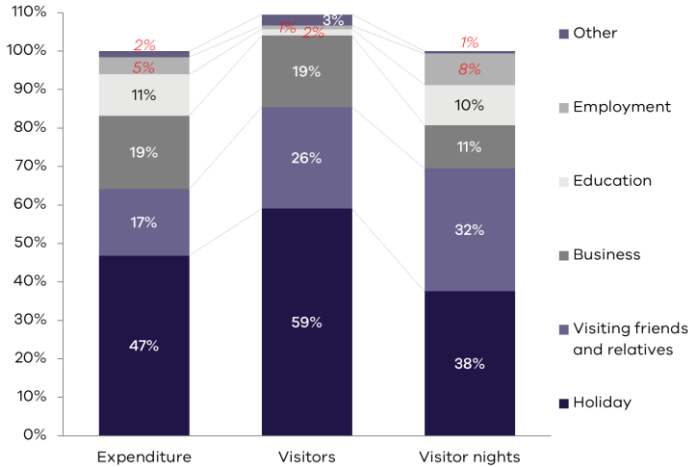
NB: Where there is a '-', figures are unreliable and are unable to be published.

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.

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

Year Ending December 2019



In the year ending December 2019, leisure visitors accounted for 64 per cent of US visitor expenditure in Victoria, comprising holiday visitor expenditure (47%) and VFR visitor expenditure (17%)\*. Business visitors contributed 19 per cent of spend while employment visitors contributed 11 per cent.

During the same period, 59 percent of US visitors travelled to Victoria for holiday purposes, 26 per cent travelled for VFR and a further 19 per cent came for business purposes.

Thirty-eight per cent (38%) of all nights spent in Victoria by US visitors in the year ending December 2019 were accounted for by holiday visitors, while VFR visitors accounted for 32 per cent of visitor nights, business visitors for 11 per cent of visitor nights and education visitors for 10 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.

\*Figures might not add up due to rounding.

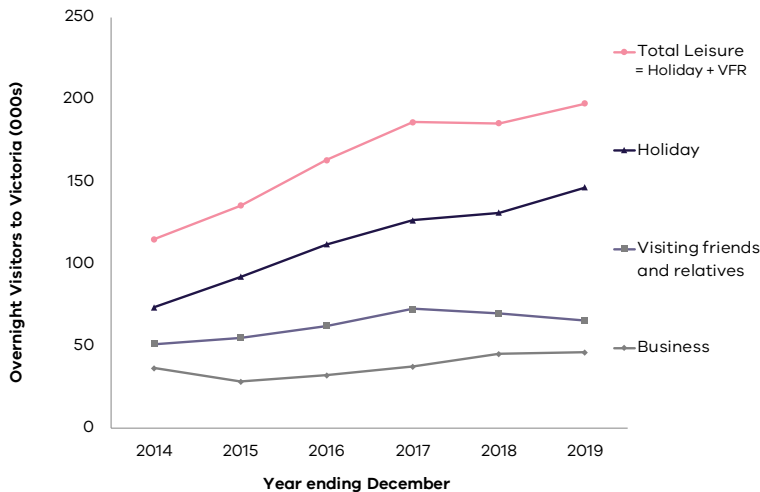
## US Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual	
							% change	% change
							14/19	18/19
<b>Holiday</b>	74	92	112	126	131	146	14.8% p.a.	11.8%
<b>Visiting friends and relative</b>	51	55	62	72	70	65	5.1% p.a.	-6.1%
<b>Total Leisure</b>	115	135	163	186	185	198	11.5% p.a.	6.5%
<b>Business</b>	36	28	32	37	45	46	4.8% p.a.	2.1%

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

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

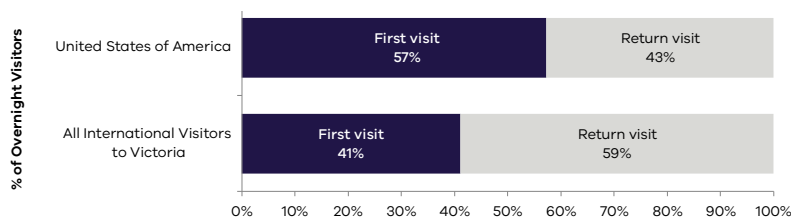


Of all the main purpose segments, the US holiday market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+14.8% p.a.), while VFR (+5.1% p.a.) and business (+4.8% p.a.) visitors have also increased strongly.

Overall, overnight US leisure visitors to Victoria have increased at an average annual rate of 11.5 per cent per annum over the period 2014-2019.

## Repeat Visitation to Australia

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



In the year ending December 2019, 57 per cent of overnight visitors from the US 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

US 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	150	163	187	218	222	233	9.3% p.a.	4.8%
Regional Victoria	31	35	48	48	47	44	7.3% p.a.	-4.5%
<b>Victoria</b>	<b>158</b>	<b>173</b>	<b>203</b>	<b>232</b>	<b>235</b>	<b>248</b>	<b>9.4% p.a.</b>	<b>5.6%</b>

There were 233,000 US overnight visitors to Melbourne in the year ending December 2019, a 4.8 per cent increase over the previous year. US visitors to Melbourne have grown at an average annual rate of 9.3 per cent over the period 2014 to 2019.

In the year ending December 2019, there were 44,000 US overnight visitors to regional Victoria, a 4.5 per cent decline year-on-year. Over the longer term (2014-19), US overnight visitors to regional Victoria have grown at an average annual rate of 7.3 per cent per annum.

US 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	3,809	3,573	4,112	4,589	4,613	4,501	3.4% p.a.	-2.4%
Regional Victoria	677	723	845	899	887	894	5.7% p.a.	0.8%
<b>Victoria</b>	<b>4,486</b>	<b>4,296</b>	<b>4,957</b>	<b>5,488</b>	<b>5,500</b>	<b>5,396</b>	<b>3.8% p.a.</b>	<b>-1.9%</b>

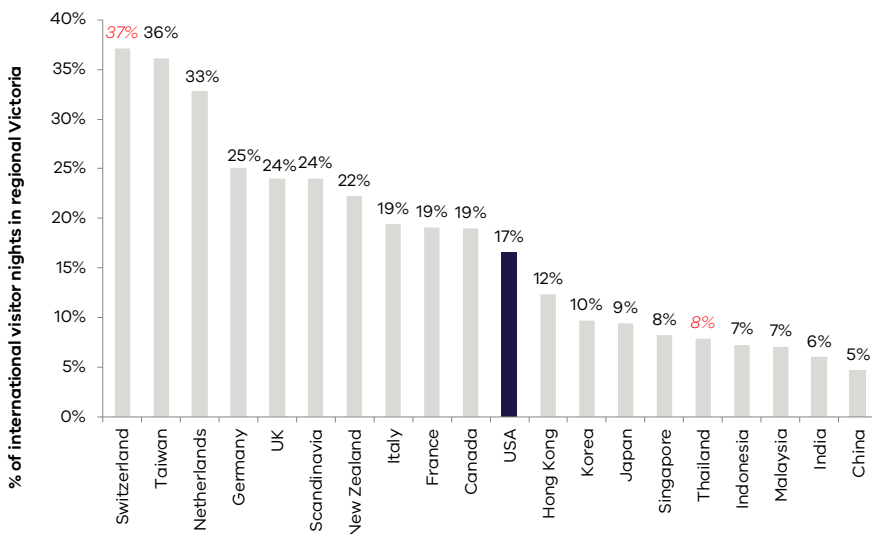
US visitors spent 4.5 million nights in Melbourne in the two years ending December 2019, a decline of 2.4 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum\*), visitor nights spent in Melbourne increased at an average annual rate of 3.4 per cent.

In the two years ending December 2019, US visitors spent 894,000 nights in regional Victoria, representing an increase of 0.8 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 regional Victoria increased at an average rate of 5.7 per cent.

\* 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 5.4 million nights spent in Victoria by US visitors in the two years ending December 2019, 17 per cent (894,000) of them were spent in regional Victoria.

US visitors to Victoria have the 11<sup>th</sup> highest 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)	United States of America	
	America Visitors	All International Visitors
Ballarat, Sovereign Hill	4%	6%
Bendigo	2%	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	7%	9%
Great Ocean Road/Twelve Apostles	25%	33%
Healesville Sanctuary	3%	2%
Mornington Peninsula	7%	8%
Phillip Island/Penguin Parade	15%	17%
Puffing Billy and Dandenong Ranges	5%	10%
Victorian Snowfields	-	2%
Wilson's Promontory	2%	3%
Yarra Valley	11%	12%

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

### Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	United States of America	
	America Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	2%	4%
Brunswick Street	9%	10%
Chadstone Shopping Centre	5%	15%
Chapel Street	9%	9%
Crown Casino/entertainment complex	17%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	15%	19%
Federation Square	34%	38%
Melbourne CBD Shopping Precinct	52%	63%
Melbourne Cricket Ground (MCG)	6%	6%
Melbourne Museum (Royal Exhibition Building)	10%	16%
Melbourne Zoo	5%	8%
National Gallery of Victoria (NGV)	13%	17%
Queen Victoria Market	39%	44%
Shrine of Remembrance	13%	12%
Southbank/Southgate	23%	26%
St Kilda	26%	28%

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

In the year ending December 2019, 25 per cent of US 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.

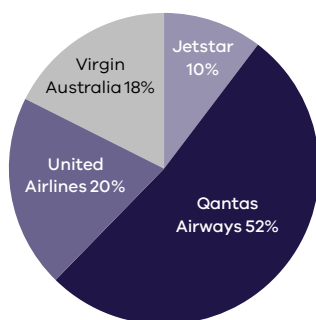
Fifteen per cent (15%) of US overnight visitors to Victoria went to the Phillip Island/Penguin Parade area (compared with 17 per cent of international overnight visitors to Victoria overall) and 11 per cent went to the Yarra Valley (compared with 12 per cent of international visitors overall).

The most visited Melbourne attractions by US overnight visitors to Victoria were the CBD shopping precinct (52 per cent compared with 63 per cent of international visitors overall) and the Queen Victoria Market (39 per cent compared with 44 per cent of international visitors overall). Federation Square was also popular (34 per cent of US overnight visitors compared with 38 per cent of international visitors overall).

Other highly visited attractions included the St Kilda (26 per cent of US overnight visitors compared with 28 per cent of international overnight visitors to Victoria overall) and Southbank/Southgate (23 per cent compared with 26 per cent of international overnight visitors overall).

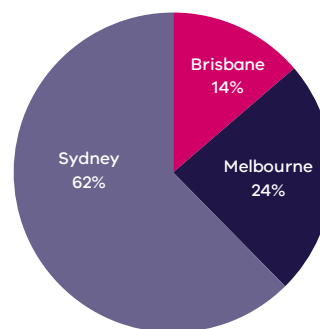
## Aviation<sup>3</sup>

### Airline Market Share – Direct Seats into Melbourne from the US – Year ending December 2019



In the year ending December 2019, Qantas Airways contributed 52 per cent of the 469,600 available seats on direct flights from the US to Melbourne. United Airlines contributed 20 per cent and Virgin Australia accounted for 18 per cent of seats.

### Direct Flight Market Share – Direct Seats into Australian Airports from the US – Year ending December 2019



In the year ending December 2019, Melbourne received 24 per cent of the 2.0 million available seats on direct flights from the US to Australia. Sydney received the highest share (62%) of available seats on direct flights from the US to Australia.

<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 2019)
- Regional Expenditure Model (REX) 2014-2019, Tourism Research Australia (data released 8 April 2019)
- 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.