Travel and Tourism in Australia to 2019

Description: Australia's tourism sector continued to perform well in 2014, with positive growth across inbound and domestic categories. High expenditure of AUD30.9 billion (US$28 billion) by international visitors in 2014, and AUD77.6 billion (US$70.5 billion) by domestic travellers places the Australian tourism sector in a strong position to achieve the 2020 target of AUD115 billion (US$104.4 billion) in overnight expenditure. The growth was largely driven by a strong increase in tourists from Japan, Singapore, Malaysia, South Korea, and Indonesia which grew by 22.4%, 10.7%, 13.8%, 8%, and 13.8%, respectively. This signals that Australia's tourism board is moving in the right direction as it outlines in Tourism 2020 plan to expand inflows and expenditure from key Asian markets. The 2020 plan will be taken-up in three phases and the first phase 'Setting the foundations' spanned from 2011 to 2014 ended recently. The first phase was aimed to increase investment in the sector, ensure sufficient levels of skilled labor, and work with aviation partners to ensure adequate capacity on relevant routes.

- The Australian economy is expected to grow at a CAGR of 5.54% over the forecast period while the unemployment rate is projected to decrease from 6.2% in 2014 to 5.7% in 2019. Healthy economic growth and decreasing unemployment will benefit the growth of Australian domestic and outbound tourism over the forecast period.
- Domestic trips expanded by 5% in 2014 totalling 78.3 million while expenditure valued AUD77.6 billion (US$70.5 billion), registering a growth of 3.5%. However, the expenditure declined by -2.4% in 2013 despite a growth in the number of tourists. The decline was largely attributed to a contraction in business expenditure, indicating that business travellers and companies exercised caution in business spending as currency started to depreciate in 2013.
- The 2020 Tourism Industry Potential lists the prime targets of the Australian government's tourism strategy, Tourism 2020. It outlines the tourism sector's collective goal to generate AUD115 billion (US$104.4 billion) to AUD140 billion (US$127.1 billion) in overnight visitor expenditure (including both inbound and domestic) by 2020.
- Australia's leading airlines - the Qantas Group and Virgin Australia, reported a combined loss of AUD3.4 billion (US$3.1 billion) in 2013-2014, while combined revenues declined by only 1.3% i.e. AUD290.7 million (US$264 million). The combined loss was primarily attributed to increased expenses incurred by both airlines over the fiscal year, exacerbated by the Australian dollar (AUD) depreciating 11% against the US dollar (US$) in 2013-2014.
- The occupancy rate in Australia increased by 1.5% to 66.9% in 2013-2014, and has been fueled by slow growth in national room supply. The trend is expected to continue in short term with occupancies projected to rise by another 1.7% annually until December 2016. This trend will be seen particularly in Adelaide, Melbourne and Sydney, as strong demand has increased occupancy rates in these cities, in comparison to the national average. Increased occupancy rates in these cities will translate into strong revenue growth and RevPAR. In 2013-2014, occupancy rate in Sydney, Melbourne and Adelaide increased by 6.1%, 7% and 5.3% respectively. In line with this trend, revenues grew by 8.5%, 7.6% and 6.2%.
- Avis Budget Group Inc. acquired New Zealand-based Apex Car Rentals for a consideration of US$29 million in cash, along with the book value of Apex's rental fleet and potential earn-out payments based on its financial performance in 2012. The takeover of Apex which has a fleet of over 4,000 rental cars throughout locations in Australia and New Zealand will strengthen Avis's presence in these two countries.

Key Features and Benefits

The report provides detailed market analysis, information, and insights, including:

- Historic and forecast tourist volumes covering the entire Australian Travel and Tourism sector
- Detailed analysis of tourist spending patterns in Australia for various categories in the Travel and Tourism sector, such as accommodation, sightseeing and entertainment, food service, transportation, retail, travel intermediaries, and others
- Detailed market classification across each category, with analysis using similar metrics
- Detailed analysis of the airline, hotel, car rental, and travel intermediaries industries

Key Market Issues:

- Make strategic business decisions using historic and forecast market data related to the Australian Travel
and Tourism sector
- Understand the demand-side dynamics within the Australian Travel and Tourism sector, along with key market trends and growth opportunities

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