International visitation recorded solid growth during the year ending December 2018, with visitor arrivals for those aged 15 years and over up 5% to 8.5 million, and spend increasing 7% to reach $43.9 billion.

**TOP FIVE MARKETS**
There were mixed results for arrivals from our top five markets during the year:

- China continued as the top market with 1.3 million visitors and spend of $11.7 billion, an increase of 5% and 13%, respectively. While China has continued to grow, the rate of growth has been slowing.
- New Zealand remained the second largest market with 1.3 million visitors, up 2%, while spend increased to $2.6 billion, up 4%.
- Japan recorded the strongest growth of the top five markets, with arrivals up 8% to 434,000 and spend up 11% to $2 billion.
- The US market has seen softer results, recording 744,000 arrivals and spend of $3.8 billion, increases of 1% and 2%, respectively.
- The UK’s arrival numbers remained steady at 688,000, while spend fell 1% to $3.4 billion.

**FIGURE 1: ANNUAL VISITOR GROWTH OF TOP FIVE MARKETS**

Other markets include India, Taiwan, and Hong Kong. India continues to be the strongest performing market, with arrivals up 18% to 336,000 and spend up 21% to $1.7 billion. Arrivals from India for the purpose of visiting friends and relatives and education underpinned this growth, increasing 30% and 17%, respectively. These types of travellers are also more likely to stay longer - they contributed to a 30% increase in Indian nights for the year, which reached 20.5 million.

**FIGURE 2: GROWTH IN CHINESE AND INDIAN VISITORS**

Taiwan recorded strong growth with both visitor arrivals and spend increasing by 12% to reach 186,000 and $1 billion respectively. Visitor arrivals from Hong Kong increased 9% to reach 280,000, while spend was up 5% to $1.3 billion.

In terms of traditional markets, Canada experienced strong growth with a 9% increase in visitors to reach 172,000, while spend increased 10% to $855 million. There was also strong growth in visitation from France, with visitor arrivals up 10% to 135,000 and spend up 13% to $833 million.
**AGE**

The majority of the growth seen during the year was the result of increases in the number of older travellers. Ninety-three per cent of the growth in visitors was from increased travel by those aged 30 and over, up by 6% (an additional 362,000 visitors). In contrast, visitors aged 15-29 only grew by 1% (an additional 26,000 visitors).

**FIGURE 3: SHARE OF GROWTH BY AGE**

<table>
<thead>
<tr>
<th>AGE</th>
<th>GROWTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-29</td>
<td>1%</td>
</tr>
<tr>
<td>30-44</td>
<td>6%</td>
</tr>
<tr>
<td>45-59</td>
<td>8%</td>
</tr>
<tr>
<td>60+</td>
<td>4%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>5%</td>
</tr>
</tbody>
</table>

**PURPOSE OF TRAVEL**

During the year ending December 2018, the number of international visitors aged 15 years and over travelling to Australia for the purpose of business and education both increased by 7% to reach 996,000 and 577,000, respectively. Business travellers contributed $4.2 billion in spend during the year, an increase of 11%, while education spend rose 17% to reach $12.6 billion. Education accounts for 29% of all trip spend by international visitors.

There was also solid growth in the number of visitors arriving for a holiday or to visit friends and relatives. Holiday visitors increased by 4% during the year to reach 3.9 million, spending a total of $16.4 billion, up 5%. Those visiting friends and relatives grew 6% to reach 2.6 million, and spent a total of $7.5 billion, up 7%.

**FIGURE 4: PER CENT CHANGE IN FIRST VERSUS REPEAT VISITATION**

- The fastest growing travel groups were business associates travelling together, where arrivals increased by 15% to reach 308,000, and family travelling together, which increased 13% to 1.1 million visitors.

**OTHER KEY FACTS**

The number of backpackers fell 4% during the year to 605,000. Growth in first-time visitors has slowed, with numbers remaining steady at 3.1 million. This is the lowest result since 2011 when the number fell by 1%. In contrast, repeat visitors increased by 8% to reach 5.4 million.

**FIGURE 5: INTERNATIONAL VISITOR NUMBERS AND SPEND BY STATE, YE DECEMBER 2018**

- Total number of visitors by state will be greater than total number of visitors for Australia