

# *How Have Mainland Chinese Market Visitation Patterns to Queensland and New South Wales Changed over the Last Decade in Terms of Nature-Based Attractions?*

**Wang shiqiao**

*Internal Sustainable Tourism Management, Arts, Wellington Road Clayton Victoria, 3800, Australia*

**Keywords:** Chinese market, Nature-based attractions, Queensland, New South Wales, Change over

**Abstract:** As the development of China's economy since 1978 and its intention to join the world economy development since 2000, more and more Chinese started going out to study, conducting business and traveling abroad. China has become one of the top 10 source markets for international travel. The recent growth of outbound travel from mainland China has significantly affected the world travel market. Almost all developed countries see the importance of Chinese tourism market and develop various strategies to attract more Chinese tourists because of their high expenditures. Australia is also among this list. Although it is important to notice that domestic travel plays a significant role in the Australian tourism industry, international travelers also matter, especially China.

## **1. Introduction**

Tourism plays a more important role in people's life as the accumulated family and personal wealth. The past decades saw an ongoing growth and diversification of tourism industry across the world, making tourism one of the faster growing economic sectors in the world. UNWTO ranks China as the No.1 outbound tourism of expenditure and in 2019, mainland China visitors expended 254.6 million USD dollars on international tourism. At the same time, the academic world also became more interested in China tourism, especially the outbound tourism.

The key issue for Australian tourism industry is that it is only a small part of Chinese outbound market and Australia should improve its competitiveness around the world to attract increasing number of international arrivals including Chinese tourists. This research is supposed to make contribution by analyzing the changes of mainland China visitor's visitation pattern to the nature-attracted spots in Queensland and NSW.

This paper mainly studies the potential changes of age group and group tour of mainland China visitors to the nature-based attractions in Queensland and NSW via collecting and analysing related data from International Visitor Survey. This project uses the Microsoft Excel to manage existing estimated data collected from Australia Research Tourism to analyse the potential trend existed and to study potential changes accordingly. Moreover, due to the consideration of the manageability of the data, this paper only includes the data of the nine activities outlined in the

category of Nature/Outdoor activity from the IVS database. The remain of this paper starts with literature review on the development of China's outbound tourism, Australian tourism industry. Finally, it concludes with the summary of key findings, stating the value of the research, limitation of the research and opportunities and suggestions for the future research.

## **2. Literature Review**

### **2.1 Australian Tourism Industry**

Chinese travelers as they spend more than the average visitors. Australia government realized the importance of tourism industry in economy in the early 1980s and from 1986 to 1988 Australia experienced 'Tourism Boom', which had features of 'significant expansion, profitability and optimism within the tourism industry. According to the TRA (2020 a), in 2018-2019 the Australian tourism GDP was around \$61.2 billion, accounting for some 3.1% of national economy and the direct tourism employment is 621,000 people.

Moreover, the tourism industry now focuses on ensuring its sustainable development by spreading the benefits brought by tourism economy across the country and encouraging regional travelling is the top priority. Australian tourism industry also understands that some rich countries should be their priority to keep continuously strong increase of their international expenditure in Australia and they are going to maintain this strategy although they also realized the potential risks of lacking diversity.

According to Tourism and Event Queensland, tourism played a significant role in Queensland economy, and it contributed 7.5% of Gross State Product (GSP), hiring 220,000 employees and generating \$25 billion for Queensland. Queensland has the ambition to "inspire the world to experience the best address on earth", which is the vision of TED. TED has developed its strategic plan and marketing plan based on their consumer research as their marketing is "consumer-led, experience-focused and destination-delivered". TEQ (2018) also identifies the Queensland's Experience Framework with five experience pillars and supposed to make contribution to TEQ's future strategic and marketing plan.

### **2.2 The Definition of Nature-Based Tourism**

For most countries and regions valuing tourism industry, it is hard to ignore the role of nature-based tourism (NBT) as it is an essential part of tourism industry. Australia has seen an increasing percentage of international nature-based tourists. The natural environment would affect visitors' attitude and intention of the destination. Eco-tourism started in the late 1980s and it has been interchangeably used with nature-based tourism in the tourism literature. Nature-based tourism is a broad definition that including various experiences enhanced by nature.

### **2.3 Chinese Visitors**

The Greater China outbound tourist market started to grow from 1990. The previous literature mostly focuses on the reasons for the rapid development and the motives, preference, satisfaction, and the segmentation of Chinese outbound tourist. The rapid growth of Chinese outbound tourism may result from its fast economic growth and the motivation resulting from the changes of society and policies.

The mainland China outbound travellers could be divided into three categories and there are Seniors, Families and Young People. Particularly the Young People are aged from 25-35 and this category of market is growing. The features of Young People market include being more

adventurous and tending to enjoy Free Independent Travel (FIT). In fact, Australian tourism industry may be seeing a transition of mainland China visitors' preference of group tour to travelling on their own.

Also, many researchers believed that the majority of Chinese outbound tourists are wealthy, middle-age, and well-educated. Zhang and Tse (2017) fully analyzed an important component of Chinese tourists travelling abroad, namely luxury travelers and Bao et al., (2019) examined the features of a third wave of Chinese outbound visitors as elite middle aged. Moreover, Chinese tourists are famous for their surprising purchasing power when travelling abroad. For example, Kwek and Lee (2013) study the consumption behavior of mainland China's corporate travelers in Australia because they believed that corporate travelers are an important component of Chinese outbound tourism market. Their study suggests that these travelers prefer purchasing western luxury goods and they regard travelling abroad to experience and learn western lifestyle.

Furthermore, the changes of Chinese tourists could also be identified on ages. There are generational differences of the process of making travel decisions and indicated that the knowledge of such differences would help the industry to prepare for future growth by understanding the primary demand factors in advance. Huang and Veen (2019) also examined the different Chinese generations' attitudes on natural environment and suggested that the attitude of post-1980s/1990s would be more easily affected by natural environment than that of the post-1960s/1970s. When making decisions on traveling abroad, Chinese younger generation tends to choose natural destination for relaxation.

### **3. Methods**

The project collects data of both Queensland and New South Wales from 2010 to 2019 in the aspects of total visitors with the details of country of residence, visitor purpose, visitor activities, age group and group tour. This project also collects the data of Australia in aspects of total expenditure by countries, expenditure by age, expenditure by activity and expenditure by group tour. The samples included in the IVS are the Overseas Arrivals and Departures short term visitor arrivals aged 15 years and over and the survey results are weighted to data on international visitor numbers over the period. The IVS methodology uses the sample to estimate, and Tourism Research Australia (TRA) increased the sample size to 40,000 to increase its data reliability of 95% confidence level. The author also notices that IVS survey requires respondent answering around 100 questions. Visitors may lose their patience when answering so many questions and the validity of some results may be questioned.

### **4. Findings**

#### **4.1 Mainland China Visitors' Expenditure in Australia**

Australia saw a substantial increase of total mainland China visitors' expenditure. The data on the Figure 1 show that from 2010 to 2019, among all international visitors, mainland China visitors spent most money during their trips in Australia. Then the Figure 2 shows a clear increasing trend of the total expenditure during this period and the figure increased from around 2.2 billion dollars to more than 10 billion dollars. Moreover, the percentage of mainland China visitor expenditures out of the total international visitor expenditure in Australia has increased from about 14% to some 34% at the same time (Figure 3).

**Country of residence by Calendar year by Spend in Australia (\$000)**  
**Counting: Spend in Australia (\$000)**

**Filters:**  
Summation Option: Spend in Australia (\$000)

Calendar year		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Total
	<b>Country of residence</b>											
	New Zealand	1427249	1482575	1554912	1502296	1574820	1698138	1725240	1624614	1643480	1630253	15683578
	Japan	858475	780818	909240	809252	827809	807044	1030072	1105217	1171817	1239048	9538790
	Hong Kong	532224	568216	525165	651638	705173	858895	873709	954127	970052	1022825	7662023
	Singapore	676776	732861	749279	763187	828537	999608	1019722	1039150	1088767	1098956	8996844
	Malaysia	740443	721041	780930	747048	824365	886687	986681	1068119	1058173	964889	8778357
	Indonesia	401549	498648	471997	555478	471726	473539	604830	545863	613060	682577	5319266
	Taiwan	306489	385528	415642	448495	503095	554071	667257	664842	748676	706403	5400298
	Thailand	294250	294811	252555	250890	278014	271817	324532	396561	353291	402692	3119412
	Korea	987838	1020917	991793	809208	789306	921935	1052247	1078450	1084273	1068961	9804929
	<b>Asia</b>	<b>594984</b>	<b>604384</b>	<b>594923</b>	<b>542925</b>	<b>539941</b>	<b>622923</b>	<b>661889</b>	<b>669191</b>	<b>689191</b>	<b>689191</b>	<b>542923</b>
	India	559991	609383	539065	490972	530663	723923	821869	859110	1194089	1263504	7825597
	Other Asia	533756	598908	651434	732974	733184	849425	922877	1314243	1400784	1575834	9313077
	United States of	1144276	1205449	1288986	1399644	1321126	1669342	1820592	1844990	1879607	1931296	15505309
	Canada	444782	444574	477594	439092	486185	499917	454641	450408	504114	523848	4705155
	United Kingdom	1837748	1686588	1753375	1927890	1848332	2068149	2002042	1974318	1885329	1781463	18765234
	Germany	555773	569994	557581	564357	612479	645263	707098	680044	708165	692288	6293043
	Scandinavia	335556	322040	314747	332139	368840	369394	410321	393207	433450	374955	3662650
	France	366095	415668	385809	467021	440184	531340	421548	474738	515348	490992	4508343
	Italy	221171	232836	268471	308527	318121	306766	321734	351232	310522	308022	2947401
	Netherlands	183000	156969	151472	148225	151668	149953	191899	176577	219365	219485	1748612
	Switzerland	194657	191608	179609	181640	191652	212279	211489	219097	230784	217901	2030716
	Other Europe	734861	806891	932035	867136	807785	770431	746922	805609	876661	1003153	8351485
	Other Countries	1126071	1150301	1142589	1271569	1335779	1519409	1505189	1796339	1793906	1901780	14542612
	<b>Total</b>	<b>1194944</b>	<b>1292892</b>	<b>1354296</b>	<b>1342489</b>	<b>1420909</b>	<b>1619699</b>	<b>1619048</b>	<b>1786357</b>	<b>1824420</b>	<b>1743699</b>	<b>23189773</b>

Fig.1 International Expenditure: Country of Residence by Calendar by Spend in Australia

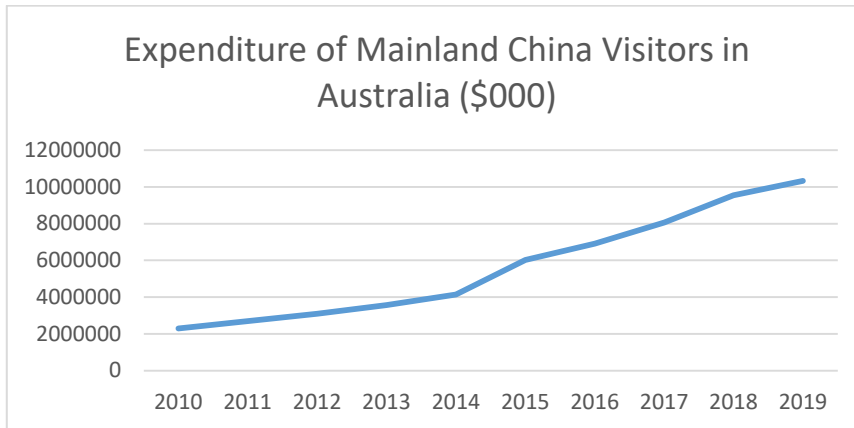


Fig.2 Expenditure of China Visitors in Australia (\$000)



Fig.3 Percentage of Mainland China Visitors' Expenditure from the Total International Expenditure Across Australia

The Figure 4 shows that mainland China visitors aged 20-24 occupied the largest number of spending each year from 2010 to 2019 and their expenditure has substantially increased from AUD\$842 million in 2010 to around AUD\$ 40 billion in 2019. Following that they were visitors aged 25-29 and aged 15-19. Moreover, for mainland China visitors aged 30-54, their annual expenditure in Australia was less than AUD\$ 500 million between 2010 and 2019. It is interesting to further study the changing patterns of the spending of visitors aged 30-54. Finally, for people aged 55+, they spent more than AUD\$ 500 million annually in Australia from 2015, reaching to its largest number of around AUD\$ 783 million in 2019.

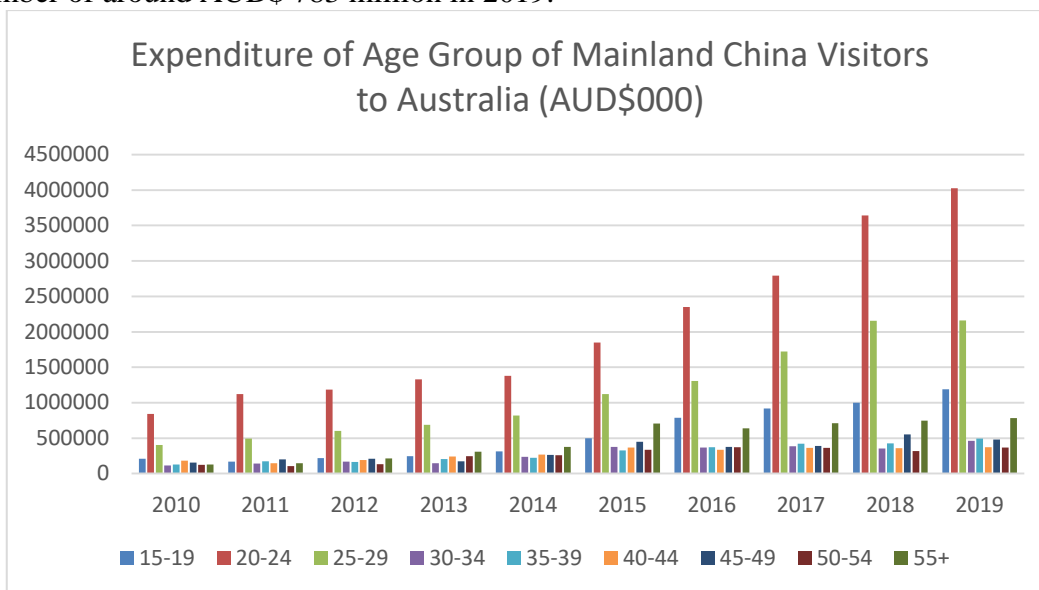


Fig.4 Expenditure of Age Group of Mainland China Visitors to Australia (\$000)

The Figure 5 shows that although mainland China visitors spent the most money in social activities, the second largest number of their expenditure lied in the category of Outdoor/Nature. Particularly, although the Figure 6 shows that mainland China visitors' expenditure on Outdoor/Nature activities increased from around 2 billion dollars to around 8 billion dollars between 2010 and 2019, the Figure 7 demonstrates that there has been a quite significant fall of the relative figure as proportion of expenditure on outdoor/nature activity out of mainland China visitors' overall expenditure. The figure has decreased from around 88% to around 79% during this period. It is important to remind that it only includes the data under the category of Outdoor/Nature activity of IVS database.

Individual activity on trip by Calendar year by Spend in Australia (\$000) and Country of residence											
Counting: Spend in Australia (\$000)											
Filters:											
Summation Option: Spend in Australia (\$000)											
Country of residence: China											
Calendar year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Total
Individual activity on trip											
Outdoor / Nature	1997325	2288429	2594888	3072001	3595997	5411356	5937967	6905842	7809205	8175617	47788027
Active outdoor /	928650	1051258	1297600	1515830	1770910	2726772	3149990	3220082	3647633	3441846	22750570
Arts / Heritage	1380564	1504243	1769817	1964683	2309455	3990812	4313394	5121195	6190433	6231309	34855905
Indigenous	297489	364163	447486	490360	529484	829998	922969	952492	1415464	1214758	7464640
Local attractions /	1789087	1891579	2326493	2667037	3135070	4970721	5266316	6234133	6936668	7294314	42510416
Social activities	2227700	2585002	3010920	3463647	4043647	5940547	6844305	8033743	9464732	10197038	55811282
Other activities	2796	260	1823	3892	4156	3530	5076	1866	5251	2701	31352
None of these	9950	28903	14597	27653	17804	20222	12981	8363	8539	32764	181777
Not Asked	67	1286	2389	3588	4765	6322	586	2172	2125	1918	25217
Total	2286446	2691502	3089077	3574220	4133781	6022722	6907973	8065743	9550929	10337674	56680088

Fig.5 Expenditure of Individual Activity on Trip by Mainland China Visitors Across Australia (\$000)



Fig.6 Mainland China Visitors' Expenditure on Outdoor/Nature Activity in Australia (\$000)

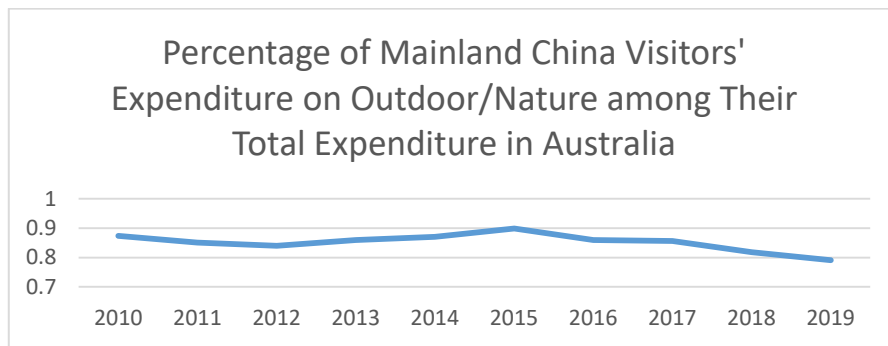


Fig.7 Percentage of Mainland China Visitors' Expenditure on Outdoor/Nature Activity from Total Expenditure in Australia

Lastly, the data on the Figure 8 shows that most of mainland China visitors' expenditure was spent via non-group tour. Particularly, the figures increased from some 2 billion dollars to some 9.7 billion dollars in the last decade. Although there was a slight increase of expenditure by group from 2010 to 2015, it began to decrease from 2016.



Fig.8 Mainland China Visitors' Expenditure by Group Tour in Australia (\$000)

#### 4.2 Mainland China Visitors to Queensland

First, the Figure 9 shows that mainland China visitors was on the top 10 source market of Queensland tourism market and from 2016, mainland China surpassed New Zealand and occupied

the largest number of total international visitors to Queensland. The number of mainland China visitors travel in Queensland has increased from 200,000 visitors to around 500,000 visitors (Figure 10). It is worth noting that the number of mainland China visitors began to decrease since 2016 (Figure 10 and Figure 11).

Queensland		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Total
Calendar year												
Country of residence	New Zealand	401627	407166	403826	383445	412604	422960	441049	464586	483299	489422	4309985
	Japan	217640	163024	171070	156049	159381	168041	199201	206018	208168	219161	1867753
	Hong Kong	38125	35802	42594	43634	49620	56113	61865	63965	71133	66189	529059
	Singapore	47052	43908	54651	62346	59476	60784	66304	59965	66697	69718	589571
	Malaysia	45270	39661	40247	45834	47284	44414	48415	46315	51483	46182	455106
	Indonesia	18908	21753	26052	24457	18244	19825	23754	22448	19936	29086	224462
	Taiwan	46235	36913	41146	48582	50151	58506	71189	72770	79640	80553	585684
	Thailand	9486	10656	13791	14064	14145	14014	16216	20289	18013	19150	149825
	Korea	80597	66877	61986	56710	46911	56350	69248	74121	77896	74214	664910
	<b>China</b>	<b>185236</b>	<b>204202</b>	<b>257811</b>	<b>301936</b>	<b>334487</b>	<b>401667</b>	<b>487172</b>	<b>507280</b>	<b>502380</b>	<b>496704</b>	<b>3678874</b>
	India	23489	29984	34639	42340	42415	56564	56045	74350	77748	82881	520456
	Other Asia	27622	30380	36063	31288	37030	45476	57629	57683	60817	68535	452522
	United States	139881	147822	154055	157213	165598	201721	226880	233549	229393	236367	1892478
	Canada	54543	52896	52731	52193	50004	53247	56813	59612	65693	66775	570307
	United Kingdom	239108	202543	195097	214419	207092	222670	218726	229355	227220	218593	2174823
	Germany	78028	68203	78100	64452	78378	78511	84647	90788	81653	80632	781371
	Scandinavia	42936	38223	36096	39076	43240	38890	36879	47394	47452	41015	411201
	France	44228	40626	44103	47591	43814	44451	38969	45142	49362	48428	446714
	Italy	23946	20627	23007	25471	22816	23774	20171	26203	28301	25466	239781
	Netherlands	25016	22212	17325	17270	17436	16277	19330	21080	22847	25023	203816
	Switzerland	21375	17099	16709	19771	20270	20897	22464	21497	22536	15451	198070
	Other Europe	75596	64218	68440	62932	69448	69307	72853	82366	82814	94685	742658
	Other	144932	145201	144880	145321	153380	159430	170954	175262	188900	188485	1616706
	<b>Total</b>	<b>2030873</b>	<b>1909896</b>	<b>2012421</b>	<b>2056393</b>	<b>2148223</b>	<b>2333869</b>	<b>2566573</b>	<b>2701938</b>	<b>2763232</b>	<b>2782714</b>	<b>23306132</b>

Fig.9 Number of International Visitors Stopover Queensland by Country of Residence

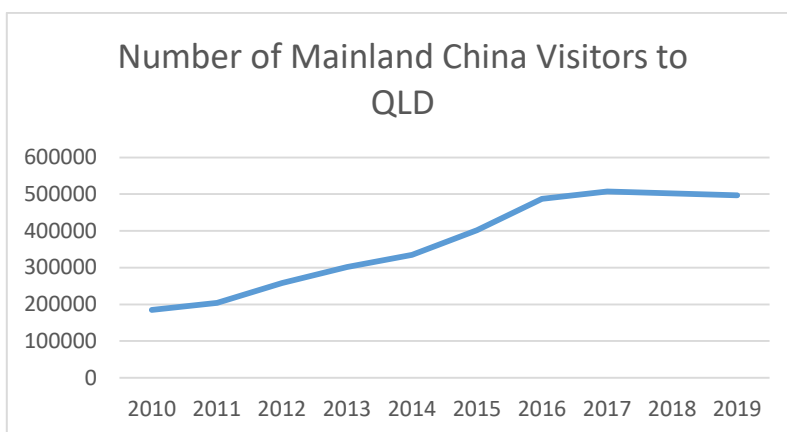


Fig.10 Number of Mainland China Visitors to Queensland



Fig.11 Percentage of Mainland China Visitors from the Total International Visitors to Queensland (Number of Visitors)

To study what mainland China visitors do when traveling in Queensland, this project first finds out that mainland China visitors mainly choose Gold Coast to stopover and the number of mainland China visitors stopover Brisbane and Regional QLD are quite similar (Figure 12). Furthermore, no matter where mainland China visitors choose to stopover, the number of them choosing Outdoor/Nature activity steadily increased during the last ten years and over 94% of Chinese visitors to Queensland chose to see the natural views there (Figure 15), except that Regional QLD experienced a rather significant drop between 2016 and 2019 (Figure 13). But the relative figure of percentage in Figure 15 shows that there has been quite a decrease of Chinese visitors visiting nature in Queensland by over 3% between 2015 and 2019.

For mainland China visitors stopover Brisbane, the number of them choosing Outdoor/Nature activity experienced a stable rising trend between 2010 and 2019. The number increased from around 80,000 visitors to about 270,000 visitors. It increased almost three times (Figure 12). Furthermore, although the number of mainland China visitors stopover Brisbane choosing Outdoor/Nature activity saw a stable increase during the same period, the percentage of them from the total mainland China visitors stopover Brisbane dropped from 96% to around 92% and even reach to the lowest point of 90% in 2011 (Figure 13). Moreover, Brisbane accounted for the lowest percentage among three stopover capital/region in QLD (Figure 14).

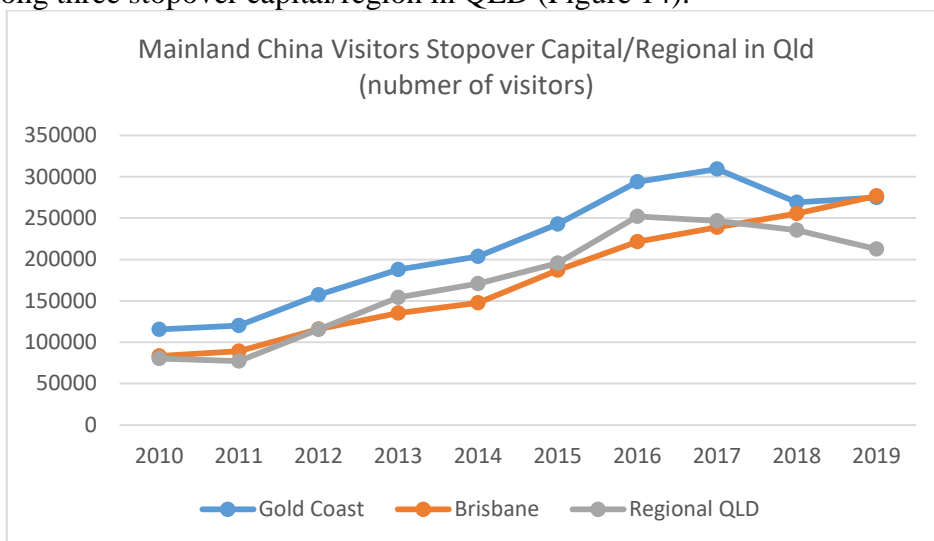
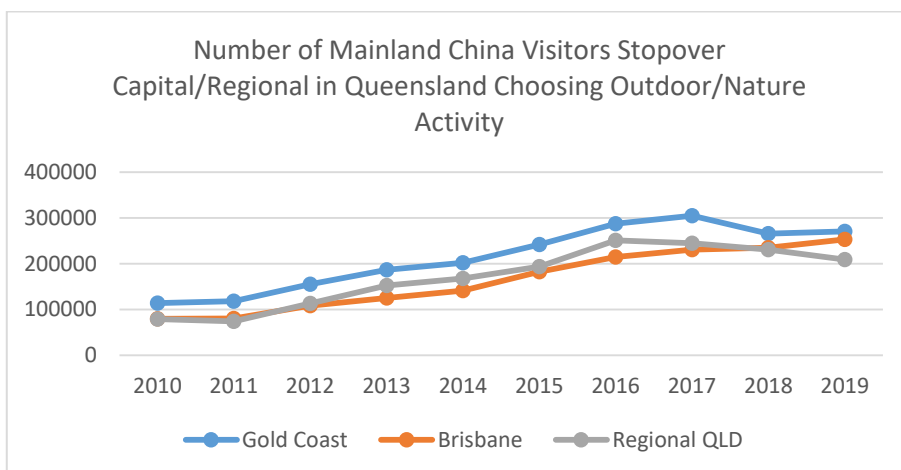
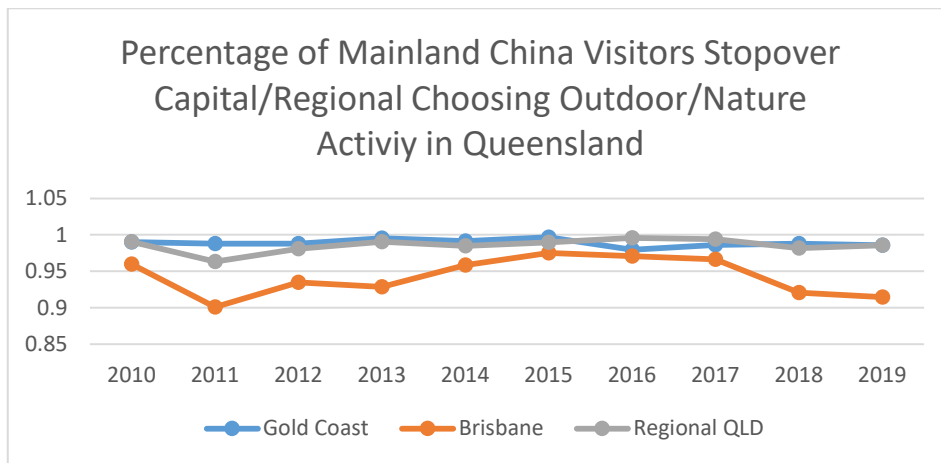


Fig.12 the Number of Mainland China Visitors Stopover Capital/Regional in Queensland





*Fig.13 Number of Mainland China Visitors Stopover Capital/Regional in Queensland Choosing Outdoor/Nature Activity*



*Fig.14 Percentage of Mainland China Visitors Stopover Capital/Regional Choosing Outdoor/Nature Activity in Queensland (Number of Visitors)*



*Fig.15 Percentage of Mainland China Visitors to Queensland Choosing Outdoor/Nature Activity (Number of Visitors)*

From the Figure 16, holiday visitors accounted for the largest amount of total mainland China visitors to QLD and the number experienced a significant rise from some 135,000 visitors to around 370,000 visitors in the last decade. The number increased more than twice. Although the number of visitors to Queensland for holiday kept rising in the last decade, the percentage of having this purpose out of the total mainland China visitors to QLD fluctuated between 60% and 80% (Figure 17).



Fig.16 Number of Mainland China Visitors to Queensland by Purpose

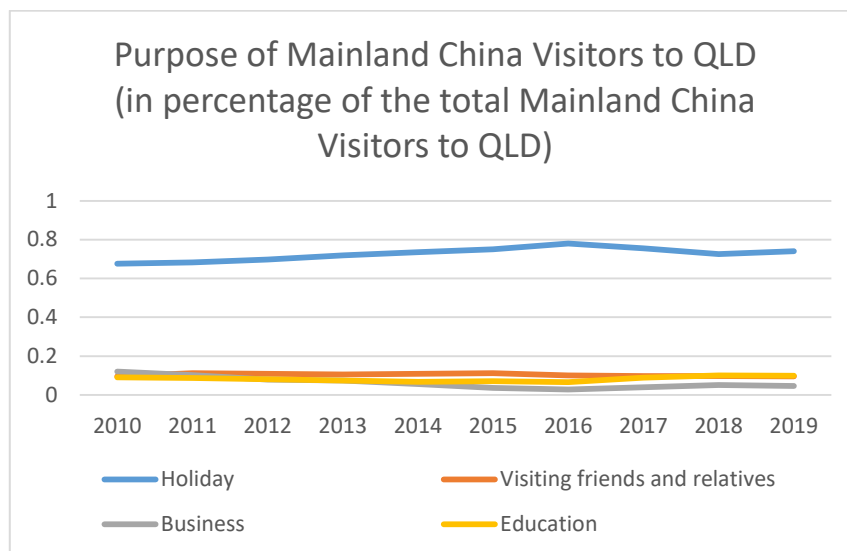
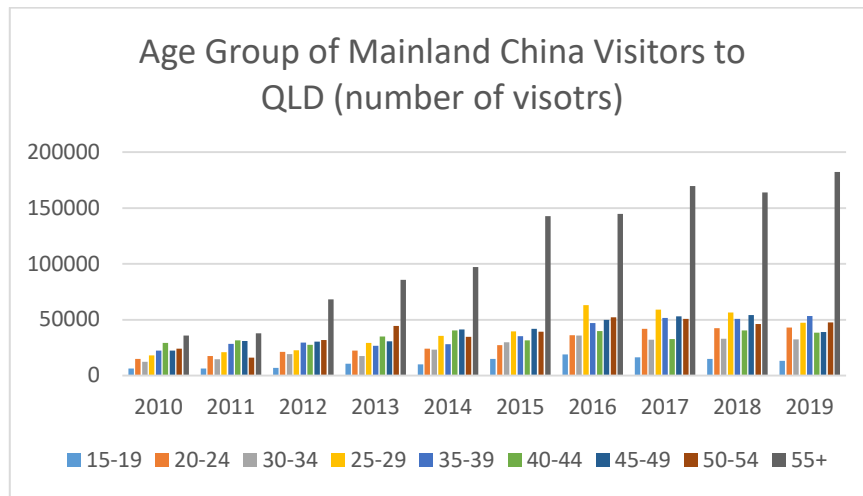
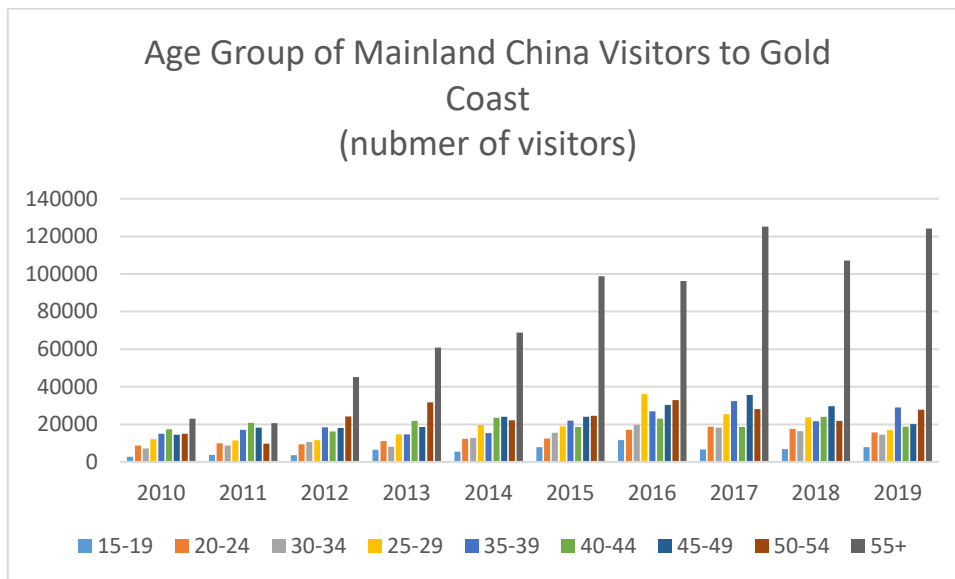


Fig.17 Percentage of Mainland China Visitors to Queensland by Purpose (Number of Visitors)

As for the age group of mainland China visitors to QLD, according to the data from Figure 18-21, those who aged 55+ occupied the largest amount of the total mainland China visitors to QLD, Gold Coast, Brisbane and Regional QLD. The number of aged 55+ mainland China visitors to QLD rose from about 36,000 visitors in 2010 to over 182,000 in 2019. Then we can also see that mainland China visitors aged 25-29 witnessed a significant increase trend at the same time in all to QLD, to Gold Coast, to Brisbane and Regional QLD (Figure 18-21). Moreover, there were more mainland China visitors aged 25 + traveling to QLD than that of aged 15 to 25.



*Fig.18 Number of Mainland China Visitors to Queensland by Age Group*



*Fig.19 Number of Mainland China Visitors to Gold Coast by Age Group*

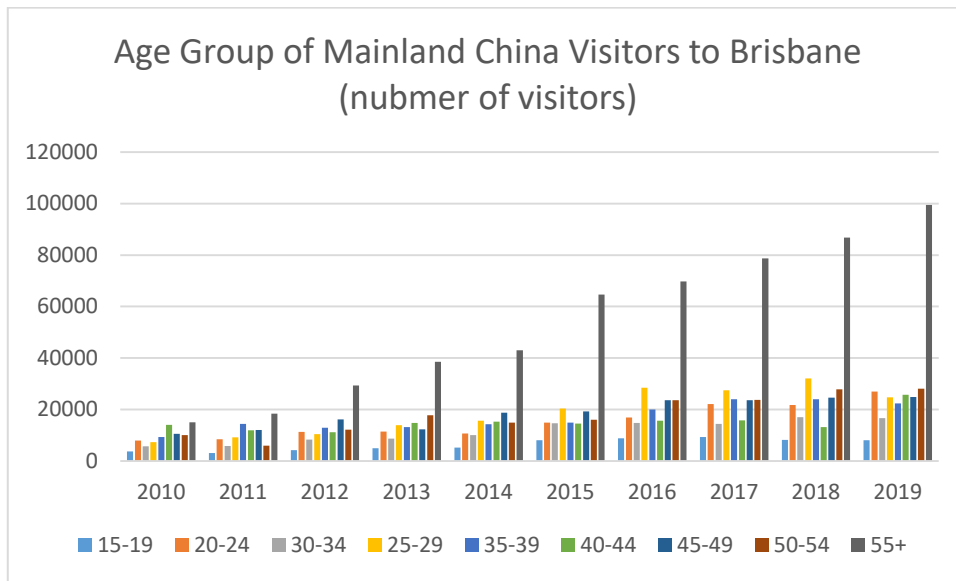


Fig.20 Number of Mainland China Visitors to Brisbane by Age Group

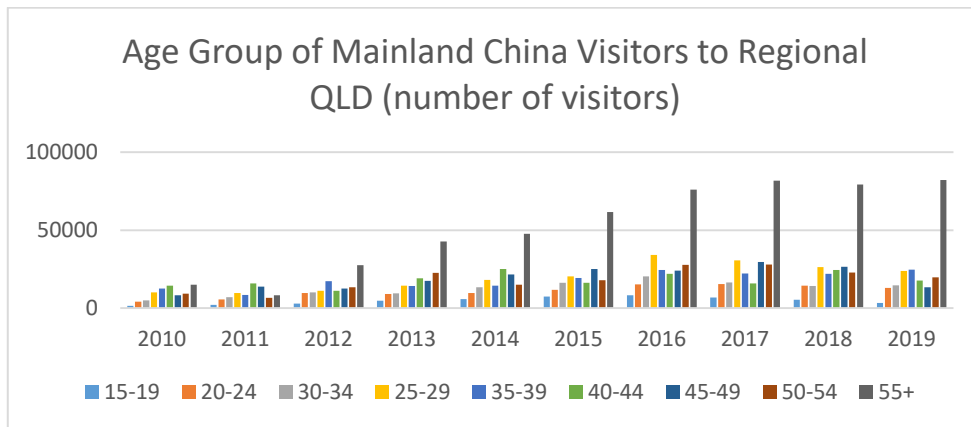


Fig.21 Number of Mainland China Visitors to Regional Qld by Age Group

The number of mainland China visitors choosing group tour to QLD, no matter to Gold Coast, to Brisbane or to Regional QLD, increased to the highest point in 2016 and then decreased in the remaining 3 years (Figure 22). However as for the non-group tour by mainland China visitors to QLD, all Gold Coast, Brisbane, and Regional QLD, they roughly witnessed a growing trend in the last decade. Moreover, from 2017 to 2019, there was a larger number of mainland China visitor choosing non-group tour to travel Brisbane than group tour (Figure 22 and 23).

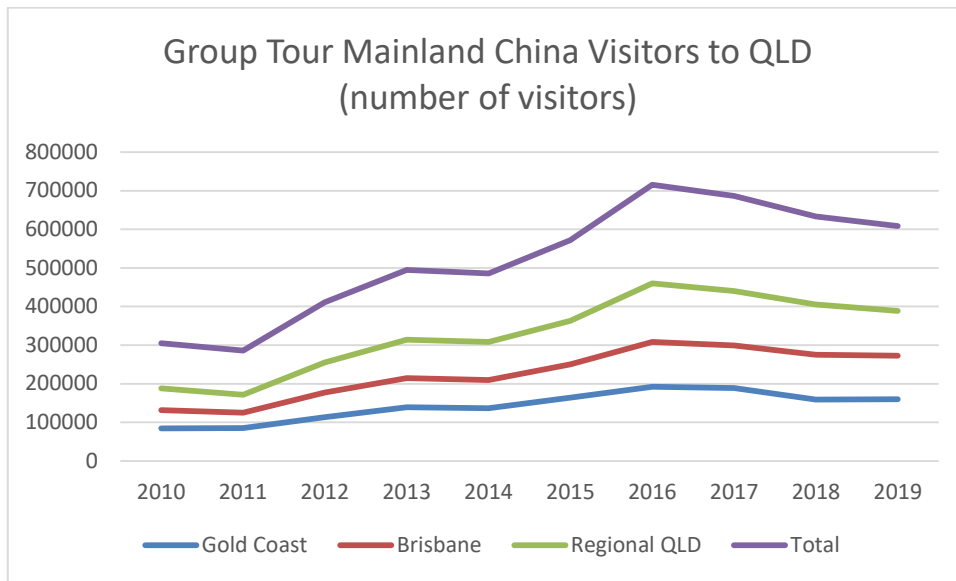


Fig.22 Number of Mainland China Visitors to Queensland by Group Tour

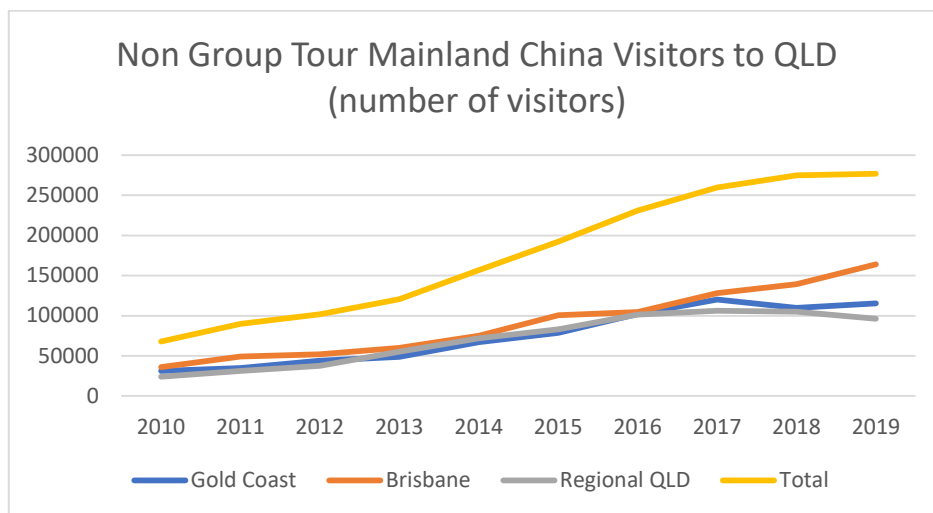


Fig.23 Number of Mainland China Visitors to Queensland by Non-Group Tour

## 5. Discussions

Overall, this research suggests that Australian tourism industry benefit from the unimageable growth of main China outbound tourism markets and mainland China has become more and more important to Australia international tourism segment. Specifically, in terms of the number of mainland China visitors to Queensland and New South Wales, greater China remained the top international source market for these two states from 2017 and 2013 respectively and the overall trends were increasing, however it should note that both states saw a decline of the number of mainland China after 2017 and 2013 go upward and then downward. The potential reason for the decline in the figure of percentage may result from lack of repeated visitation.

However, Chinese visitors are very interested in nature spots in Queensland as over 94% of them chose outdoor/nature activity in Queensland and the highest point could reach more than 98%. The previous results together may suggest that the average expenditure of mainland China visitors aged 15-30 be higher than that of aged 30+. The potential reason may that education spending for the

younger visitors. Moreover, most of the Chinese outbound market are aged between 25 and 44. So the young and middle-aged individuals from 25 to 44 could be a great opportunity for Australian tourism industry in both terms of the number of visitors and the amount of expenditure.

## 6. Conclusion

Australian tourism is becoming increasingly important in its economy growth, and it is on the growing stage of its life cycle. By March of 2020, international travelers occupy many total tourism expenditures in Australia and China mainland visitors are becoming increasingly valuable for Australia tourism because as they spend more than the average visitors. Moreover, Australia is a famous travel destination possessing stunning natural and wildlife views and pristine aquatic and coastal attractions.

This paper makes contribution to adding knowledge about the importance of mainland China tourist market to Australian tourism market, the changes of how Australian natural environment including the specific nature-based attractions in Queensland and NSW attracting Chinese tourists, and the changes of Chinese visitors to QLD and NSW in terms of age distribution and group tour to the literature. This information would further provide insights for the policy makers and business operators within the tourism industry especially for those located in Queensland and NSW to help them make informative decisions and prepare for adapting to the changes. For the future research, it is suggested that when analyzing Chinese outbound tourists in a nuanced manner it would be better to exclude the data about international students as their major purpose is for education and their staying period is relatively longer. Moreover, this paper finds out a different visitation patterns of group tour in the different states of Queensland and NSW.

## References

- [1] Australian Government and Tourism Research Australia. (2012). *Snapshots 2012: China-First and return visitation*. Retrieve from: [https://www.tra.gov.au/ArticleDocuments/185/China\\_Snapshot\\_2012\\_FINAL.pdf.aspx](https://www.tra.gov.au/ArticleDocuments/185/China_Snapshot_2012_FINAL.pdf.aspx)
- [2] Australian Government Austrade and Tourism Research Australia. (2019). *International Visitors in Australia Year Ending September 2019*. Retrieved from <https://www.tra.gov.au/data-and-research>
- [3] Australian Government Austrade and Tourism Research Australia. (2019). *Chinese and independent travellers – Their potential for regional Australia*. Retrieved from <https://www.tra.gov.au/ArticleDocuments/317/China%20report%20summary%20March%202019.pdf.aspx>
- [4] Australian Government Austrade and Tourism Research Australia. (2020a). *State of the Industry 2018-29*. Retrieved from <https://www.tra.gov.au/data-and-research>
- [5] Australian Government Austrade and Tourism Research Australia. (2020b). *International visitor survey results (IVS) Year ending December 2019*. Retrieved from <https://www.tra.gov.au/data-and-research>