



Australian Government

Austrade

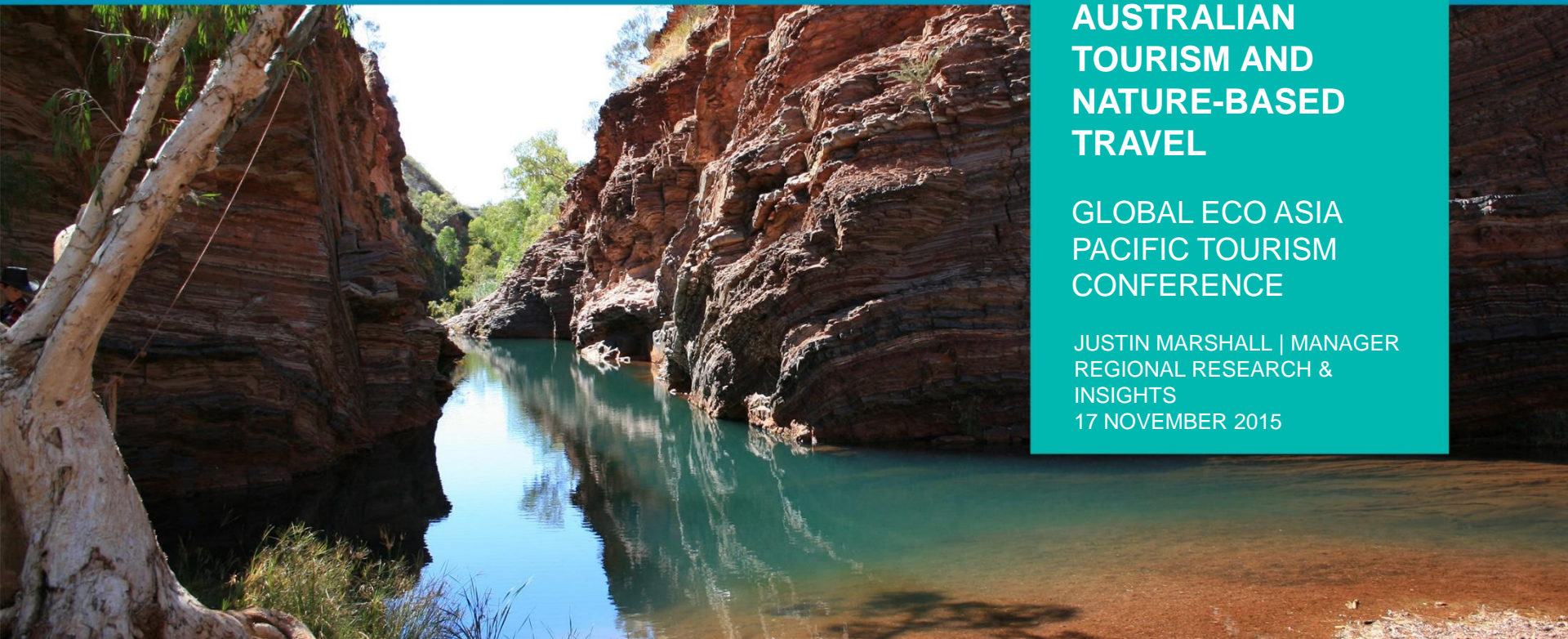


TOURISM
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AUSTRALIA

AUSTRALIAN TOURISM AND NATURE-BASED TRAVEL

GLOBAL ECO ASIA
PACIFIC TOURISM
CONFERENCE

JUSTIN MARSHALL | MANAGER
REGIONAL RESEARCH &
INSIGHTS
17 NOVEMBER 2015



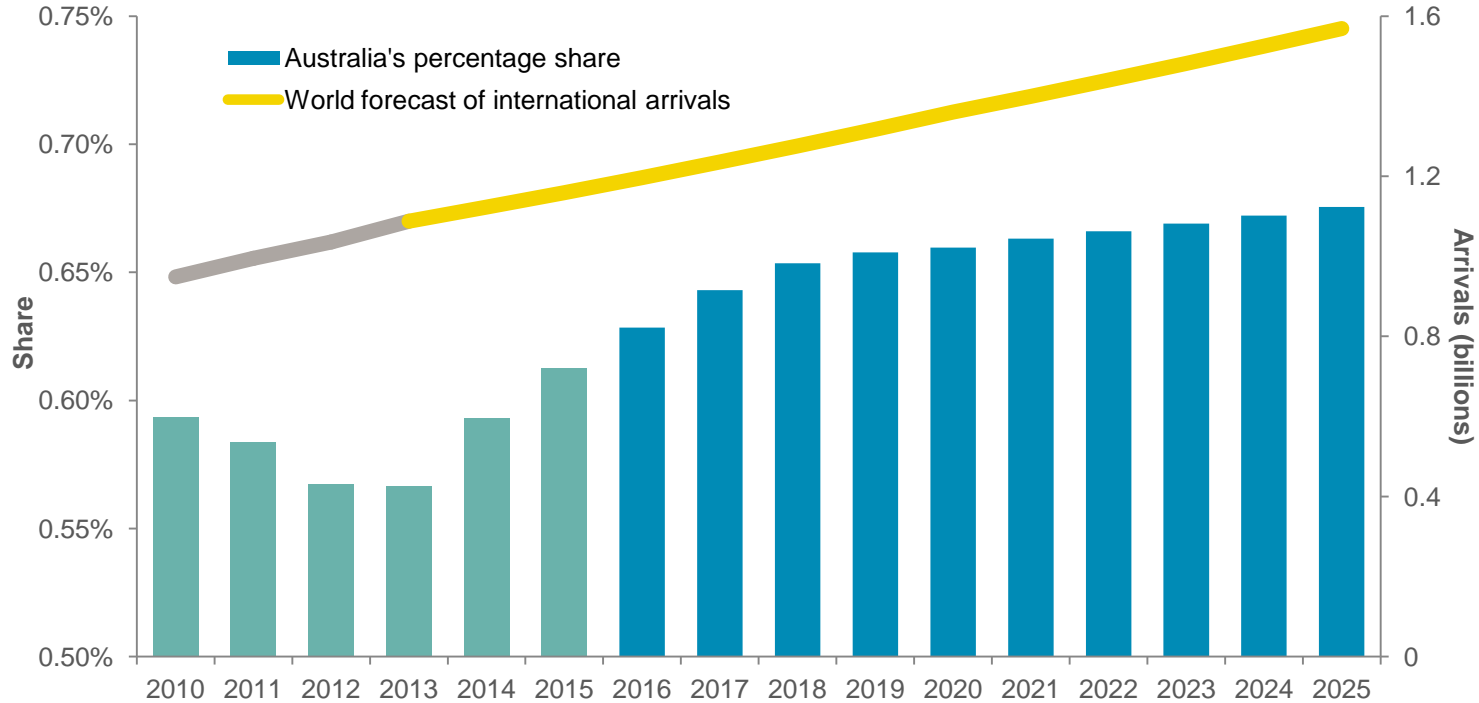
PRESENTATION OVERVIEW

- Global outlook
- Tourism's economic significance
- State of the industry
- International market trends
- Australians' overnight travel patterns
- Nature-based visitors



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GLOBAL OUTLOOK



Source: UNWTO and TRA

TOURISM'S ECONOMIC SIGNIFICANCE



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2013-14	Australia
Direct tourism GDP	\$43.4 billion (+3.4%) (2.7% of national GDP)
Tourism consumption	\$113.3 billion (+3.7%)
Direct employment	534,000 jobs (-1.0%) (4.6% of total employment)
Tourism businesses	266,649 (-5.7%) (13% of total businesses)

STATE OF THE INDUSTRY

YEAR ENDING JUNE 2015



DEMAND

INTERNATIONAL \$33.4 billion		
EXPENDITURE ▲10.4%		
TOP 5 MARKETS	EXPENDITURE (\$ BILLION)	CHANGE
CHINA	7.0	32.1%
UNITED KINGDOM	3.5	-2.0%
UNITED STATES	3.0	14.5%
NEW ZEALAND	2.5	5.4%
JAPAN	1.3	-1.3%
DOMESTIC OVERNIGHT \$55.4 billion		
EXPENDITURE ▲4.0%		
DOMESTIC DAY \$18.3 billion		
EXPENDITURE ▲0.3%		

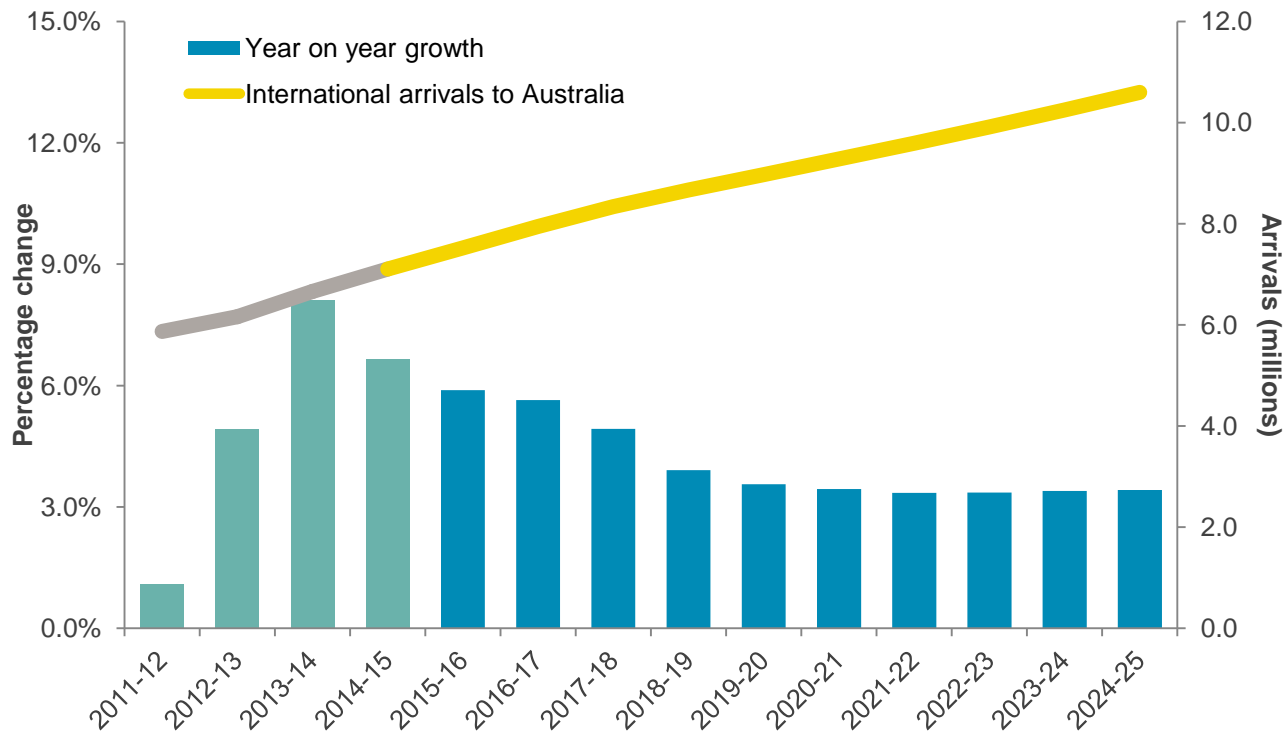
Tourism 2020
POTENTIAL >

\$88.8 billion
OVERNIGHT VISITOR
EXPENDITURE ▲4.8%

EXPENDITURE

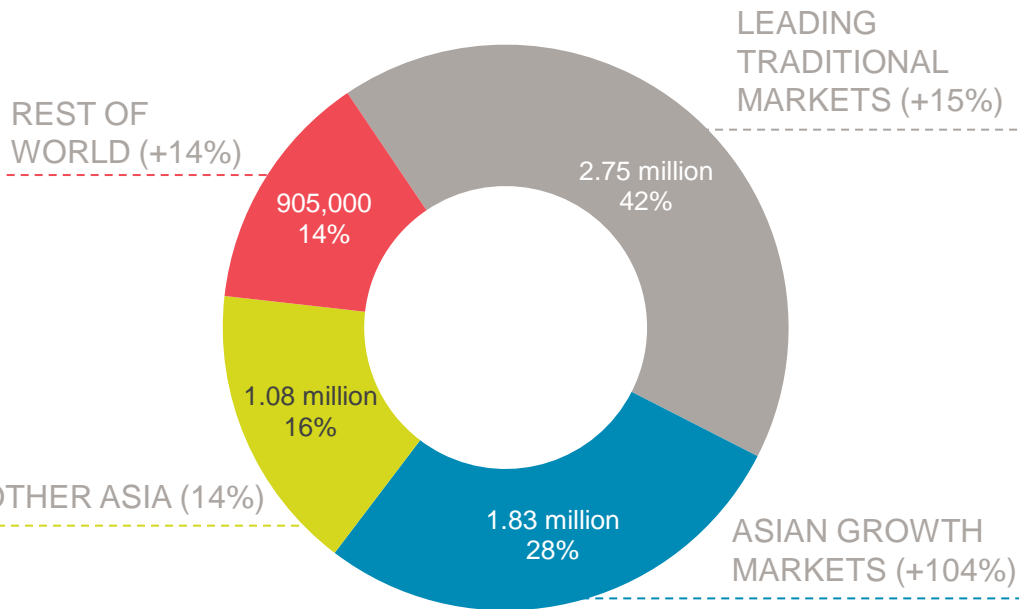
\$107.1 billion		
TOTAL VISITOR EXPENDITURE ▲5.2%		
BY PURPOSE	EXPENDITURE (\$ BILLION)	CHANGE
HOLIDAY	42.8	3.4
VISITING FRIENDS & RELATIVES	17.4	-0.6
BUSINESS	15.0	8.7
EDUCATION	6.6	15.9
OTHER	13.9	8.0
TRA.GOV.AU		

INTERNATIONAL ARRIVALS

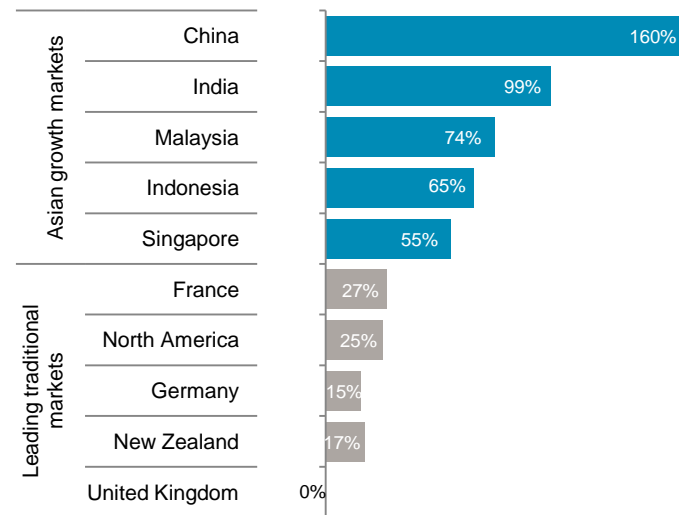


INTERNATIONAL MARKET TRENDS

YEAR ENDING JUNE 2015



GROWTH SINCE 2009



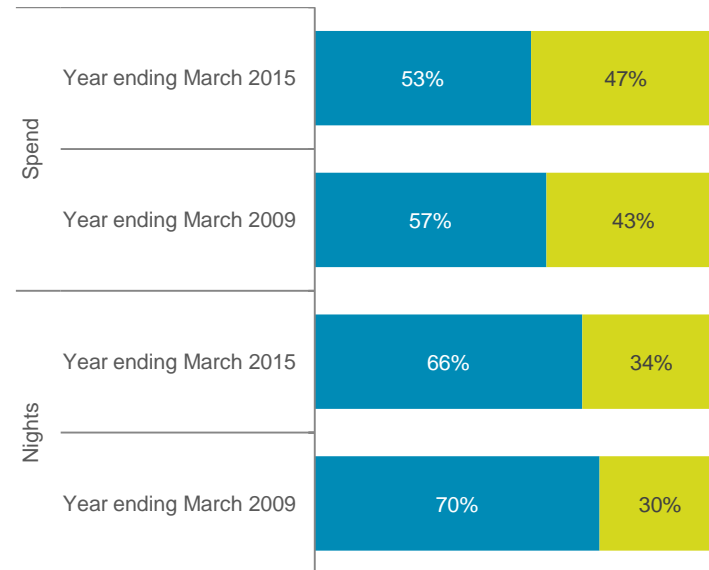
AUSTRALIAN'S OVERNIGHT TRAVEL PATTERNS

YEAR ENDING MARCH 2015



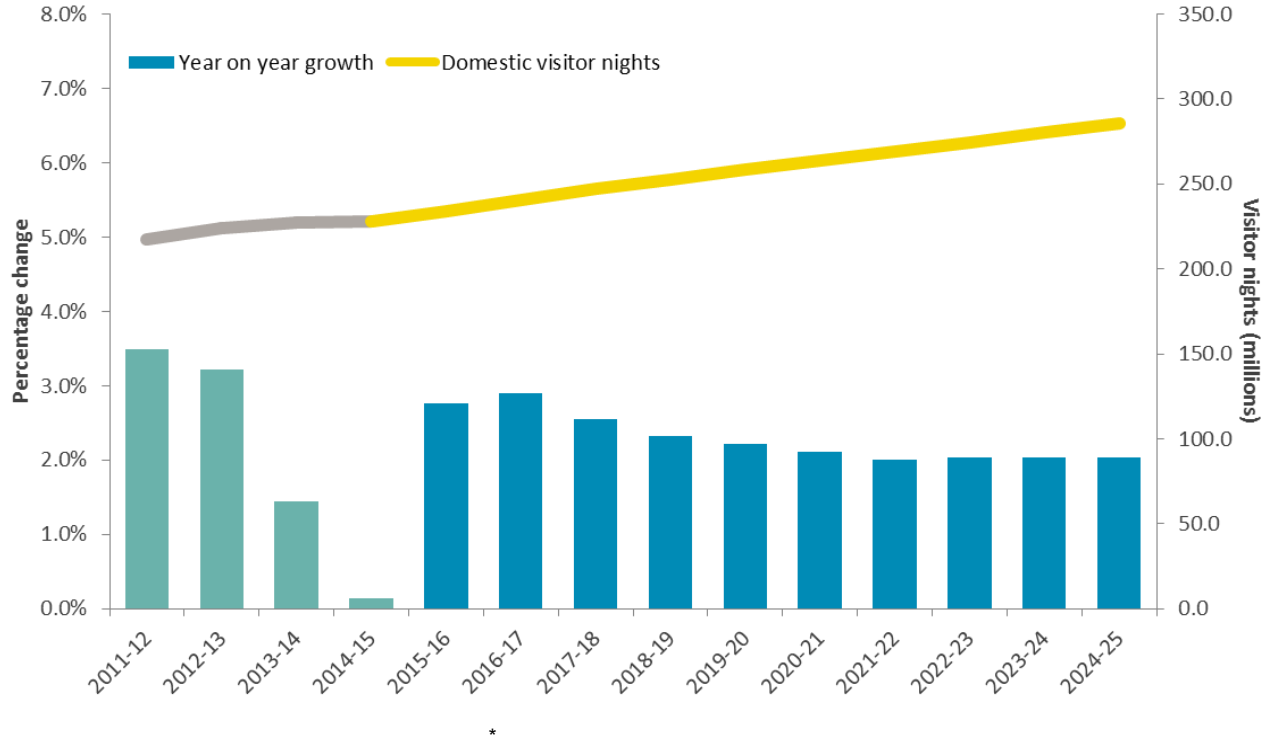
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Metric	Domestic	Outbound
Visitors (million)	82.3	8.2
Change since 2009 (%)	19.0	56.7
Nights (million)	312	161
Change since 2009 (%)	17.5	43.0
Spend (\$ billion)	55.7	48.9
Change since 2009 (%)	21.0	41.0
Average stay (nights)	4	20
Average spend (trip \$)	179	303
Average spend (night \$)	676	5,967



■ Domestic ■ Outbound

DOMESTIC LEISURE NIGHTS

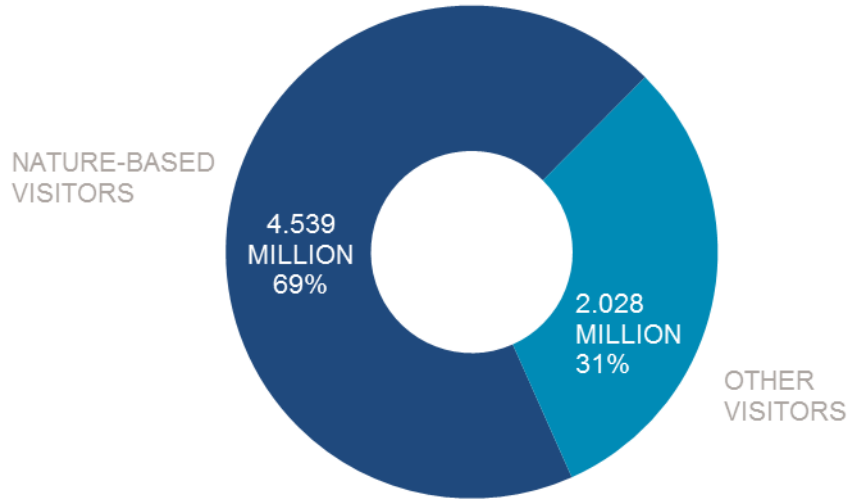


NATURE-BASED VISITORS

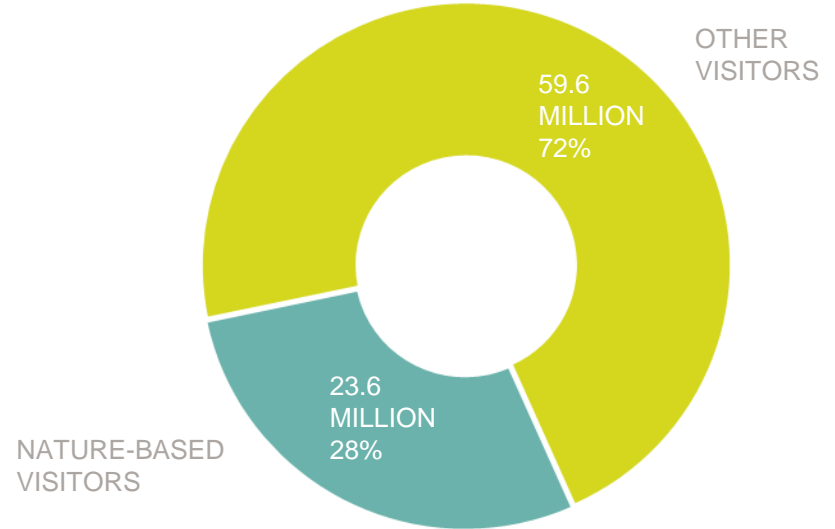
YEAR ENDING JUNE 2015



INTERNATIONAL



DOMESTIC OVERNIGHT



NATURE-BASED VISITORS

Year ending June 2015

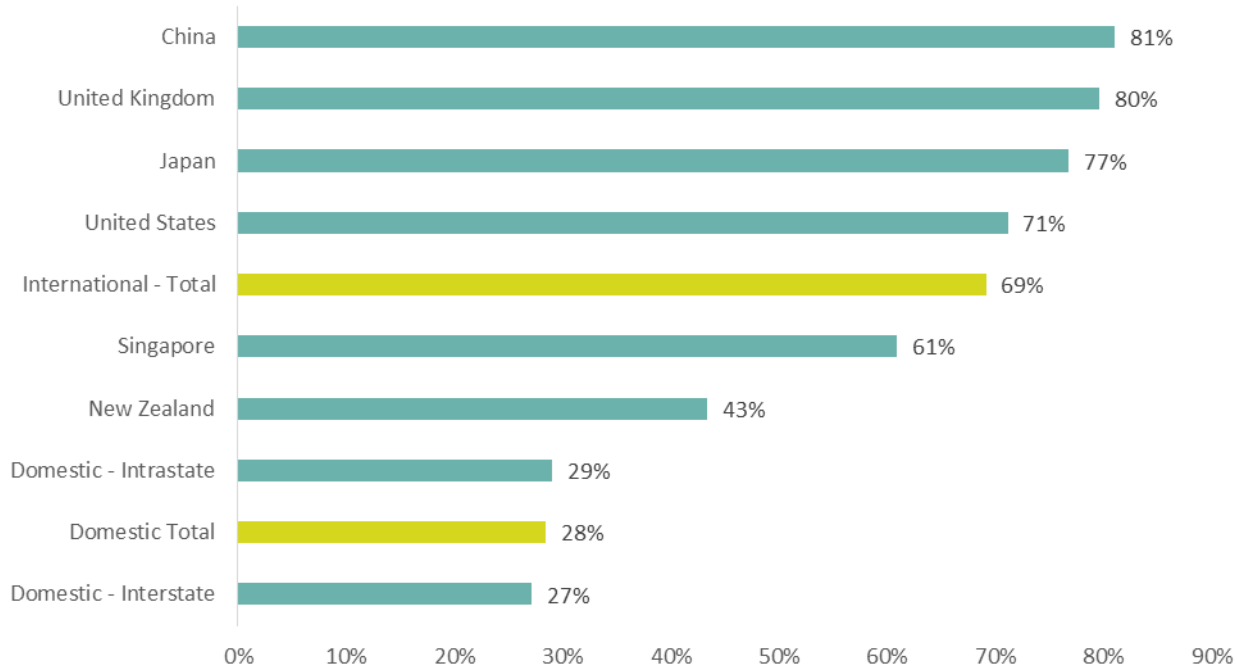


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Metric	International	Domestic overnight	Domestic day
Visitors (million)	4.5	23.6	23.0
Share (%)	69	28	14
Nights (million)	195	117	na
Share (%)	83	37	na
Spend (\$ billion)	26.4	20.3	2.3
Share (%)	79	37	12
Average stay – nature (nights)	43	5	na
Average stay – total (nights)	36	4	na
Average spend (trip) – nature (\$)	5,806	859	98
Average spend (trip) – total (\$)	5,089	666	108
Average spend (night) – nature (\$)	135	173	na
Average spend (night) – total (\$)	142	177	na

NATURE-BASED VISITORS

Year ending June 2015

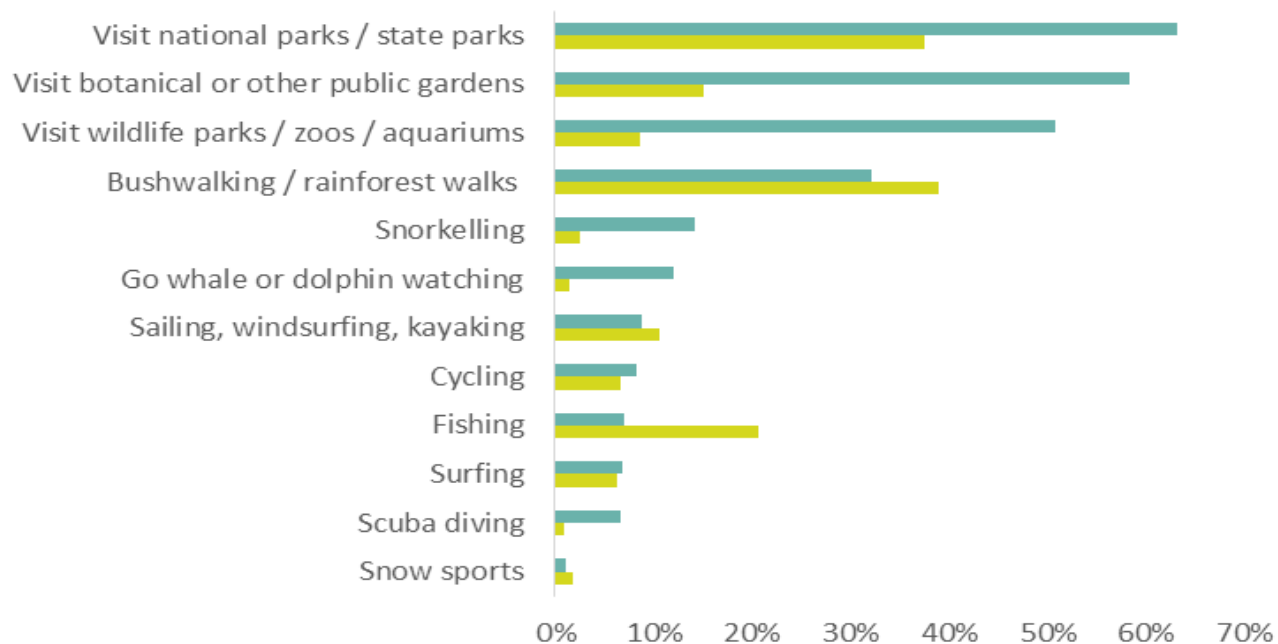


MOST POPULAR NATURE-BASED ACTIVITIES

Year ending June 2015

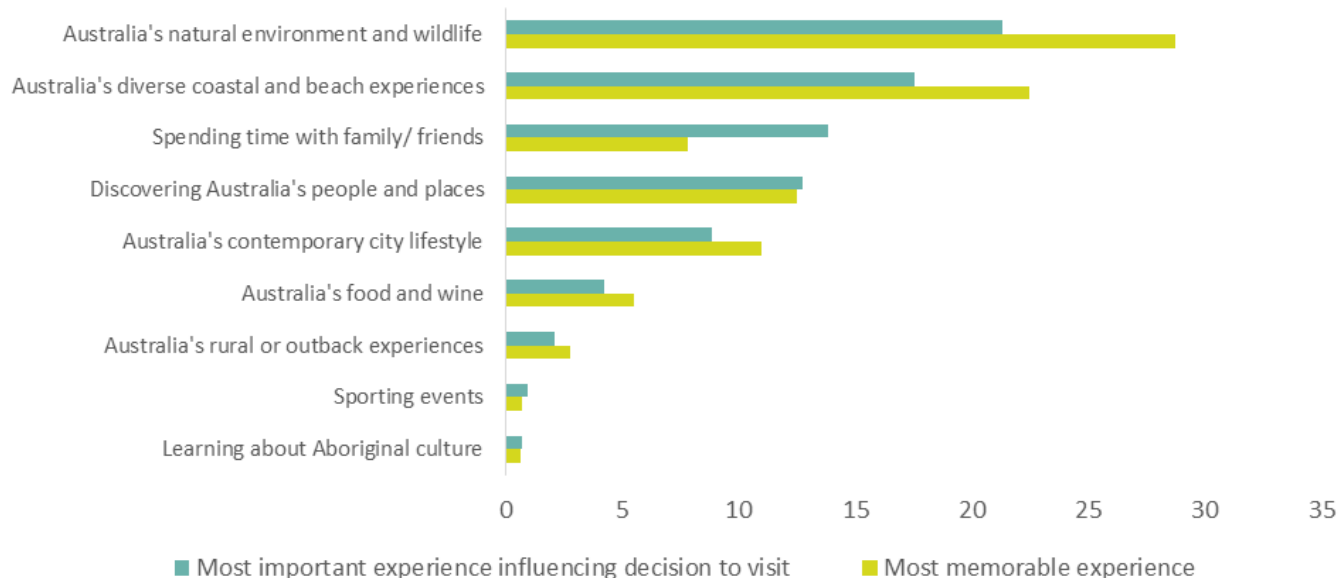


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IMPORTANT AND MEMORABLE EXPERIENCES

Year ending June 2015



TOP 5 TAKE OUTS



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- Tourism contributes significantly to Australia's economy
- 2014-15 was a year of records for tourism and the outlook is bright
- International visitors more likely to participate in nature-based activities
- Australia's natural environment, wildlife and diverse coast are memorable tourism experiences
- Nature-based visitors spent \$49 billion in 2014-15