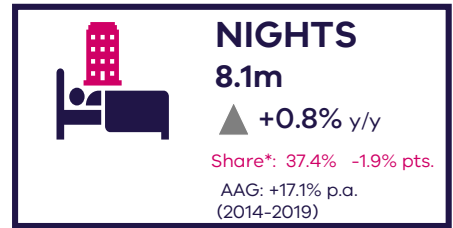
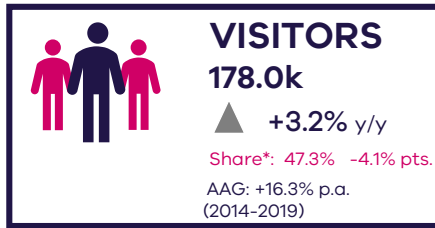
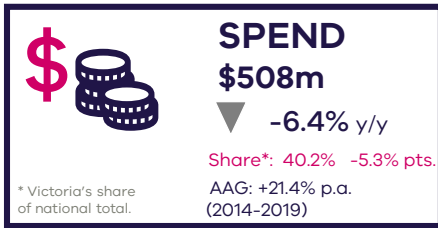


International Tourism Summary: India

Year ending December 2019

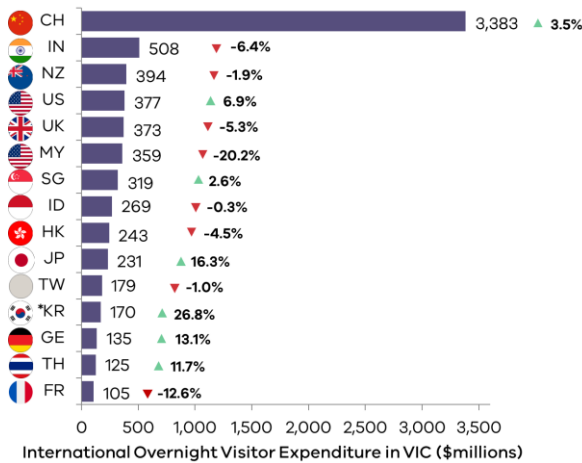


178,000 Indian visitors spent 8.1 million nights and \$508 million on trips to Victoria in the year ending December 2019.

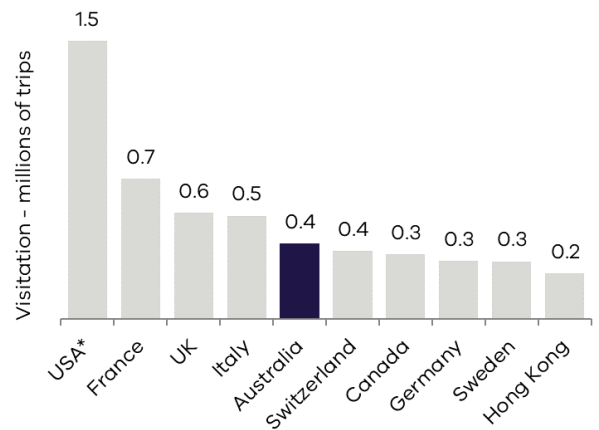


Context: In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

International Overnight Expenditure in Victoria (\$m)



Top 10 Out-of-Region Destinations for Indian Travellers



Indian visitors spent \$508 million on trips to Victoria in the year ending December 2019, a year-on-year decline of 6.4 per cent. This represents 5.8 per cent of all international overnight visitor spend in Victoria. India is ranked Victoria's 2nd largest international market in terms of expenditure.

Australia was ranked #5 for visitation against other out-of-region destinations for Indian travellers in the year ending December 2019 (down from #4 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



\$1.3b Spend ▲ +5.8%
377k Visitors ▲ +12.2%
21.6m Nights ▲ +5.8%

NEW SOUTH WALES



\$444m Spend ▲ +19.0%
175k Visitors ▲ +6.9%
7.4m Nights ▲ +5.1%

QUEENSLAND



\$150m Spend ▲ +8.5%
83k Visitors ▲ +6.6%
2.6m Nights ▲ +23.0%

The rate of decline of Indian expenditure on trips to Victoria (-6.4% year-on-year) was in contrast to the growth in the national average (+5.8%), New South Wales (+19.0%) and Queensland (+8.5%).

MELBOURNE



\$480m Spend ▼ -7.3%
169k Visitors ▲ +0.5%
7.5m Nights ▼ -1.0%

REGIONAL VICTORIA



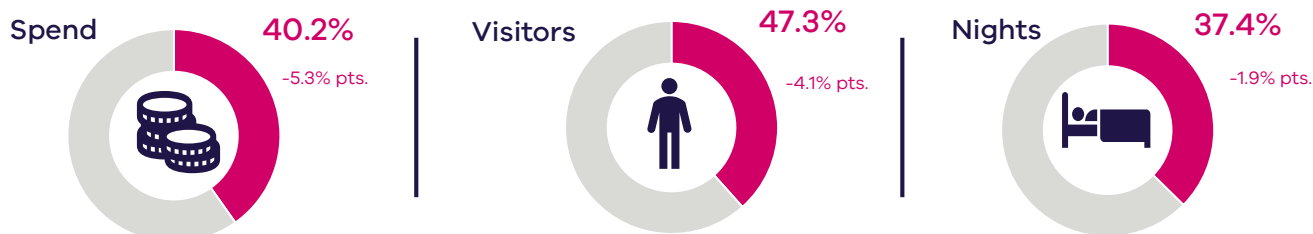
\$28m Spend ▲ +10.1%
16k Visitors ▲ +57.2%
557k Nights ▲ +34.9%

In the year ending December 2019:

- 169,000 Indian visitors spent 7.5 million nights and \$480 million on trips to Melbourne
- 16,000 Indian visitors spent 557,000 nights and \$28 million on trips to regional Victoria.

Indian Spend, Visitors and Nights by Key States Visited

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



Indian Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from India 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	163	373	444	22.2% p.a.	19.0%	30.8%	31.3%	35.2%	50	53	60	1,738	2,282	2,539
Victoria	193	543	508	21.4% p.a.	-6.4%	36.3%	45.4%	40.2%	53	68	63	2,300	3,144	2,851
Queensland	91	138	150	10.6% p.a.	8.5%	17.1%	11.6%	11.9%	58	66	58	2,141	1,779	1,811
Australia	531	1,194	1,264	18.9% p.a.	5.8%				50	58	58	2,820	3,556	3,354

Total VIC International Expenditure	4,903	8,467	8,826	12.5% p.a.	4.2%
India's Share of VIC International Expenditure	3.9%	6.4%	5.8%		

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 40.2 per cent of Indian overnight visitors' expenditure in Australia in the year ending December 2019, ahead of New South Wales (35.2%) and Queensland (11.9%). Indian visitors' expenditure per night in Victoria (\$63) was higher than the national average (\$58), New South Wales (\$60) and Queensland (\$58). Victoria received a higher total spend per visitor (\$2,851) than New South Wales (\$2,539) and Queensland (\$1,811).

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

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Visitors %
							% change 14/19	% change 18/19	
Australia	188	222	247	285	336	377	14.9% p.a.	12.2%	
New South Wales	94	114	127	147	164	175	13.3% p.a.	6.9%	46%
Victoria	84	103	118	145	173	178	16.3% p.a.	3.2%	47%
Queensland	42	57	56	74	78	83	14.3% p.a.	6.6%	22%

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

The year-on-year increase in Indian overnight visitor numbers to Victoria (+3.2%) was behind the national average (+12.2%) and key competitor states New South Wales (+6.9%) and Queensland (+6.6%) in the year ending December 2019. Over the longer term (2014 to 2019), Indian overnight visitors to Victoria increased at an average annual rate of 16.3 per cent, ahead of the national average (+14.9% p.a.), Queensland (+14.3% p.a.) and New South Wales (+13.3% p.a.).

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

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Nights %
							% change 14/19	% change 18/19	
Australia	10,566	14,476	15,149	15,697	20,458	21,649	15.4% p.a.	5.8%	
New South Wales	3,285	4,908	5,073	5,849	7,075	7,434	17.7% p.a.	5.1%	34%
Victoria	3,669	5,196	5,442	5,466	8,024	8,090	17.1% p.a.	0.8%	37%
Queensland	1,563	2,152	1,820	1,707	2,106	2,591	10.6% p.a.	23.0%	12%

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

In the year ending December 2019, Indian visitor nights to Victoria increased by 0.8 per cent year-on-year, behind the national average (+5.8%), Queensland (+23.0%) and New South Wales (+5.1%). Over the longer term (2014 to 2019), Indian visitor nights spent in Victoria increased at an average annual rate of 17.1 per cent, ahead of the national average (+15.4% p.a.) and Queensland (+10.6% p.a.), but marginally behind New South Wales (+17.7% p.a.).

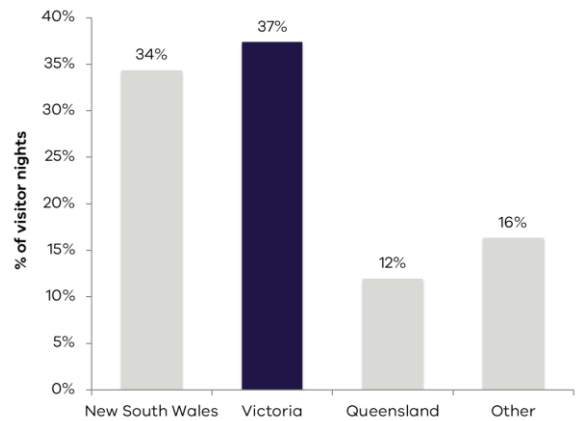
Market Share by Key States¹

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



In the year ending December 2019, 47 per cent of Indian visitors to Australia stayed overnight in Victoria; ahead of New South Wales (46%) and Queensland (22%).

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



Victoria's market share of visitor nights spent by Indian travellers to Australia in the year ending December 2019 was 37 per cent; ahead of New South Wales (34%) and Queensland (12%).

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	Employment	Other reason	Total
New South Wales	44	80	124	24	9	11	6	175
Market Share %	69%	39%	46%	53%	37%	51%	44%	46%
Victoria	36	101	137	17	13	8	-	178
Market Share %	57%	49%	51%	38%	52%	34%	-	47%
Queensland	33	30	63	7	-	5	-	83
Market Share %	52%	15%	23%	15%	-	23%	-	22%
Australia	64	206	270	46	24	22	14	377

* Total Leisure = Holiday + VFR

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

In the year ending December 2019, 51 per cent of Indian leisure visitors to Australia stayed overnight in Victoria, including 57 per cent of holiday and 49 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of Indian leisure visitors was lower at 46 per cent, with Queensland's share also lower at 23 per cent. During the same period, Victoria's share of the Indian education visitor market was 52 per cent, business visitor market share was 38 per cent and employment visitor market share was 34 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.

Indian 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	Employment	Total
Overnight Expenditure (\$M)	38	98	136	44	272	54	508
Overnight Visitors (000s)	47	101	143	18	13	6	178
Visitor Nights (000s)	373	4,608	4,982	316	2,037	747	8,090
Average Length of Stay	7.9	45.5	34.8	17.8	154.2	118.4	45.4
Spend per Visitor	802	972	951	2,467	20,598	8,611	2,851
Spend per Night	101	21	27	138	134	73	63

* 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 '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.

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

Year Ending December 2019



In the year ending December 2019, education visitors accounted for more than half (54%) of Indian visitor expenditure in Victoria. Indian leisure visitors accounted for 27 per cent of expenditure, comprising VFR visitor expenditure (19%) and holiday visitor expenditure (7%)*.

During the same period, 57 percent of Indian visitors travelled to Victoria for VFR purposes, 26 per cent travelled on holiday, 10 per cent for business purposes and a further seven per cent for education.

Fifty-seven per cent (57%) of all nights spent in Victoria by Indian visitors in the year ending December 2019 were accounted for by VFR visitors, while education visitors accounted for 25 per cent of visitor 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.

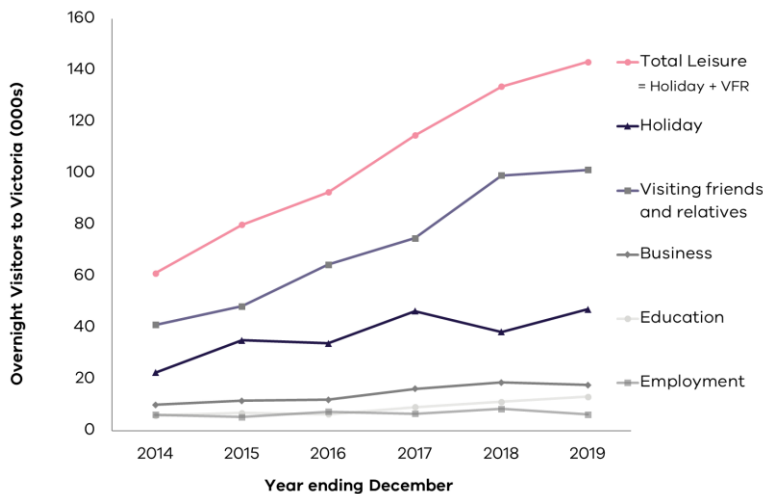
Indian Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Holiday	23	35	34	46	38	47	15.9% p.a.	23.0%
Visiting friends and relative	41	48	64	75	99	101	19.8% p.a.	2.2%
Total Leisure	61	80	93	115	134	143	18.6% p.a.	7.1%
Business	10	12	12	16	19	18	12.2% p.a.	-5.2%
Education	6	7	6	9	11	13	17.5% p.a.	18.4%
Employment	6	5	7	7	8	6	0.5% p.a.	-24.9%

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

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

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



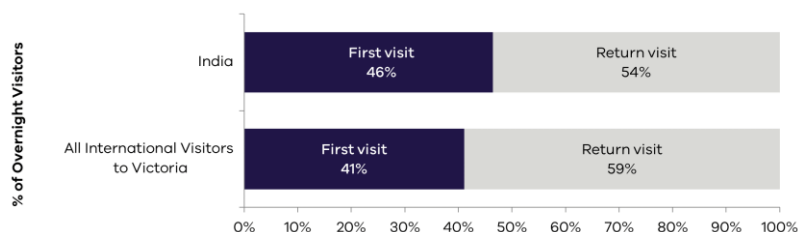
Of all the main purpose segments, the Indian VFR market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+19.8% p.a.), while holiday visitors have also increased strongly (+15.9% p.a.).

Overall, overnight Indian leisure visitors to Victoria have increased at an average annual rate of 18.6 per cent per annum over the period 2014-2019.

Overnight Indian education visitors to Victoria have increased at an average rate of 17.5 per cent per annum since 2014, while Indian overnight business visitors have increased at an average annual rate of 12.2 per cent.

Repeat Visitation to Australia

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



In the year ending December 2019, 46 per cent of overnight visitors from India 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

Indian 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	80	100	112	138	168	169	16.2% p.a.	0.5%
Regional Victoria	8	10	12	16	10	16	14.3% p.a.	57.2%
Victoria	84	103	118	145	173	178	16.3% p.a.	3.2%

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

There were 169,000 Indian overnight visitors to Melbourne in the year ending December 2019, a 0.5 per cent increase over the previous year. Indian visitors to Melbourne have grown at an average annual rate of 16.2 per cent over the period 2014 to 2019.

In the year ending December 2019, there were 16,000 Indian overnight visitors to regional Victoria, a 57.2 per cent increase year-on-year. Over the longer term (2014-19), Indian overnight visitors to regional Victoria have grown at an average annual rate of 14.3 per cent per annum.

Indian 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	6,798	8,213	9,938	9,957	12,476	15,145	17.4% p.a.	21.4%
Regional Victoria	486	652	701	951	1,014	970	14.8% p.a.	-4.3%
Victoria	7,285	8,865	10,639	10,908	13,490	16,115	17.2% p.a.	19.5%

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

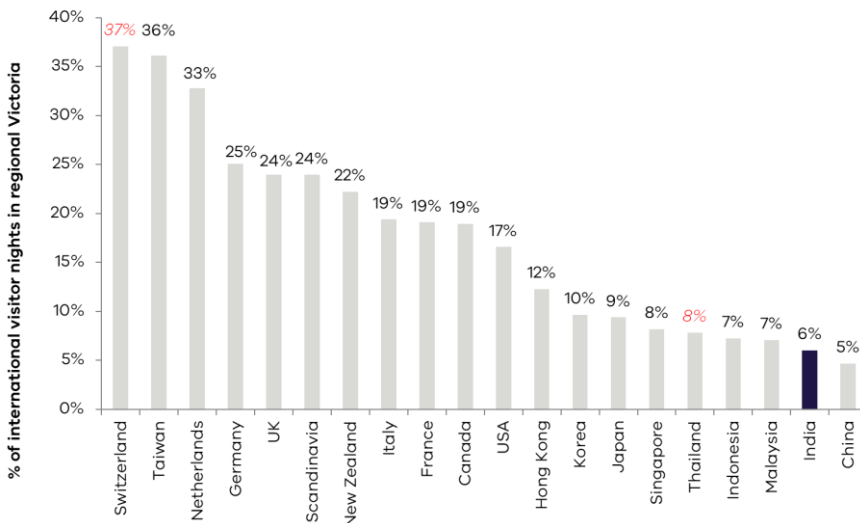
Indian visitors spent 15.1 million nights in Melbourne in the two years ending December 2019, an increase of 21.4 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum*), visitor nights spent in Melbourne increased at an average annual rate of 17.4 per cent.

In the two years ending December 2019, Indian visitors spent 970,000 nights in regional Victoria, representing a decline of 4.3 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 increased at an average rate of 14.8 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 16.1 million nights spent in Victoria by Indian visitors in the two years ending December 2019, only six per cent (970,000) of them were spent in regional Victoria.

Indian visitors to Victoria have the second 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.

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)	India Visitors	All International Visitors
Ballarat, Sovereign Hill	8%	6%
Bendigo	-	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	11%	9%
Great Ocean Road/Twelve Apostles	42%	33%
Healesville Sanctuary	3%	2%
Mornington Peninsula	6%	8%
Phillip Island/Penguin Parade	21%	17%
Puffing Billy and Dandenong Ranges	8%	10%
Victorian Snowfields	4%	2%
Wilson's Promontory	3%	3%
Yarra Valley	14%	12%

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

In the year ending December 2019, 42 per cent of Indian 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-one per cent (21%) of Indian 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 14 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)	India Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	3%	4%
Brunswick Street	7%	10%
Chadstone Shopping Centre	30%	15%
Chapel Street	10%	9%
Crown Casino/entertainment complex	30%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	29%	19%
Federation Square	34%	38%
Melbourne CBD Shopping Precinct	61%	63%
Melbourne Cricket Ground (MCG)	28%	6%
Melbourne Museum (Royal Exhibition Building)	12%	16%
Melbourne Zoo	12%	8%
National Gallery of Victoria (NGV)	9%	17%
Queen Victoria Market	41%	44%
Shrine of Remembrance	12%	12%
Southbank/Southgate	23%	26%
St Kilda	32%	28%

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

The most visited Melbourne attractions by Indian overnight visitors to Victoria were the CBD shopping precinct (61 per cent compared with 63 per cent of international visitors overall) and Queen Victoria Market (41 per cent of Indian overnight visitors compared with 44 per cent of international visitors overall).

Other attractions that Indian visitors were more likely to visit compared to international visitors overall included St Kilda (32 per cent of Indian overnight visitors compared with 28 per cent of international visitors overall), Chadstone Shopping Centre (30 per cent compared with 15 per cent of international visitors overall), Crown Casino/entertainment complex (30 per cent compared with 19 per cent of international visitors overall), Docklands/Marvel Stadium (29 per cent compared with 19 per cent of international visitors overall), the Melbourne Cricket Ground (MCG) (28 per cent compared with six per cent of international overnight visitors to Victoria overall) and the Melbourne Zoo (12 per cent compared with eight per cent of international overnight visitors to Victoria overall).

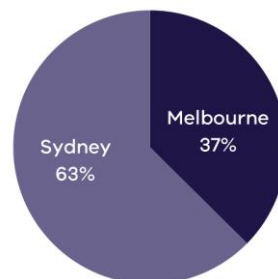
Aviation³

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



In the year ending December 2019, Air India contributed 100 per cent of the 39,900 available seats on direct flights from India to Melbourne.

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



In the year ending December 2019, Melbourne received 37 per cent of the 106,800 available seats on direct flights from India to Australia. Sydney received the remaining 63 per cent of available seats on direct flights from India 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>

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.