

# DOMESTIC TOURISM INSIGHTS

APRIL 2014



# Tourism and the Australian economy

Tourism is a significant industry and an economic growth strategy for Australia.

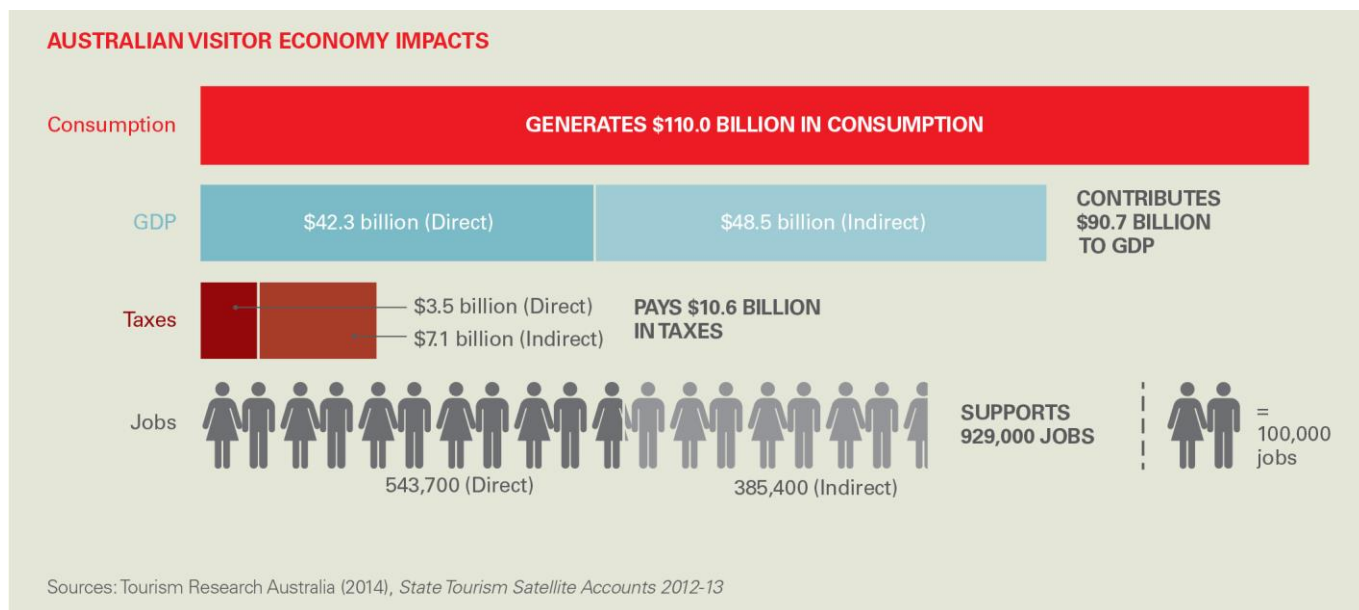
\$110 billion in consumption

Largest service export

\$242 million in expenditure each day

280,000 businesses

929,000 jobs



Sources: Tourism Research Australia (TRA, 2014) - *State Tourism Satellite Accounts 2012-13*; TRA (2013) - *International and National Visitor Surveys, June 2013*, visitors aged 15 years+; TRA (2013) - *Tourism Businesses in Australia, June 2012*; Australian Bureau of Statistics (ABS, 2010) - *Household and family projections, 2006 to 2031*.

# The value of domestic tourism

**Domestic tourism accounts for 80% of total visitor spend in Australia.**

*In 2012-13:*

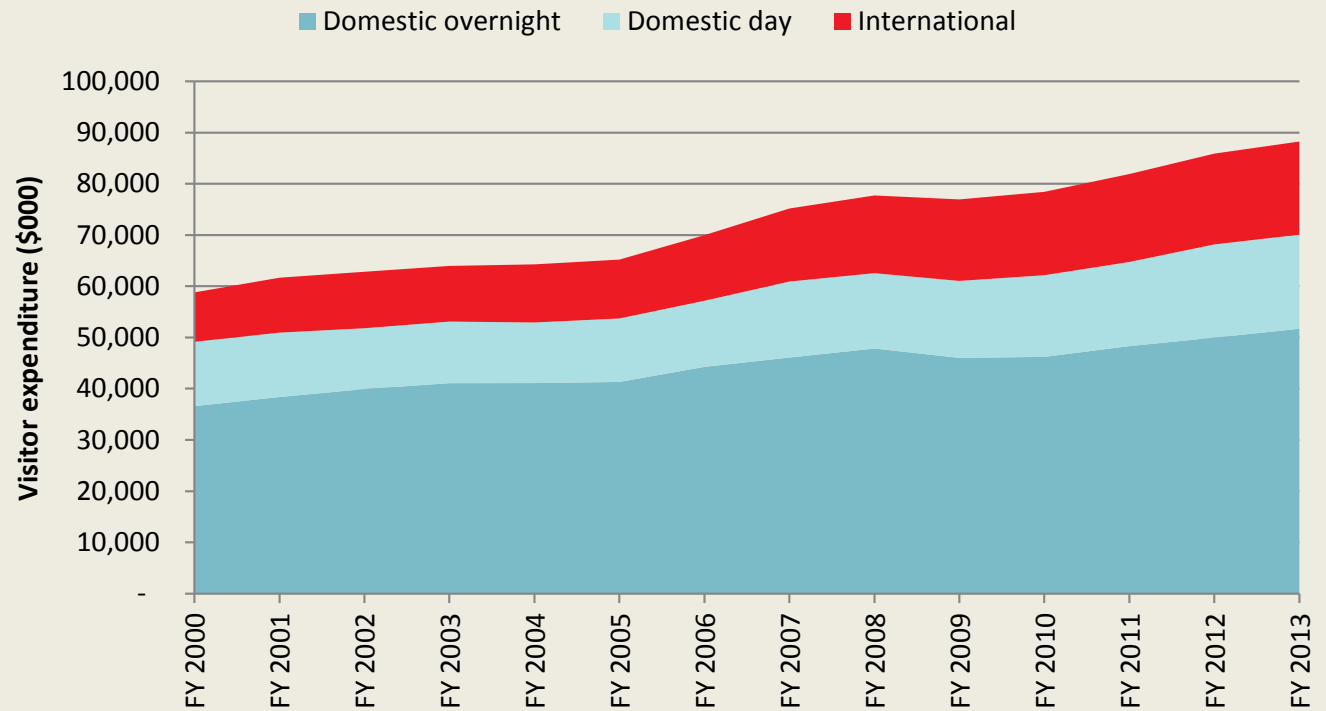
**Total visitor expenditure**  
\$88.3 billion

**Domestic overnight visitor expenditure**  
\$51.7 billion (59%)

**Domestic day visitor expenditure**  
\$18.4 billion (21%)

**International visitor expenditure**  
\$18.2 billion (21%)

## VISITOR EXPENDITURE IN AUSTRALIA

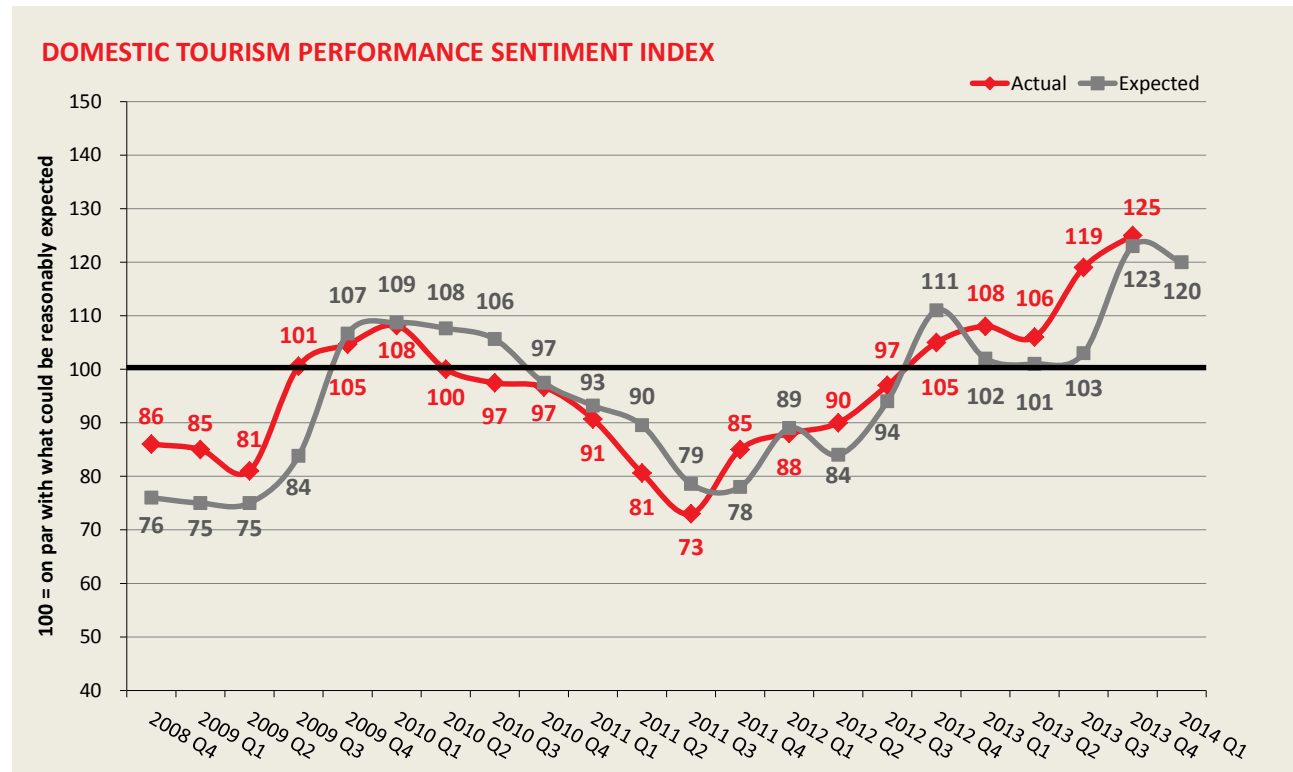


Source: Tourism Research Australia (2013) – *International and National Visitor Surveys, June 2013 edition*, visitors aged 15 years+.

# Domestic tourism sentiment

**Industry sentiment regarding domestic tourism is at record highs.**

Q: What is your assessment and expectation of domestic tourism performance in your destination/business compared with what you would reasonably expect for this time of year?



Source: TTF (2013) – TTF-MasterCard Tourism Industry Sentiment Survey, June quarter 2013 edition.

# Domestic overnight travel trends

**Domestic overnight travel has recovered to above pre-GFC levels, growing consistently over the past three years.**

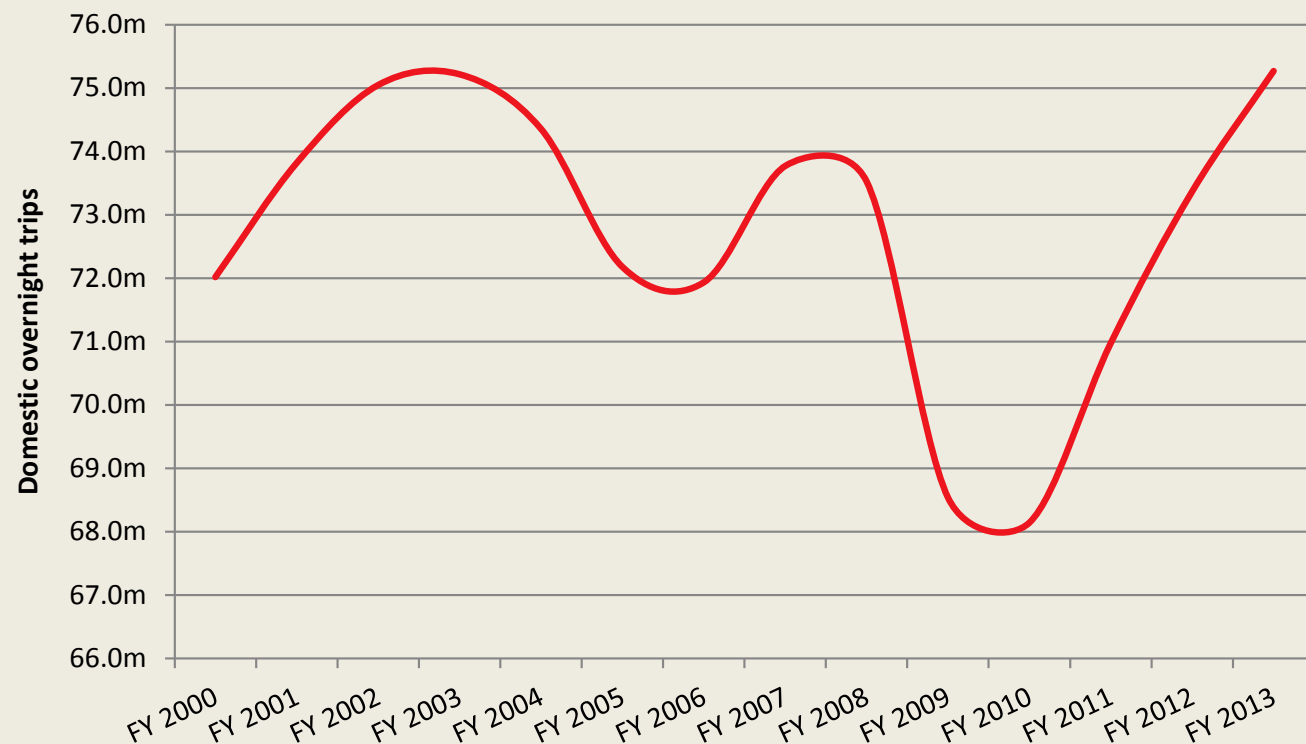
*In 2012-13:*

**Total overnight trips**

75.3 million

+2.6% YoY

## DOMESTIC OVERNIGHT VISITORS



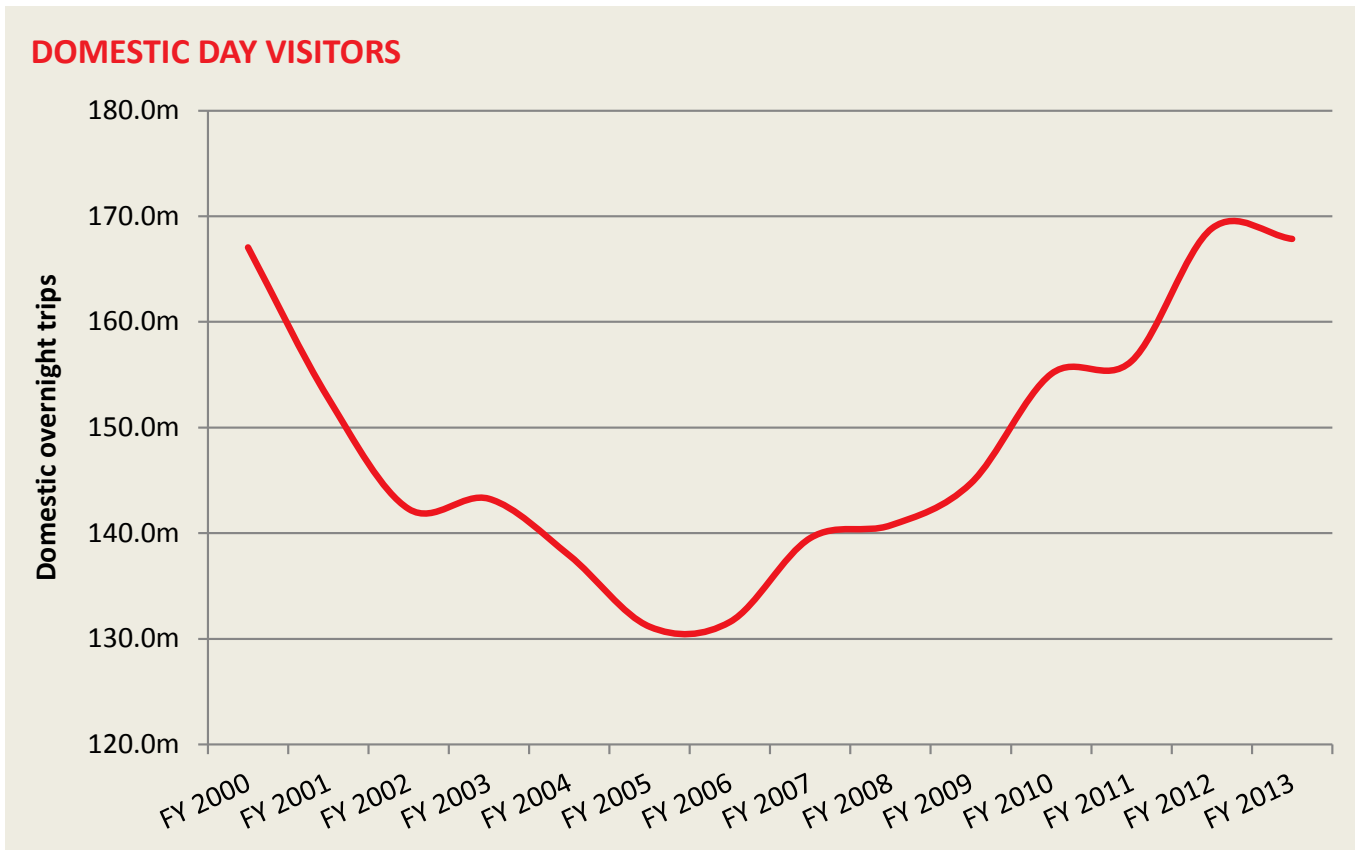
Source: Tourism Research Australia (2013) – *National Visitor Survey, June 2013 edition*, visitors aged 15 years+.

# Domestic day trip trends

**Domestic day trips has increased steadily even through the GFC, buoying the domestic market.**

*In 2012-13:*

**Total day trips**  
167.9 million  
-0.6% YoY



Source: Tourism Research Australia (2013) – *National Visitor Survey, June 2013 edition*, visitors aged 15 years+.

# Domestic overnight travel by purpose

Holiday travel has been the key driver of the growth in domestic overnight travel last year.

In 2012-13:

**Holiday travel**

32.3 million (43%)  
+5.6% YoY

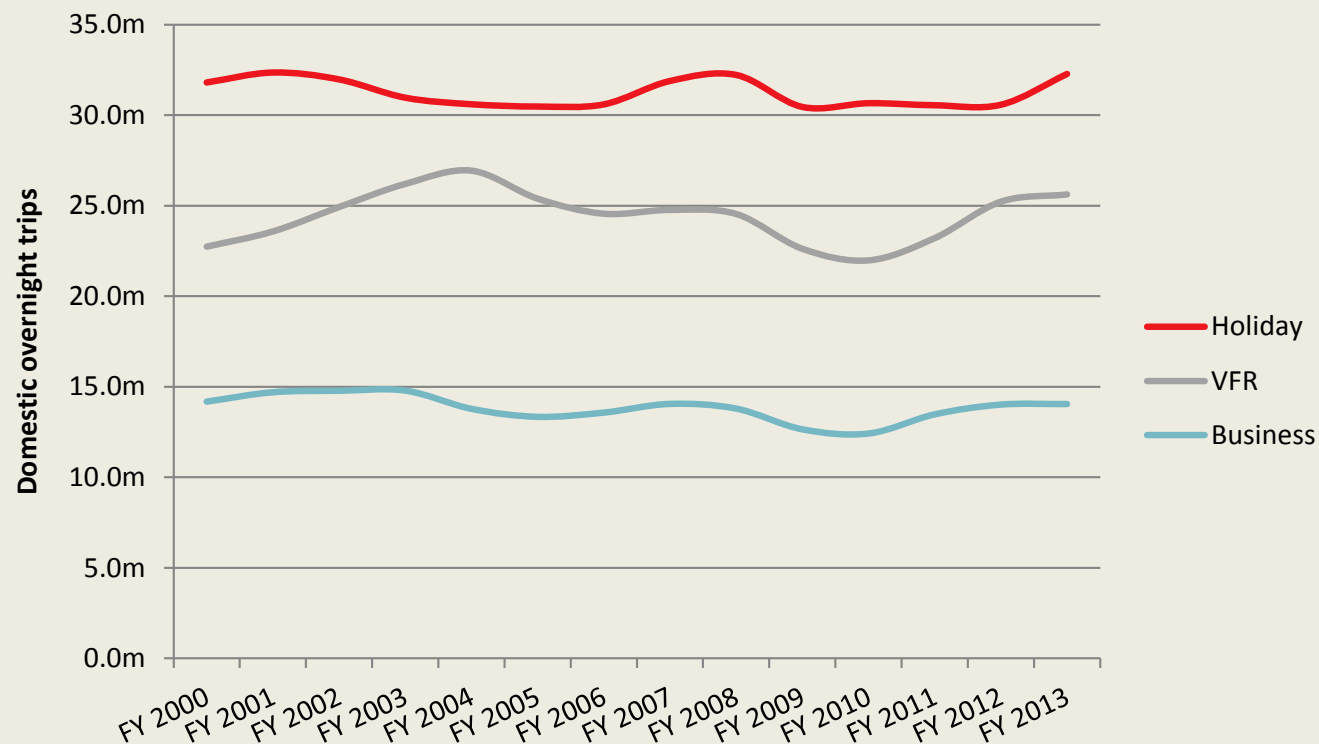
**VFR travel**

25.6 million (34%)  
+1.6% YoY

**Business travel**

14.0 million (19%)  
+0.2% YoY

DOMESTIC OVERNIGHT VISITORS BY PURPOSE OF TRAVEL



Source: Tourism Research Australia (2013) – National Visitor Survey, June 2013 edition, visitors aged 15 years+.

# Domestic overnight travel by jurisdiction

Growth in overnight travel has been uneven across states and territories.

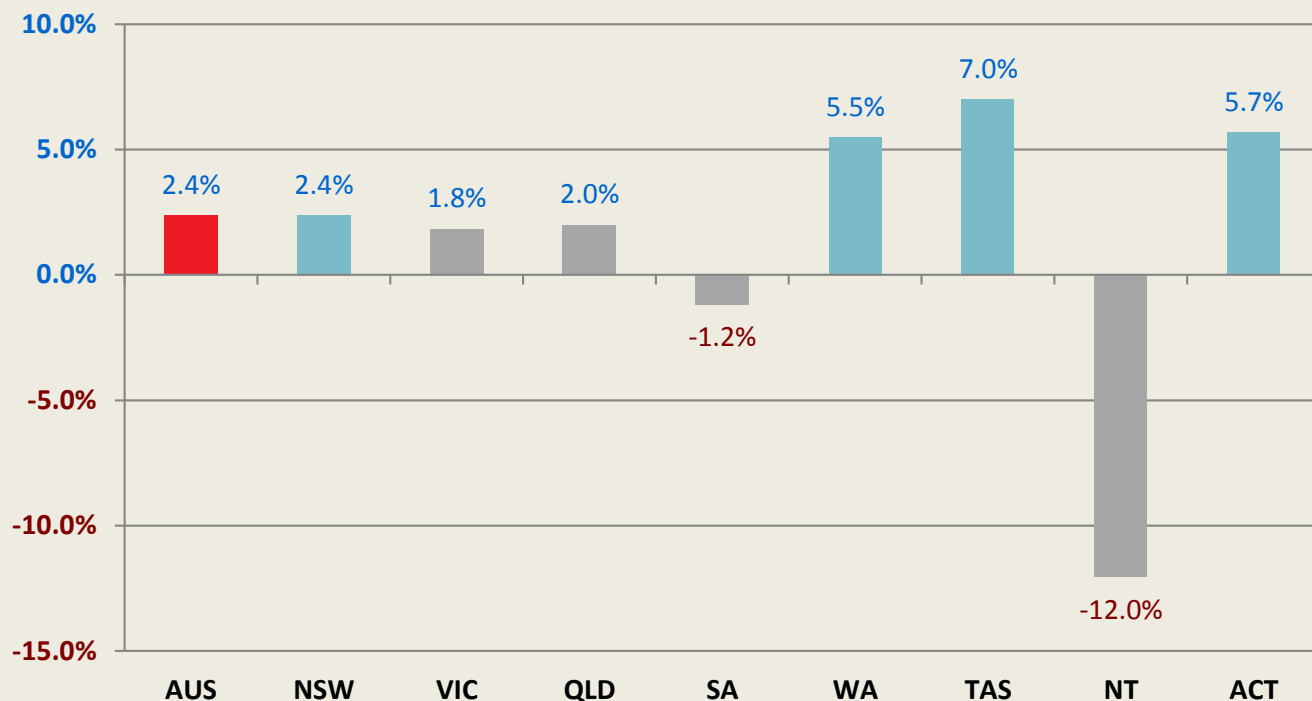
Over the past 5 years:

**National average**  
+2.4%

**Above average**  
TAS, ACT, WA, NSW

**Below average**  
NT, QLD, VIC

DOMESTIC OVERNIGHT VISITORS TO STATES AND TERRITORIES, 5-YEAR GROWTH (FY 2008-2013)



Source: Tourism Research Australia (2013) – National Visitor Survey, June 2013 edition, visitors aged 15 years+.



# Outbound travel by Australians

**Outbound travel by Australians has continued its strong growth trajectory, up 7.2 per cent in the year ending January.**

The fastest growing outbound destinations over this period have been Singapore, Malaysia, India, Japan, the UK and the US.

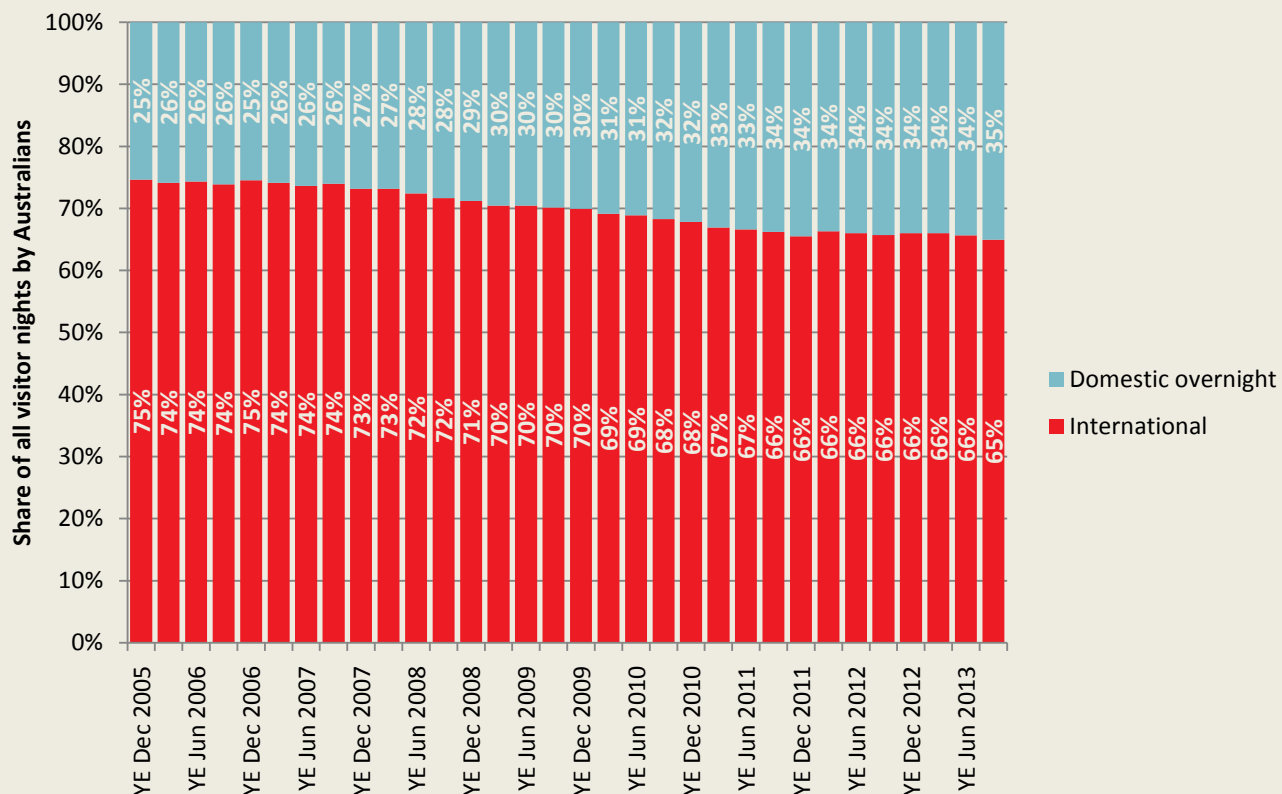
DEPARTURES TO:	Year Ended			
	Jan 2013	Jan 2014	Difference	% change
New Zealand	1,108,700	1,180,100	71,400	6.4%
Indonesia	911,800	963,800	52,000	5.7%
USA	864,700	950,300	85,600	9.9%
Thailand	627,900	625,100	-2,800	-0.4%
UK	510,500	562,900	52,400	10.3%
China	377,000	405,000	28,000	7.4%
Singapore	298,600	355,000	56,400	18.9%
Fiji	328,800	331,500	2,700	0.8%
Malaysia	253,900	288,200	34,300	13.5%
India	221,400	251,000	29,600	13.4%
Vietnam	215,400	231,200	15,800	7.3%
Hong Kong	222,300	221,600	-700	-0.3%
Japan	177,000	200,300	23,300	13.2%
Philippines	171,500	181,900	10,400	6.1%
Italy	156,600	174,600	18,000	11.5%
France	137,400	147,900	10,500	7.6%
Canada	112,500	120,200	7,700	6.8%
Papua New Guinea	90,800	95,100	4,300	4.7%
Germany	89,100	89,600	500	0.6%
South Africa	83,000	87,600	4,600	5.5%
<b>TOP 20 MARKETS</b>	<b>6,958,900</b>	<b>7,462,900</b>	<b>504,000</b>	<b>7.2%</b>
<b>ALL MARKETS</b>	<b>8,238,300</b>	<b>8,827,600</b>	<b>589,300</b>	<b>7.2%</b>

Source: TTF (2014) – Overseas Arrivals Summary, January 2014 edition.

# Domestic share of Australian visitor nights

Despite the strength of outbound travel, the share of nights away from home by Australians on domestic trips has grown steadily.

SHARE OF VISITOR NIGHTS BY AUSTRALIAN TRAVELLERS



Source: Tourism Research Australia (2013) – National Visitor Survey, June 2013 edition, visitors aged 15 years+.