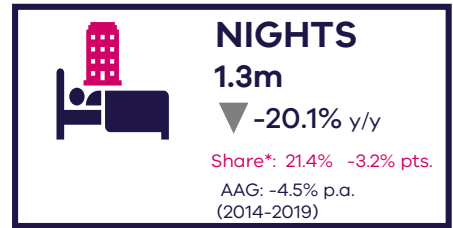
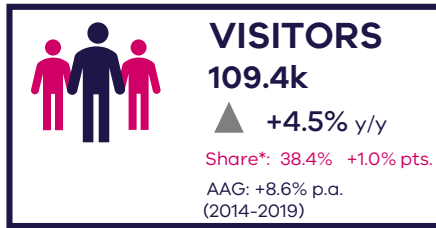
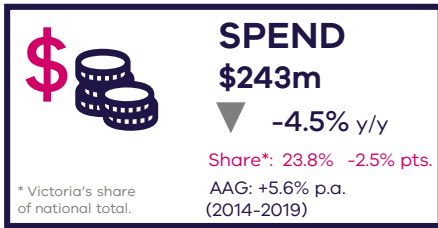


International Tourism Summary: Hong Kong

Year ending December 2019

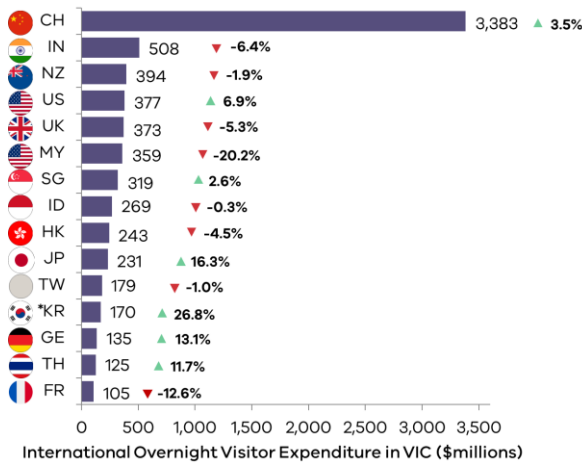


109,400 Hong Kong visitors spent 1.3 million nights and \$243 million on trips to Victoria in the year ending December 2019.

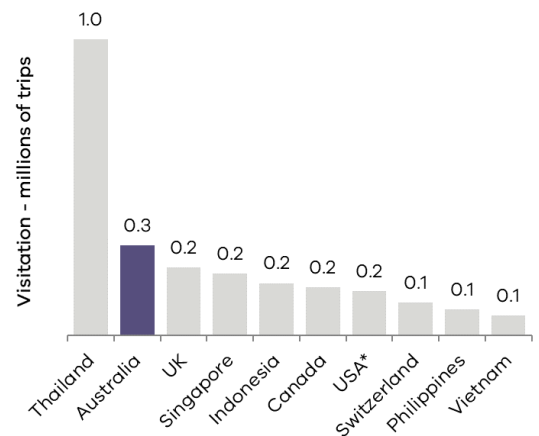


Context: In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

International Overnight Expenditure in Victoria (\$m)



Top 10 Out-of-Region Destinations for Hong Kong Travellers



Hong Kong visitors spent \$243 million on trips to Victoria in the year ending December 2019, a year-on-year decline of 4.5 per cent. This represents 2.8 per cent of all international overnight visitor spend in Victoria. Hong Kong is ranked Victoria's 9th largest international market in terms of expenditure.

Australia was ranked #2 for visitation against other out-of-region destinations for Hong Kong travellers in the year ending December 2019 (no change from previous year).

*USA including Hawaii Source: Tourism Economics, YE2019

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

AUSTRALIA



\$1.0b Spend
▲ +5.4%
285k Visitors
▲ +1.9%
6.2m Nights
▼ -8.2%

NEW SOUTH WALES



\$361m Spend
▲ +10.5%
135k Visitors
▲ +3.0%
2.2m Nights
▼ -8.6%

QUEENSLAND



\$206m Spend
▲ +8.5%
66k Visitors
▼ -7.0%
1.3m Nights
▼ -4.4%

The rate of decline of Hong Kong expenditure on trips to Victoria (-4.5% year-on-year) was in contrast to the growth in the national average (+5.4%), New South Wales (+10.5%) and Queensland (+8.5%).

MELBOURNE



\$228m Spend
▲ +2.5%
108k Visitors
▲ +7.7%
1.2m Nights
▼ -11.7%

REGIONAL VICTORIA



np
15k Visitors
▼ -9.8%
np

In the year ending December 2019:

- 108,000 Hong Kong visitors spent 1.2 million nights and \$228 million on trips to Melbourne
- 15,000 Hong Kong visitors stayed overnight in regional Victoria.

np = non-publishable (figures are below reliable and publishable thresholds)

Hong Kong Spend, Visitors and Nights by Key States Visited

Victoria's Market Share of Hong Kong spend, visitors and nights



Hong Kong Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from Hong Kong 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	220	326	361	10.4% p.a.	10.5%	31.2%	33.6%	35.3%	97	137	166	2,265	2,491	2,673
Victoria	185	255	243	5.6% p.a.	-4.5%	26.3%	26.3%	23.8%	112	154	185	2,559	2,433	2,223
Queensland	123	190	206	10.8% p.a.	8.5%	17.5%	19.6%	20.2%	82	138	157	2,484	2,672	3,117
Australia	705	970	1,023	7.7% p.a.	5.4%				97	144	166	3,824	3,470	3,590

Total VIC International Expenditure	4,903	8,467	8,826	12.5% p.a.	4.2%
Hong Kong's Share of VIC International Expenditure	3.8%	3.0%	2.8%		

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 23.8 per cent of Hong Kong overnight visitors' expenditure in Australia in the year ending December 2019, ahead of Queensland (20.2%) but behind New South Wales (35.3%). Hong Kong visitors' expenditure per night in Victoria (\$185) was higher than the national average (\$166), New South Wales (\$166) and Queensland (\$157). Victoria received a lower total spend per visitor (\$2,223) than Queensland (\$3,117) and New South Wales (\$2,673).

Hong Kong 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 %
Australia	184	199	226	256	280	285	9.1% p.a.	1.9%	
New South Wales	97	103	117	131	131	135	6.8% p.a.	3.0%	47%
Victoria	72	81	87	99	105	109	8.6% p.a.	4.5%	38%
Queensland	50	56	62	64	71	66	5.9% p.a.	-7.0%	23%

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

The year-on-year increase in Hong Kong overnight visitor numbers to Victoria (+4.5%) was ahead of the national average (+1.9%) and key competitor states New South Wales (+3.0%) and Queensland (-7.0%) in the year ending December 2019. Over the longer term (2014 to 2019), Hong Kong overnight visitors to Victoria increased at an average annual rate of 8.6 per cent, behind the national average (+9.1% p.a.) but ahead of New South Wales (+6.8% p.a.) and Queensland (+5.9% p.a.).

Hong Kong Visitor Nights (000s) in Australia by Key States, 2014-2019

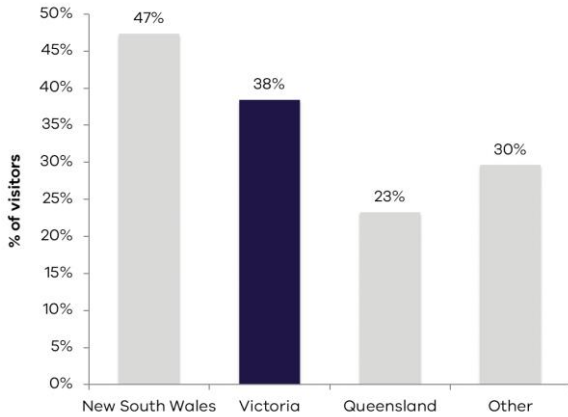
Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19	Share of Nights %
Australia	7,281	7,771	6,971	7,119	6,716	6,162	-3.3% p.a.	-8.2%	
New South Wales	2,276	2,405	2,377	2,425	2,379	2,175	-0.9% p.a.	-8.6%	35%
Victoria	1,659	1,876	1,776	1,795	1,649	1,318	-4.5% p.a.	-20.1%	21%
Queensland	1,499	1,496	1,257	1,553	1,374	1,314	-2.6% p.a.	-4.4%	21%

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

In the year ending December 2019, Hong Kong visitor nights to Victoria declined by 20.1 per cent year-on-year, a steeper decline than at the national level (-8.2%), in New South Wales (-8.6%) and in Queensland (-4.4%). Over the longer term (2014 to 2019), Hong Kong visitor nights spent in Victoria declined at an average annual rate of 4.5 per cent, higher than the decline at the national level (-3.3% p.a.), in Queensland (-2.6% p.a.) and in New South Wales (-0.9% p.a.).

Market Share by Key States¹

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



In the year ending December 2019, 38 per cent of Hong Kong visitors to Australia stayed overnight in Victoria; ahead of Queensland (23%) but behind New South Wales (47%).

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



Victoria's market share of visitor nights spent by Hong Kong travellers to Australia in the year ending December 2019 was 21 per cent; in line with Queensland (21%) but behind New South Wales (35%).

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	74	37	112	15	6	135
Market Share %	49%	44%	47%	55%	39%	47%
Victoria	64	32	96	7	6	109
Market Share %	42%	37%	40%	26%	35%	38%
Queensland	39	18	57	-	-	66
Market Share %	26%	21%	24%	-	-	23%
Australia	152	85	237	27	16	285

* 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, 40 per cent of Hong Kong leisure visitors to Australia stayed overnight in Victoria, including 42 per cent of holiday and 37 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of Hong Kong leisure visitors was higher at 47 per cent, while Queensland's share was much lower at 24 per cent. During the same period, Victoria's share of the Hong Kong education visitor market was 35 per cent and business visitor market share was 26 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.

Hong Kong 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
Overnight Expenditure (\$M)	91	46	137	-	88	243
Overnight Visitors (000s)	68	34	96	7	-	109
Visitor Nights (000s)	408	394	802	-	449	1,318
Average Length of Stay	6.0	11.7	8.4	-	-	12.0
Spend per Visitor	1,339	1,356	1,428	-	-	2,223
Spend per Night	223	116	171	-	197	185

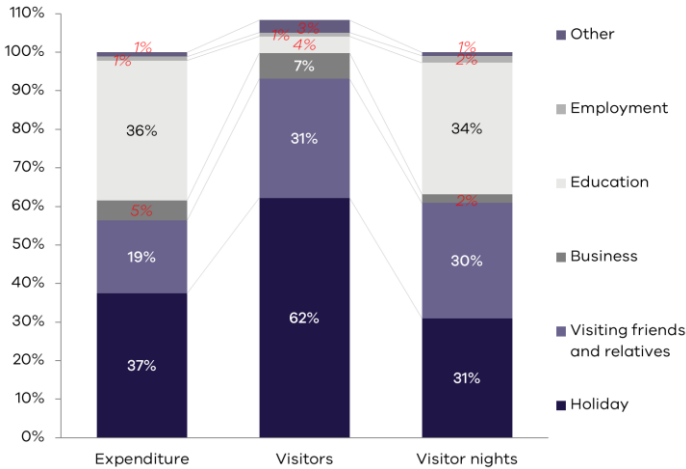
* Total Leisure = Holiday + VFR (NB total leisure may equal more than the sum of holiday + VFR, since visitors can visit more than one destination in Victoria with more than one purpose)

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

¹NOTE: 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.

Hong Kong 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 56 per cent of Hong Kong visitor expenditure in Victoria, comprising holiday visitor expenditure (37%) and VFR visitor expenditure (19%)*.

During the same period, 62 percent of Hong Kong visitors travelled to Victoria for holiday purposes, 31 per cent travelled for VFR and a further 7 per cent came on business.

Thirty-four per cent (34%) of all nights spent in Victoria by Hong Kong visitors in the year ending December 2019 were accounted for by education visitors, while holiday visitors accounted for 31 per cent of visitor nights and VFR visitors for 30 per cent of nights.

*Figures might not add up due to rounding.

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.

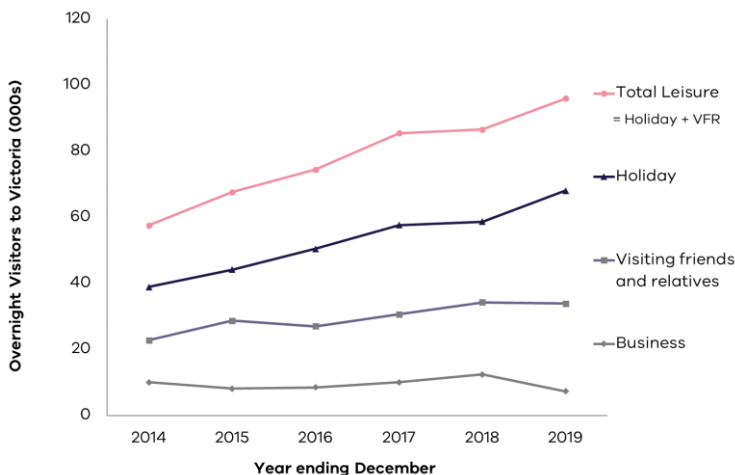
Hong Kong Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Holiday	39	44	50	58	59	68	11.8% p.a.	16.0%
Visiting friends and relative	23	29	27	31	34	34	8.3% p.a.	-1.2%
Total Leisure	58	68	74	85	87	96	10.8% p.a.	10.8%
Business	10	8	8	10	12	7	-6.2% p.a.	-41.0%

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

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



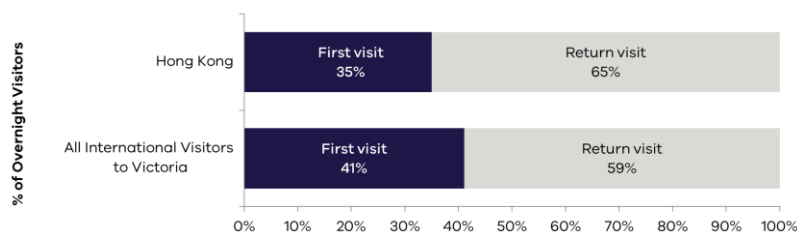
Of all the main purpose segments, the Hong Kong holiday market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+11.8% p.a.), while VFR visitors have also increased strongly (+8.3% p.a.).

Overall, overnight Hong Kong leisure visitors to Victoria have increased at an average annual rate of 10.8 per cent per annum over the period 2014-2019.

Overnight Hong Kong business visitors to Victoria have declined at an average rate of 6.2 per cent per annum since 2014 (although the average annual growth rate was positive until the most recent time period; a sharp decline of 41.0 per cent in the last year has put the 5 year average annual growth rate into negative).

Repeat Visitation to Australia

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



In the year ending December 2019, 35 per cent of overnight visitors from Hong Kong 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

Hong Kong 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	70	79	86	97	101	108	9.3% p.a.	7.7%
Regional Victoria	9	12	8	10	16	15	10.8% p.a.	-9.8%
Victoria	72	81	87	99	105	109	8.6% p.a.	4.5%

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

There were 108,000 Hong Kong overnight visitors to Melbourne in the year ending December 2019, a 7.7 per cent increase over the previous year. Hong Kong 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 15,000 Hong Kong overnight visitors to regional Victoria, a 9.8 per cent decline year-on-year. Over the longer term (2014-19), Hong Kong overnight visitors to regional Victoria have grown at an average annual rate of 10.8 per cent per annum.

Hong Kong Visitor Nights (000s) to Victoria, 2 years² (rolling), 2014-2019

2 Years Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	2,737	2,888	3,053	3,157	2,986	2,602	-1.0% p.a.	-12.9%
Regional Victoria	371	647	599	414	458	365	-0.3% p.a.	-20.3%
Victoria	3,107	3,535	3,652	3,570	3,444	2,967	-0.9% p.a.	-13.8%

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

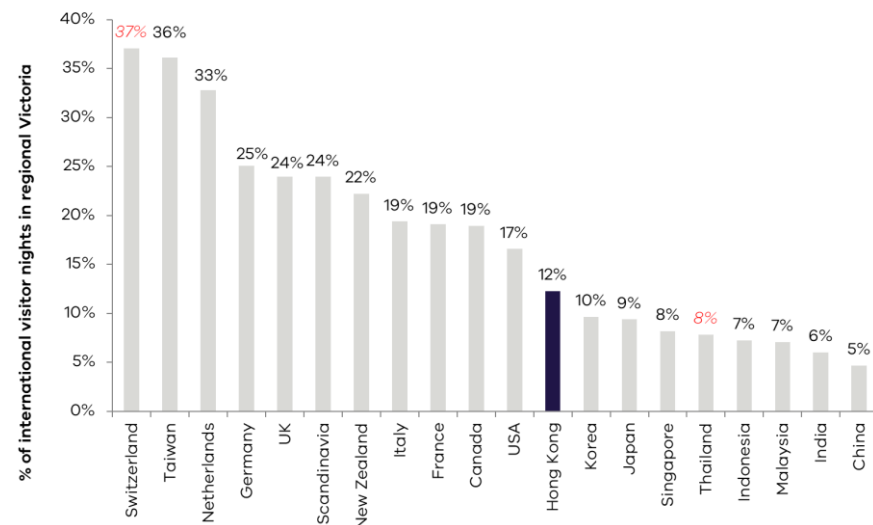
Hong Kong visitors spent 2.6 million nights in Melbourne in the two years ending December 2019, a decline of 12.9 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum*), visitor nights spent in Melbourne decreased at an average annual rate of 1.0 per cent.

In the two years ending December 2019, Hong Kong visitors spent 365,000 nights in regional Victoria, representing a decline of 20.3 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 regional Victoria decreased at an average annual rate of 0.3 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 3.0 million nights spent in Victoria by Hong Kong visitors in the two years ending December 2019, 12 per cent (365,000) of them were spent in regional Victoria.

Hong Kong visitors to Victoria have the 12th 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.

² 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)	Hong Kong Visitors	All International Visitors
Ballarat, Sovereign Hill	6%	6%
Bendigo	-	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	8%	9%
Great Ocean Road/Twelve Apostles	39%	33%
Healesville Sanctuary	-	2%
Mornington Peninsula	9%	8%
Phillip Island/Penguin Parade	26%	17%
Puffing Billy and Dandenong Ranges	14%	10%
Victorian Snowfields	-	2%
Wilson's Promontory	-	3%
Yarra Valley	13%	12%

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

In the year ending December 2019, 39 per cent of Hong Kong 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-six per cent (26%) of Hong Kong overnight visitors to Victoria went to the Phillip Island/Penguin Parade area (compared with 17 per cent of international overnight visitors to Victoria overall), 14 per cent visited Puffing Billy and Dandenong Ranges (compared with 10 per cent of international overnight visitors to Victoria overall) and 13 per cent visited the Yarra Valley (compared with 12 per cent of international visitors overall).

Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	Hong Kong Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	-	4%
Brunswick Street	6%	10%
Chadstone Shopping Centre	13%	15%
Chapel Street	7%	9%
Crown Casino/entertainment complex	19%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	19%	19%
Federation Square	33%	38%
Melbourne CBD Shopping Precinct	63%	63%
Melbourne Cricket Ground (MCG)	-	6%
Melbourne Museum (Royal Exhibition Building)	14%	16%
Melbourne Zoo	10%	8%
National Gallery of Victoria (NGV)	11%	17%
Queen Victoria Market	55%	44%
Shrine of Remembrance	7%	12%
Southbank/Southgate	22%	26%
St Kilda	22%	28%

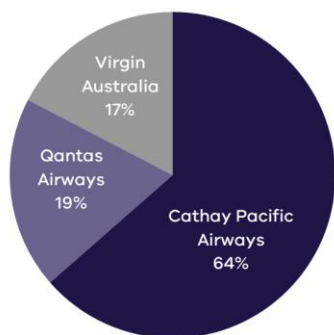
NB: Where there is a '-', figures are unreliable and are unable to be published.

The most visited Melbourne attractions by Hong Kong overnight visitors to Victoria were the CBD shopping precinct (63 per cent of Hong Kong overnight visitors, in line with 63 per cent of international visitors overall) and Queen Victoria Market (55 per cent of Hong Kong overnight visitors compared with 44 per cent of international visitors overall).

Other Melbourne attractions included Federation Square (33 per cent compared with 38 per cent of international visitors overall), Southbank/Southgate (22 per cent of Hong Kong overnight visitors compared with 26 per cent of international overnight visitors to Victoria overall) and St Kilda (22 per cent of Hong Kong overnight visitors compared with 28 per cent of international overnight visitors to Victoria overall).

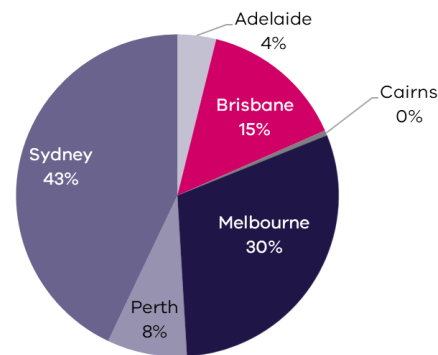
Aviation³

Airline Market Share – Direct Seats into Melbourne from Hong Kong – Year ending December 2019



In the year ending December 2019, Cathay Pacific Airways contributed 64 per cent of the 517,400 available seats on direct flights from Hong Kong to Melbourne. Qantas Airways contributed 19 per cent and Virgin Australia accounted for the remaining 17 per cent of seats.

Direct Flight Market Share – Direct Seats into Australian Airports from Hong Kong – Year ending December 2019



In the year ending December 2019, Melbourne received 30 per cent of the 1.7 million available seats on direct flights from Hong Kong to Australia. Sydney received the highest share (43%) of available seats on direct flights from Hong Kong to Australia.

³ 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>

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