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TOURISM
RESEARCH
AUSTRALIA

TOURISM UPDATE

Updated results to
'State of the Industry 2014'

SEPTEMBER QUARTER 2014



TOURISM UPDATE SEPTEMBER QUARTER 2014

OVERVIEW

This is the first update to Tourism Research Australia's (TRA) *State of the Industry 2014* report and incorporates the latest data for the year ending September 2014 for the following key tourism industry metrics:

Demand side

- visitor movements from the Australian Bureau of Statistics' (ABS) Overseas Arrivals and Departures (OAD)
- visitor statistics from the September quarter 2014 release of TRA's *International Visitor Survey (IVS)* and *National Visitor Survey (NVS)*.

Supply side

- aviation statistics from the Bureau of Infrastructure, Transport and Regional Economics (BITRE)
- tourism employment statistics from the ABS *Tourism Satellite Accounts 2013–14*
- accommodation statistics from the ABS' *Survey of Tourist Accommodation*, June 2014
- estimates from TRA's *Tourism Investment Monitor 2014*.

IMPACTS OF METHODOLOGY CHANGES TO THE NATIONAL VISITOR SURVEY

TRA introduced mobile phone interviewing to the National Visitor Survey (NVS) as of 2 January 2014 to provide better coverage of the Australian population, which has resulted in a break in series.

NVS estimates from March quarter 2014 onwards are based on the new methodology. However, the December 2013 component of the year ending September 2014 estimates was collected from fixed-line interviews only. Year ending December 2014 survey estimates will provide the first annual data where the impact of mobile phone interviewing is fully integrated. However, it is important to note that this methodology allows a broader population to be captured than has previously been the case.

More information on the impact of the introduction of mobile phone interviewing to the NVS can be found on the [TRA website](#) or by contacting TRA's Statsline (tourism.research@tra.gov.au)

KEY FINDINGS

During the year ending September 2014:

- visitor expenditure, trips and nights increased across both domestic and international overnight tourism segments, compared to the year ending September 2013
- growth in total visitor expenditure in Australia was driven by strong increases in the international market (up 8.6 per cent to \$30.7 billion), with nights increasing 3.1 per cent to an all-time high of 221 million nights.

TOTAL EXPENDITURE AND NIGHTS BY INTERNATIONAL AND DOMESTIC VISITORS

\$102.1 BILLION	523 MILLION
EXPENDITURE ▲ 3.8%	NIGHTS ▲ 5.1%

INTERNATIONAL TOURISM

\$30.7 BILLION	221 MILLION
EXPENDITURE ▲ 8.6%	NIGHTS ▲ 3.1%

TOTAL DOMESTIC TOURISM*

\$71.4 BILLION	302 MILLION
EXPENDITURE ▲ 1.8%	NIGHTS ▲ 6.7%

OUTBOUND TOURISM**

9.1 MILLION
OUTBOUND TRIPS ▲ 5.2%

PROGRESS TOWARDS TOURISM 2020

\$84.4 BILLION
TOTAL OVERNIGHT VISITOR EXPENDITURE ▲ 5.6%

*Total domestic tourism includes expenditure by both domestic overnight and domestic day visitors, and nights spent by domestic overnight visitors only.

**Outbound tourism is based on ABS OAD data.

1 TRACKING TOURISM DEMAND (YEAR ENDING SEPTEMBER 2014)

1.1 TOURISM 2020 PROGRESS

Under the 2020 Tourism Industry Potential (the *Potential*), the Australian tourism industry's target is to increase annual overnight visitor expenditure to between \$115 billion and \$140 billion by 2020. In the year ending September 2014, solid growth in total overnight visitor expenditure resulted in the *Potential* increasing 5.6 per cent to \$84.4 billion (Figure 1).

Total overnight visitor spend continues to grow at an increasing rate, but remains below the *Potential's* lower limit

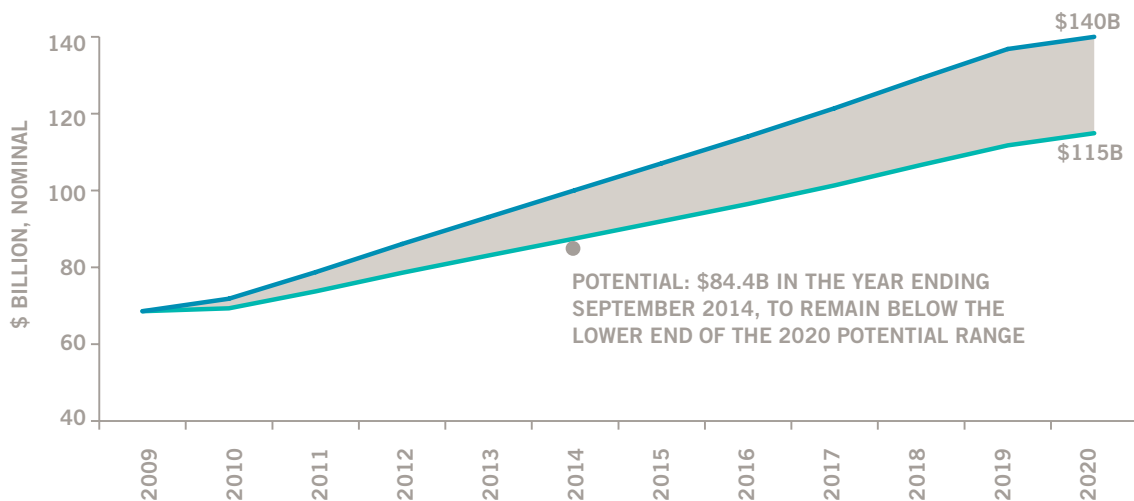
Since 2009, the *Potential* has increased 18.7 per cent with 54 per cent of that growth occurring since the end of 2012. The *Potential* has increased at an average annual growth rate of 3.6 per cent, progressing 19.3 per cent of the way towards the \$140 billion 2020 target.

Growth in the year ending September 2014 was driven by:

- Domestic overnight expenditure – up 3.9 per cent to \$53.7 billion, achieving 26 per cent of its 2020 target of \$76.6 billion
- International expenditure - up 8.6 per cent to \$30.7 billion, achieving 13.6 per cent of its \$63.4 billion target.

While the *Potential* remains below the lower limit of the range, growth has continued to increase, and is expected to gather further momentum in 2015 and beyond. TRA expects an improving global economy, weakening Australian dollar, and realisation of increased investment will assist the Tourism 2020 to move out of the 'Setting the Foundation' phase and into the 'Seeing the Results' phase.

FIGURE 1: PROGRESS TO DATE ON THE TOURISM 2020 POTENTIAL, YEAR ENDING SEPTEMBER 2014



Source: Derived by TRA from TRA surveys data (international and domestic overnight expenditure).

1.2 INTERNATIONAL TOURISM

International tourism continued to increase in the year ending September 2014:



KEY MARKETS

China continues to grow at an increasing rate, and remains Australia's most valuable international tourism market. In the year ending September 2014, Chinese visitor expenditure grew by 15.8 per cent (or \$740 million) to reach \$5.4 billion. Increased growth from other markets, particularly those in Europe, meant the growth in Chinese expenditure accounted for only 30 per cent of total growth (down from 50 per cent in the 12 months to September 2013). The United Kingdom (UK) continues to be Australia's second largest tourism expenditure market (11.9 per cent of total expenditure).

TRADITIONAL MARKETS

Expenditure from traditional markets continued to grow, particularly from the UK, Germany and the United States (US) (up 14.3 per cent, 11.6 per cent, and 7.1 per cent, respectively). Strong growth from the UK was driven by increased arrivals in the summer periods (December quarter 2013 and March quarter 2014), which were 8.6 per cent higher than the same period in the previous year.

ASIAN MARKETS

Total expenditure from Asia increased 9.3 per cent to \$14.4 billion due to very strong increases from Thailand, China and Taiwan (up 25 per cent, 15.8 per cent and 14.0 per cent, respectively). Expenditure from Japan returned to marginal growth (up 1.2 per cent). South Korea and Indonesia were the only significant Asian markets to decline in the year ending September 2014 (falling 5.0 per cent and 1.8 per cent, respectively).

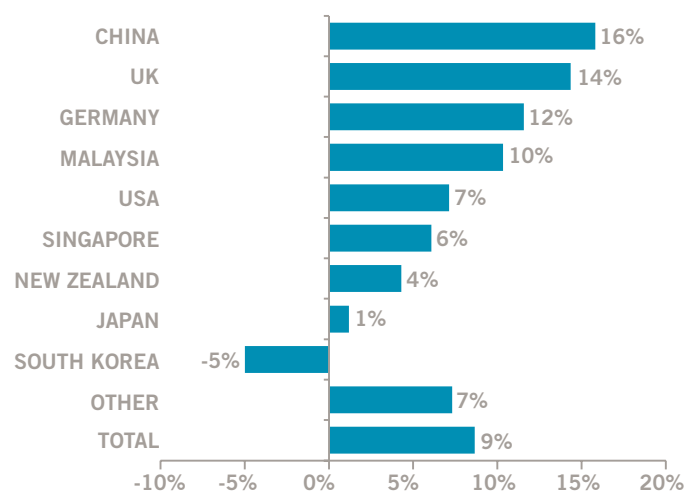
TRAVEL PURPOSE

International holiday travel continues to represent the largest purpose-of-visit share of total international visitor expenditure, accounting for 40 per cent. Growth in the expenditure of visitors travelling for holiday purposes (up 10.6 per cent) and to visit friends and relatives (VFR) (up 18.0 per cent) led to the increase in total international visitor expenditure in the year ending September 2014.

Total expenditure by international business visitors showed significant growth in the year ending September 2014 (up 9.1 per cent), reaching a record \$3.5 billion. This was the first increase since year ending September 2011 and was driven by growth across all quarters.

Total international education visitor expenditure grew 1.2 per cent to \$6.5 billion, despite a 0.4 per cent decrease in arrivals and a 2.9 per cent decrease in nights. Strong growth from China (up 8.7 per cent)—Australia's leading market for education visitors—continues to drive international education expenditure, with significant increases also from the UK, India and Thailand (up 43 per cent, 15.8 per cent and 13.5 per cent, respectively). The growth in these markets offset declines for Canada, Hong Kong and South Korea (down 57 per cent, 19.1 per cent and 15.7 per cent, respectively).

FIGURE 2: CHANGE IN TOTAL INTERNATIONAL VISITOR EXPENDITURE BY MARKET, YEAR ENDING SEPTEMBER 2014



Notes: All percentage changes are as compared to year ending September 2013. Expenditure data are based on total visitor expenditure, which includes expenditure on pre-paid packages and international airfares, consistent with the Tourism Scorecard in Figure 3. Source: Tourism Research Australia: *International Visitor Survey* (year ending September 2014).

¹ Estimates are taken from TRA's *International Visitor Survey* for international visitors aged 15 years or older.

1.3 DOMESTIC TOURISM²

DOMESTIC OVERNIGHT

Domestic overnight travel increased in the year ending September 2014:



Domestic overnight visitor expenditure growth was driven by strong growth in business and VFR visitor expenditure (up 9.8 per cent and 7.6 per cent, respectively), accounting for 98 per cent of growth in domestic overnight expenditure for the year ending September 2014. Holiday expenditure, which accounts for approximately 50 per cent of total overnight domestic expenditure, fell 1.6 per cent to \$26 billion.

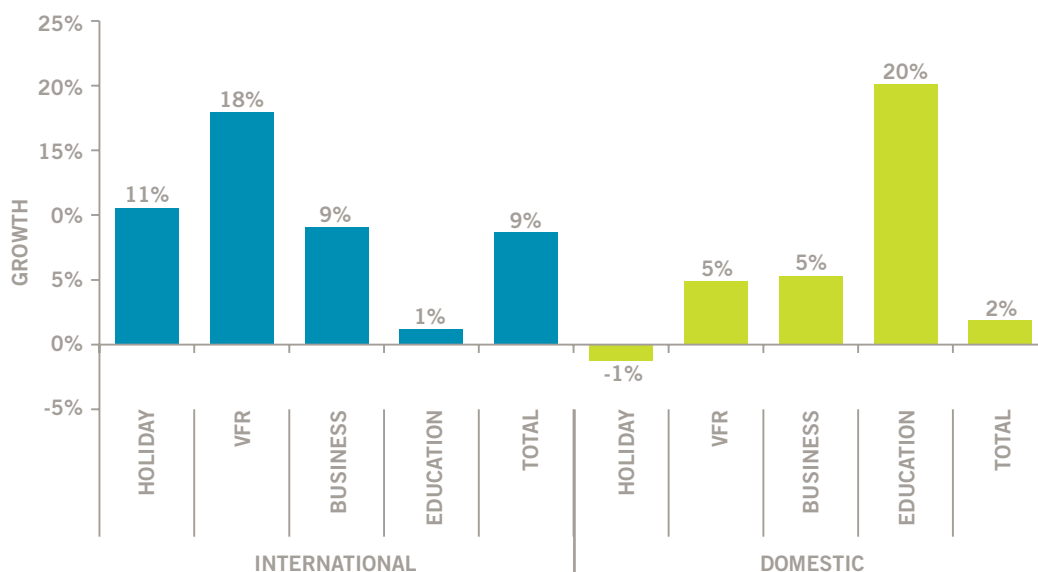
The majority of states recorded an increase in domestic overnight expenditure for the year ending September 2014. The largest increases occurred in the Northern Territory, Western Australia and Victoria (up 14.0 per cent, 12.8 per cent and 12.4 per cent, respectively).

DOMESTIC DAY

Nationally, domestic day trip travel was weak in the year ending September 2014. Domestic day travel fell 1.8 per cent to 163 million trips and day trip expenditure fell 4.1 per cent to \$17.6 billion.

Day trip expenditure fell for all purposes of travel. The decline in holiday expenditure was negligible (down 0.3 per cent to \$9.7 billion). Business day trip expenditure decreased 19.3 per cent (or \$405 million), to \$1.7 billion. However, the decline in business day trip expenditure could be partially offset by the increases in overnight business expenditure.

FIGURE 3: CHANGE IN TOTAL INTERNATIONAL AND DOMESTIC VISITOR EXPENDITURE, BY PURPOSE, YEAR ENDING SEPTEMBER 2014



Notes: All percentage changes are for the year ending September 2014, compared to the year ending September 2013. International visitor expenditure data are based on total visitor expenditure, which includes expenditure on pre-paid packages and international airfares, consistent with the Tourism Scorecard in Figure 5. Source: Tourism Research Australia: *International Visitor Survey* and *National Visitor Survey* (year ending September 2014).

² Domestic tourism analyses use estimates from the *National Visitor Survey*. From the March quarter 2014, the *National Visitor Survey* results are based on a new dual frame interviewing methodology, causing a break in series. Consequently, readers should use the domestic tourism comparisons with caution. For more information, a [factsheet](#) is available on the [TRA website](#).

1.4 OUTBOUND TOURISM

Australians continued to travel overseas in record numbers, with total domestic departures reaching 9.1 million in the year ending September 2014 (up 5.2 per cent).

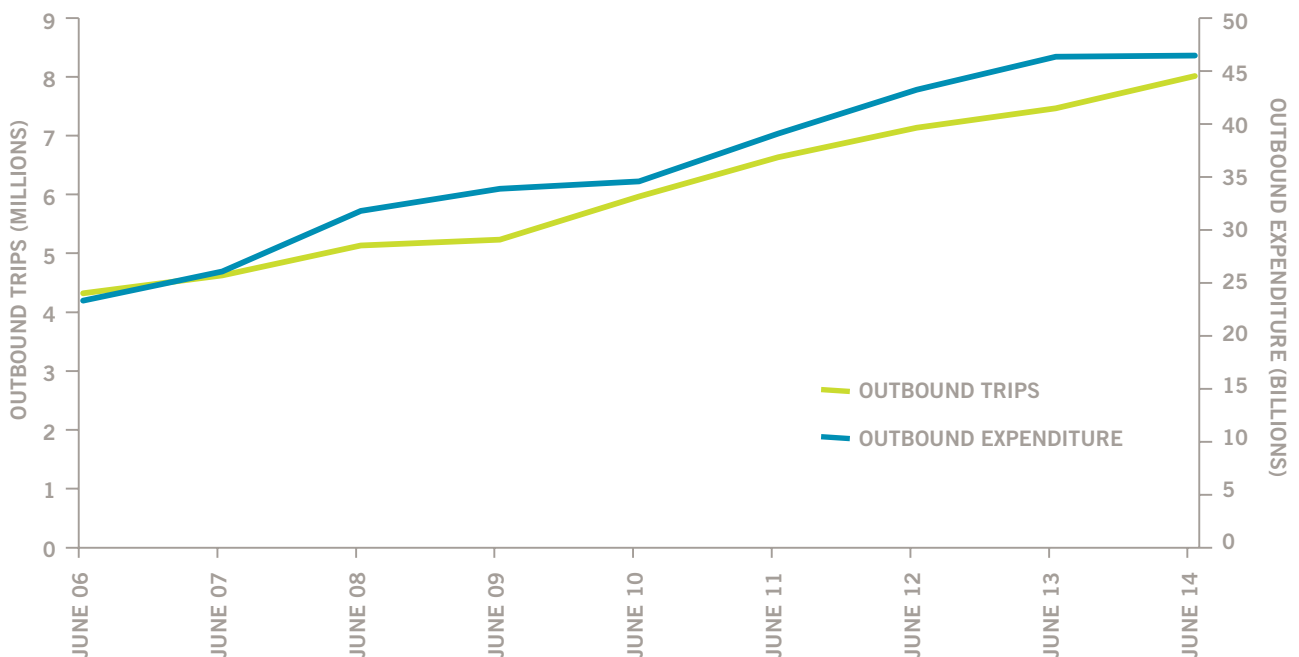
In the year ending June 2014³:



Australians travelled overseas in record numbers. However, total expenditure remained relatively unchanged (up 0.2 per cent to \$46.4 billion); the first plateau in expenditure since June 2010. This plateau was driven by a 23 per cent (or \$1.7 billion) decrease in outbound business trip expenditure which offset the increase in all other purposes of travel.

Holiday continues to be the main reason for travel, accounting for 57 per cent of all trips. Following the trend seen across all travel types, VFR is the fastest growing purpose of travel (up 18.0 per cent). Combined, leisure travel (holiday and VFR) accounts for 85% of total outbound travel.

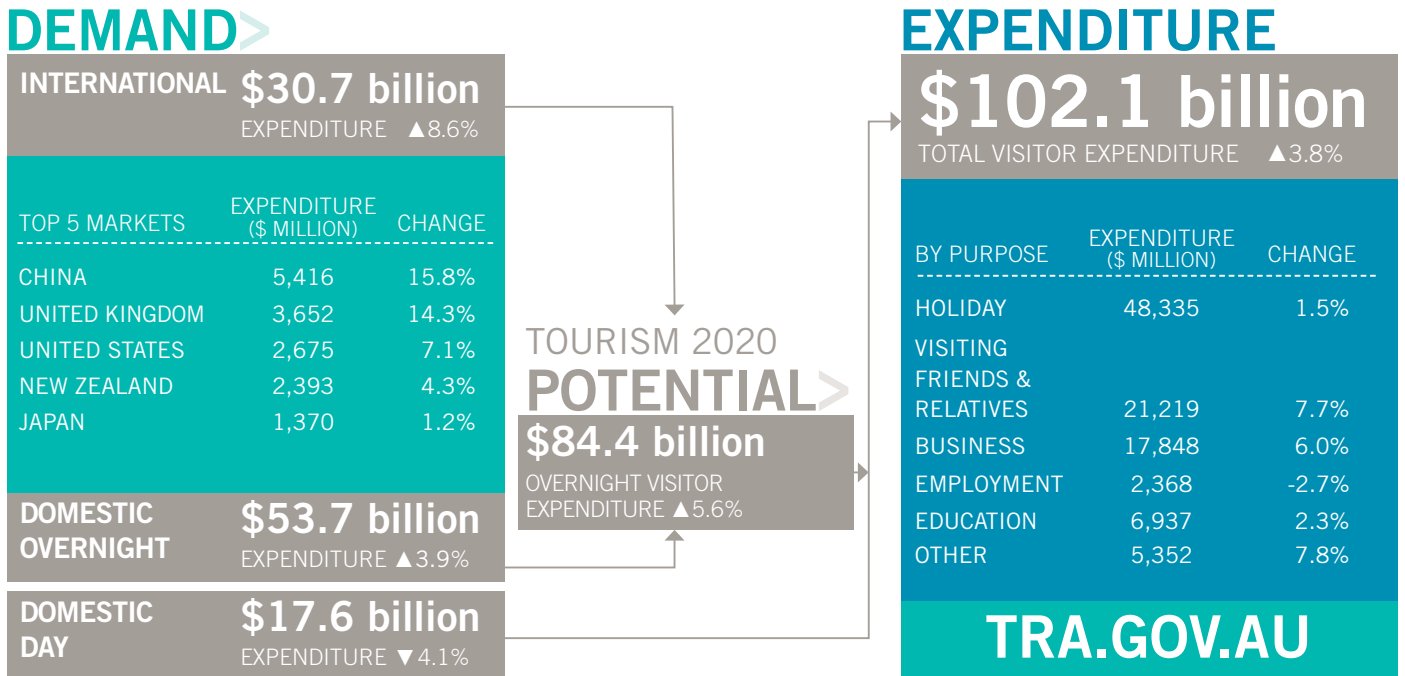
FIGURE 4: OUTBOUND TRIPS AND EXPENDITURE, YEAR ENDING JUNE 2006 TO YEAR ENDING JUNE 2014



Source: TRA, National Visitor Survey (September 2014).

³ Estimates are taken from TRA's National Visitor Survey for outbound visitors aged 15 years or older. Outbound figures lag one quarter behind international and domestic travel figures.

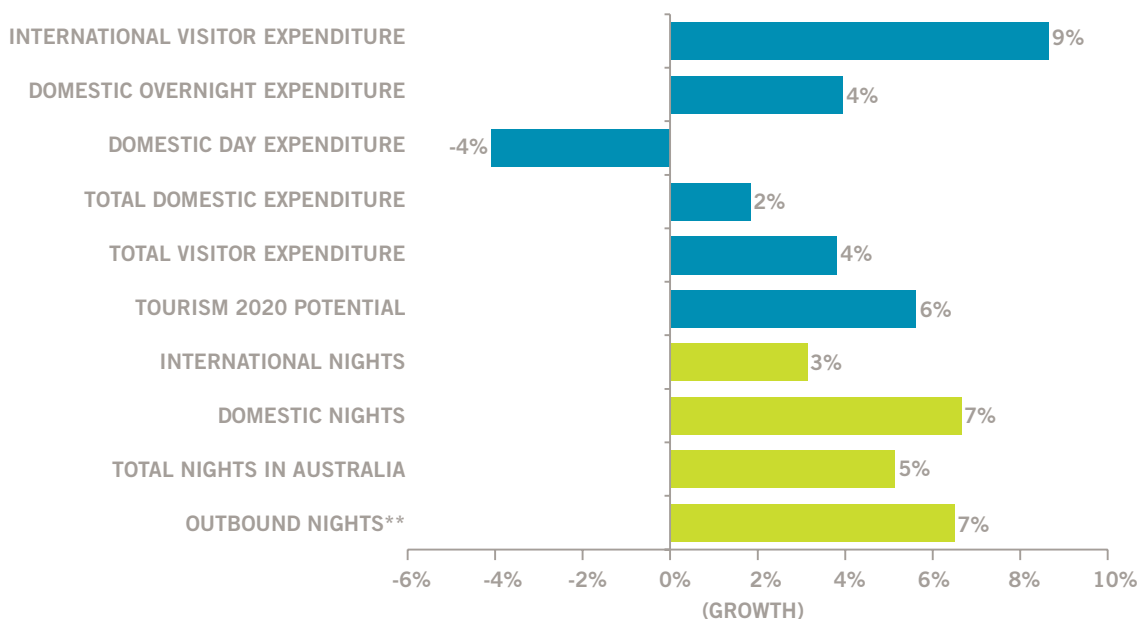
FIGURE 5: TOURISM SCORECARD UPDATE—DEMAND SIDE ONLY, YEAR ENDING SEPTEMBER 2014



Note: All percentage changes are compared to the year ending September 2013.

Source: Tourism Research Australia: International Visitor Survey and National Visitor Survey (year ending September 2014).

FIGURE 6: GROWTH IN EXPENDITURE AND VISITOR NIGHTS BY TRAVEL SEGMENTS, YEAR ENDING SEPTEMBER 2014



Note: ** Outbound nights are for the year ending June 2013, compared to June 2012. All other percentage changes are for the year ending September 2014, compared to the year ending September 2013. Source: Tourism Research Australia: *International Visitor Survey* and *National Visitor Survey* (year ending September 2014).

2 TRACKING TOURISM SEGMENTS (YEAR ENDING SEPTEMBER 2014)

Since the release of *State of the Industry 2014* in October 2014, new information is available that tracks international and domestic aviation capacity growth, accommodation rooms and yield, and tourism employment.

2.1 ACCOMMODATION

In 2013–14, room supply has tracked 16.1 per cent against the *Potential* target of an additional 20,000 rooms by 2020. The accommodation sector continues to be appealing to investors, likely due to the increasing occupancy rates in many capital cities. Consequently, the current outlook for Australian room supply is promising; however, these investment projects need to be seen through to completion for room supply to continue to increase.

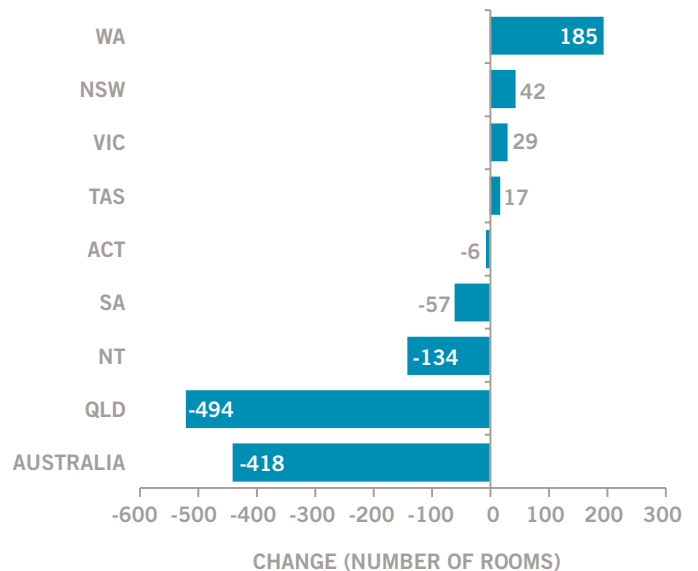
RECENT RELEASE—SURVEY OF TOURIST ACCOMMODATION, 2013–14

Published in December 2014, the ABS *Survey of Tourist Accommodation* is a census of Australian accommodation establishments (motels, private hotels, guest houses and serviced apartments) with 15 or more rooms.

The recent release shows that in 2013–14:

- Rooms remained relatively flat, decreasing by 0.2 per cent (or 418 rooms) to 229,646 rooms. This was driven by decreases in Queensland, the Northern Territory and South Australia.
- Occupancy also decreased, down 0.5 percentage points to 61.5 per cent, despite a decrease in available rooms.
- Revenue per available room (RevPAR) decreased, with lower occupancy rates likely playing a key role. National RevPAR decreased 0.5 per cent to \$108.
- RevPAR grew moderately in Tasmania, Victoria and New South Wales (up 6.5 per cent, 4.3 per cent and 3.4 per cent, respectively). Growth in Victoria and New South Wales was coupled with increasing occupancy rates, likely due to supply constraints in their capital cities. Western Australia had the greatest change in RevPAR, down 11.0 per cent.
- The number of accommodation establishments fell marginally, down 0.8 per cent (or 33 establishments).

FIGURE 7: CHANGE IN ACCOMMODATION ROOM SUPPLY, 2012–13 TO 2013–14



Source: ABS, *Survey of Tourist Accommodation* (2014).

2.2 AVIATION

Air capacity continues to track well against the goals of the *Potential*, reaching well over half the anticipated capacity required (Figure 8).

- Strong growth was achieved in the number of international seats available (up 6.9 per cent to 22 million seats) and inbound passenger movements (up 5.9 per cent to 17.0 million passengers). The marginally stronger growth in available seats led to a small decline in passenger load factors (down 0.8 percentage points to 77.0 per cent).
- Inbound passengers continue to gravitate towards low-cost carriers, with inbound passengers on low-cost carriers increasing 43 per cent to 3.1 million passengers. This was predominantly driven by the Jetstar and AirAsia brands.
- Domestic aviation capacity (in terms of available seat kilometres, or ASKs) rose 2.1 per cent in the year to September 2014, to reach 89 billion ASKs.
- Average domestic passenger load factors continued to decline (down 0.6 percentage points to 76.1 per cent), driven by slower growth in domestic revenue passenger kilometres⁴ (up 1.3 per cent to 68 billion kilometres), compared to year ending September 2013.

⁴ Revenue Passenger Kilometres (RPKs) are calculated by multiplying the number of revenue passengers travelling on each flight stage, by the distance in kilometres between the ports.

2.3 EMPLOYMENT

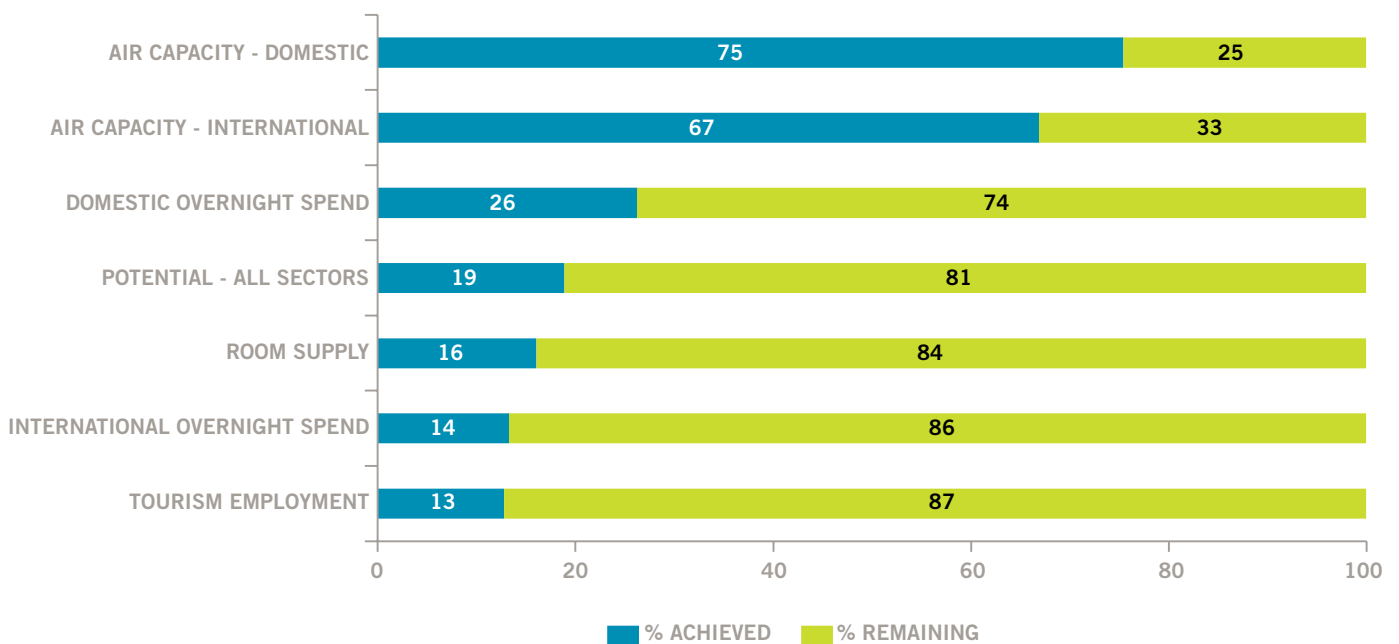
In 2013–14, the Australian tourism industry employed 534,000 persons; a decrease of 1.0 per cent. This decrease means that tourism employment has now tracked only 13.3 per cent towards the *Potential* target of 666,000 persons employed by 2020.

- There were 290,000 people employed full-time, with an additional 244,000 people employed part-time.

- More than half of the tourism workforce (54 per cent) were female—the number of females working in tourism decreased 1.4 per cent to 286,000 persons, while the number of males working in tourism decreased 0.6 per cent to 248,000 persons.

- The biggest employment sectors continued to be *Cafes, restaurants and takeaway food services, Retail trade* and *Accommodation*.

FIGURE 8: PROGRESS ON SUPPLY SIDE TOURISM 2020 POTENTIAL KEY TARGETS, YEAR ENDING SEPTEMBER 2014



Note: Room supply and employment data are accurate to June 2014.

Sources: Australian Bureau of Statistics: *Survey of Tourist Accommodation Australia* (June 2014), *Tourism Satellite Account 2013–14*; BITRE: *Domestic Aviation Activity, International Airline Activity* (September 2014); Tourism Research Australia: *International Visitor Survey, National Visitor Survey* (year ending September 2014).

3 RECENT RELEASE: TOURISM SATELLITE ACCOUNT 2013–14

The Australian Tourism Satellite Account (TSA) explicitly captures the contribution of the industry in terms of its gross domestic product (GDP), gross value added (GVA), tourism trade and employment. For the first time, this edition of the TSA also provides tourism labour productivity and some tourism estimates in chain volume measures (CVM), which account for inflation and provide a more accurate basis for evaluating annual growth of the industry.

In current prices (nominal terms)

- Direct tourism GDP increased by 3.4 per cent to \$43.4 billion, accounting for 2.7 per cent of Australia's total GDP. This consisted of domestic tourism GDP (up by 3.5 per cent); with a contribution of 74 per cent (\$32 billion) to total direct tourism GDP; and international tourism GDP (up by 3.1 per cent); with a contribution of 26 per cent (\$11.4 billion) to total direct tourism GDP.
- Direct tourism GVA increased 3.4 per cent (or \$1.3 billion) to \$39.9 billion. The main contributing tourism industries to the increase in Direct GVA were *Accommodation* (up 1.5 per cent to \$7.0 billion); *Cafes, restaurants and takeaway food services* (up 5.7 per cent to \$4.4 billion); and *Air, water and other transport* (up 3.5 per cent to \$5.8 billion).

- Total tourism consumption in Australia increased 3.7 per cent (or \$4.0 billion) to \$113 billion, consisting of domestic visitor consumption (up by 3.5 per cent to \$86.2 billion); and tourism exports (up by 4.1 per cent to \$27.2 billion—8.2 per cent of total national exports). Additionally, tourism imports (Australians spending overseas) increased by 3.6 per cent to \$34.9 billion, creating a trade deficit of \$7.7 billion—down from the deficit of \$7.6 billion in 2012–13.

In chain volume measures (real terms)

- Direct tourism GDP decreased by 0.4 per cent, compared with national GDP growth of 2.5 per cent. Direct tourism GVA decreased by 0.5 per cent.
- Tourism prices increased at a faster rate (3.8 per cent) than the national average (1.5 per cent).
- Total internal tourism consumption decreased marginally by 0.2 per cent.
- Direct tourism employment decreased 1.0 per cent (or 5,600 jobs) to 534,000. This resulted in tourism's share of total employment decreasing by 0.1 percentage points to 4.6 per cent, compared to 2012–13. Tourism hours worked decreased 0.4 per cent, and tourism labour productivity fell by 0.1 per cent.

FIGURE 9: KEY TOURISM AGGREGATES, 2012-13 AND 2013-14 (CURRENT PRICES)

	2012–13	2013–14	% CHANGE
Tourism gross value added (\$m)	38,596	39,900	3.4
<i>Tourism share of gross value added (%)</i>	2.7	2.7	n.a.
Tourism gross domestic product (\$m)	42,005	43,443	3.4
<i>Tourism share of gross domestic product (%)</i>	2.8	2.7	n.a.
Persons employed in tourism	539,600	534,000	-1.0
<i>Tourism share of total employment (%)</i>	4.7	4.6	n.a.
Total consumption by tourists in Australia (\$m)	109,341	113,343	3.7
Consumption by domestic visitors in Australia (\$m)	83,239	86,168	3.5
Consumption by international visitors in Australia (\$m)	26,101	27,176	4.1
Consumption by Australian visitors while overseas (\$m)	33,671	34,871	3.6
Tourism balance of trade (\$m)	-7,570	-7,695	n.a.

Source: ABS, *Tourism Satellite Account* (2014).

⁵ TRA also estimates the indirect and total contribution of tourism to the Australian economy in *Tourism's Contribution to the Australian Economy, 1997–98 to 2012–13* (www.tra.gov.au).

4 CONCLUSION

The Australian tourism industry continues to expand, with total expenditure increasing by 3.8 per cent in the last 12 months. A solid increase in nights of 5.1 per cent was a major contributor, with domestic nights in particular increasing by 6.7 per cent to 302 million nights. In 2013–14, the tourism industry contributed \$43.4 billion to the Australian economy (or 2.7 per cent of total GDP) and employed 534,000 persons.

China continues to be a driving force behind international growth in Australia, with traditional markets such as the UK and Germany also demonstrating continued growth.

Overnight business tourism has returned to growth after recent decline, an indicator of increased confidence in the Australian economy. This can be expected to continue in the short term with a number of large business events, such as the G20 conference, either having just occurred (the results for which will be reflected next quarter), or coming up in the near future. VFR tourism is following current global trends and continues to grow strongly across all travel types, and was the fastest growing travel purpose for international visitors.

Key *Potential* targets, especially aviation, continue to show progress towards Tourism 2020 goals. There was little change to tourism accommodation room supply in 2013–14. However, a number of projects in the current tourism investment pipeline have the capability to drive progress towards the 2020 target. These need to continue to progress through the investment pipeline for this to be realised.

Total visitor expenditure growth has begun to increase, driven primarily by international expenditure. Meanwhile, progress towards the expenditure goals of *Tourism 2020 Potential* continues, as the strong growth in international visitor expenditure is supported by a solid increase in overnight domestic visitor expenditure.

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TOURISM READY RECKONER

TOURISM'S DIRECT CONTRIBUTION TO THE AUSTRALIAN ECONOMY 2013-14

TOURISM GDP \$43.4b	▲ 3.4%	Direct tourism Gross Domestic Product. Tourism's direct contribution to the Australian economy.
TOURISM GVA \$39.9b	▲ 3.4%	Direct tourism Gross Value Added. The direct value of tourism at basic prices, before taxes are added and subsidies deducted.
TOURISM EMPLOYMENT 534,000	▼ 1.0%	Persons employed directly in tourism-related industries.
TOURISM CONSUMPTION \$113.3b	▲ 3.7%	Adjusted expenditure based on domestic and international consumption in Australia. Consumption should not be used as a 'contribution' statistic.
DOMESTIC CONSUMPTION IN AUSTRALIA \$86.2b	▲ 3.5%	Adjusted expenditure by Australian residents in Australia (for domestic tourism in Australia and spending by Australians before/after an overseas trip).
TOURISM EXPORTS \$27.2b	▲ 4.1%	Consumption by international visitors in Australia. Also known as tourism credits.
TOURISM IMPORTS \$34.9b	▲ 3.6%	Adjusted expenditure occurring overseas by Australian residents. Also known as tourism debits.
TOURISM TRADE BALANCE -\$7.7b		Tourism exports minus the value of tourism imports. Negative estimate refers to a deficit.



RELEASE: DECEMBER 2014

TOURISM VISITOR EXPENDITURE (YEAR ENDING SEPTEMBER 2014)

TOTAL VISITOR EXPENDITURE \$102.1b	▲ 3.8%	Sum of total international & domestic visitor expenditure. Includes international pre-paid airfares and packages expenditure. Excludes the purchase of motor vehicles.
TOTAL INTERNATIONAL VISITOR EXPENDITURE \$30.7b	▲ 8.6%	All expenditure made by international visitors when travelling to Australia. Includes international pre-paid airfares and packages expenditure.
DOMESTIC OVERNIGHT VISITOR EXPENDITURE \$53.7b	▲ 3.9%	Expenditure by Australian residents who travel away from home for at least one night. Excludes the purchase of motor vehicles.
DOMESTIC DAY TRIP VISITOR EXPENDITURE \$17.6b	▼ 4.1%	Expenditure by Australian residents travelling on a day trip. Excludes the purchase of motor vehicles.
INTERNATIONAL VISITOR EXPENDITURE IN AUSTRALIA \$20.3b	▲ 5.4%	Amount that international visitors spend while in Australia. Excludes international pre-paid airfares and packages expenditure.
TOURISM INDUSTRY POTENTIAL \$84.4b	▲ 5.6%	Combined value of total international visitor & domestic overnight visitor expenditure.

Sources: Australian Bureau of Statistics, Australian National Accounts: Tourism Satellite Account, 2013-14 (ABS Cat. No. 5249.0) and Tourism Research Australia, International Visitor Survey & National Visitor Survey (NVS), September Quarter 2014. Note: From the March quarter 2014, the NVS results are based on a new dual frame interviewing methodology, causing a break in series. Consequently, readers should use the domestic tourism comparisons with caution. For more information go to tra.gov.au

SUMMARY OF TOURISM IN AUSTRALIA

Source: Tourism Research Australia, *International Visitor Survey & National Visitor Survey* (NVS), September quarter 2014; Australian Bureau of Statistics, *Overseas Arrivals and Departures*, September 2014 (ABS Cat. No. 3401.0)

Note: From the March quarter 2014, the NVS results are based on a new dual frame interviewing methodology, causing a break in series. Consequently, readers should use the domestic tourism comparisons with caution. Due to increased variance in the data, quarterly figures have been removed from the *Ready Reckoner*. For more information go to tra.gov.au

Other notes: (A) Movement of all overseas visitors who arrive in Australia for a period of less than one year (ABS OAD). These numbers do not include pro-rata allocation of purpose 'not stated'.

(B) Visitors aged 15 years and older.

(C) All expenditure made by international visitors when travelling to Australia. Includes international pre-paid airfares and packages expenditure.

(D) Visitors from overseas who stay in Australia for a period of less than twelve months.

(E) Ranking is based on total trip expenditure in TRA IVS year ending September 2014.

(F) Includes conferences and conventions.

(G) Australian residents who spend a minimum of one night at a location 40km or more away from home.

(H) Australian residents who take a day trip (minimum of 4 hours) at a location at least 50km or more away from home.

(I) Departures are the movement of Australian residents who travel overseas for a period of less than one year as at year ending June 2014. 'All ages' figures are for the year ending September 2014.

	VISITORS ('000)		TRIP NIGHTS IN AUSTRALIA ('000)		TOTAL TRIP EXPENDITURE (\$ MILLION) (C)	
	YE September 2014 (A)	% change	YE September 2014 (B)	% change	YE September 2014 (B)	% change
INTERNATIONAL (D)	6,769	8%	220,565	3%	30,684	9%
TOP 5 COUNTRIES (E)						
China	789	10%	31,358	7%	5,416	16%
United Kingdom	669	6%	26,365	3%	3,652	14%
United States	538	11%	11,349	-2%	2,675	7%
New Zealand	1,230	4%	14,599	-3%	2,393	4%
Japan	329	1%	8,770	3%	1,370	1%
TRAVEL PURPOSE						
Holiday	3,155	9%	74,124	1%	12,288	11%
VFR	1,891	14%	49,516	14%	5,057	18%
Business (F)	834	3%	11,713	2%	3,492	9%
Education	385	-1%	26,360	-3%	2,242	-2%
Employment	226	0%	50,492	-3%	6,468	1%
DOMESTIC OVERNIGHT	79,736	5%	302,368	7%	53,744	4%
TRAVEL PURPOSE						
Holiday	32,743	-1%	130,748	-3%	26,955	-1%
VFR	28,822	9%	97,649	9%	13,158	7%
Business	15,270	8%	54,307	22%	12,756	9%
Other	750	12%	19,664	30%	3,356	7%
DOMESTIC DAY (H)	162,861	-2%			17,629	-4%
TRAVEL PURPOSE						
Holiday	74,546	-5%			9,685	0%
VFR	49,752	0%			3,786	-3%
Business	17,458	3%			1,700	-19%
Other	21,105	4%			2,458	-7%
DEPARTURES (I)	9,057	7%	161,115	7%	46,417	0%
TOP 5 COUNTRIES						
United States	932	7%	18,983	6%	7,695	0%
United Kingdom	552	8%	18,128	4%	4,815	6%
New Zealand	1,190	6%	11,561	13%	3,327	8%
Indonesia	1,054	12%	9,589	11%	3,056	7%
Thailand	592	-2%	10,323	22%	2,236	-18%

