

THE VALUE OF TOURISM

June 2021

Deloitte.

TOURISM AUSTRALIA





FOREWORD



Koalas,
Queensland

Tourism is a vital industry and crucial to Australia's economic prosperity. As a country with world-class offerings in nature, wildlife, produce and cultural experiences, it should be of no surprise that the tourism industry was one of the fastest-growing sectors of the Australian economy prior to the COVID-19 pandemic. Supporting 1 in 12 jobs in Australia, the industry is the lifeblood for many communities – particularly those in regional areas – driving economic activity across the country through almost 300,000 tourism-related businesses.

However, since the COVID-19 pandemic, economies around the world have suffered enormously, and in Australia, the tourism sector has been hit particularly hard. Domestic and international travel restrictions, together with health concerns, have caused a loss of confidence in travel. This loss of confidence has resulted in severe impacts to Australian tourism including an estimated loss of \$10 billion a month to the Australian economy. There remains a relatively high degree of uncertainty around international and domestic borders which will continue to affect the industry's recovery.

International working holiday makers and international students provide a critical contribution to Australia's economy and culture. Australia is the fifth most popular destination for international students globally, with approximately 450,000 international students choosing to study and explore Australia in 2019. Likewise, working holiday-makers play a vital role in our nation's economy. Not only do they fill critical seasonal and regional skill shortages, but they also cover skills-gaps within our tourism and hospitality industries. As a cohort, they contribute approximately \$1.5 billion in labour income to the wider Australian economy. Domestic tourism alone cannot wholly fill the vacuum of lost international tourism and its contribution to the economy through international visitors' spending or their contribution of skills.

Australia's position as a world-class destination for high-yield travellers is not guaranteed. The global landscape for tourism is expected to become even

more competitive as countries look to reinvigorate their tourism industries as part of their economic recovery strategies following COVID-19. Australia's tourism sector could be in a vulnerable position if travel restrictions remain in place after competitor nations have re-opened for tourism, resulting in travellers who would otherwise consider travel to Australia opting to travel to another country with similar attributes instead.

Yet, there are encouraging signs in Australia's tourism recovery from the COVID-19 pandemic. Today, some regions in Australia are experiencing unprecedented levels of demand, and consumer confidence in travel is continuing to rise as lockdowns and border closures become less frequent. There is an immediate opportunity in this rising optimism, to further encourage Australians to approach their domestic travel as they would international travel - staying longer, spending more and taking advantage of more of the tourism experiences that would ordinarily be so popular with international tourists in Australia. The travel industry is in a constant state of change, and with change comes both challenges and opportunities. This paper seeks to explore both the challenges and optimism of Australian tourism as it embarks on the road ahead.

Deloitte
Access **Economics**



Ningaloo,
Western Australia





Lake Gairdner National Park,
South Australia

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ACRONYMS

TERM	FULL NAME
ABS	Australian Bureau of Statistics
BSI	Brand Strength Index
FDI	Foreign direct investment
GDP	Gross domestic product
GRP	Gross Value Added
GVA	Gross value added
IVS	International Visitor Survey
NVS	National Visitor Survey
TRA	Tourism Research Australia
TSA	Tourism Satellite Account
UK	United Kingdom
UNWTO	United Nations World Tourism Organization
USA	United States of America
USD	United States dollar
VFR	Visiting friends and relatives
WHV	Working holiday visa



EXECUTIVE SUMMARY

Blue Mountains,
New South Wales

AUSTRALIA IS A NATION OF TRAVELLERS

Travel is part of the Australian DNA



Australians are exceptionally well travelled by world standards. Everything from the everyday to the once-in-a-lifetime, from trips in

our home states, to ones right around the nation; travel lets us unwind for holidays, reconnect with friends and family, and forge business relationships.

Australians are frequent travellers!

In 2019, Australians took an average of four domestic overnight trips per person, and a further 10 day trips. This is double the number of domestic trips per US resident, and one and a half times the domestic trips per New Zealand resident.¹

Australians are also experienced global travellers. In 2019, Australians took 10 million trips overseas, the equivalent of two out of every five Australians in just one year.

TOURISM: AN AUSTRALIAN SUCCESS STORY

Australia is a highly desirable destination



Australia is a world-class destination by global standards and ranks highly relative to key competitors

along key metrics including desirability, consideration, and intention to travel here, and also being a cool and fashionable destination.³

Tourism has been growing faster than the Australian economy

Tourism's strong performance has been a sustained trend. Tourism sector growth has outpaced that of the Australian economy, growing at almost twice the rate of the broader Australian economy in the five years prior to 2018-19. Tourism GDP grew at an annual rate of 4.5 per cent over the period compared to 2.5 per cent for the Australian economy.

AUSTRALIA ATTRACTS SOME OF THE WORLD'S MOST COVETED TRAVELLERS

Australia is one of the top ten tourism earners in the world



Australia ranks in the top ten countries when it comes to the total value of expenditure received by international tourists.² In 2019, Australia was eighth

in the list of top international tourism earners.

Australia attracts the highest yielding travellers

Australia has a unique position in the global tourism marketplace. On average, international travellers who visit Australia spend more per person than they do when they visit other destinations. A typical traveller from the US spends around USD1,000 on an overseas trip. This average spend doubles to around USD2,000 when they travel to Australia. The trend is similar across many of Australia's key international source markets, with the notable exception of New Zealand and Singapore for whom Australia is a relatively short-haul tourist destination.

DROUGHT, BUSHFIRES AND COVID-19 HAVE HAD A DEVASTATING IMPACT ON AUSTRALIAN TOURISM

The tourism economy has been heavily hit in 2020



The COVID-19 pandemic has triggered an unprecedented crisis in the global economy in 2020. As a result of the alarming levels of virus spread and severity, governments around the world implemented a variety of lockdown measures and travel restrictions to contain the virus. This presented an immediate and intense shock to the tourism sector, crippling the sector overnight.

Australia lost almost \$80 billion in tourism revenue in 2020

The decline in activity in the tourism sector in 2020 is reflected in 7.6 million fewer international arrivals to Australia, 45 million fewer domestic overnight trips and 84 million fewer day trips compared to 2019.

This represents a combined loss of around \$78 billion in visitor spend, including \$34 billion in international and \$44 billion in domestic visitor spend, a staggering 56 per cent decline in tourism receipts.

¹ Stats NZ, (2021), <www.stats.govt.nz/topics/population>; US Census, (2019), <www.census.gov/newsroom/press-releases/2019/popest-nation.html>; Tourism New Zealand, (2021), <www.tourismnewzealand.com/markets-stats/markets/new-zealand/>; US Travel Association, (2019), US Travel and tourism overview (2019), <www.ustravel.org/system/files/media_root/document/Research_Fact-Sheet_US-Travel-and-Tourism-Overview.pdf>.

² UNWTO, (2020), International Tourism Highlights

³ Tourism Australia, (2019), Consumer Demand Project



TOURISM IS AN INTEGRAL PART OF AUSTRALIA'S ECONOMY

Tourism accounts for a significant part of the economy



In 2018-19, tourism's share of Australian total GDP was 3.1 per cent, higher than the share of agriculture, forestry and fishing (2.6 per cent), utilities (2.7 per cent) and information, media and communication (2.6 per cent).

Tourism's share of Australia's service exports is significant

Australia's international tourism receipts accounts for nearly 15 per cent of total exports, with tourism representing a greater share of exports than in countries such as the USA, the UK and Japan.

Tourism account for almost 70 per cent of all of Australia's service exports, up from less than 30 per cent in 1975.

Tourism is a driving force of job creation

Prior to the recent disruptions faced by the tourism sector, around 665,000 Australians were directly employed in tourism in 2018-19⁴, representing one in twenty Australians in the workforce. These are the jobs *directly* supporting tourism transactions, including jobs in tourism related industries such as accommodation, cafes, restaurants and takeaway food services and travel agency and information centre services. Tourism was the ninth largest employing industry in the Australian economy greater than finance, agriculture and mining.

In addition, tourism demand has flow-on effects in the chain of supply of goods and services for tourists. This *indirect* tourism activity supported a further 370,000 jobs across the country.

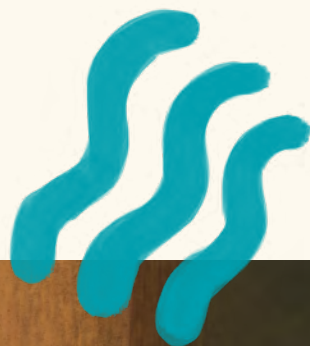
In total, tourism supported more than a million jobs in 2018-19. This is equivalent to one out of every 12 jobs in Australia.

One in every eight businesses across the country is in the tourism business

Prior to COVID-19, there were 312,000 tourism related businesses in Australia, up from 274,000 five years earlier.

These businesses account for 13 per cent of businesses, or one in every eight businesses across the country.⁵

In Tasmania and the Northern Territory this share is even higher, with close to one in every six businesses related to tourism (16 per cent and 15 per cent, respectively).



Lirriwi Tourism, Northern Territory



Seacliff Bridge, New South Wales

TOURISM IS EVEN MORE IMPORTANT TO AUSTRALIA'S REGIONS

Tourism is closely linked to Australia's regions



Australia's regions are front and centre of tourism experiences in the country, with 44 cents of every tourism dollar spent in regional destinations.

While tourism jobs can be found right across the nation, tourism jobs are a mainstay of employment in parts of regional Australia, comprising as many as six in ten jobs.

Australia's regions have twice the proportion of jobs in tourism compared to major cities

Tourism-related industries contribute twice the share of jobs in regional locations versus in the major cities. Outside of the capital cities and the Gold Coast, approximately one in nine jobs was in tourism, compared to about one in twenty jobs in the major cities.

⁴Technical note: the Australian Bureau of Statistics derives tourism employed persons by industry by multiplying 'employed persons in each industry at the national level' by the proportion of value added attributable to tourism for that corresponding industry.

⁵Tourism Research Australia, (2019), Tourism Businesses in Australia June 2014 to 2019, <<https://www.tra.gov.au/data-and-research/reports/tourism-businesses-in-australia-june-2014-to-2019/tourism-businesses-in-australia-june-2014-to-2019>>.





Bridestowe Lavender Estate,
Tasmania

TOURISM'S ROLE IN SUPPORTING AUSTRALIA'S GROWTH AGENDA

International tourism creates *Australia alumni*



Tourism creates a valuable pool of *Australia alumni* who can share their experiences with others and who may return to visit Australia.

Prior visitors become ambassadors as they tell others about their visit and build more interest in travel to Australia among their networks.

Many of Australia's international visitors are return travellers who make several trips across their lifetime. In fact, almost two thirds of all international visitors to Australia have visited before. For each new international visitor to Australia, there is a lifetime value in connection to the multiple trips they will make to Australia, which can range from \$14,000 to \$38,000 depending on source market and historical visitor mix.

Tourism is an important ingredient in *Brand Australia*

Tourism also plays important roles in the broader economy, driving consumer demand for Australia's products overseas, as well as generating interest to invest, study and work in Australia.

Inbound tourism can influence the way people around the world perceive Australia, and therefore plays an important role in shaping the understanding and positioning *Brand Australia*.

International students are a critical piece of the puzzle

International students are a critical segment of the tourism sector as they generally travel broadly while studying, they attract friends and relatives to visit them in Australia while studying and at graduation, they are likely to be return visitors themselves in the future with many becoming lifelong advocates for Australia. Given their longer stay profile, education visitors are high yielding, spending on average more than \$20,000.

International students help to build Australia's cultural capital and diversity and benefit cross-cultural knowledge exchanges. Post-study, migration pathways can offer further benefits to Australia's productivity and skilled workforce. More broadly, international education is seen to contribute to soft diplomacy, cultural interlinkages and the development of trade and investment.⁶

⁶ Deloitte Access Economics, (2015), The value of international education to Australia (report commissioned by Australian Government Department of Education and Training), <<https://internationaleducation.gov.au/research/research-papers/Documents/ValueInternationalEd.pdf>>.



Port Campbell National Park,
Victoria



1 INTRODUCTION

1.1 CONTEXT

The COVID-19 pandemic has triggered an unprecedented crisis in the global economy in 2020. As a result of the alarming levels of virus spread and severity, governments around the world implemented a variety of lockdown measures and travel restrictions to contain the virus. This presented an immediate and intense shock to the tourism sector, crippling the sector overnight.

The onset of COVID-19 could not have come at a more difficult time, with Australia's tourism industry still reeling from the impacts of drought, and the worst bushfire season on record.

The disruptions resulting from the lockdown measures and travel restrictions affected most industries and sectors in some ways. Tourism was among the most directly affected sectors at the height of the pandemic as governments sought to limit movement forcing many of the sector's operators into hibernation and while activity levels have increased steadily since mid-2020, the tourism sector will be the last to recover with many planes still on the ground, many city hotels operating at very low levels of occupancy and international border restrictions looking to stay in place for most of 2021.

From devastating job losses, business closures and the human toll of not being able to travel to visit friends and family, the economic and social value of the tourism sector to the economy and to Australians has never been more apparent than in the past year.

Tourism's importance to Australia and Australians is multifaceted, contributing to Australia's economy, the employment of one million Australians, while contributing to *Brand Australia*, solidifying our national identity and image to the rest of the world.

This paper outlines the economic significance of the tourism sector to Australia, including its importance to the regions and its role in supporting Australia's growth agenda.



Horizontal Falls,
Western Australia

1.2 STATE OF PLAY AND CURRENT CHALLENGES

COVID-19 impact

COVID-19 has had a staggering impact on Australia's tourism sector. Travel bans and border restrictions have brought international travel to a halt and reduced interstate travel considerably throughout 2020.

Overall, the decline in 2020 corresponds to 7.6 million fewer international arrivals to Australia, 45 million fewer domestic overnight trips and 84 million fewer day trips compared to 2019. This results in a total combined loss of around \$78 billion in visitor spend, including \$34 billion in international and \$44 billion in domestic visitor spend, a staggering 51 per cent decline in tourism receipts.

Uneven impacts across the country

The impact of the decline in tourism activity has been uneven across Australia. Given capital cities attract a much greater share of international visitors than regional destinations, they have faced a much greater decline in the number of visitors and associated spend than has been the case in many regional areas. As some travel became permitted, many regional destinations became the beneficiaries of pent up demand following the lockdown periods, with activity levels matching or in some cases exceeding levels prior to COVID-19.

Holiday makers, and those wishing to travel to reconnect with friends and family, were the first to resume travel. As businesses have moved to hybrid ways of working in the wake of the pandemic, including a high uptake of

virtual meeting platforms, it is expected that the business travel sector will take some time to recover and may not return to pre-COVID-19 levels for a considerable period of time. This anticipated slower recovery of the business travel segment will present further challenges for capital cities, which typically have higher share of business visitors compared to regional destinations.



THE PICTURE OF AUSTRALIAN TOURISM

Heart Reef, Queensland

Tourism is important for Australia and for Australians. While the word 'tourism' conjures a different picture for everyone, a shared understanding of what it comprises illustrates its breadth and importance.

The activity undertaken by tourists generates significant income for Australia. In Australia, tourists may be locals spending time away from home beyond their usual place of residence (domestic tourists)⁷ or international tourists, residing overseas but visiting Australia. Australians travelling overseas are considered outbound tourists, and will also contribute to tourism spending in Australia, such as booking through Australian travel agencies or transport providers.

2.1 A NATION OF TRAVELLERS

Australians are exceptionally well travelled by world standards. In 2019, Australians took an average of four domestic overnight trips per person, and a further 10 day trips. This is double the average number of domestic trips per US resident, and one and a half times the domestic trips per New Zealand resident.⁸

Australians are also experienced global travellers. In 2019, Australians took 10 million trips overseas, the equivalent of two out of every five Australians in just one year.

The total scale and scope of the tourism sector in Australia is remarkable. In 2019, Australians made

more than 117 million overnight trips, spending close to 420 million nights away from home on domestic trips. Australians also took almost 250 million day trips.⁹

Beyond its dollar value, travel facilitates meaningful experiences for Australians. Travel can be considered part of the Australian DNA. For Australians, tourism facilitates experiences. Everything from the everyday to the once-in-a-lifetime, from trips in our home states, to ones right around the nation; travel lets us unwind for holidays, reconnect with friends and family, and forge business relationships.

FIGURE 2.1: A NATION OF TRAVELLERS: AUSTRALIANS' PROPENSITY TO TRAVEL IN 2019

TOTAL



Australians took a total of 14.7 trips per person in 2019 (incl. both domestic and overseas trips)



Australians spent a total of \$5,708 per person on overnight travel in 2019, including travel in Australia and abroad. Including day trips, this spend per capita increases to \$6,738.

DOMESTIC

Australians took

14

domestic trips (14.3 if we want to be exact) – 4 domestic overnight trips and 10 day trips.



Of 14 domestic trips, 12 (or 12.4) were trips in their own state (intrastate) and 2 trips were interstate.



Of 14 domestic trips, 6.2 holiday trips, 4.3 trips to visit family and friends, 2.4 business trips, and 1.5 trips for other reasons

Per capita, Australians spent

\$4,189

on domestic tourism.

OVERSEAS

Two in 5 Australians took an overseas trip – approximately

10 MILLION

5.6 M holiday trips, 2.3m trips visiting friends and family, 1.8m business trips, and 0.2m trips for other reasons

Australians spent an average of

\$2,552

per capita on overseas trips.

⁷ Domestic tourists may be taking a daytrip (those who travel for a round trip distance of at least 50 kilometres outside of the routine (such as commuting to work), are away from home for at least four hours, do not spend a night away from home), or overnight visitors (spending at least one night away from home a minimum of 40 kilometres from their usual place of residence).

⁸ Stats NZ, (2021), <<https://www.stats.govt.nz/topics/population>>; US Census, (2019), <<https://www.census.gov/newsroom/press-releases/2019/popest-nation.html>>; Tourism New Zealand, (2021), <<https://www.tourismnewzealand.com/markets-stats/markets/new-zealand/>>; US Travel Association, (2019), US Travel and tourism overview (2019), <https://www.ustravel.org/system/files/media_root/document/Research_Fact-Sheet_US-Travel-and-Tourism-Overview.pdf>.

⁹ Tourism Research Australia, (2021), National Visitor Survey, <<https://www.tra.gov.au/>>.



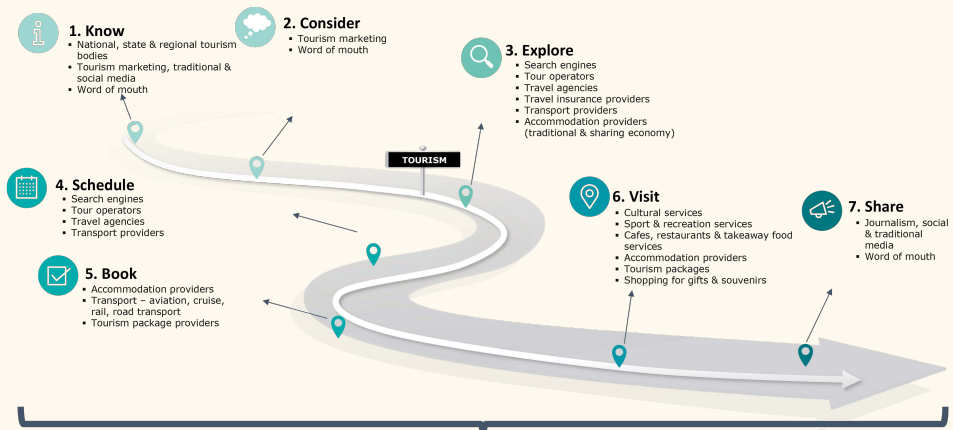
Sydney Harbour, New South Wales

2.2 THE TOURISM ECOSYSTEM

The tourism sector consists of a broad range of players and stakeholders, each impacting directly or indirectly on the consumer journey of a typical tourist – starting from creating an awareness of a destination, inviting consideration of a potential trip, and moving the potential visitor through the stages of planning, booking and finally to visiting and sharing their experiences during and after the trip. The tourism sector has touchpoints throughout the economy, with a wide range of industries inextricably intertwined to deliver the tourism experiences.

Behind each tourism operator and stakeholder working directly in tourism related industries, other industries support the supply of tourism products, from primary producers supplying hotels with food for room service to technology researchers producing the next virtual reality experience. These are just a couple of examples of the millions of transactions and interactions that underpin the tourism sector, contributing to Australia’s wider visitor economy.

FIGURE 2.2: TOURISM ECOSYSTEM OF PLAYERS THROUGH A TYPICAL TOURISM CONSUMER JOURNEY



Underpinned by tourism supply industries spanning the economy

Source: Deloitte Access Economics

Not surprisingly, the majority of jobs and businesses across the visitor economy are largely concentrated in the ‘Visit’ stage of the consumer journey, where businesses contribute to the visitor’s experience. However, prior to a visitor arriving in the destination, Australian businesses and jobs play an important role in supporting the knowledge, consideration and booking components of a tourist’s consumer journey. Table 2.1 provides an estimate of the number of businesses and jobs in Australia that support each phase of the tourism consumer journey.

TABLE 2.1: BUSINESSES AND EMPLOYEES WITHIN EACH STAGE OF THE TOURISM CONSUMER JOURNEY

	KNOW	CONSIDER	EXPLORE	SCHEDULE	BOOK	VISIT
Examples of types of businesses	Travel agency services	Travel agency services	Travel agency services Accommodation Airlines	Travel agency services Airlines	Travel agency services Accommodation Airlines	Accommodation Car rental, airlines Cafes and restaurants Museums Sports and recreation Retail trade Education
No of businesses	8,020	8,020	67,477	54,713	67,477	304,540
No of related jobs	44,000	44,000	202,000	116,000	202,000	600,000

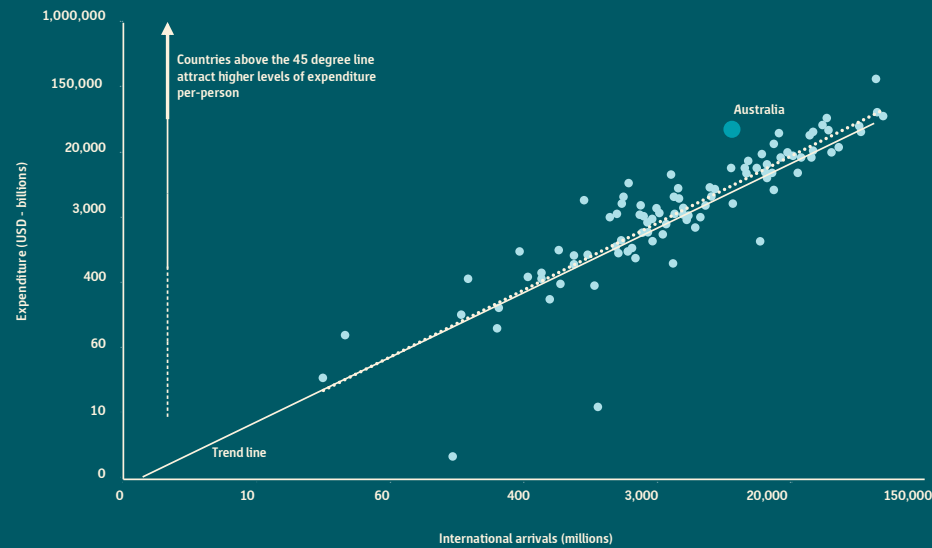
Source: Deloitte Access Economics, and ABS

2.3 AUSTRALIA: A WORLD-CLASS INTERNATIONAL DESTINATION

Australia is a world-class destination that attracts high yielding international tourists. Being a medium-to-long haul destination for most international source markets, Australia receives a relatively modest volume of international visitors – in fact, Australia ranks outside the top 30 in terms of total international arrivals. However, Australia ranks in the top ten when it comes to the total value of expenditure received by international tourists.¹⁰

Chart 2.1 indicates the relative position of where Australia is when it comes to number of international arrivals and visitor expenditure it receives. The trend line shows the average level of expenditure for a given number of arrivals across all countries. Countries above the trend line have higher levels of expenditure per arrival than the average country. This is the case for Australia, which ranks second in terms of expenditure per arrival. The one country above Australia is Luxembourg, which has significantly smaller number of arrivals. Further, to put this into perspective, expenditure per arrival in Australia is approximately 1.8 times the size of expenditure per arrival in the USA, a close competitor of Australia for tourism.

CHART 2.1: COMPARISON OF INBOUND TOURISM EXPENDITURE AND INTERNATIONAL TOURISM ARRIVALS, 2018



Source: Deloitte Access Economics and UNWTO
Notes: Scale is a log-scale that has been re-labelled for readability

Australia's international tourism receipts accounts for nearly 15 per cent of total exports (by value), with tourism ranking more highly in terms of contribution to exports than in countries such as the USA, the UK and Japan (Chart 2.2). Further, tourism is the largest component of Australian service exports, which were driving the growth in Australia's balance of trade in the years prior to COVID-19.

¹⁰ UNWTO, (2020, International Tourism Highlights

CHART 2.2: COMPARISON OF TOURISM'S CONTRIBUTION TO EXPORTS AND EXPENDITURE PER VISITOR ACROSS COUNTRIES, 2018



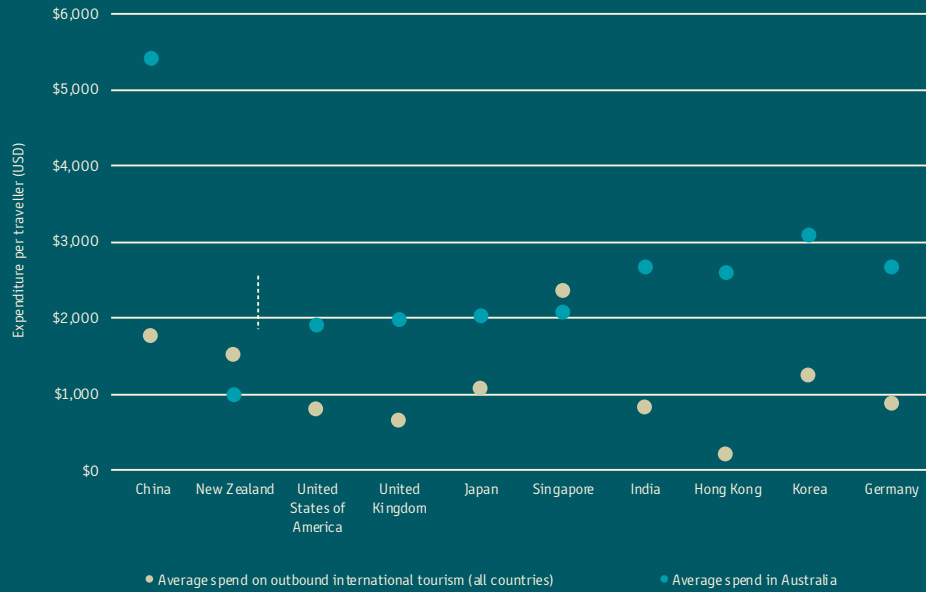
Source: Deloitte Access Economics and World Bank

Australia has a unique position in the global tourism market relative to the rest of the world. International travellers who visit Australia spend more per-person when they visit than they do when they visit elsewhere in the world. For example, a typical international traveller from the US would spend around USD1,000 on an overseas trip. This average spend doubles (around USD2,000) when they travel to Australia. The trend is similar across many of Australia's key international source markets. Notable exceptions include Singapore and New Zealand, for whom Australia is a relatively short-haul tourist destination.





CHART 2.3: COMPARISON BETWEEN AVERAGE EXPENDITURE WITHIN AUSTRALIA AND IN OTHER COUNTRIES, BY RESIDENTS FROM TOP TEN SOURCE COUNTRIES OF INTERNATIONAL ARRIVALS TO AUSTRALIA, 2018



Source: Deloitte Access Economics, World Bank, UNWTO and Tourism Research Australia

Notes: Expenditure excludes international airfares. Spend in Australia is sourced from IVS and converted to USD using an exchange rate of 1 AUD:0.75 USD. ^Top ten source markets include those that have available outbound expenditure data. Total outbound data for China and United Kingdom is sourced from UNWTO 2018. All other total outbound data is sourced from the World Bank.



Rottneest Island, Western Australia

Despite this, Australia's position as a world-class destination for high-yield travellers is not guaranteed. The World Economic Forum¹¹ rates Australia highly on the four main reasons why tourists choose Australia as a holiday destination. However, Australia has a significant number of competitors along these four attributes, including the USA, New Zealand and the UK.

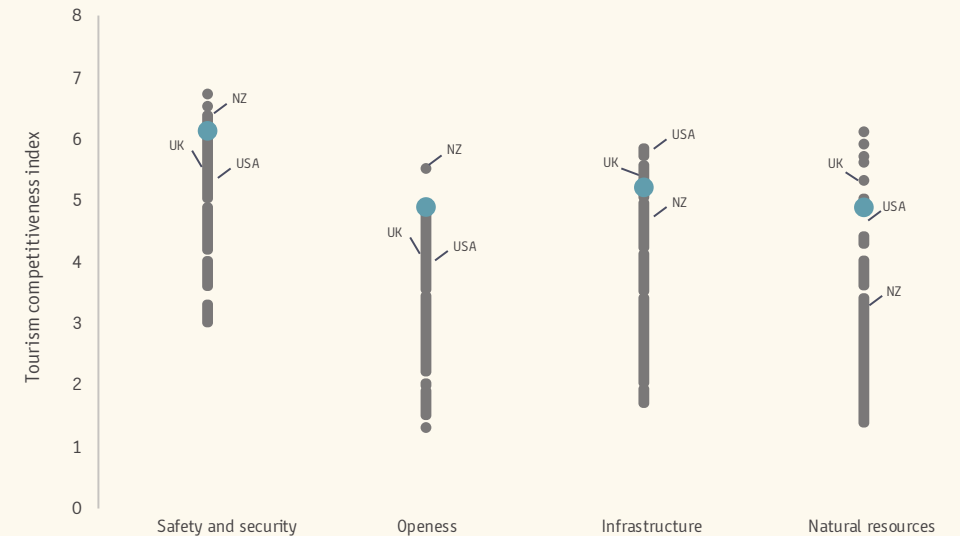
The global landscape for tourism is expected to become even more competitive as countries look to reinvigorate their tourism industries as part of their economic recovery strategies following COVID-19. Australia's tourism sector could be in a vulnerable position if travel restrictions remain in place beyond that of competitor nations, resulting in potential travellers who would be planning to travel Australia opting to travel to another country with similar attributes as Australia.

¹¹ World Economic Forum, (2019), The Travel & Tourism Competitiveness Report 2019, <<https://www.weforum.org/reports/the-travel-tourism-competitiveness-report-2019>>.



Twelve Apostles, Great Ocean Road, Victoria

CHART 2.4: COMPETITIVENESS OF AUSTRALIA ON ASPECTS ALIGNED TO THE MAIN REASONS THAT TOURISTS CHOOSE TO COME TO AUSTRALIA



Source: Deloitte Access Economics, Tourism Research Australia and World Economic Forum

Notes: Main reasons that tourists choose Australia as a holiday destination are sourced from IVS 2019, and include: beauty and natural environments (43%), safe and secure destination (27%), friendly and open citizens (27%), and Cities and attractions (24%)



2.4 TOURISM BUSINESSES AND EMPLOYMENT

Tourism activity supports businesses and employment around the country. Being a labour-intensive sector, tourism is particularly strong at supporting employment in the Australian economy. As noted by the International Labour Organization:

“TOURISM IS GLOBALLY ONE OF THE KEY AND FAST GROWING VITAL SECTORS. IT IS AMONG THE TOP JOB CREATING SECTORS DUE TO ITS LABOUR-INTENSIVE NATURE AND THE LARGE MULTIPLIER EFFECT IT HAS ON EMPLOYMENT IN OTHER RELATED SECTORS”¹²



Wave Rock,
Western Australia

TOURISM JOBS

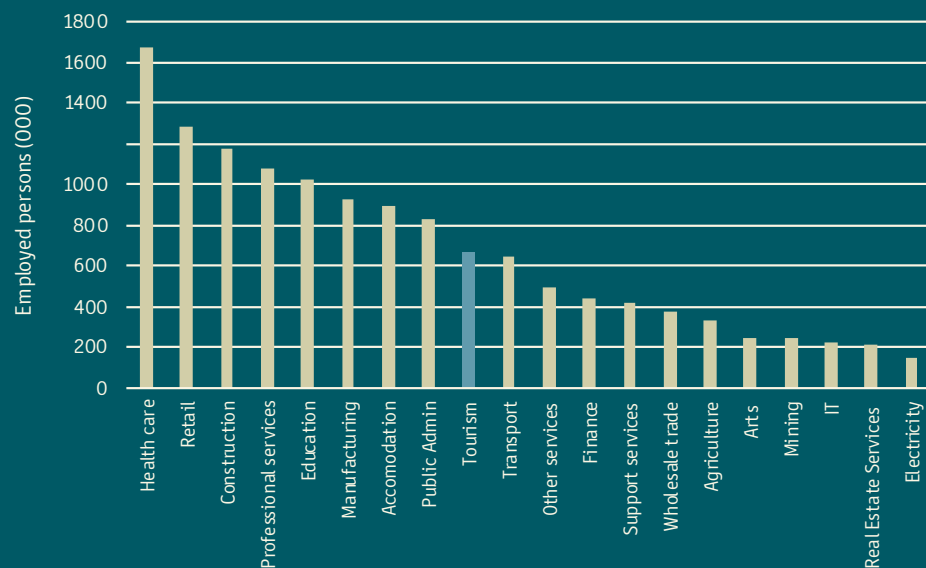
Prior to the recent disruptions faced by the tourism sector, the Tourism Satellite Account showed close to 665,000 Australians were directly employed in tourism in 2018-19.¹³ These are the jobs directly supporting tourism transactions, including jobs in tourism related industries such as accommodation, cafes, restaurants and takeaway food services and travel agency and information centre services.

In 2018-19, there were approximately 12.8 million Australians employed.¹⁴ This means one in twenty Australians in the workforce was employed directly in the tourism sector.

In addition, tourism demand has flow-on effects in the chain of supply of goods and services for tourists. These are the *indirect* flow on effects of tourism. Indirectly, tourism activity supported a further 370,000 jobs across the country.

In total, tourism supported more than a million jobs in 2018-19. This is equivalent to one out of every 12 jobs in Australia. In direct terms, tourism is the ninth largest employing industry in the Australian economy. Direct employment in the tourism industry is larger than that in each of the finance industry, agriculture and mining (Chart 2.5).

CHART 2.5: COMPARISON OF DIRECT EMPLOYMENT BY INDUSTRY, 2018-19



Source: Deloitte Access Economics and ABS

Not surprisingly, the greatest number of tourism jobs are located in Australia's major tourism capital cities regions. While tourism jobs can be found right across the nation, tourism jobs are a mainstay of employment in parts of regional Australia, comprising as many as six in ten jobs. This distribution of employment is highlighted in Table 2.2, showing the proportion of jobs in a tourism region supported by tourism in 2018-19. Across the ten most tourism reliant regions, tourism accounted for an average of three out of ten jobs with the tourism share of employment as high as 60 per cent for Tasmania's East Coast.

TABLE 2.2: DIRECT TOURISM EMPLOYMENT BY TOURISM REGION, 2018-19

TOURISM REGION	STATE	EMPLOYMENT	TOURISM REGION	STATE	EMPLOYMENT
1 Melbourne	VIC	95,808	11 South Coast	NSW	15,307
2 Sydney	NSW	92,021	12 Australia's South West	WA	13,187
3 Brisbane	QLD	45,155	13 Hobart and the South	TAS	11,083
4 Destination Perth	WA	38,488	14 Canberra	ACT	10,955
5 Gold Coast	QLD	29,764	15 High Country	VIC	10,166
6 North Coast NSW	NSW	24,316	16 Great Ocean Road	VIC	9,802
7 Adelaide	SA	22,771	17 Central NSW	NSW	9,214
8 Tropical North Queensland	QLD	18,231	18 Peninsula	VIC	9,082
9 Sunshine Coast	QLD	17,476	19 Geelong and the Bellarine	VIC	7,252
10 Hunter	NSW	15,813	20 Central Coast	NSW	7,092

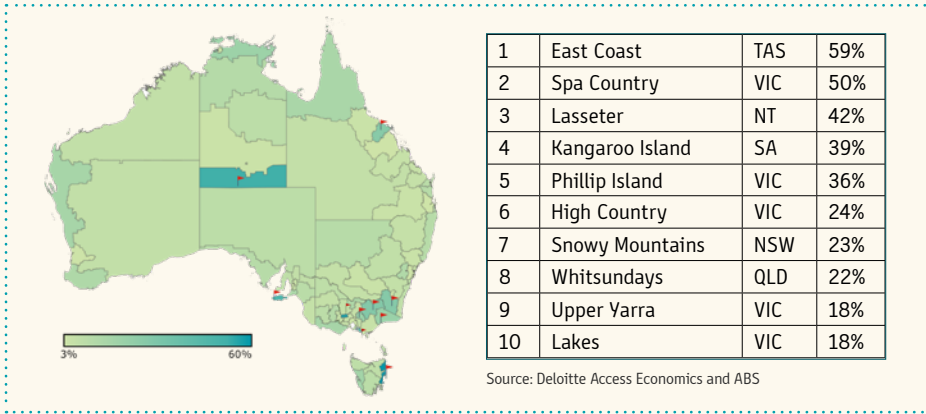
Source: Deloitte Access Economics and Tourism Research Australia

¹² Peter Van Rooij (International Labour Organization), 'Promoting Tourism through Decent Work in Egypt', International Labour Organization (15 November 2015) <https://www.ilo.org/africa/media-centre/pr/WCMS_425657/lang-en/index.htm>.

¹³ Technical note: the Australian Bureau of Statistics derives tourism employed persons by industry by multiplying 'employed persons in each industry at the national level' by the proportion of value added attributable to tourism for that corresponding industry.

¹⁴ ABS, (2019), 5249.0 Australian National Accounts: Tourism Satellite Account 2018-19 reference year, <<https://www.abs.gov.au/statistics/economy/national-accounts/australian-national-accounts-tourism-satellite-account/2018-19>>.

FIGURE 2.3: SHARE OF TOURISM EMPLOYMENT IN A TOURISM REGION, 2018-19



Among Australians employed in tourism, a few distinct cohorts can be considered:

- The tourism career cohort: business owners and employees who spend their careers working in tourism
- The labour force (re)entry cohort: youth and carers re-entering the labour market, getting a foot in the door, and gaining valuable and transferable skills
- Working holiday makers: international visitors supporting their Australian adventures with local work
- The seasonal workers: those employed in peak seasons, supplementing their incomes and gaining skills and experience.

For each of these cohorts, and all Australians working in tourism, work in the sector helps develop in-demand skills (explored further in Section 5.1). For youth in Australia, tourism jobs are particularly important as an entry point to the labour market: people aged under 25 comprised approximately 45 per cent of the accommodation and food services workforce in 2019, compared to 15 per cent across all industries.

TOURISM BUSINESSES

As at June 2019, there were 312,000 tourism businesses in Australia, up from 274,000 in 2014 – accounting for 13 per cent of businesses, or one in every eight businesses across the country.¹⁵ In Tasmania and the Northern Territory, this share was even higher, with close to one in every six businesses related to tourism (15.6 per cent and 15.3 per cent, respectively).

This figure is based on unpublished business registration data from the Australian Bureau of Statistics and represents a conservative estimate, as it excludes businesses in tourism related industries where tourism contributed less than five per cent of the industry's gross value added (GVA).¹⁶ As at June 2019, only the construction industry had more businesses than tourism (with 394,500 businesses).¹⁷

While most businesses across Australia (63 per cent) are non-employing businesses, this is not true for tourism: where more than half of tourism businesses were employing businesses in 2019 (51.2 per cent). That said, tourism businesses remain mostly small businesses. The largest proportion of employing businesses are micro, employing one to four people, in line with the profile of all Australian businesses.

Reflecting the diversity of the tourism ecosystem, businesses in the tourism sector span a wide range of industries, from accommodation, food services, and transport, through to retail trade, cultural services, and sports and recreation operations.

Tourism businesses are distributed all around the nation: while the highest numbers of businesses are concentrated in the major cities, tourism businesses comprise a higher share of total businesses in regional areas. This highlights the relative importance of tourism to regional economies.

¹⁵ Tourism Research Australia, (2019), Tourism Businesses in Australia June 2014 to 2019, <<https://www.tra.gov.au/data-and-research/reports/tourism-businesses-in-australia-june-2014-to-2019/tourism-businesses-in-australia-june-2014-to-2019>>.

¹⁶ Tourism Research Australia, (2016), Tourism Businesses 2016, <https://www.tra.gov.au/ArticleDocuments/185/Tourism_businesses_2016.pdf.aspx>.

¹⁷ ABS, (2021), Business Indicators, <<https://www.abs.gov.au/statistics/economy/business-indicators/counts-australian-businesses-including-entries-and-exits/latest-release#data-download>>.



Uluru,
Northern Territory



3 TOURISM IS A CRITICAL CONTRIBUTOR TO AUSTRALIA'S ECONOMY

Freycinet, Tasmania

3.1 THE SUCCESS OF TOURISM IN AUSTRALIA

The economic value of tourism to Australia is significant and well-established. Each year, the Australian Bureau of Statistics releases the national Tourism Satellite Account, using an internationally recognised approach to valuing tourism using the national accounting framework.

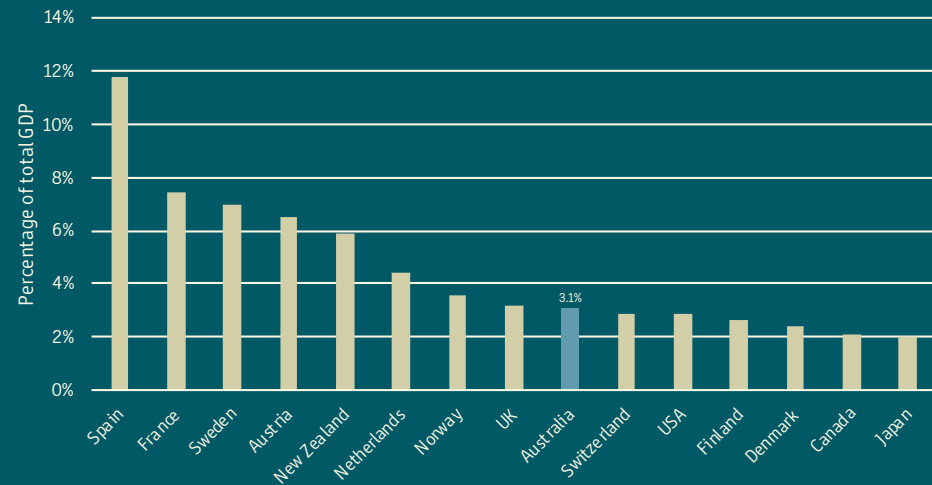
Prior to COVID-19 disruptions, direct tourism gross domestic product (GDP) was \$60.8 billion, following year-on-year growth of 6.0 per cent, outpacing total GDP growth by 0.6 percentage points.¹⁸

At the same time, tourism labour productivity was increasing (+0.6 per cent) at a time where productivity across the whole economy was falling (-0.2 per cent).

Overall, tourism's share of Australia's total GDP was 3.1 per cent, higher than the share of agriculture, forestry and fishing (2.6 per cent), utilities (2.7 per cent) and information, media and communication (2.6 per cent).

Further, the Australian tourism industry is more important to the Australian economy than the tourism industry in comparable economies such as the USA, Canada and Japan.

CHART 3.1: DIRECT TOURISM AS A PERCENTAGE OF GDP OF TOP 20 COUNTRIES IN TERMS OF VALUE (USD)

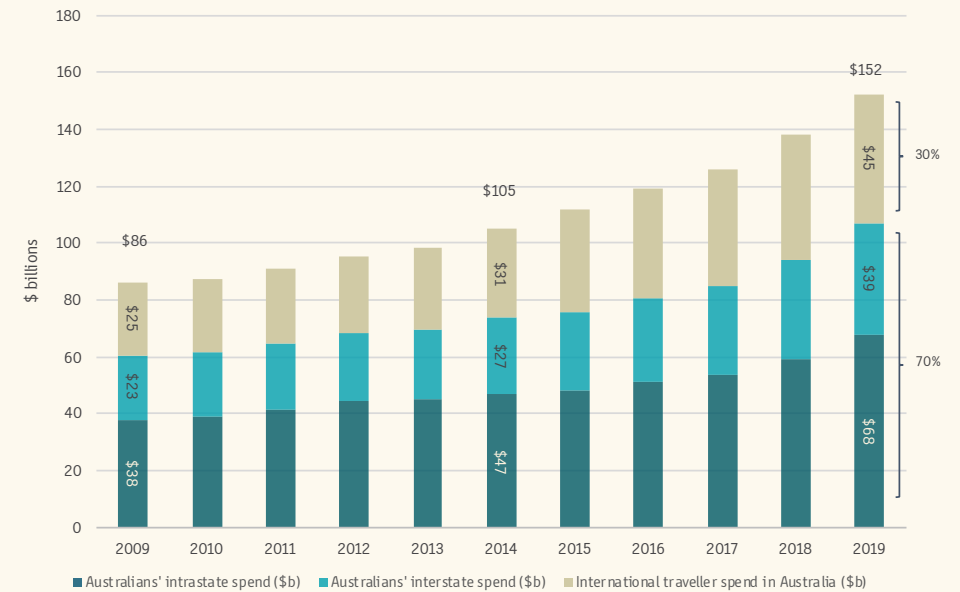


Source: Deloitte Access Economics, World Travel and Tourism Council (2019), and ABS (2020)

Tourism's strong performance has been a sustained trend: tourism's growth has outpaced that of the Australian economy, growing at almost twice the rate of the broader Australian economy from 2013-14 to 2018-19. Tourism GDP grew at an annual rate of 4.5 per cent over the period, compared to 2.5 per cent for the Australian economy.

Over the last decade, visitor expenditure, including expenditure from both domestic and international visitors, has increased from \$86 billion in 2009 to \$152 billion in 2019, increasing at a remarkable rate of 5.9 per cent per year.

CHART 3.2: TOURISM EXPENDITURE MIX IN AUSTRALIA, 2009 TO 2019



Source: Deloitte Access Economics and Tourism Research Australia

¹⁸ ABS, (2019), 5249.0 Australian National Accounts: Tourism Satellite Account 2018-19 reference year, <<https://www.abs.gov.au/statistics/economy/national-accounts/australian-national-accounts-tourism-satellite-account/2018-19>>.





Mount Killiecrankie,
Tasmania

3.2 TOURISM – AN INTEGRAL PART OF THE BROADER ECONOMY

3.2.1 ROLE IN AUSTRALIA'S EXPORTS

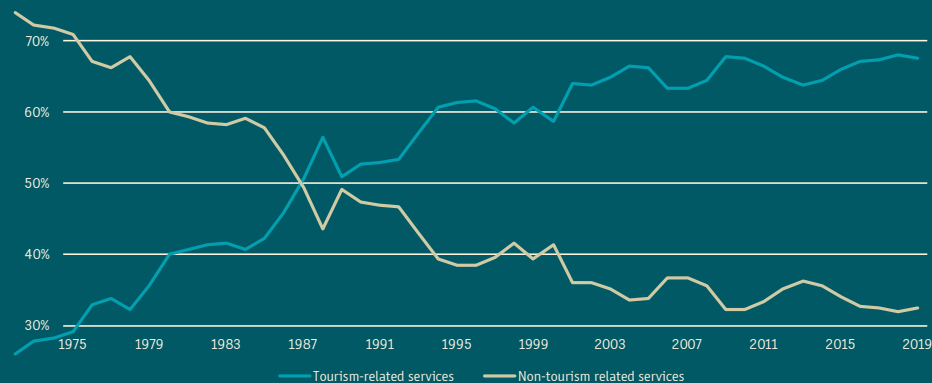
Over time, exports have become an increasingly important driver of Australia's economic activity. In 1975, exports accounted for 10 per cent of the size of our economy, but by 2019 they accounted for almost a quarter of all economic activity.

Tourism plays an important role in Australian exports, accounting for nearly 15 per cent of total exports in Australia.

While Australia's mining-related exports mean our goods exports exceed our service exports, over the past three decades, services have accounted for between 20 and 25 per cent of Australia's total exports. This is a substantial share and indicates that services exports will become increasingly important as Australia looks to diversify its exports to have a lesser reliance on mining-related exports.

When it comes to Australia's service exports, tourism is the dominant contributor. Tourism-related services account for almost 70 per cent of all of Australia's service exports as indicated in Chart 3.3, with the contribution growing significantly over time, from less than 30 per cent of all services exports in 1975. The recovery of the tourism sector is of critical importance to Australia's services exports and exports more generally, supporting goals to diversify exports and provide a counterbalance to the cyclical nature of Australia's commodity product exports.

CHART 3.3: SHARE OF AUSTRALIAN SERVICES EXPORTS, 1975 TO 2019



Source: Deloitte Access Economics and ABS

3.2.2 ROLE IN THE BROADER ECONOMY

Tourism plays an important role in the broader economy, from generating interest in Australia's products overseas, as well as interest to invest, study and work in Australia.

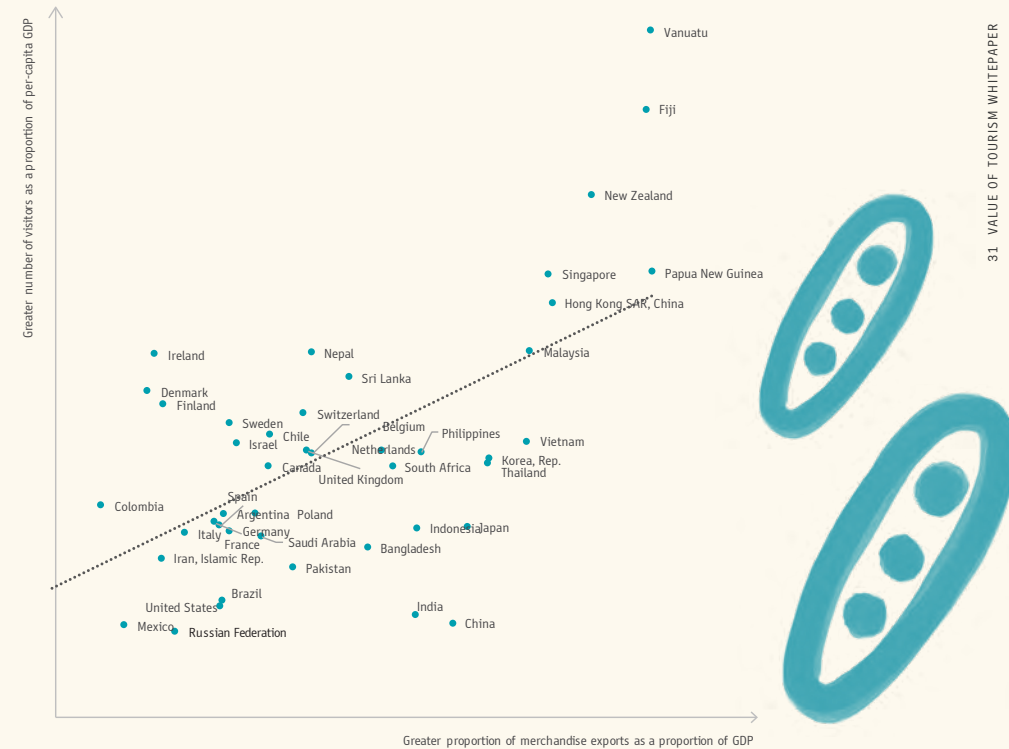
Inbound tourism can influence the way people around the world perceive Australia, and therefore plays an important role in shaping the understanding and positioning of *Brand Australia*.

Tourism and merchandise exports

Activity around international tourism is likely to increase the awareness of Australian products overseas, including manufactured products, food and wine. People who visit Australia will be exposed to a wide range of Australian products during their trip that they then want to source back in their home countries. This leads to greater demand for Australian exports, while supporting the development of stronger bilateral trade relationships between Australia and other countries.

There is some quantitative evidence of this intrinsic relationship between tourism and exports. The positive relationship shown in Chart 3.4 below suggests there is a relationship between the number of visitors to Australia from a specific source country, and the degree to which that country purchases Australian exports. Further, once controlling for differences in distance between Australia and the source market and income per-capita, the analysis shows that a 1 per cent higher level of arrivals to Australia (as a percentage of the source market's population) is associated with a 0.3 per cent higher level of Australian exports to a country (as a percentage of its GDP).

CHART 3.4: CORRELATION BETWEEN AUSTRALIAN INTERNATIONAL TOURIST ARRIVALS AND MERCHANDISE EXPORTS, 2018



Source: Deloitte Access Economics analysis using ABS merchandise export data (5368.0), ABS short-term arrivals data (3401.0), World Bank GDP and population data (2020)

Notes: Merchandise exports do not include international tourism receipts. Exports are measured in value terms. Arrivals to Australia controls for differences in population and GDP for each country.





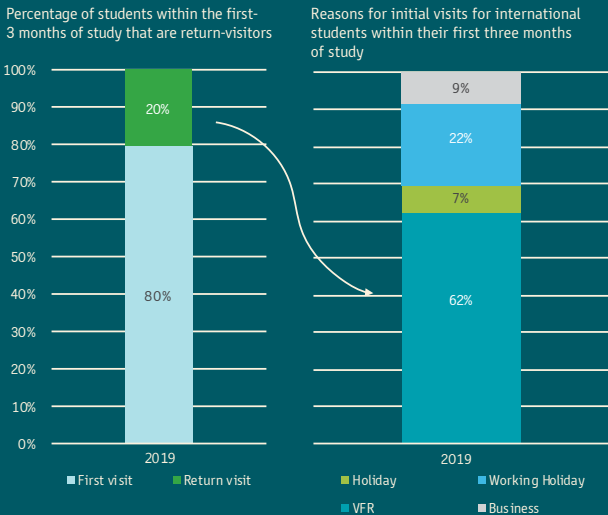
Mt Wellington, Tasmania

There is growing evidence that shows there is a causal link between tourism and exports. Research by Madelona et al. (2017a) found that increased tourism has increased agri-food exports between the Netherlands and France. While other research by Madelona et al. (2017b) found that international inbound tourism to Portugal increased wine exports to the visitor source markets.^{19,20}

Tourism and education

Australia is the fifth most popular destination for international students globally, with approximately 450,000 international students choosing to study in Australia in 2019.²¹ Tourism plays an important role in promoting Australia as a study destination across the globe. A memorable travel experience in Australia may induce interest to study in Australia, or to send children to study in Australia. Around one in five international students in Australia have visited Australia prior to studying here, with over 60 per cent of students indicated they were previously in Australia for a holiday. People who come to study in Australia contribute substantially to the tourism sector, by travelling throughout the country, attracting friends and family to come to visit them during their studies and returning for graduation ceremonies.

CHART 3.5: PAST PURPOSE OF VISIT AMONG INTERNATIONAL EDUCATION VISITORS



Source: Deloitte Access Economics and Tourism Research Australia
Notes: Visitors study whose previous visit was also for educational purposes were included in the 'first visit' category.

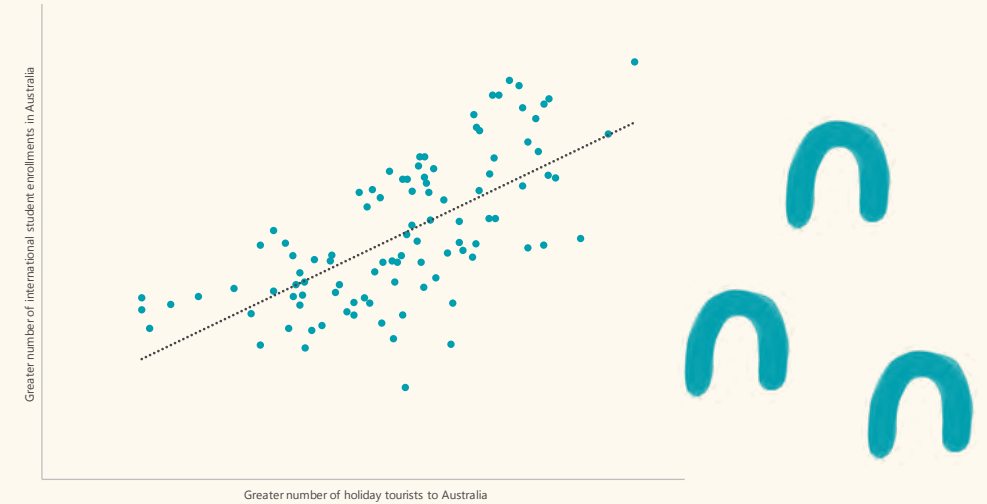
Tourism is a central contributor to Australia's international brand, *Brand Australia*. Globally, Australia is renowned as a tourism destination. In 2019 Australia once again ranked in the top ten in the World Economic Forum's Travel & Tourism Competitiveness Index.²²

Australia's international reputation contributes to the country's appeal as a study destination. An international student survey in 2019 found that students decided on a location to study based on its 'acceptance of international students' (58 per cent), and 'appealing culture/lifestyle' (35 per cent), in addition to the quality and cost of education institutions and living expenses.²³ These attributes are associated with *Brand Australia*: in the World Economic Forum's international rankings, Australia was placed within the top 20 countries in terms of openness and safety.

Analysis of the relationship between holiday arrivals to Australia and international student enrolments in Australia shows that there may be a link between the two that cannot be explained by income and distance between countries. Specifically, a 1 per cent increase of holiday arrivals to Australia as a percentage of the source market's population is associated with a 0.5 per cent increase in student enrolments in Australia as a percentage of the source market's population. This relationship is consistent even once controlling for differences in populations, incomes, tertiary enrolment rates and distance between Australia and the source market (Chart 3.1).

This relationship suggests that there could be a link between the choice of destination of where to study and the extent to which citizens generally visit that country for tourism. This relationship may, in part, be attributable to the impact of tourism on altering perceptions of a country in their home market or increasing awareness of Australia as a study destination. However, further research should be conducted to study the causal link between prior tourism visitation and choice of study destination.

CHART 3.1: CORRELATION BETWEEN INTERNATIONAL STUDENT ENROLMENTS IN AUSTRALIA AND HOLIDAY ARRIVALS TO AUSTRALIA, 2019



Source: Deloitte Access Economics, Tourism Research Australia and Department of Education, skills and employment, International Education statistics
Notes: Analysis is the output of an added variable plot, which shows the correlation between enrolments and holiday arrivals, holding-constant differences in GDP per capita, population and distance between Australia and the source country (in log kms).

¹⁹ Madaleno, A., Eusébio, C., Varum, C. (2017). International tourism and exports of agro-food products: a causality analysis. *Anatolia: An International Journal of Tourism & Hospitality Research*, 27(2), 251-261.

²⁰ Madaleno, A., Eusébio, C., Varum, C. (2017). Exports and Tourism: Testing the Causality. *International Journal of Hospitality & Tourism Administration*, 18(4), 444-458.

²¹ United Nations, (2021), Global flow of tertiary-level students, <<http://uis.unesco.org/en/uis-student-flow>>.

²² World Economic Forum, The Travel & Tourism Competitiveness Report 2019 (2019) <http://www3.weforum.org/docs/WEF_TTCR_2019.pdf>.

²³ QS International Student Survey (2019), <<http://www.iru.edu.au/wp-content/uploads/2019/07/QS-International-Student-Survey-2019.pdf>>.



TOURISM, WORK AND INVESTMENT

Tourism can also help generate interest in working and investing in Australia, which can fill skill shortages and increase foreign investment. Approximately 300,000 people visit Australia on working holiday visas each year, contributing to filling important regional skill shortages. A further 200,000 people visit Australia for the purpose of short-term employment. Data collected by Tourism Research Australia indicated nearly 10,000 people visited Australia to investigate a possible business investment in 2018.²⁴

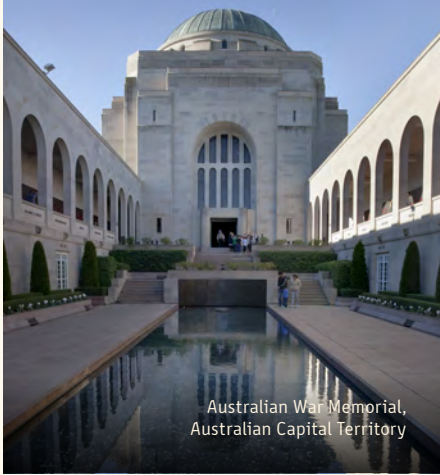
TOURISM AND GLOBAL CONNECTEDNESS

Tourism provides an important platform for the global exchange of ideas and knowledge, promoting innovation and trade to support the broader economy. This is facilitated through the staging of business events including conferences, meetings and exhibition, along with major cultural, leisure and sporting events. Events connect and convene people across the world with shared interests at a destination. In addition to participating at these events, the appeal of the location, typically first as a tourist destination, is a strong influence to drive attendance at events and in the selection of the destination itself.

SPOTLIGHT: BUSINESS EVENTS – KEY ECONOMIC DRIVER AND FOSTERING KNOWLEDGE TRANSFER, TRADE AND INVESTMENT

Business events provide the forums to bring together groups of people with a common interest or vocation, unlocking widespread collaboration and exchange of ideas. This sector is a major economic driver for the Australian economy, directly contributing around \$36 billion to the economy and providing employment to almost 230,000 Australians in FY19.²⁵ During this period, 44 million people attended business events in Australia, with international business events visitors representing one out of every five delegates. Previous research indicates around 46 per cent of international business events delegates take a pre- or post-event trip.²⁶ Even among interstate delegates, 13 per cent extend their visits beyond the conference with the economic benefits to destinations flowing to regions outside major capital cities.

Beyond the significant economic benefits, the staging of business events in Australia provides



Australian War Memorial,
Australian Capital Territory

longer-term outcomes that will generate broader social and future economic benefit for Australia. Global conferences and congresses provide the platforms for likeminded professionals with the same passion to gather together to exchange knowledge, discuss and debate new ideas and forthcoming technologies. These interactions lead to collaborations and partnerships being formed to pursue opportunities and innovations that will lead to breakthrough discoveries and developments that save lives, change society and redefine best practices.

Success stories

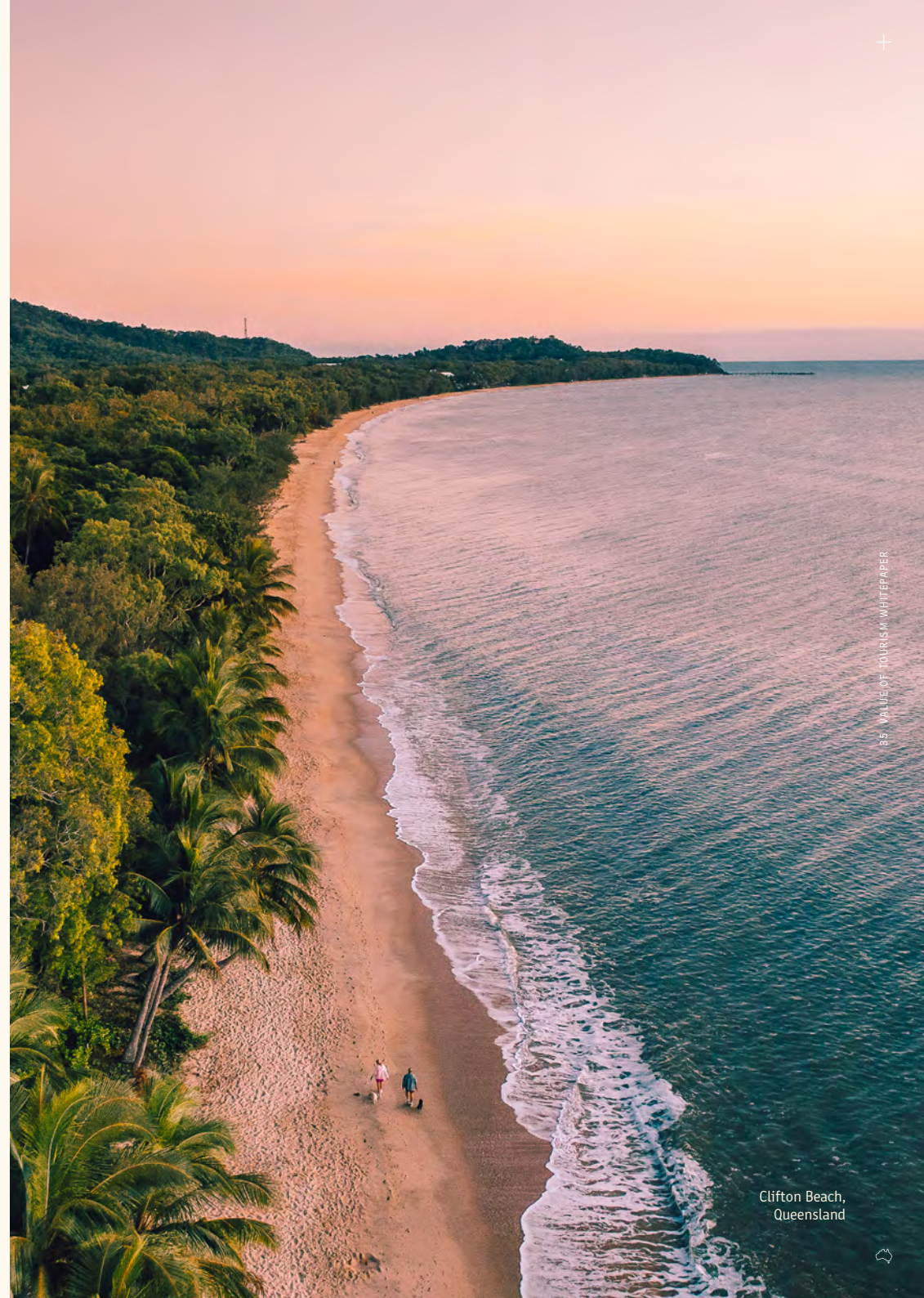
The Swift International Banking Operations (SIBOS) meeting in Sydney in 2018 attracted around 7,600 delegates from across 158 countries, providing a timely platform to discuss and refine trending topics, cementing Australia's reputation as an innovative financial services hub in the region. This was the third time the organisers had selected Sydney as the host destination, following successful events in 1997 and 2006. This event generated close to \$40 million in direct expenditure in Australia and provided benefits to the local community through donations from SIBOS' exhibitors to seven local charity organisations and over 2,500 meals donated to community members in need.

Overall, business events play a vital role to stimulate the visitor economy, contributes to exports, inward investment, infrastructure development, and generating jobs and opportunities across metropolitan and regional communities.

²⁴ Data on visiting for possible business investment was only collected in the International Visitor Survey in 2018.

²⁵ Business Events Council of Australia, (2019), The value of Business Events to Australia 2018-19

²⁶ Sustainable Tourism CRC, (2015), The national business events study, an evaluation of the Australian business events sector



Clifton Beach,
Queensland





4 TOURISM IS EVEN MORE IMPORTANT TO AUSTRALIA'S REGIONS



4.1 IMPORTANCE OF TOURISM TO AUSTRALIA'S REGIONS

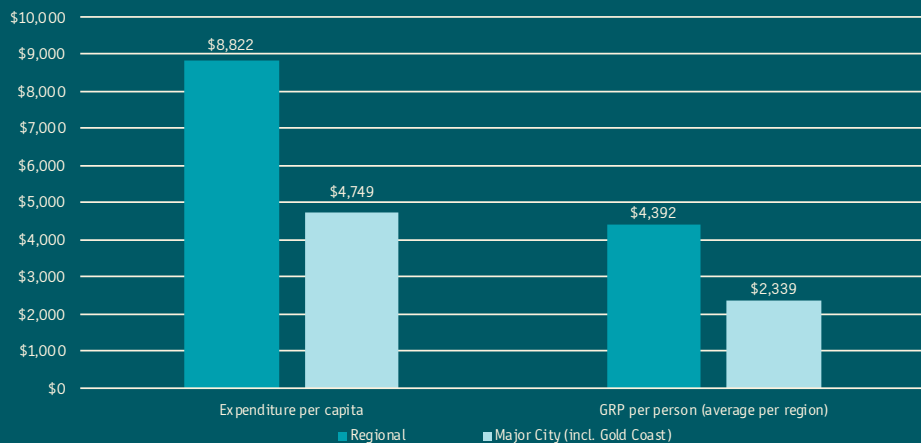
A strong and competitive tourism industry has widespread benefits for Australia's regions and residents. With many of Australia's iconic attractions located in regional destinations, tourism has a both significant role to play and impact in regional economies.

Visitors travel outside capital cities and spend in the regions: in local cafes and restaurants, for retail purchases, on tours and transport. Regional destinations are home to 31 per cent of the national population but attract approximately 44 per cent of total tourism expenditure.

Tourism expenditure makes a greater contribution to the economic activity in regional destinations than it does in major centres. There is a much higher level of visitor expenditure on a per capita basis in regional destinations than in cities: \$8,822 per capita in the regions compared to \$4,749 in the capital cities and Gold Coast.

This flows on to tourism's contribution to Gross Regional Product (GRP). In regional areas, tourism activity contributes an average of \$4,392 per resident compared to \$2,339 per resident in the major cities underlining how critical tourism is to the economic activity in regions.

CHART 4.1: TOURISM EXPENDITURE IMPACT IN URBAN AND REGIONAL AUSTRALIA, 2018-19



Source: Deloitte Access Economics, Tourism Research Australia and ABS
Notes: Average GRP per person is calculated as the average contribution of tourism to GRP across regions.

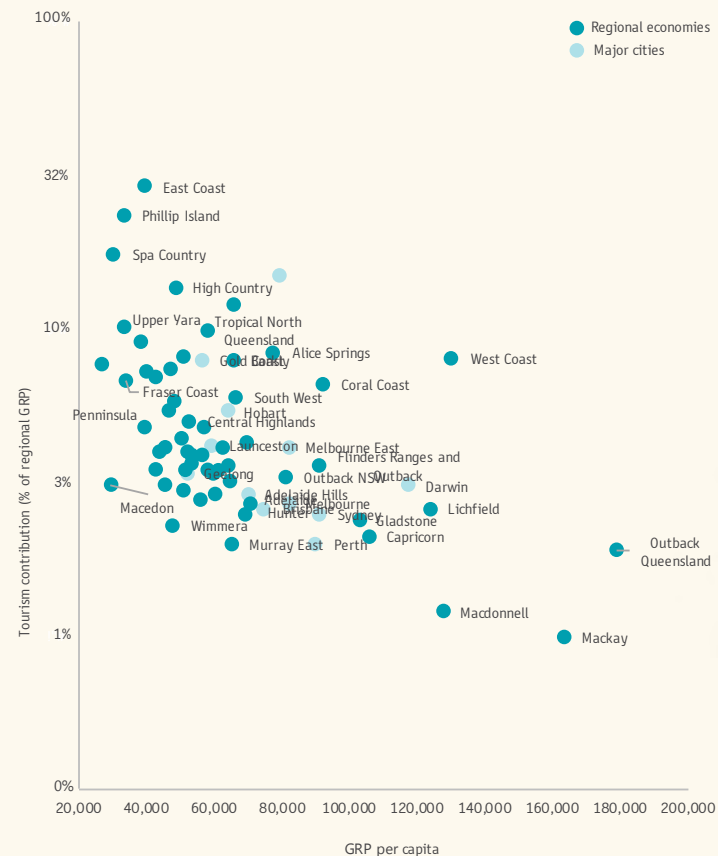
Tourism-related industries contribute twice as many jobs (from a share perspective) in regional locations than in the major cities. Outside of the capital cities and the Gold Coast, approximately one in nine jobs was in tourism, compared to about one in twenty jobs in the major cities.

The regions in which tourism is critical tend to be lower income regions (considered on a GRP per person basis). In the lowest income quartile of regions, 10 per cent of income is sourced from tourism, with one in every six jobs in the tourism industry, on average, compared to 3 per cent or one in every 14 jobs in the higher income regions.



Exceptional Kangaroo Island, South Australia

CHART 4.2: TOURISM EXPENDITURE IMPACT IN URBAN AND REGIONAL AUSTRALIA, 2018-19



Source: Deloitte Access Economics and Tourism Research Australia
Notes: Tourism contribution (% of regional GRP) – y-axis- is a log scale that has been re-labelled for readability



SPOTLIGHT: THE IMPORTANCE OF TOURISM TO REGIONAL DESTINATIONS

Regional destinations that have established themselves as tourism destinations reap the benefits of having higher levels of economic activity, thereby increasing their GRP. The relative impact that tourism can have on a regional economy is often greater than in capital cities, as tourism creates jobs and opportunities that may not otherwise exist in these regional areas, can raise the profile of the regional destination and improve amenity for the local community. The right investment in a tourist attraction has the potential to transform a regional destination. Some examples of successful tourism initiatives include:

- **Cairns Aquarium:** The Cairns aquarium opened in 2017 and quickly became one of the most popular destinations in the city. It provides a complementary and relevant experience given its location within the Great Barrier Reef region and serves as a place where visitors can learn about the surrounding reef and wildlife that is iconic to the area. The investment generated 600 jobs during construction and 130 permanent jobs upon opening. It averaged 1,200 visitors a day in its first few periods of operation.²⁷
- **Jackalope Hotel:** The Jackalope hotel opened in 2017 and was named ‘Australia’s hotel of the Year’ later in the same year. The five-star boutique hotel provides a unique experience located on the Willow Creek Vineyard, featuring unique architecture and immersive food and wine experiences. By its second year of operation, the hotel added more than 150 jobs to the Mornington Peninsula region in Victoria and raised the tourism profile of the region as a whole.²⁸
- **Big Pineapple:** The Big Pineapple, located in Woombye, Sunshine Coast, Queensland, was opened in 1971 and attracted one million visitors annually at its peak. Originally located at a pineapple farm, the surrounding property has been transformed over the years and now hosts a café, zoo and TreeTop Challenge course.²⁹

- **Crystalbrook Collection Hotels:** Crystalbrook Collection has transformed the Cairns skyline with a \$500 million investment in three new international hotels. These hotels delivered more than 800 new hotel rooms to Cairns and are estimated to have created 500 permanent jobs and injected more than \$900 million into the local economy.³⁰



Great Barrier Reef, Queensland

4.2 FLOW-ON IMPACT OF TOURISM FROM CAPITAL CITIES TO REGIONAL ECONOMICS

Tourism related businesses, such as hotels, restaurants and airlines, while often located in major centres are inextricably linked to regional economies through their trading relationships with upstream suppliers. Cafés and restaurants need to procure produce, airlines need to purchase petrol, hotels require a range of supplies including bedding linen, toiletries and furniture. Invariably, a component of these intermediate supply inputs are produced in regional areas. Thus, even when tourists stay and spend in capital cities, their consumption results in important flow-on benefits to regional economies. In 2018-19, visitors to capital cities indirectly contributed \$1.0 billion in terms of value added to regional economies and supported 12,200 jobs.

²⁷ Tourism Australia, (2020), Investment success stories, <<https://www.tourisminvestment.com.au/en/research-insights/success-stories.html>>. ²⁸ Ibid ²⁹ The Big Pineapple, (2021), < <https://www.bigpineapple.com.au/>>. ³⁰ Tourism Australia, (2020), Investment success stories, <<https://www.tourisminvestment.com.au/en/research-insights/success-stories.html>>.

SPOTLIGHT: THE VALUE OF INTERNATIONAL VISITORS TO THE AUSTRALIAN WINE INDUSTRY

The international visitor market is an important source of demand for the Australian wine industry. Even when international visitors stay in capital cities, they drink wine while dining in restaurants and purchase wine to take home. Demand from international visitors induces bars, restaurants, and bottle shops to purchase wine from Australian wineries, thus, creating demand for Australian wine producers.

In 2019, it is estimated that one in every four international visitors consumed Australian wine during their trip. They spent at least \$279 million on wine to drink while in Australia. Visitors from China and the UK were the biggest spenders on wine, purchasing a total value of \$46 million and \$43 million respectively.

Many international visitors take overnight or day trips to visit wineries. In 2019, more than 1 million international visitors, or roughly one in every nine international visitors, went to a winery during their time in Australia. Of these visitors, more than 84 per cent participated in wine tasting experiences at the wineries, and roughly a third purchased wine to take home.

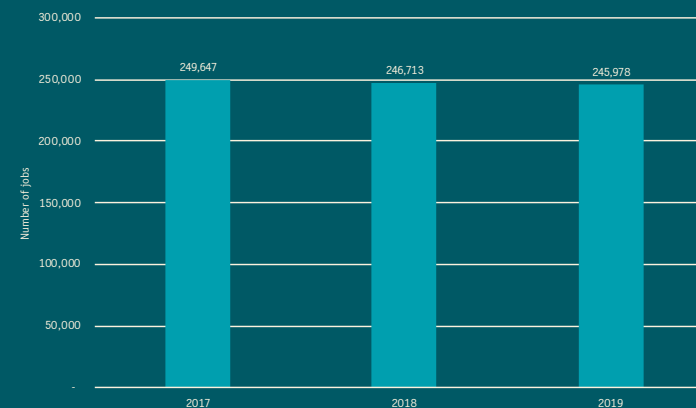
Furthermore, the experience of drinking Australian wines creates brand familiarity, increasing demand for Australian wine exports. China is one of the largest and, until recently, fastest-growing wine market for Australian wine, with exports to China in 2019 valued at \$1.2 billion in 2019, accounting for approximately 40 per cent of total Australian wine export value.

Comparatively, the US and the UK are also important wine exporting markets, contributing up to \$0.4 billion and \$0.3 billion to the industry export revenue in 2019. As premiumisation trends are driving the growth of exports, with many considering wine purchases as gifts, the Australian wine tourism is proving to be increasingly important, as higher values can be gained from visitors recommending Australian wines after their experience in Australia.³¹

4.3 FILLING REGIONAL EMPLOYMENT GAPS

Working holiday makers play a vital role in filling seasonal and regional skill shortages in Australia. Data collected by Tourism Research Australia indicates that approximately 300,000 working holiday makers enter Australia each year filling around 250,000 jobs in the Australian economy and contributing approximately \$1.5 billion in labour income to the Australian economy.³²

CHART 4.3: ESTIMATED NUMBER OF JOBS WORKED BY WORKING HOLIDAY MAKERS



Source: Deloitte Access Economics and Tourism Research Australia
Notes: Only main jobs worked by WHV holders are counted in this analysis. The average length of each job filled is approximately 10 weeks.

³¹ ABC News, (2019), Aussie wine exports continue to grow as industry spends big to reclaim Unites States market, <<https://www.abc.net.au/news/rural/2019-07-22/australian-wine-exports-increase-again-despite-us-market-losses/11335152>>. ³² Estimates from declared income from main job worked by WHV holders.



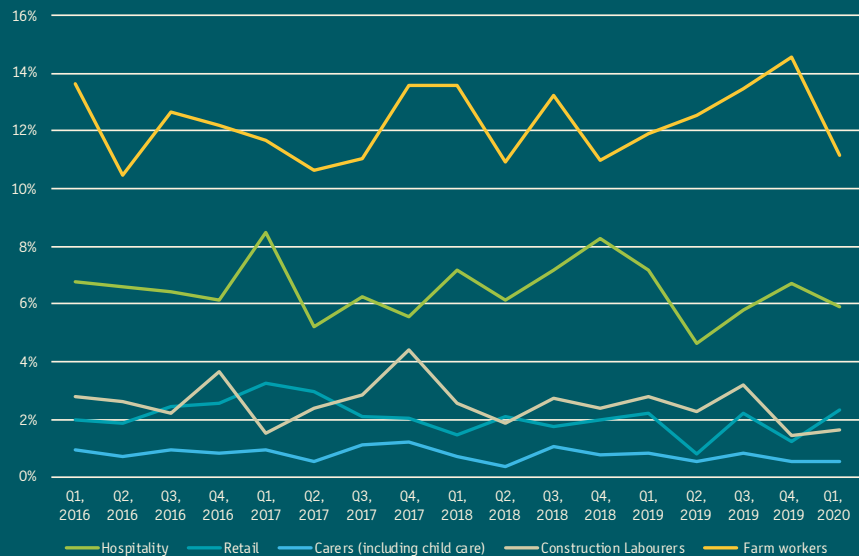
d'Arenberg Cube, South Australia



Wineglass Bay, Tasmania

Working holiday makers contribute to filling significant proportions of jobs in important industries throughout the Australian economy. They fill up to 14 per cent of farm worker jobs, and 8 per cent of hospitality jobs throughout Australia. The Australian Fresh Produce Alliance estimates that working holiday makers account for approximately 80 per cent of the fresh produce sector's harvest labour workforce.³³ Further, approximately one in three jobs held by working holiday makers are in Australian regions.

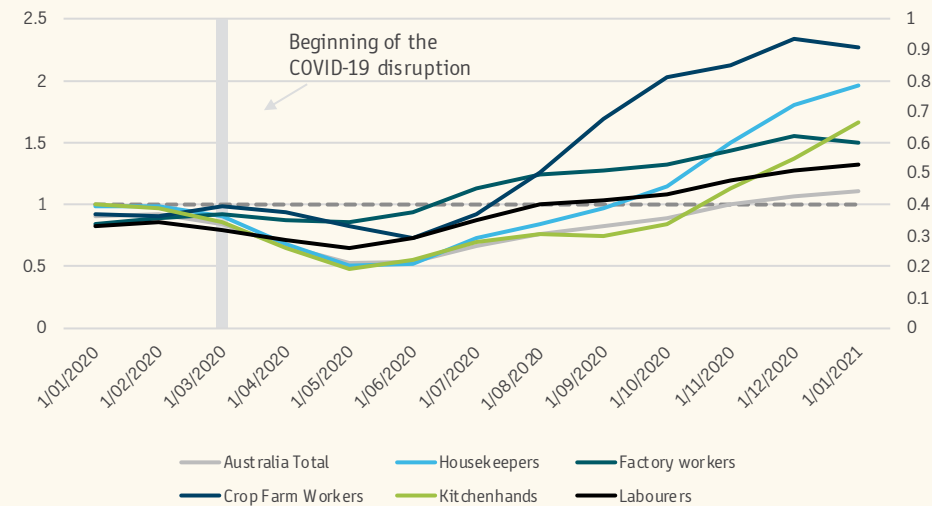
CHART 4.4: ESTIMATED PROPORTION OF OCCUPATIONS FILLED BY WHV HOLDERS



Source: Deloitte Access Economics, Tourism Research Australia and ABS

The COVID-19 pandemic highlights the important contribution made by working holiday makers to the Australian economy. Since March 2020, industries that employ working holiday makers have reported significant job vacancies (compared to baseline levels) than the average across the economy.

CHART 4.5: VACANCIES FOR OCCUPATIONS THAT TEND TO EMPLOY WORKING HOLIDAY MAKERS



Source: Deloitte Access Economics and ABS

³³ Australian Fresh Produce Alliance (2020). Joint Standing Committee on Migration: Inquiry into the Working Holiday Maker Program. https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Migration/WorkingHolidayMaker/Report.



Wula Gura Nyinda Eco Cultural Adventures,
Western Australia

Research undertaken by Tourism Australia³⁴ found that only around 40 per cent of young Australians aged 17 – 30 years would consider undertaking a working holiday in Australia, with just 27 per cent preferring to work in agriculture industries. With the pool of international working holiday makers not likely to return in the short to medium term, it is likely that the roles typically taken up by working holiday makers will be difficult to fill with Australians.

The impact of this temporary loss of working holiday makers will be registered most significantly in farming industries. Preliminary analysis conducted by Deloitte Access Economics indicates the value of the Australian fresh produce industry could decline by up to \$6 billion without access to working holiday makers, with flow on impacts to export revenue and employment in the broader economy.³⁵

In addition to filling labour shortages, working holiday visa holders also contribute significantly to the broader economy. Working holiday makers spend approximately \$3 billion in the Australian economy per year, approximately \$2 for every \$1 in earned income during their time in Australia. Research also suggests working holiday makers lead to a net increase in jobs in the Australian economy of approximately 0.1 for every visitor on a visa.³⁶

THE BENEFITS OF TOURISM EXTEND TO CULTURE, THE ENVIRONMENT AND TO COMMUNITIES

Beyond the economic benefits from the direct and indirect value of visitor expenditure, tourism activity from the development of new projects and experiences through to the consumption of tourism experiences generate social benefits which extend to culture, the environment and to local communities.

CULTURE

According to the United Nations World Tourism Organization (UNWTO), culture and heritage tourism has become one of the largest and fastest growing segments in global tourism, accounting for an estimated 40 per cent of all tourism worldwide.³⁷

Australia has a rich natural and cultural heritage that underpins our sense of place and national identity and makes a positive contribution to the nation's wellbeing. Our cultural heritage includes stories, traditions, events and experiences inherited from the past; it comprises natural, historic and Indigenous places with both tangible and intangible values.³⁸

Tourism provides the platform for visitors and residents to interact and share experiences around Australia's culture and heritage, which could support preservation efforts. Most importantly, tourism offers a powerful incentive for preserving and enhancing cultural heritage. In acknowledging the interconnectedness of tourism and culture, it is critical to ensure cultural sensitivities are understood and respected to then enrich the quality and authenticity of the visitor experience, providing meaning to tourists and sense of pride and purpose for the community.

ENVIRONMENT

Tourism can support efforts around environmental protection and conservation by raising awareness and generating new funding sources to go towards the protection of natural environments.

Tourism and the environment are inseparable, and both have to co-exist to bring about economic and social benefits to the community and to the landscape itself. The tourism sector has a significant social role to play to refine and protect the environment.

Tourism is uniquely positioned as tourists are compelled to preserve and protect what they love. Visitors and residents want to preserve their culture, their history, and their natural resources, especially when they can experience them first-hand.

The increasing prominence of ecotourism, an

environmentally responsible way to visit natural areas, will educate tourists about conservation efforts and research developments in fragile environments, while providing travellers a chance to experience these places. Some of the spending that occurs within ecotourism then funds conservation efforts, such as globally repopulating endangered species and reforestation. Where regular tourism efforts return about 20 per cent of revenue to local communities, almost all the revenue generated by ecotourism programs goes back into those communities.³⁹

Australia has a strong competitive advantage when it comes to its association with nature and wildlife, a key factor in the choice of a holiday destination among international travellers.⁴⁰ It is critical that Australia's natural assets are protected for the enjoyment of tourists and residents.

COMMUNITIES

Activity to support the growth of tourism will bring longer term benefits to the community. Tourism is a major driver of investment. Infrastructure development—including air, ground, port, and tourism services like hotels, attractions and car rental services plays a vital role in travel and tourism competitiveness, serving as the arteries of the sector.

These developments benefit not only the visitors, but also enhance the living conditions of residents. In a 2019 survey conducted by UNWTO and Ipsos across 15 countries including Australia, around half of the respondents indicated that tourism has a big or moderate impact in generating wealth and income. A much greater proportion of Australians (72 per cent) support this view, highest across the sampled countries.⁴¹

³⁴ Tourism Australia, (2020), Domestic Youth Travel

³⁵ Australian Fresh Produce Alliance (2020), Joint Standing Committee on Migration: Inquiry into the Working Holiday Maker Program. https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Migration/WorkingHolidayMaker/Report.

³⁶ Steen, A. Peel, V. (2015), Economic and social consequences of changing taxation arrangements to working holiday makers. <<https://researchoutput.csu.edu.au/en/publications/economic-and-social-consequences-of-changing-taxation-arrangement>>

³⁷ UNWTO, (2018), Tourism and culture synergies, <<https://www.e-unwto.org/doi/book/10.18111/9789284418978>>

³⁸ Australian Government, (2015), The Australian Heritage Strategy, <<https://www.environment.gov.au/heritage/australian-heritage-strategy>>

³⁹ USA Today, (2018), Positive & negative effects of ecotourism, <<https://traveltips.usatoday.com/positive-negative-effects-ecotourism-63682.html>>

⁴⁰ Tourism Australia, Consumer Demand Project

⁴¹ UNWTO, (2019), First ever UNWTO/IPSOs survey – citizens recognize the positive impact of tourism, <<https://www.unwto.org/global/press-release/2019-01-25/first-ever-unwtoipso-survey-citizens-recognize-positive-impact-tourism>>

5 TOURISM'S ROLE IN SUPPORTING AUSTRALIA'S GROWTH AGENDA

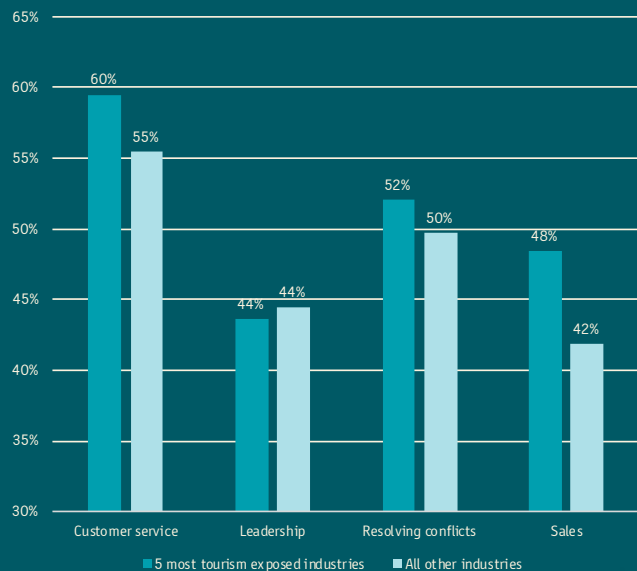
The Kimberley, Western Australia

5.1 TRAINING AND SKILLS FOR THE FUTURE

When tourism businesses train their staff they are supporting the tourism sector to invest in and develop skills for the future, namely customer service, leadership, resolving conflicts, and sales. These are inherently human skills that cannot be easily replaced by automation and other processes. They are also critical skills that are currently in shortage in Australia and are expected to be in even greater shortage in the coming decade. For almost all of these skills, the five most tourism-exposed industries contain higher proportions of employees that possess these skills when compared with all other (less tourism-exposed) industries.

Even though they are in shortage across all industries in Australia, the tourism industry has managed to foster and develop these skills among its workforce to a greater extent than other industries.

CHART 5.1: SHARE OF INDUSTRY EMPLOYEES WITH THE SKILLS FOR THE FUTURE, 2019



Source: Deloitte Access Economics

Jobs in the tourism industry are typically non-routine and cognitive, which are the least susceptible to automation and the most strongly complemented by technology. These are the jobs that have provided the most employment growth in Australia and will continue to do so to an even greater extent in the future.

The average age of staff in tourism-exposed industries is lower than other sectors. The tourism sector, in connection with the hospitality sector, play a particularly important role in providing employment to a younger cohort, often as firsts or early career jobs, equipping them with skills needed for the future. The relatively low barriers to entry across many tourism related sectors can provide an entry point to the jobs market.

5.2 LONG TERM CONNECTION WITH INTERNATIONAL TOURISTS

Tourism creates a valuable pool of 'alumni' who can share their experiences with others and who may return to visit Australia. Prior visitors become ambassadors as they tell others about their visit and build more interest in travel to Australia among their networks.

International visitors to Australia generally report very high levels of satisfaction with their experience. On the critical measure of whether they would recommend Australian as a holiday destination, the most common response was 10 (out of 10), with an average score of 8.8. Given the influence of both past experience and word-of-mouth in travel decisions, Australia's past travel ambassadors are critical to the continuing success of the sector.

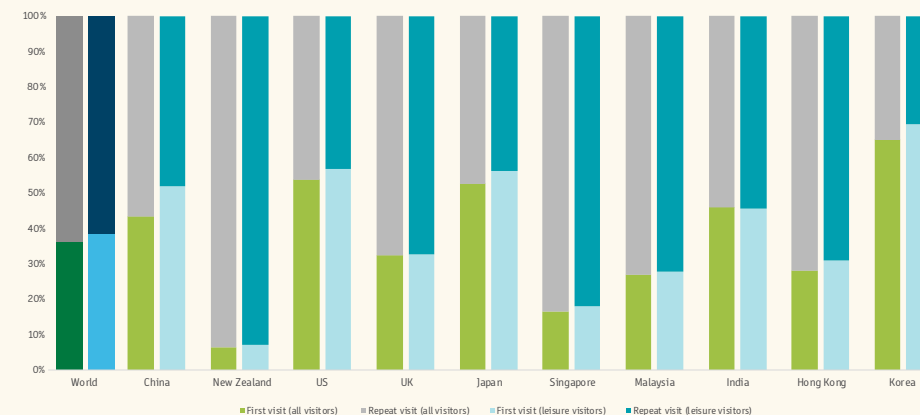
As well as being ambassadors for Australian tourism, many of Australia's international visitors are return travellers who make several trips across their lifetime. For each new international visitor to Australia, there is a lifetime value in connection to the multiple trips they will make to Australia over the years.

Almost two thirds of all international visitors to Australia have visited before. While it may not be surprising that most visitors from New Zealand have been to Australia more than once (94 per cent of visitors in 2019), it may be surprising that eight in ten visitors from Singapore and seven in ten from Malaysia are also return visitors (Chart 5.2). In 2019, returning visitor from New Zealand had visited Australia 11 times on average, while returning visitors from Singapore and Malaysia has visited 7 and 6 times previously respectively (Figure 5.1).

A higher proportion of US visitors are first-time visitors to Australia (54% first time visitors) compared to many of Australia's other key source markets. That said, while the share of repeat visitors from the US is lower, those returning have visited four times before on average.

Leisure visitors (those on holiday or visiting friends and family) are more likely to be first time visitors to Australia compared to other visitors.

CHART 5.2: COMPOSITION OF INTERNATIONAL ARRIVALS BY PROPORTION OF REPEAT VISITORS, 2019

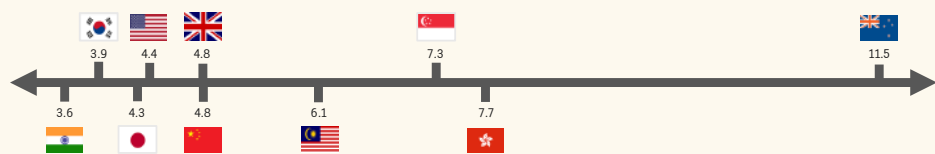


Source: Deloitte Access Economics and Tourism Research Australia



Kimberly,
Western Australia
Credit: HeliSpirit

FIGURE 5.1: AVERAGE NUMBER OF PRIOR VISITS AMONG RETURN VISITORS TO AUSTRALIA, 2019



Source: Deloitte Access Economics and Tourism Research Australia

Considering the proportion of repeat visitors, the average number of previous trips and the spend of visitors across Australia's key visitor source markets (both on the first visit and across return visits), each first-time visitor to Australia has the potential to bring a considerable lifetime value^{42,43} to Australia (Table 5.1).

The countries with the highest lifetime values per return visitor are those who are major source markets for international education, namely China and Hong Kong.

TABLE 5.1: LIFETIME VALUE OF FIRST-TIME VISITORS TO AUSTRALIA

SOURCE MARKET	RETURNING TRAVELLERS	AVERAGE NUMBER OF PREVIOUS TRIPS	AVERAGE SPEND PER (RETURN) TRIP	LIFETIME VALUE OF FIRST-TIME VISITORS (PER VISITOR)
New Zealand	94%	11.5	\$2,017	\$23,533
China	57%	4.8	\$11,243	\$37,177 ⁴⁴
US	46%	4.4	\$4,822	\$15,274
UK	68%	4.8	\$4,750	\$20,943
Japan	48%	4.3	\$4,578	\$13,915
Singapore	83%	7.3	\$3,714	\$26,029
Malaysia	73%	6.1	\$4,170	\$21,354
India	54%	3.6	\$4,512	\$14,067
Hong Kong	72%	7.7	\$5,327	\$33,118
Korea	35%	3.9	\$6,725	\$14,568

Source: Deloitte Access Economics and Tourism Research Australia

⁴² Lifetime value is captured by the likelihood of return visitation, the average number of prior trips among return travellers and the average spend per first time and return traveller trip.

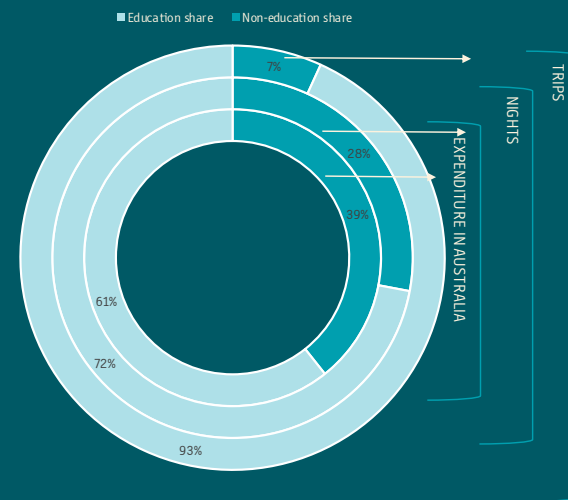
⁴³ It is worth noting that this methodology presents figures in nominal terms with no account for inflation or likely changes in future travel behaviours. This is a stylised approach designed to highlight the value of first-time visitors on an aggregated level, but does not predict when visitors will return.

5.3 OPPORTUNITIES FROM INTERNATIONAL EDUCATION VISITORS

Australia is a highly regarded destination for quality education. While education is the primary reason cited by international students for studying in Australia, students may also be motivated by the various travel opportunities available to them during their studies. From a tourism sector perspective, international students are a critical segment as they travel broadly themselves, they attract friends and relatives to visit them in Australia while studying and at graduation, they are likely to be return visitors themselves in the future with many becoming lifelong advocates for Australia.

Across many key international visitor source markets, education visitors represent a higher share of spend and nights in Australia than visitors travelling for other reasons. In 2019, 594,000 international visitors travelled to Australia with education as the main reason for their trip.⁴⁵ These education visitors typically stay in Australia much longer than other international visitors. Across markets, education visitors stayed for an average 129 nights, compared to 24 nights among other international visitors. Education visitors are higher yielding from a total visitor spend per trip perspective than other international visitors, spending on average \$20,800 compared to \$2,350 per trip for other visitors in 2019.

CHART 5.3: INTERNATIONAL EDUCATION SHARE OF INTERNATIONAL TRIPS, NIGHTS AND EXPENDITURE IN AUSTRALIA, 2019



Source: Deloitte Access Economics and Tourism Research Australia

⁴⁴ China's large lifetime value is largely attributed to a higher average spend per return trip due to international education visitors.

⁴⁵ Tourism Research Australia, (2021), International Visitor Survey, <<https://www.tra.gov.au/>>.

International students can induce friends and relatives from their home country to visit them in Australia. In 2019, 293,000 international leisure visitors (around 12 per cent of leisure visitors) indicated that they were visiting an international student relative or friend studying in Australia.⁴⁶ These visitors spent \$957 million over 5.6 million nights, representing 3.0 per cent of total spend in Australia.

While onshore, international students contribute to the vibrancy and economy of Australia, with many taking domestic trips and joining the labour force. International students help to build Australia's cultural capital and diversity and benefit cross-cultural knowledge exchanges. Post-study, migration pathways can offer further benefits to Australia's productivity and skilled workforce. More broadly, international education is seen to contribute to soft diplomacy, cultural interlinkages and the development of trade and investment.⁴⁷



The Maria Island Walk, Tasmania

period without international visitor demand, interrupted domestic demand and quickly evolving consumer trends.

The successful recovery of the tourism sector is an important plank of Australia's brand on the global stage. As the country emerges from the challenges of the pandemic, a strong nation brand will bring widespread benefits to Australia's trade, investment and international education and skilled migration.

In the body of literature published on nation branding, and in Deloitte Access Economics' modelling, it was found that an improvement in a country's nation brand ranking has a positive effect on merchandise exports, foreign direct investment (FDI), tourism expenditure and number of international students. A one-place improvement in rank in the Brand Finance Brand Strength Index for Australia is associated with a one per cent increase each in value merchandise export (\$3.1 billion per year) and FDI (\$704 million per year), a 0.4 per cent increase in tourism (\$174 million per year) and a 0.6 per cent increase in international students' sector (\$137 million per year).

⁴⁶ While there are some difficulties in attributing trips solely to visiting international students, analysis conducted by Deloitte Access Economics in 2015 based on supplementary Tourism Research Australia questions found the number of 'attributable' leisure visitors who responded that visiting an international student relative or friend studying in Australia' was a reason for their trip comprised only 20 per cent of all international visitors to Australia who visited an international student during their stay. Moreover, a small fraction of business trips may be spurred by a desire to visit an international student, not captured in this attribution value.

⁴⁷ Deloitte Access Economics, (2015), The value of international education to Australia (report commissioned by Australian Government Department of Education and Training), <<https://internationaleducation.gov.au/research/research-papers/Documents/ValueInternationalEd.pdf>>.

⁴⁸ Tourism Australia, Consumer Demand Project



Hot air balloon over Parliament House, Australian Capital Territory

EMBARKING ON THE ROAD AHEAD

North Stradbroke Island,
Queensland

6.1 TRAVEL WILL ENDURE

The travel and tourism sector has been struck with an immense and intense shock in 2020, and there will be many challenges on the road ahead.

With vaccination programs picking up pace globally, there is a sense of optimism that international travel can and will gradually return. Destinations around the world are hopeful pent up demand from long periods of lockdown, quarantine requirement and general uncertainty around travel will bring back leisure travel and perhaps even see travellers willing to spend more and seek premium or more sustainable experiences when they travel.⁴⁹

While the current COVID-19 pandemic has raged through societies at an unimaginable scale and speed not witnessed before, the tourism sector has dealt with and survived several major crisis such as terrorist attacks, global financial crisis and SARS. The basic needs of human beings to connect with each other, be it for leisure or business will withstand the virus.⁵⁰

The way the world takes on travel is already shifting to adapt to new protocols required to meet health requirements. Despite some form of inconvenience, the urge to travel will reassert itself. While the return to pre-pandemic levels, especially for international tourism, will take a few years and is likely to look different, it is clear that the need for and desire to travel will sustain.



Wilpena Pound Resort,
South Australia

6.2 THE ROAD TO RECOVERY

While we await the return of international travel

With limited prospects of international travel in 2021, Australian tourism faces a significant drop in the usual level of visitor expenditure. In 2019, international visitors spent a record \$45 billion, or 30 per cent of the tourism sector's 'usual' \$150 billion in spend. These 9.5 million international visitors spent an average of \$5,210 per trip.

As Australians turn their focus to domestic travel pursuits, will they redirect some of their overseas travel budget to augment their 'usual' domestic travel budget?

Australians took more than 11 million overseas trips in 2019, with an average spend per trip of \$6,520. When Australians travel at home, however, the average spend of a domestic trip is far less, at about \$690 per trip.

Some Australians will choose to save and wait until overseas travel resumes, but others may opt for a greater level of travel in Australia, encouraged in part by government marketing campaigns and incentives.

To offset the shortfall in international visitor spend, any increase in domestic travel by Australians needs to be above already high levels of domestic tourism activity. In 2019, Australians each took 4 domestic overnight trips and further 10 day trips, spending a total of \$4,189 per capita on domestic tourism (see also Figure 2.1).

How many additional trips will Australians take during this domestic only period?

- If every Australian took an additional overnight domestic trip, this would replace approx. \$17 billion or about 38 per cent of the international visitor spend shortfall
- It would take around seven domestic overnight trips to generate the equivalent spend of one international visitor
- To make up for the entire shortfall would need every Australian to take an additional three overnight trips, or 17 day trips, or a combination of these

⁴⁹ Huffpost, (2021), 'Revenge travel' will be all the rage over the next few years, <https://www.huffpost.com/entry/revenge-travel-future_16052b724c5b638881d29a416>

⁵⁰ The Economist (2021), Tourism will rebound after the pandemic, <<https://www.economist.com/special-report/2021/02/11/tourism-will-rebound-after-the-pandemic>>



Remarkable Rocks, Kangaroo Island, South Australia

FIGURE 6.1: HOW TO OFFSET LOSS OF INTERNATIONAL VISITOR SPEND, 2019

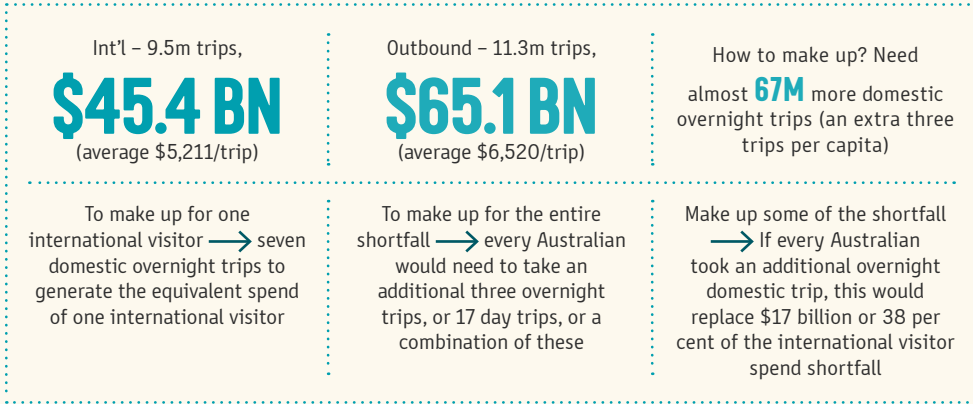


TABLE 6.1: TOURISM KEY FIGURES, 2019

MEASURE	FIGURE
International arrivals	9,465,900
International expenditure (total trip spend)	\$45.4 billion
Average spend per trip	\$5,211
Outbound trips by Australians	11,300,000
Outbound expenditure	\$65.1 billion
Outbound spend per trip	\$6,520
Australians' domestic overnight trips	117.5 million
Australians' domestic overnight expenditure	\$80.7 billion
Australians' domestic overnight average trip spend	\$687 per trip
Australians' daytrip expenditure	\$106

Source: Deloitte Access Economics, Tourism Research Australia, and ABS (2021).

Note: International visitor survey samples short term international travellers aged 15 years and above.



Castle Rock, Bass Strait, Tasmania

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