



TOURISM INDUSTRY PERFORMANCE SCORECARD 2013–14

SUPPLY >

ACCOMMODATION*	2013–14	CHANGE
ROOMS	231,695	0.7%
YIELD	\$114	4.7%
OCCUPANCY	66.9%	1.5 ppt**

AVIATION	2013–14	CHANGE
INTERNATIONAL SEATS	21.8 million	8.1%
DOMESTIC SEATS	77.3 million	1.8%
DOMESTIC SEAT KM	89.0 billion	2.9%

EMPLOYMENT	2012–13	CHANGE
FULL TIME ('000)	295.6	0.2%
PART TIME ('000)	247.9	4.6%
TOTAL ('000)	543.6	2.2%

INVESTMENT	2013	CHANGE
ACCOMMODATION	\$7.4b	32.5%
AVIATION	\$33.1b	14.4%
ARTS & RECREATION	\$8.9b	-7.4%
TOTAL	\$49.4b	11.9%

DIGITAL CAPABILITY	2013	2010
WEBSITE PRESENCE	91%	84%
INSTANT CONFIRMATION OF BOOKINGS	62%	42%

DEMAND >

INTERNATIONAL \$30.1 billion
EXPENDITURE ▲7.4%

ASIAN MARKETS	EXPENDITURE (\$ MILLION)	CHANGE
CHINA	5,255	16.3%
JAPAN	1,355	-7.2%
SINGAPORE	1,081	6.8%
SOUTH KOREA	1,107	-9.6%
MALAYSIA	1,018	10.0%
INDIA	752	-2.9%

OTHER MARKETS	EXPENDITURE (\$ MILLION)	CHANGE
NEW ZEALAND	2,361	3.2%
UNITED KINGDOM	3,548	12.9%
UNITED STATES	2,641	7.0%
FRANCE	707	10.3%
GERMANY	1,023	11.5%

DOMESTIC OVERNIGHT \$53.3 billion
EXPENDITURE ▲3.6%

DOMESTIC DAY \$18.2 billion
EXPENDITURE ▲0.9%

TOURISM 2020
POTENTIAL >
\$83.4 billion
OVERNIGHT VISITOR EXPENDITURE ▲5.0%

EXPENDITURE

\$101.6 billion
TOTAL VISITOR EXPENDITURE ▲4.2%

BY PURPOSE	EXPENDITURE (\$ MILLION)	CHANGE
HOLIDAY	48,416	2.3%
VISITING FRIENDS & RELATIVES	20,936	8.2%
BUSINESS	17,615	4.1%
EMPLOYMENT	2,323	-7.7%
EDUCATION	6,933	4.1%

BY LOCATION	EXPENDITURE (\$ MILLION)	CHANGE
NSW	28,061	5.4%
Vic	20,419	5.6%
Qld	21,797	-2.8%
SA	5,221	4.7%
WA	9,801	11.3%
Tas	2,396	-7.1%
NT	1,897	3.2%
ACT	1,671	-10.3%

TRA.GOV.AU

*Accommodation supply and demand estimates for 2013–14 have been derived by Tourism Research Australia (TRA) using data from Australian Bureau of Statistics' Survey of Tourist Accommodation, June quarter 2013 (ABS Cat. No. 8635.0), STR Global 2014 and JLL 2014. **ppt = percentage point. Note: a) All percentage changes are as compared to the same period 12 months prior. b) 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 go to tra.gov.au c) Expenditure by travel purposes will not sum to total as 'Other' and 'Not Stated' purposes have not been included. d) Expenditure by location will not add to the national total as a result of the assumptions applied in TRA's regional expenditure model. For more information go to tra.gov.au Sources: Tourism Research Australia, *International Visitor Survey & National Visitor Survey*, June Quarter 2014 & *Tourism Investment Monitor 2014*; Australian Bureau of Statistics, *Tourism Satellite Account 2012–13*, (ABS Cat No. 5249.0); Bureau of Infrastructure, Transport and Regional Economics, *International Airline Activity – time series (2014) & Australian Domestic Airline Activity—time series (2014)*; Australian Government, *Tourism Operators' Digital Uptake Benchmark Survey*, 2013