



Tourism Australia webinar series

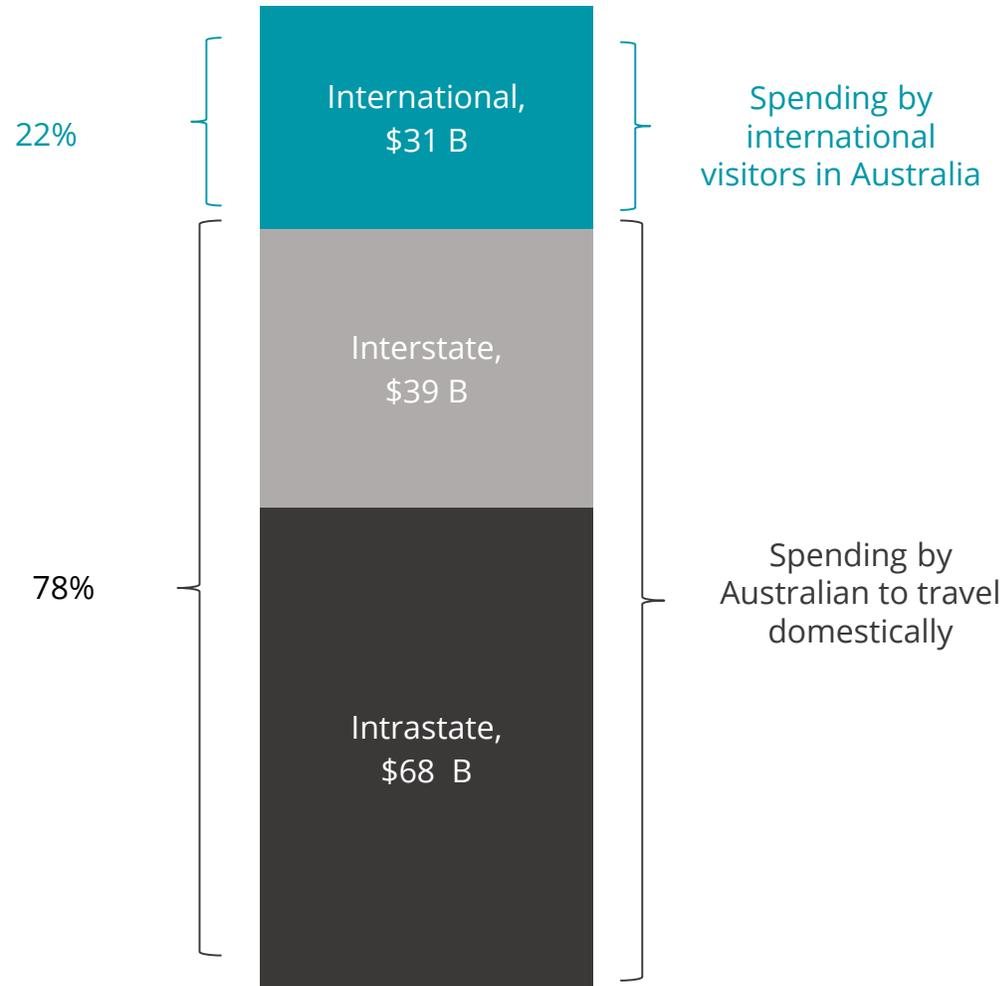
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- What is the mix of tourism spending in Australia?
- What do Australians spend on travel?
- What does the total tourism expenditure bucket look like?
- What is the opportunity to redirect and retain spending across the country?

What is the mix of tourism spending in Australia?

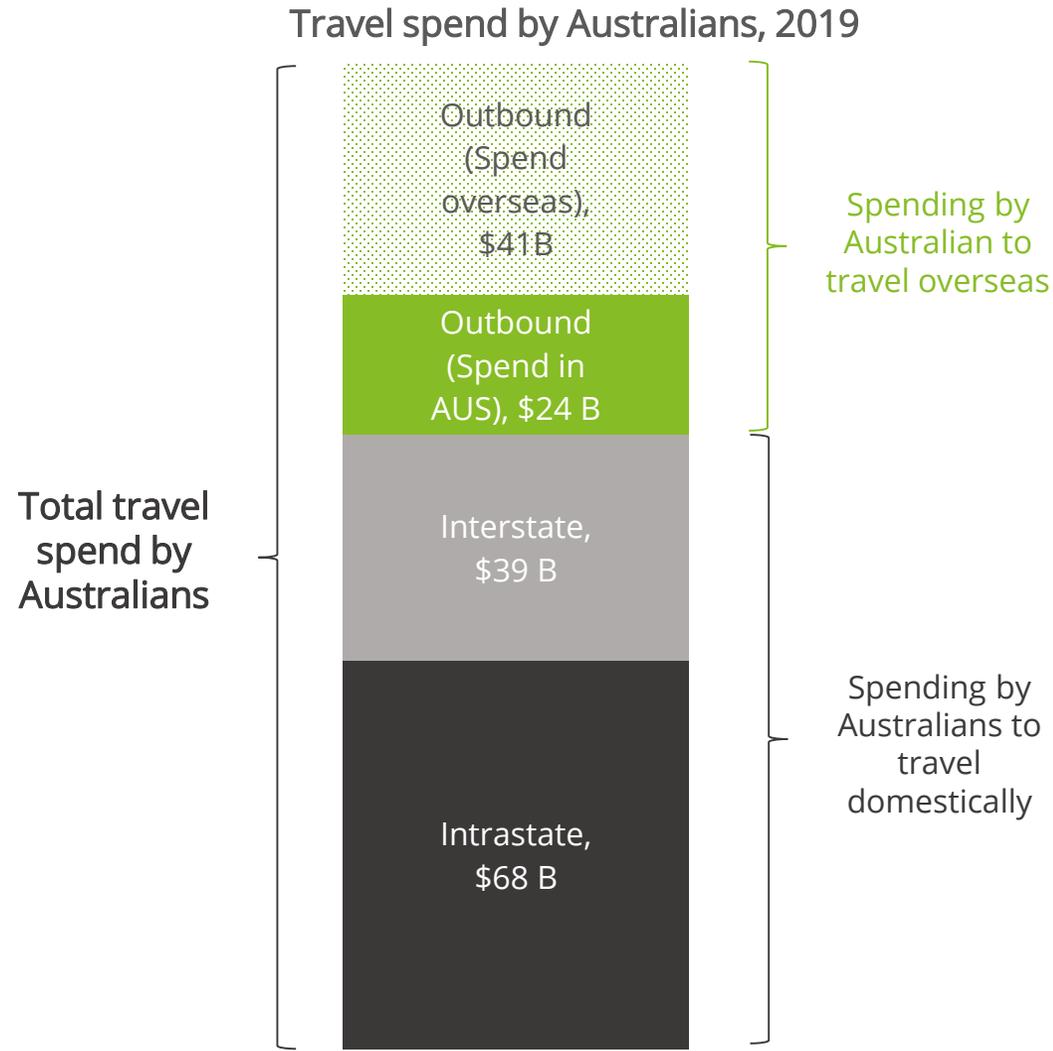
Travel spend by visitors in Australia, 2019



Source: Deloitte Access Economics, Tourism Research Australia

- Total tourism spend in Australia is worth \$138 billion
- **Almost 80% of the spending comes from Australians travelling around the country**
- **Australians are ready to travel again when restrictions are lifted, though travel patterns will be different**
- **Unlikely international tourism will return before the end of 2020 (perhaps travel to New Zealand earlier... !)**

What do Australians spend on travel?

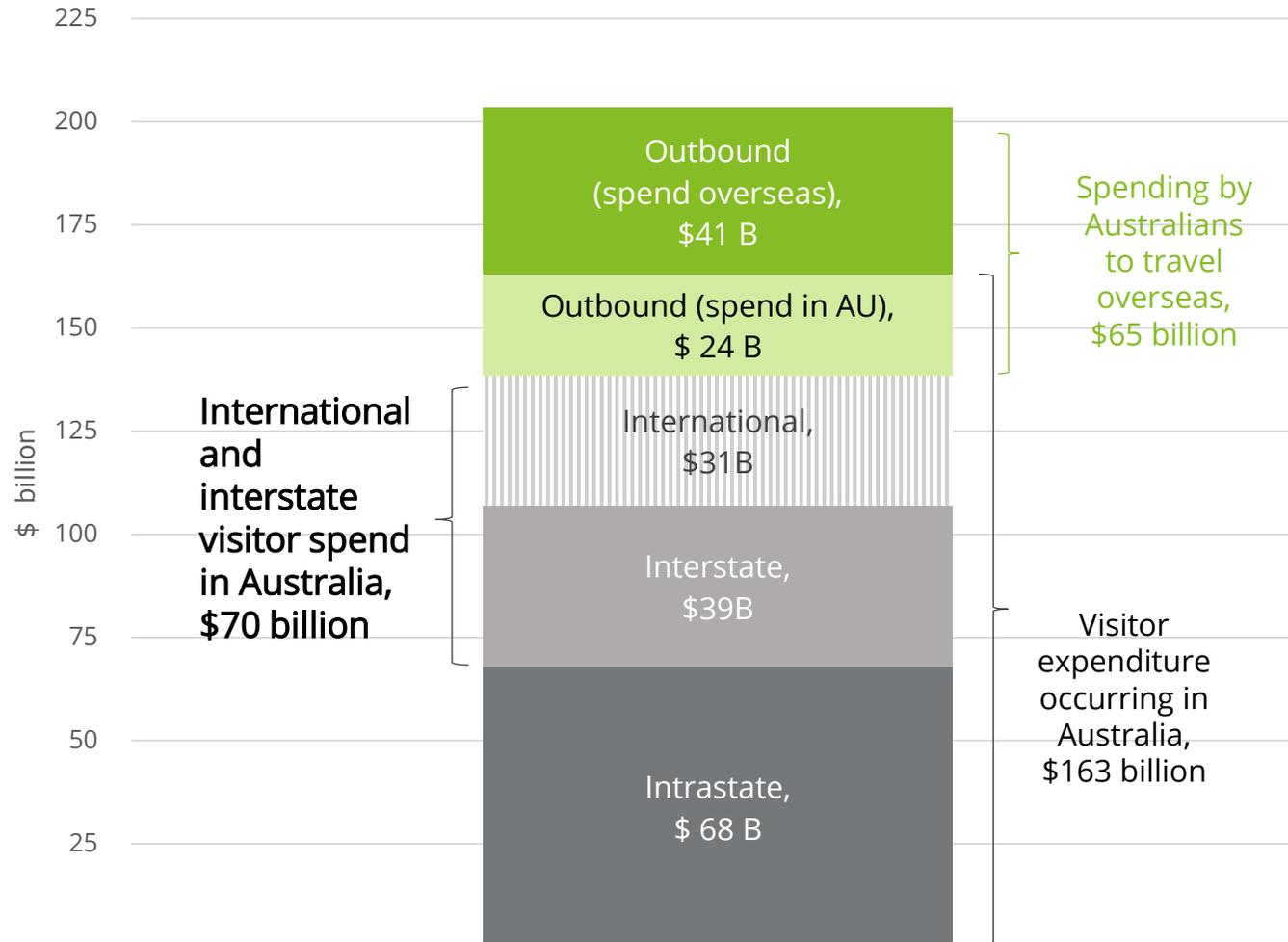


Source: Deloitte Access Economics, Tourism Research Australia

- Australians spend \$170 billion on travel, about \$6500 per capita
- Australians took just under 10 million trips outside of Australia in 2019, spending a total of \$65 billion, of which an estimated 38% stayed in the Australian economy
- 40% of travel spend is Australians travelling within their home state or territory
- Domestic travel will be more important than ever for Australia after the crisis at least for the moment, though household propensity to travel is expected to be weaker

What does the total tourism expenditure bucket look like?

Expenditure categories of visitors and Australians in Australia, 2019



Source: Tourism Research Australia

- International and interstate visitors spent \$70 billion in Australia
 - Current restrictions mean that the spending of these two segments are gaps in the revenue mix for destinations (for the moment)
- Australians spend almost as much (\$68 billion) travelling within their home state
 - Most stringent travel restrictions have also halted this segment of spending but this will be the first to recover

What is the opportunity to redirect and retain spending across the country?

Australians *could* increase their spending on intrastate trips in the early stage of the recovery as they redirect (at least some) of the spending they would *usually* be making on interstate and overseas trips.



Source: Tourism Research Australia

- The **blue bar** above shows the total visitor spend usually occurring within each state from international markets, interstate markets and from **residents** traveling within their home states (intrastate visitors).
- While the spending of intrastate visitors once state-level travel restrictions ease will provide an initial step up in activity for tourism industry operators (beyond strictly local demand), redirecting residents *usual* interstate and **overseas** spend provides a chance to make up for the shortfall in interstate and international visitor spending.



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