



National Coach Connections Summit

MOVING PEOPLE * Long Distance * Charter * Express

What does tourism deliver to the Australian economy

Justin Marshall, Senior Policy Officer – Tourism Division, Austrade

The Future for Long Distance, Charter and Express

TOURISM:
DELIVERING FOR
AUSTRALIA

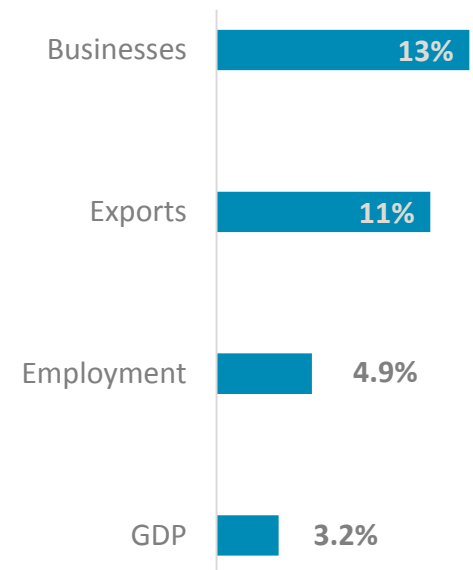
PRESENTATION OVERVIEW

- Tourism's economic contribution
- Tourism supply indicators
- International visitor patterns
- Australian resident visitor patterns
- Key take outs

TOURISM'S ECONOMIC CONTRIBUTION

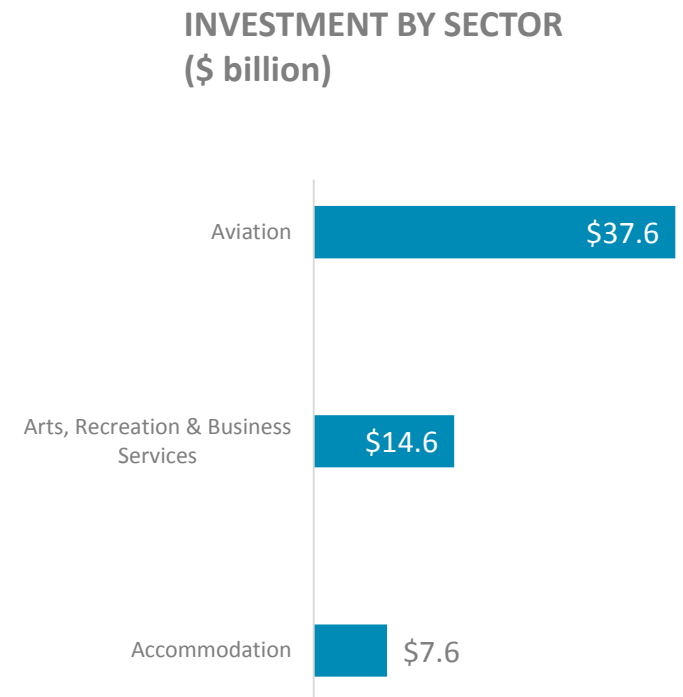
2015-16	Value	Change
Direct tourism GDP	\$53.0 billion	+7%
Tourism consumption	\$130 billion	+6%
Tourism exports	\$34.2 billion	+11%
Tourism employment	580,200	+1%
Tourism businesses	273,500	0%

TOURISM'S NATIONAL SHARE



TOURISM SUPPLY INDICATORS

2015-16	Value	Change
Accommodation		
- Rooms	249,100	+1%
- Occupancy	66.0%	+1.2 ppt
- Revenue per room	\$115	+4%
Aviation		
- International seats	23.5 million	+6%
- Domestic seats	77.0 million	+1%
Investment (2015)	\$59.8 billion	+12%



INTERNATIONAL VISITATION

2016	Value	Change
Visitors	7.6 million	+11%
Nights	253 million	+2%
Spend	\$39.1 billion	+7%

AVERAGE LENGTH
OF STAY
33 nights

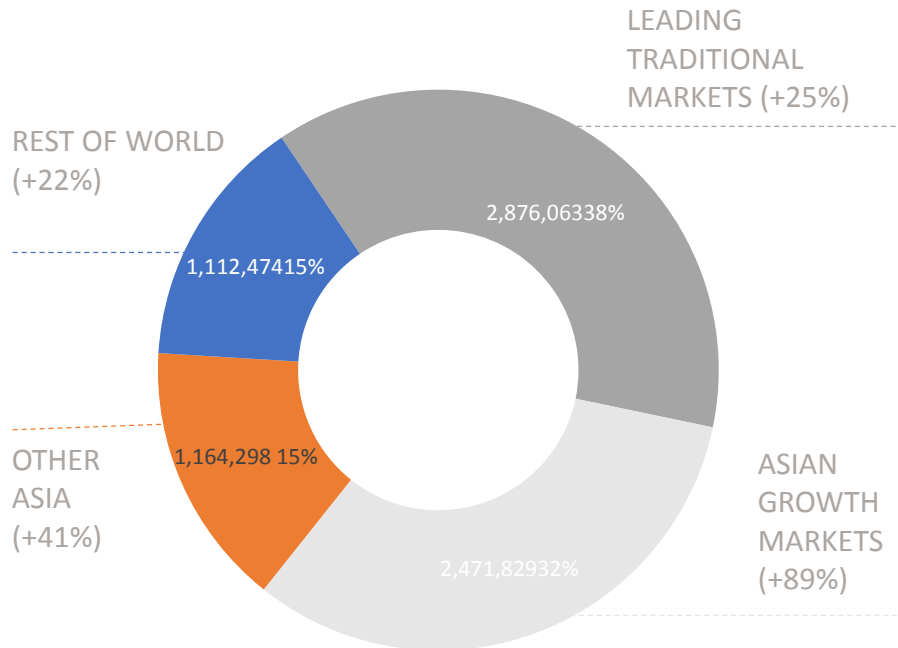
SPEND
PER TRIP
\$5,126

SPEND
PER NIGHT
\$155

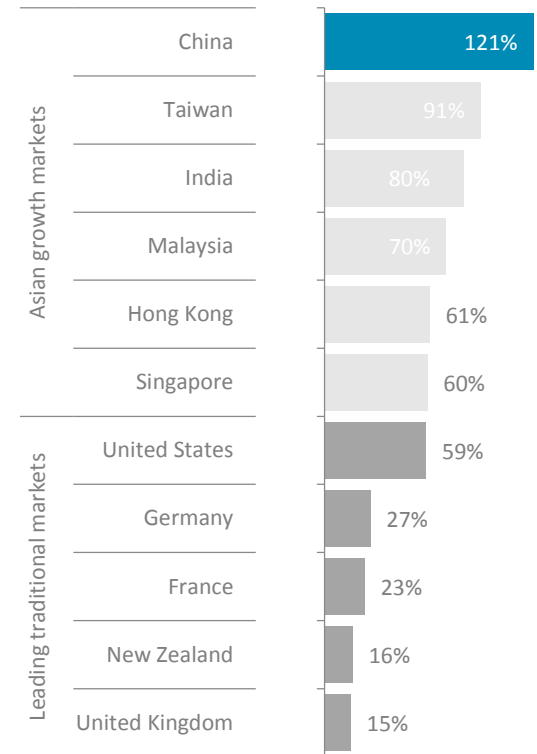
AVERAGE
STOPOVERS
2.6

INTERNATIONAL MARKETS

YEAR ENDING DECEMBER 2016

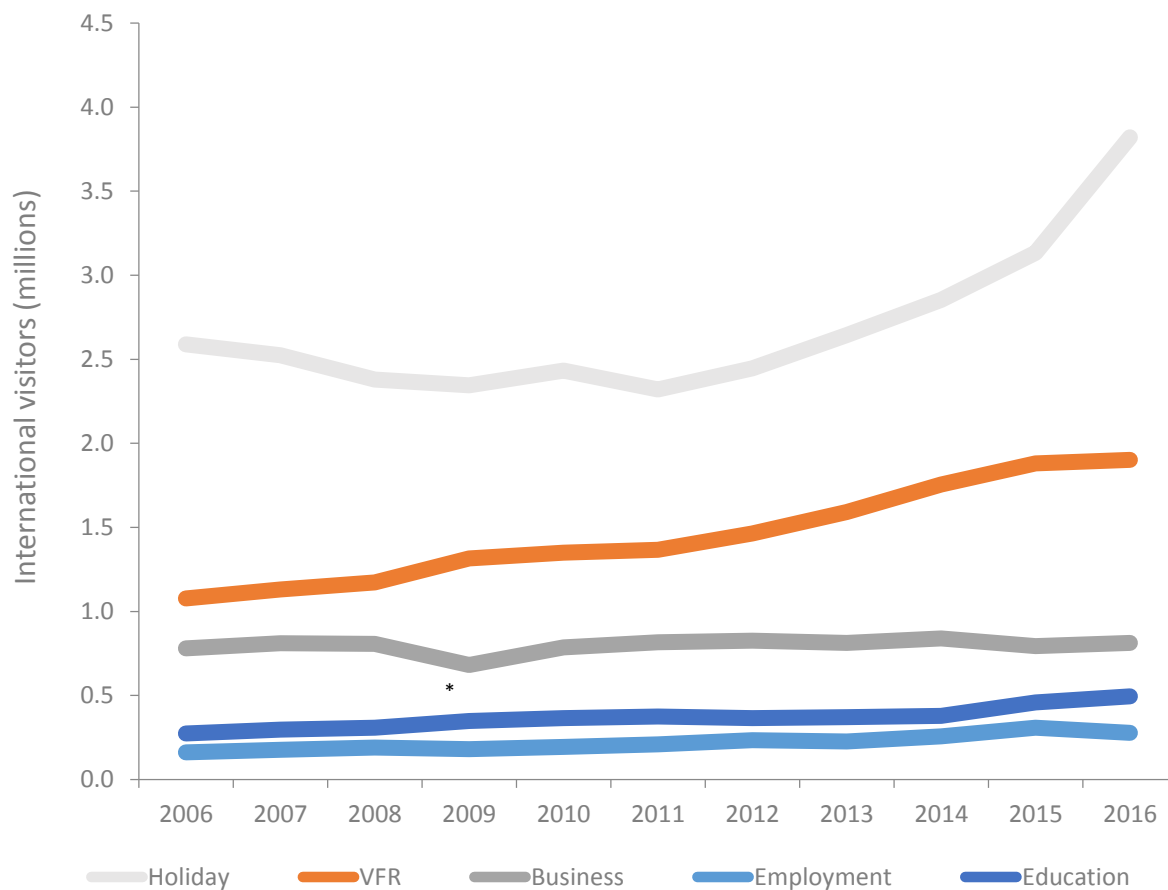


GROWTH SINCE 2011



MAIN PURPOSE OF VISIT

YEAR ENDING DECEMBER



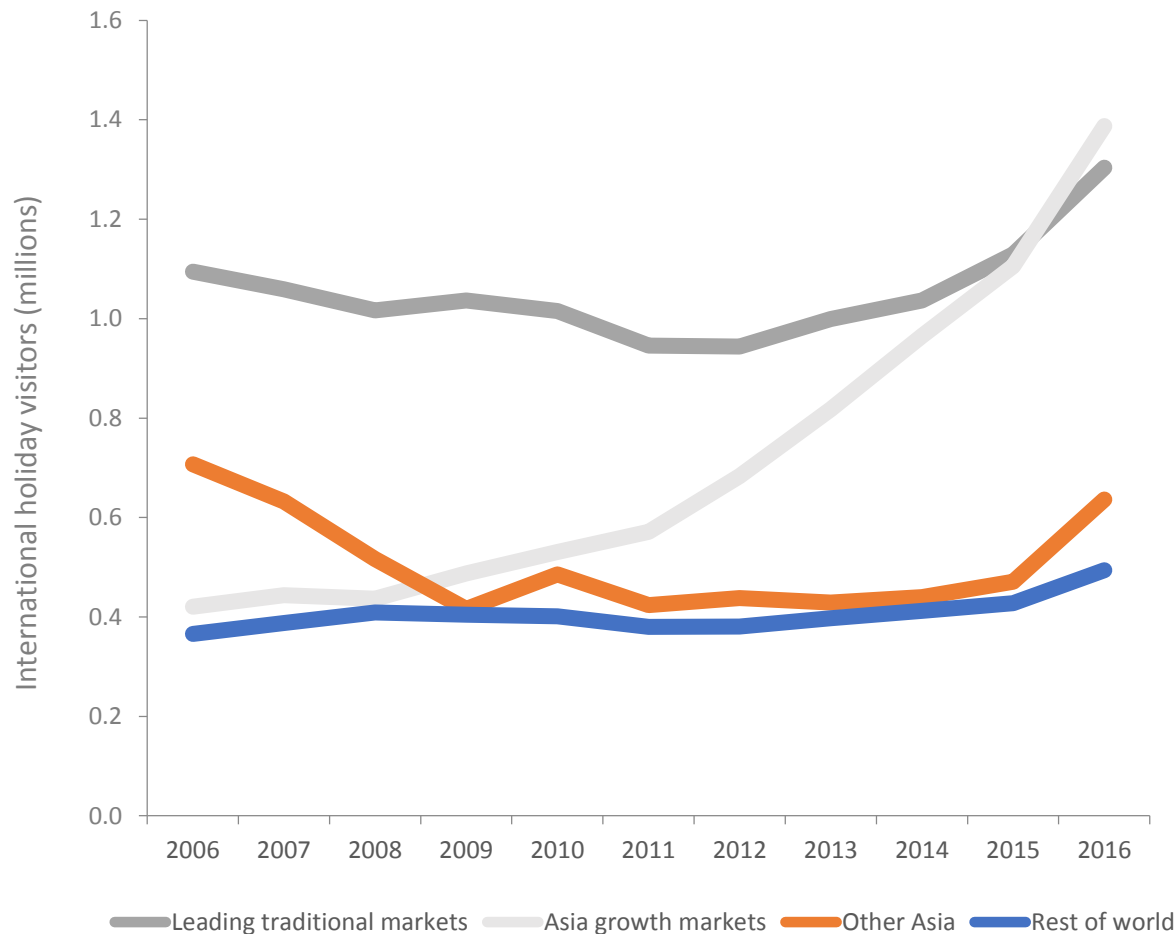
YEAR ENDING
DECEMBER 2016

Visitors	Spend
HOLIDAY 3.8 million +65% **	HOLIDAY \$16.7 billion +69% **
VFR 1.9 million +39% **	VFR \$5.7 billion +48% **
BUSINESS 814,000 0% **	BUSINESS \$3.3 billion -3% **
EDUCATION 495,000 +32% **	EDUCATION \$9.9 billion +62% **
EMPLOYMENT 279,000 +33% **	EMPLOYMENT \$2.4 billion +16% **

* VFR – Visiting Friends or Relatives
** Change 2011 to 2016

INTERNATIONAL HOLIDAY VISITORS

YEAR ENDING DECEMBER



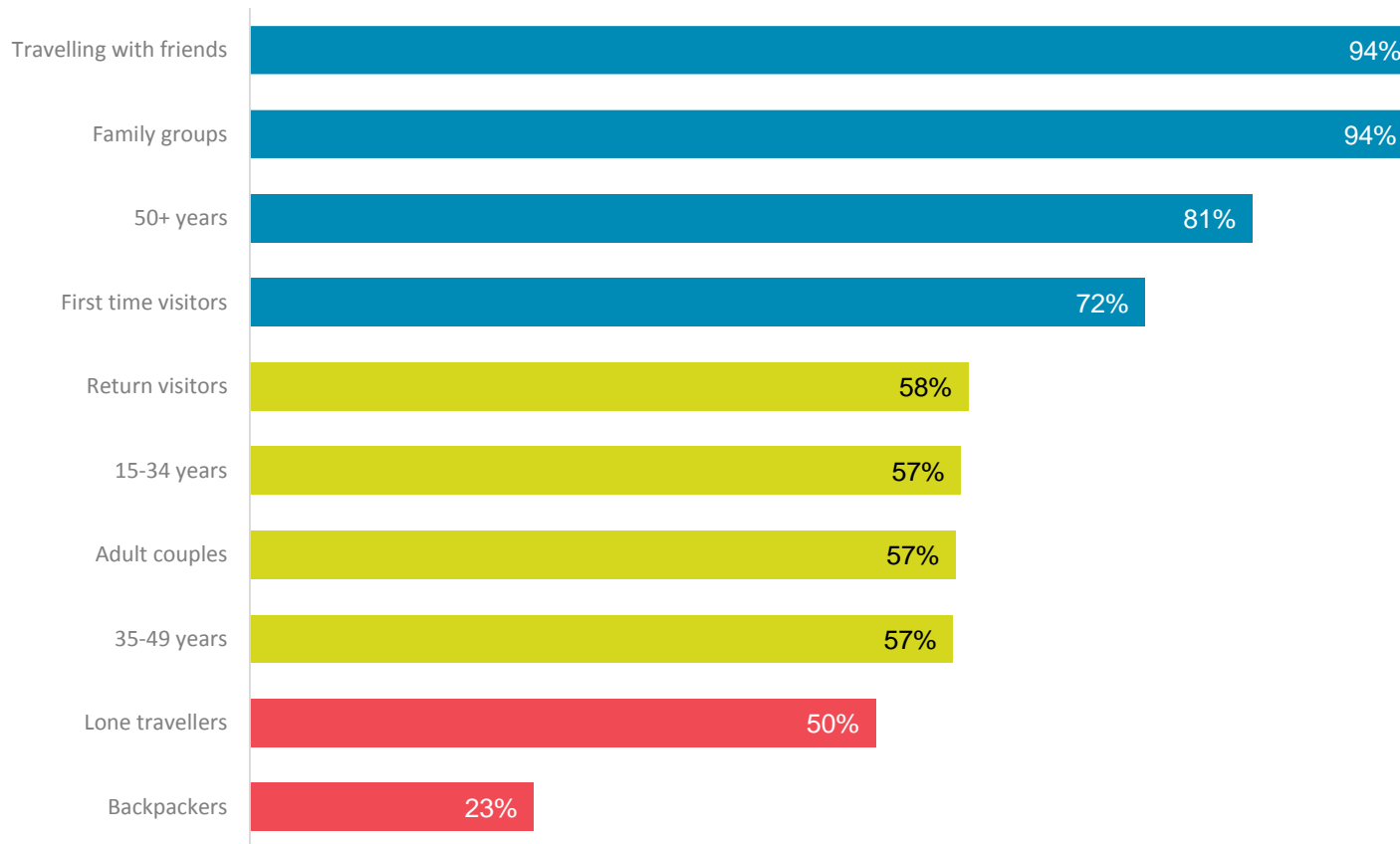
YEAR ENDING
DECEMBER 2016

Leading traditional markets	Asian growth markets
1.3 million +38%*	1.4 million +143%*
24 nights	16 nights
\$4,590 per trip	\$4,012 per trip
\$192 per night	\$255 per night
3.8 stopovers	2.5 stopovers

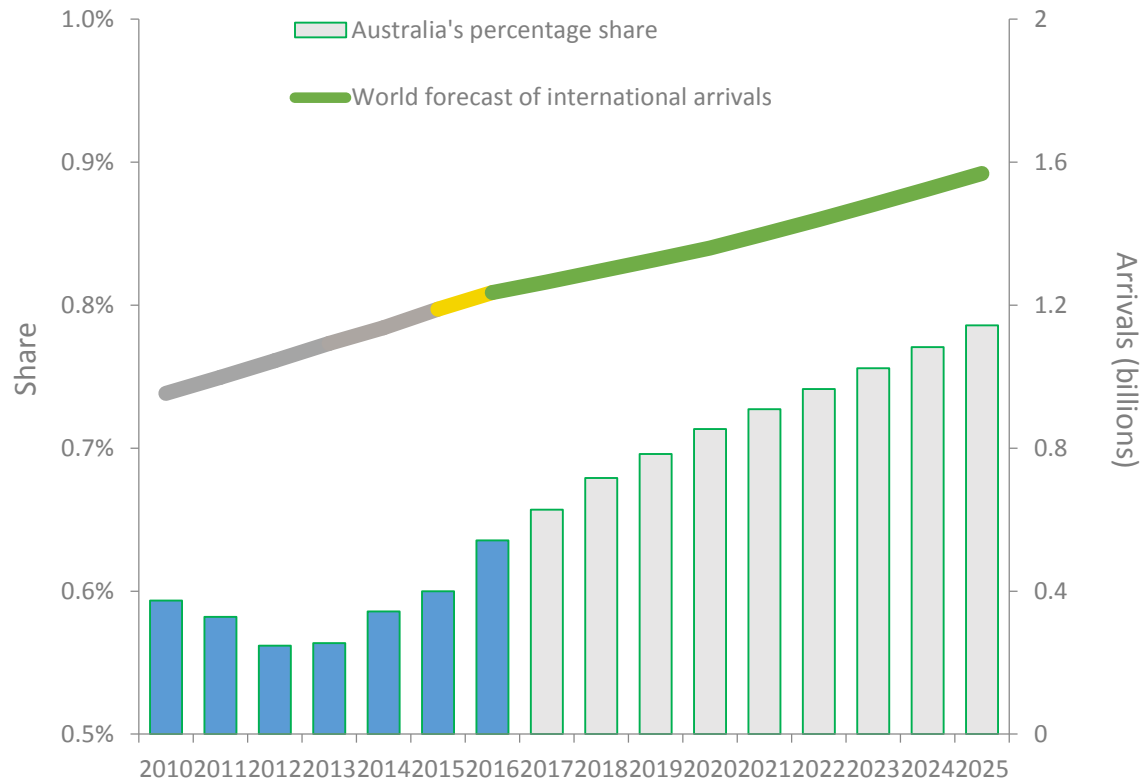
* Change 2011 to 2016

HOLIDAY VISITORS BY SEGMENT

GROWTH SINCE 2011



INTERNATIONAL TOURISM OUTLOOK



INTERNATIONAL ARRIVALS TO AUSTRALIA

2015-16
ACTUAL
7.8 million

2024-25
FORECAST
12.3 million

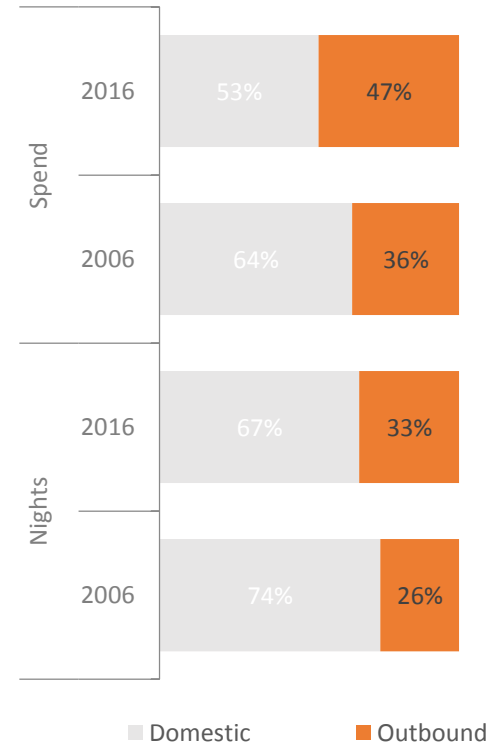
AVERAGE ANNUAL
GROWTH TO 2024-25
5.6%

Source: UNWTO and TRA

AUSTRALIAN'S OVERNIGHT TRAVEL PATTERNS

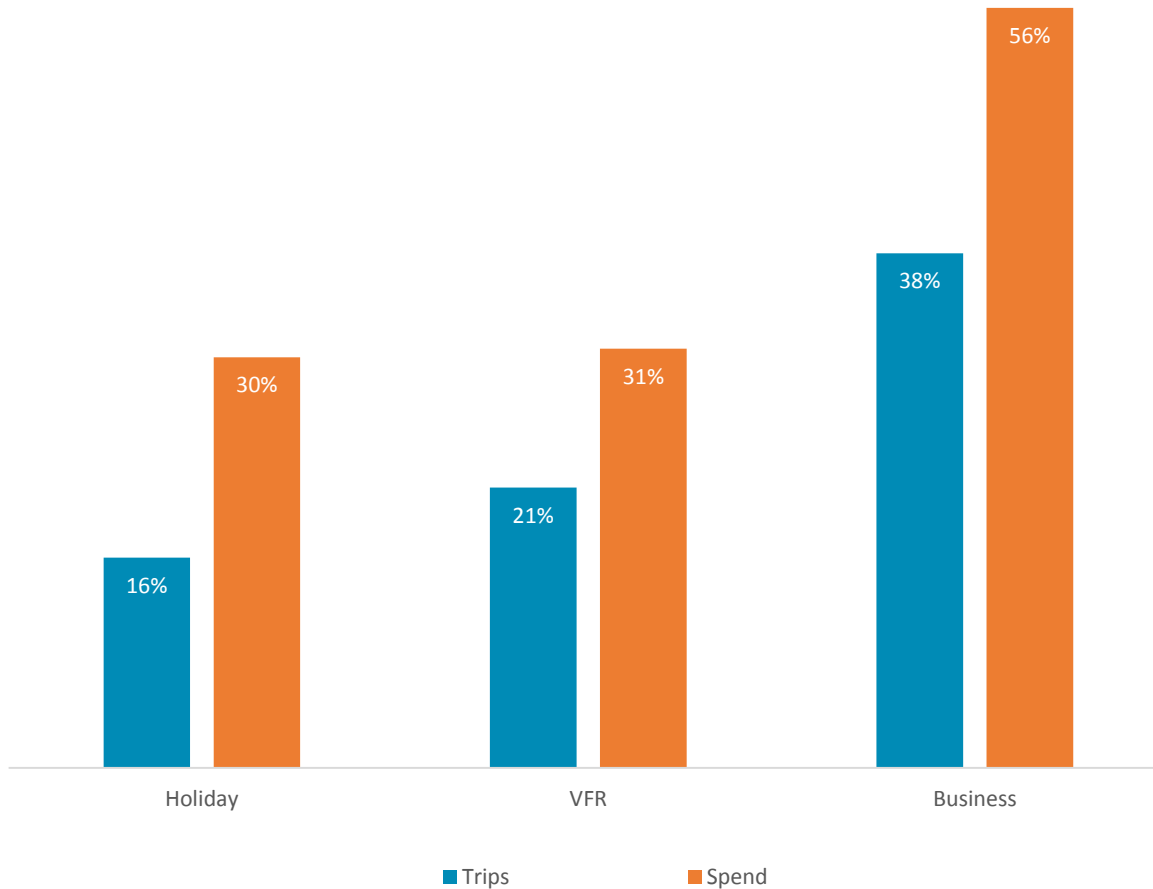
YEAR ENDING SEPTEMBER 2016

Metric	Domestic	Outbound
Trips Change since 2006	89.4 million 24%	8.7 million 100%
Nights Change since 2006	330 million 18%	165 million 65%
Spend Change since 2006	\$59.8 billion 39%	\$52.8 billion 121%
Average		
- Nights	4	19
- Spend per trip	\$668	\$6,056
- Spend per night	\$181	\$320



DOMESTIC OVERNIGHT TRAVEL BY PURPOSE

GROWTH SINCE 2006

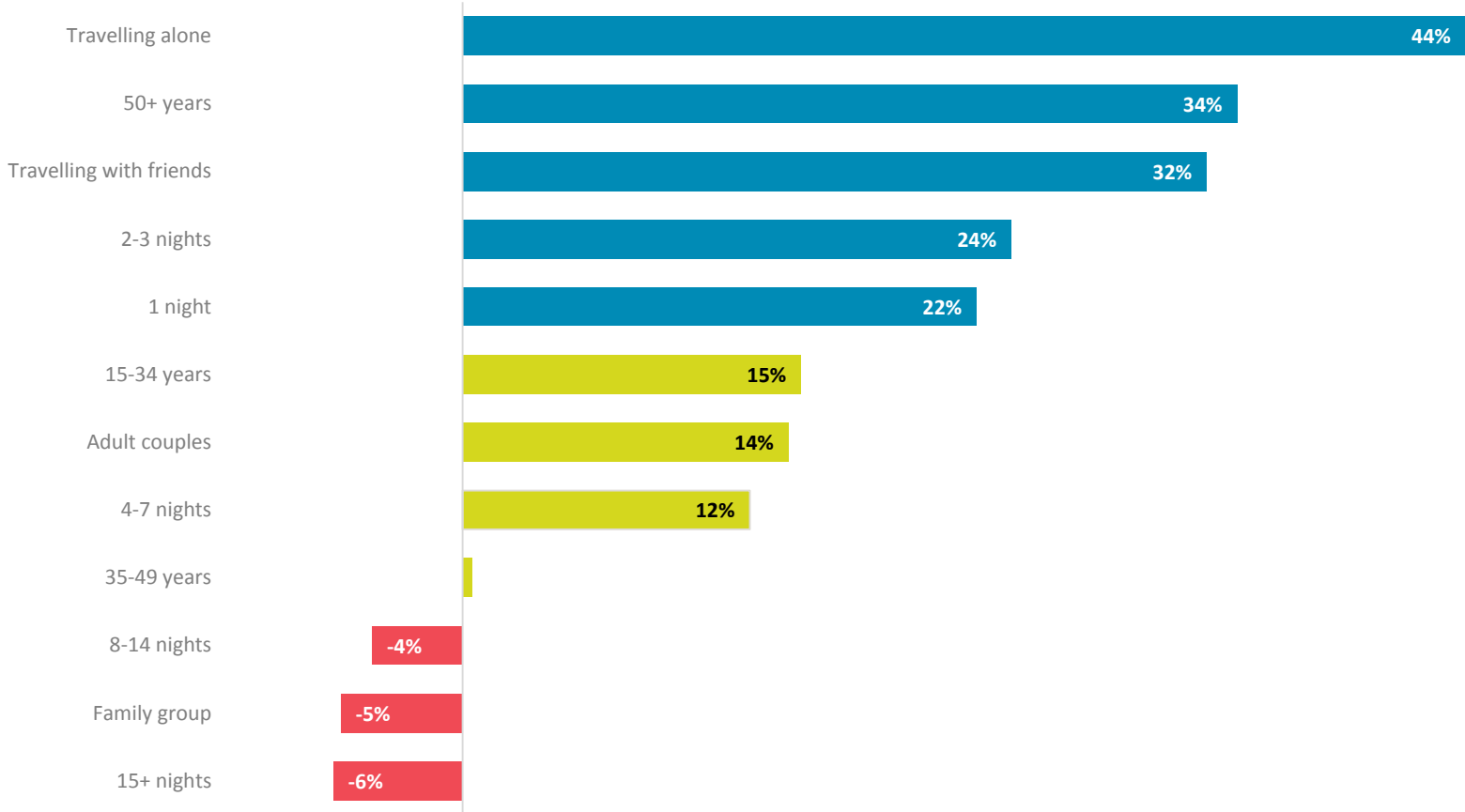


YEAR ENDING
DECEMBER 2016

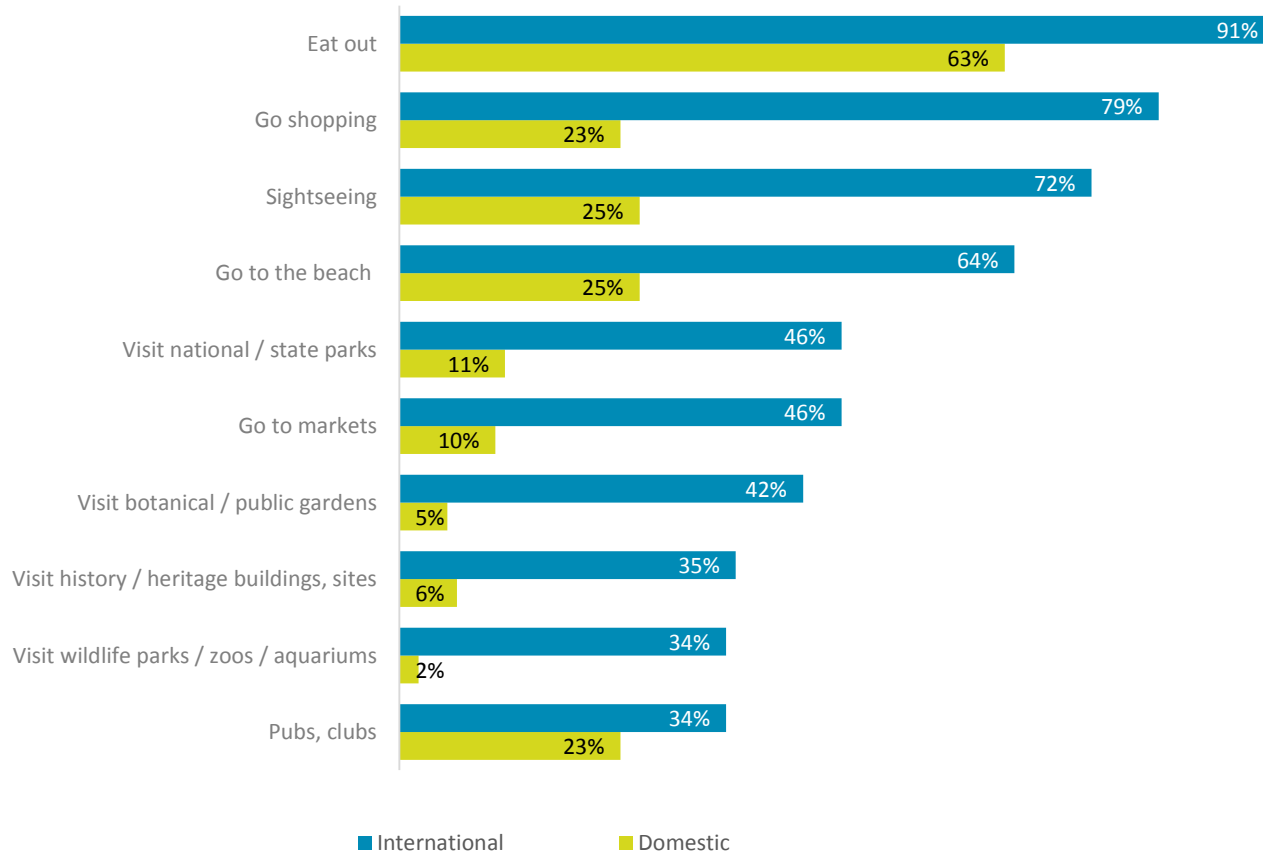
Trips	Spend
HOLIDAY 37.1 million 41%	HOLIDAY \$30.7 billion 50%
VFR 31.3 million 34%	VFR \$12.3 billion 20%
BUSINESS 18.7 million 21%	BUSINESS \$15.5 billion 25%

LEISURE TRAVEL BY SEGMENT

GROWTH SINCE 2006



WHAT DO VISITORS DO?



KEY TAKE OUTS

- Tourism is contributing to a stronger Australian economy
- There is strong investment appetite for tourism projects
- Asia led growth is set to continue
- Shorter stay domestic overnight trips are increasing
- Outbound travel to remain a challenge



Australian Government
Austrade



TOURISM
RESEARCH
AUSTRALIA

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- INDUSTRY RESOURCES
- ABOUT US
- MEDIA HUB
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INTERNATIONAL TOURISM CONTINUES TO BREAK RECORDS!

The continued confidence of investors in Australia's tourism industry has helped to boost the industry's investment pipeline in 2014.

[Find out more](#)

TOURISM INVESTMENT MONITOR 2015

2013-14 STATE TOURISM SATELLITE ACCOUNTS

INTERNATIONAL VISITOR SURVEY (IVS) RESULTS DELAYED

TOURISM REGION PROFILES 2013-14 RELEASED

DISPERSAL OF CHINESE FREE AND INDEPENDENT LEISURE VISITORS IN AUSTRALIA

WELCOME TO TOURISM RESEARCH AUSTRALIA

Tourism Research Australia is Australia's leading provider of quality tourism intelligence across both international and domestic markets. We equip industry with information to strengthen their marketing and business decisions.

Our data underpin government tourism policy and help improve the performance of the tourism industry for the benefit of the Australian community.

INTERNATIONAL VISITORS

DOMESTIC VISITORS

DESTINATION STATE

LATEST RESULTS



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FOR INDUSTRY AND
GOVERNMENT, GO TO: