

TOURISM AUSTRALIA UPDATE

Dominic Mehling - Industry Relations Manager – ACT, NSW, NT & QLD
28 July 2022 – North Coast Tourism Symposium

TODAY'S UPDATE



WHO IS TOURISM AUSTRALIA?



THE STATE OF PLAY



WHAT WE'VE BEEN UP TO



WHERE TO FROM HERE?



COME ALONG WITH US ON THE JOURNEY

WHO IS TOURISM AUSTRALIA?

Tourism Australia is the Australian Government agency **responsible for attracting international visitors to Australia**, both for **leisure and business events**.

TOURISM AUSTRALIA



OUR MANDATE

- To **influence people to travel to Australia**, including for events
- To influence people travelling to Australia to also **travel throughout Australia**
- To help foster a **sustainable** tourism industry in Australia
- To help **increase the economic benefits** to Australia from tourism

OUR VISION

To make Australia the most desirable & memorable destination on earth

OUR PURPOSE

To invite the world to experience the Australian way of life

OUR TARGET MARKETS



9.5 MILLION VISITORS

\$45 BILLION SPEND

1 IN 13 JOBS

*Pre-COVID figures

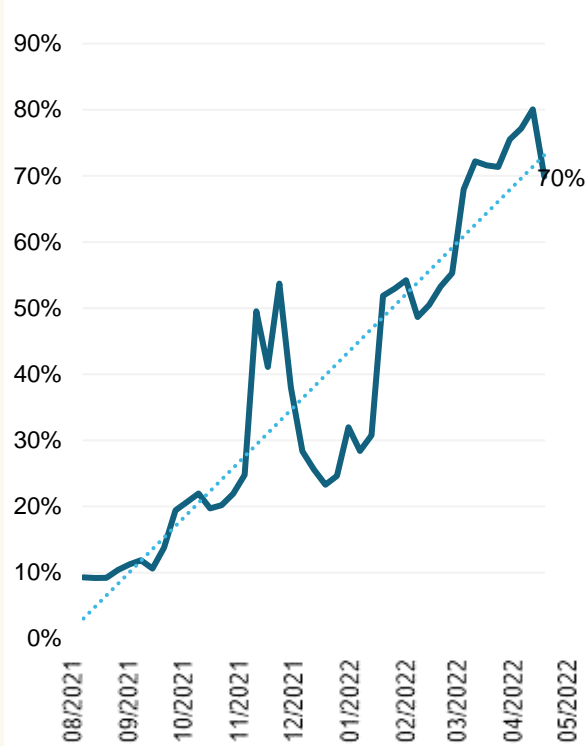
OUR TARGET SEGMENTS



THE STATE OF PLAY

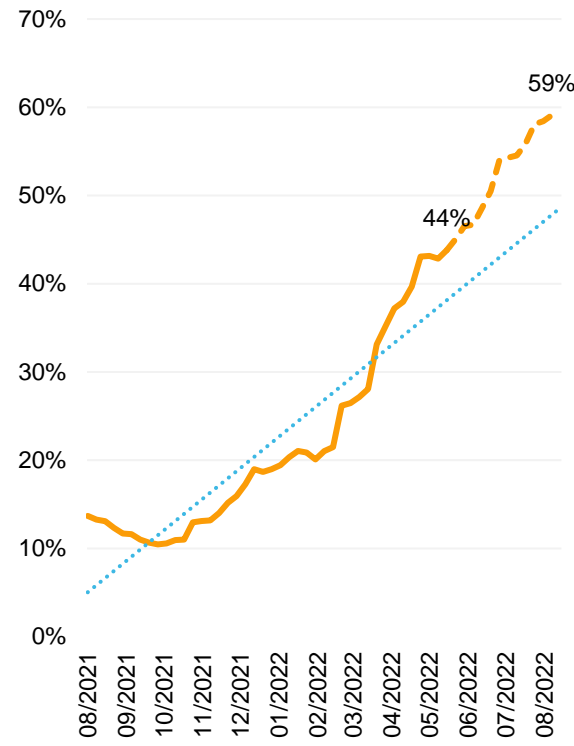
DEMAND IS RECOVERING DOWN THE SALES FUNNEL

SEARCHES: SKYSCANNER SEARCHES TO AUSTRALIA - % OF 2019 VOLUMES
Aug 21 - May 22 (vs 2019)



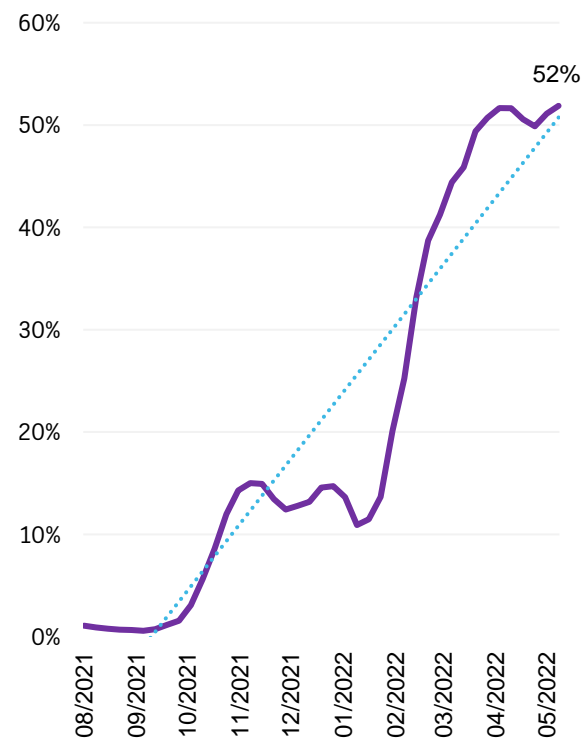
Source: Skyscanner, Flight Searches, Search Date between Aug 21 - May 22 (31-May-2022 latest available)

CAPACITY: AVIATION CAPACITY TO AUSTRALIA - % OF 2019 VOLUMES
Aug 21 - Aug 22 (vs 2019)



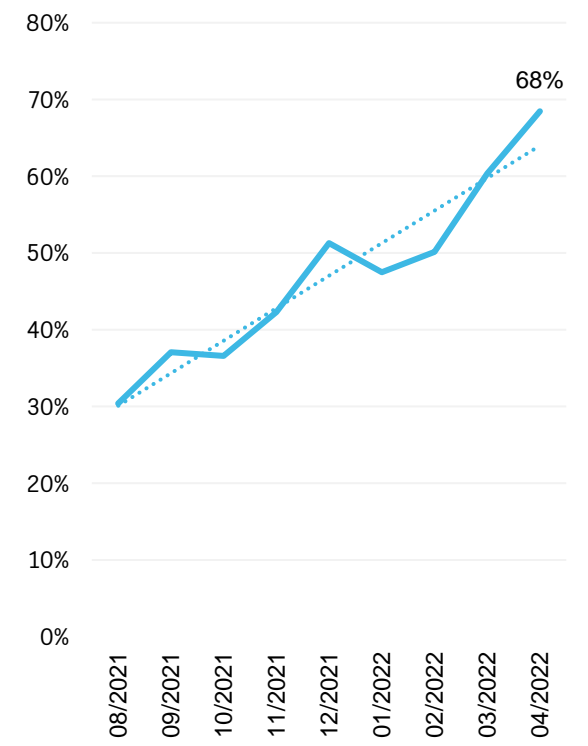
Source: Cirium - SRS Analyser, Aviation Capacity between Aug 21 - May 22 (31-May-2022 latest available)

BOOKINGS: FORWARD BOOKINGS TO AUSTRALIA - % OF 2019 VOLUMES
Aug 21 - May 22 (vs 2019)



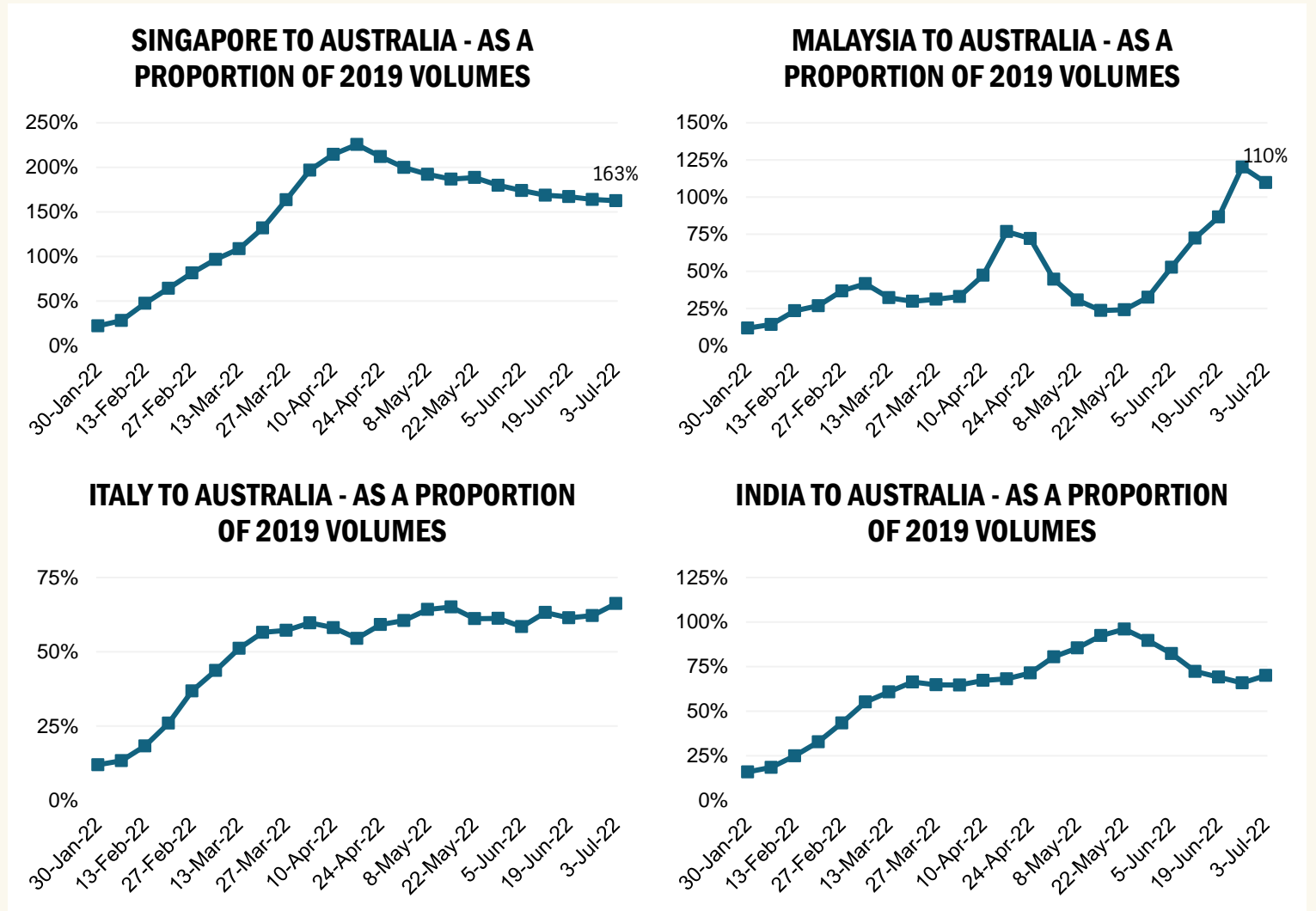
Source: ForwardKeys, Flight Bookings, Ticket Issued Dates between Aug 21 - May 22 (22-May-2022 latest week available)

OCCUPANCY: HOTEL OCCUPANCY RATES ACROSS CAPITAL CITIES
Aug 21 - April 22



Source: STR - Capital City + Cairns Hotel Performance, Occupancy Rates between Aug 21 - April 22

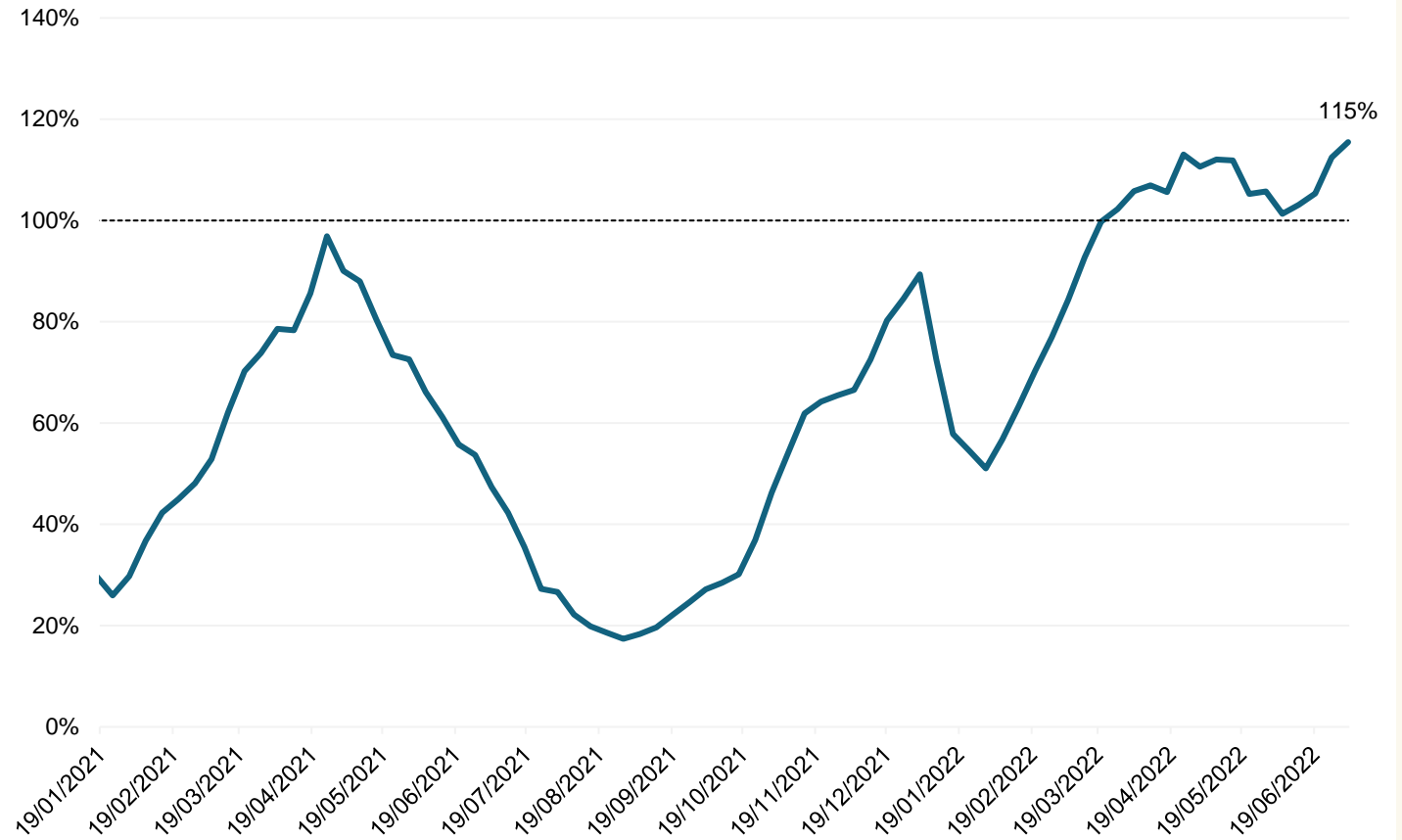
AUSTRALIA IS SEEING IMPRESSIVE GROWTH FROM SHORTER HAUL, AND NEWLY DIRECT MARKETS...



Source: ForwardKeys, Flight Bookings, Ticket Issued Dates between Aug 21 - June 22 (19-June-2022 latest week available)

AUSSIES ARE LOVING TRAVEL AGAIN: DOMESTIC TRAVEL HAS RETURNED TO PRE-PANDEMIC LEVELS

RECOVERY: AUSTRALIAN DOMESTIC FORWARD BOOKINGS AS A PROPORTION OF 2019
Jan 2021 – July 2022 (vs 2019)

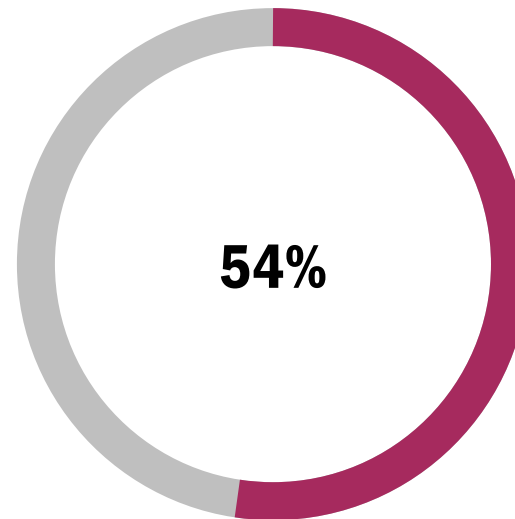


Source: ForwardKeys, Actual Air Tickets, Ticket Issued Dates between Jan 21 - July 22 (03-July-2022 latest week available)

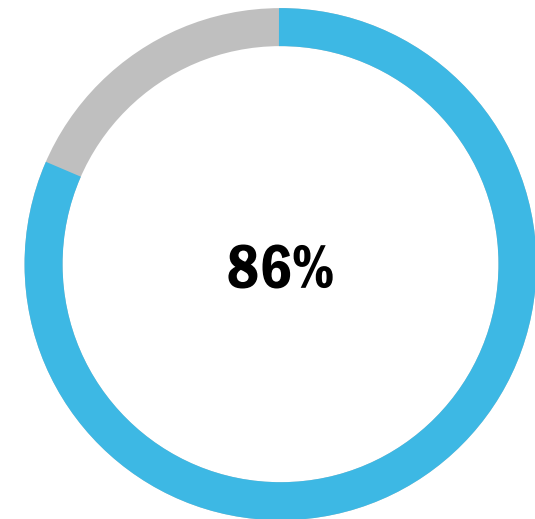
AUSTRALIANS ARE TRAVELLING OUTBOUND IN GREATER NUMBERS THAN INBOUND VISITORS HOWEVER, WORSENING OUR TOURISM DEFICIT

FORWARD BOOKINGS: INBOUND vs OUTBOUND

3rd July 2022 vs 2019 volume



Inbound bookings



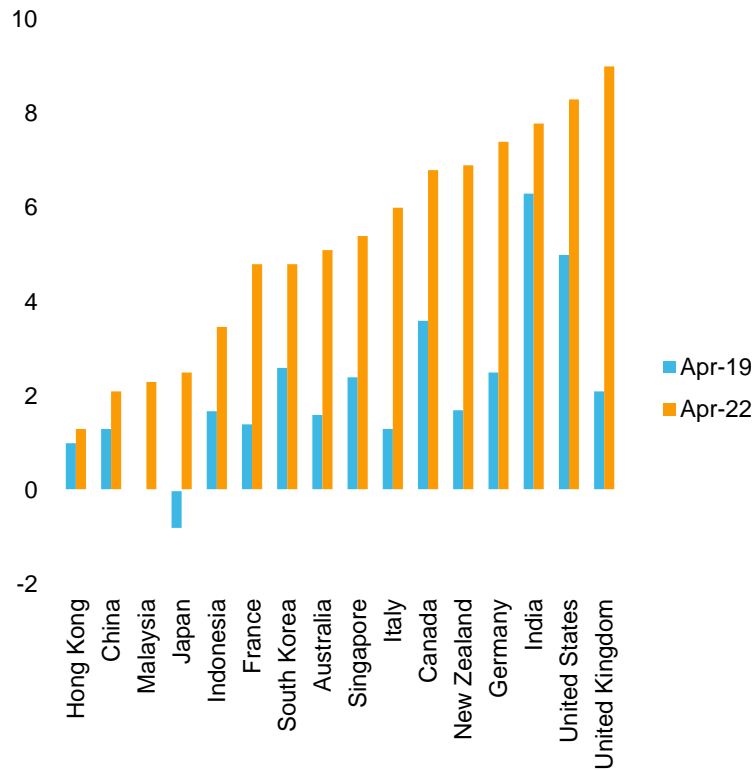
Outbound bookings

Source: ForwardKeys, Actual Air Tickets, Ticket Issued Dates between 12-06 – 3-07 4 weeks rolling (3-July-2022 latest week available)

MACRO ECONOMIC HEADWINDS ARE PROVING CHALLENGING

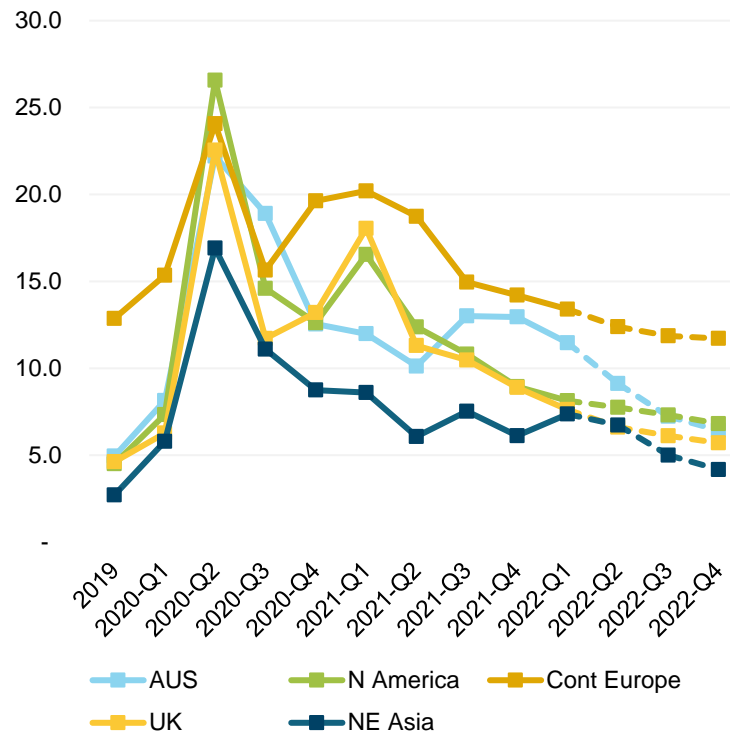
INFLATION RATES

Inflation rates for April 2019 vs April 2022



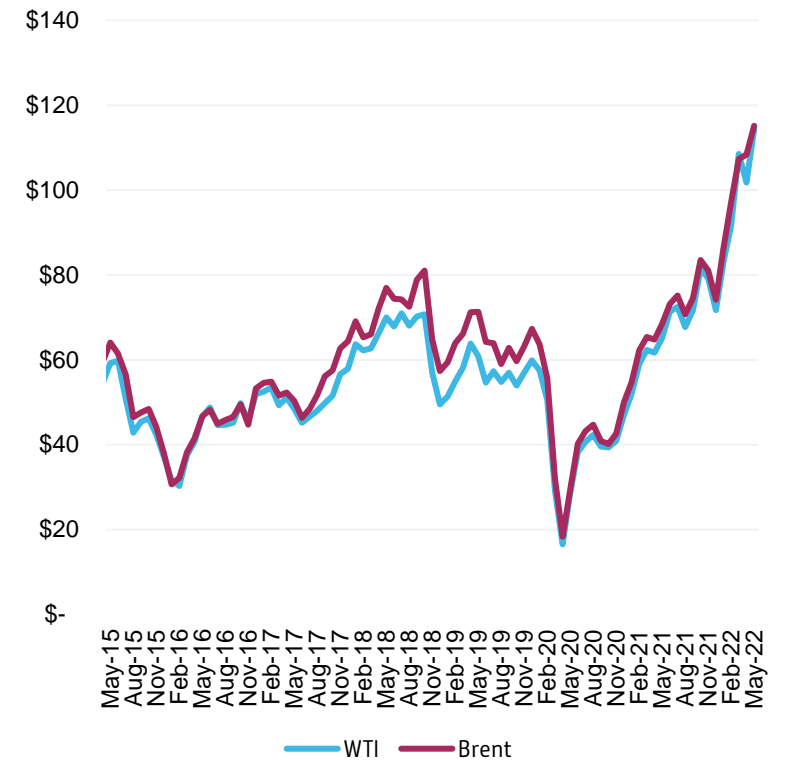
HOUSEHOLD SAVINGS

Savings as a % of household disposable income 2019 - 2022



CRUDE OIL SPOT PRICE

USD per barrel - Jan 15 - Apr 22

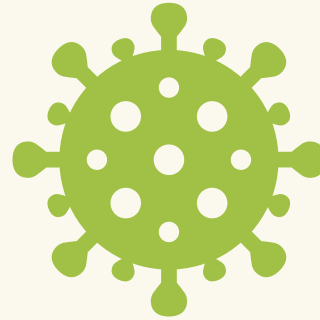


Source: Various Government Agencies via Trading Economics, 2022

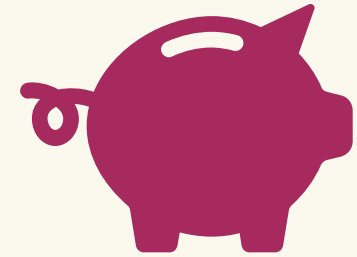
Source: OECD, Net Savings % of Household Disposable Income, Household Savings Forecast. Quarterly 2019-2022

Source: Crude Oil Prices, West Texas Intermediate (WTI) and Brent Prices, Monthly Spot Prices, Jan-15 - May 22

A GLOBAL SHIFT OF PRIORITIES HAS TAKEN PLACE

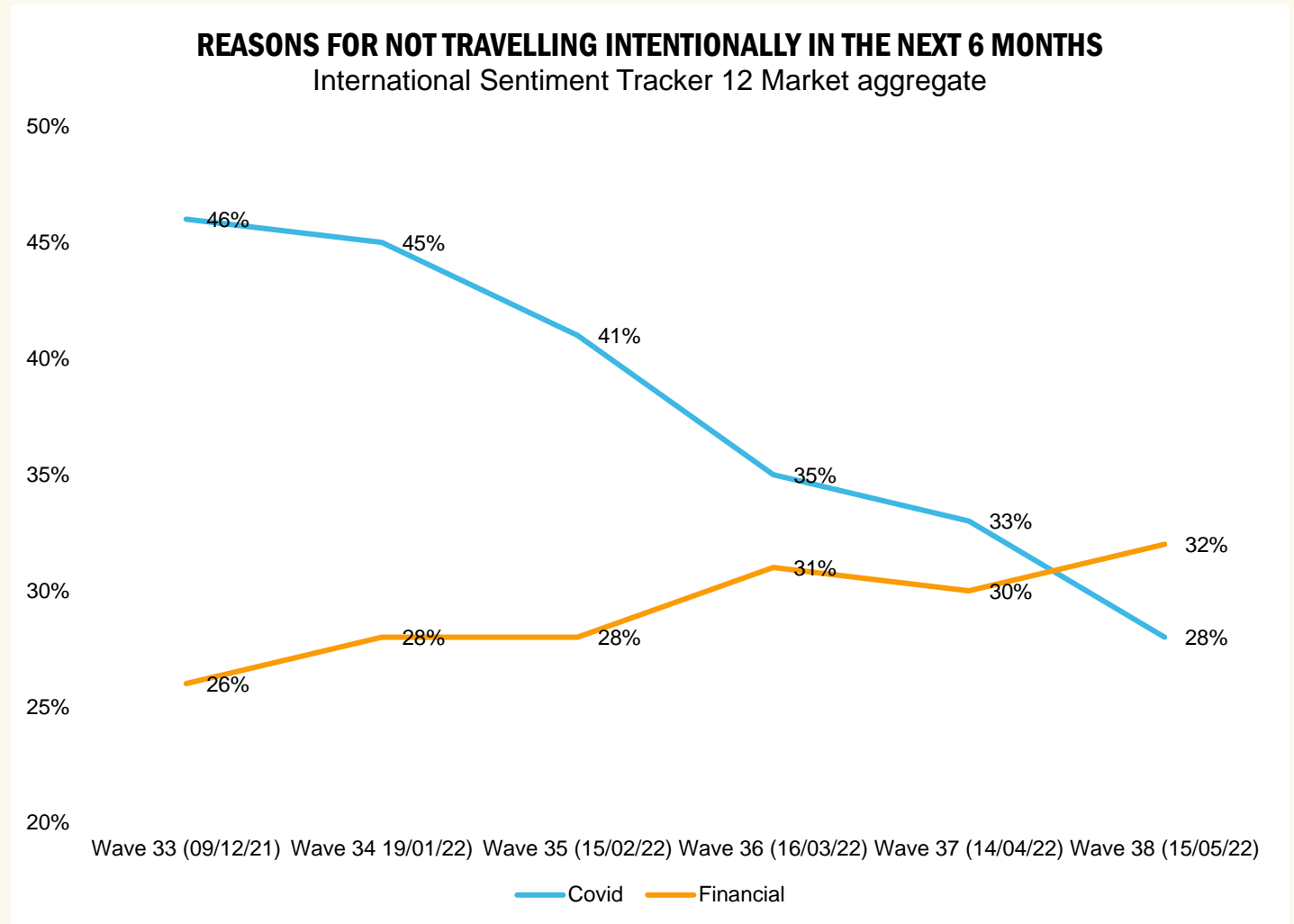


**HEALTH
CONCERNS**



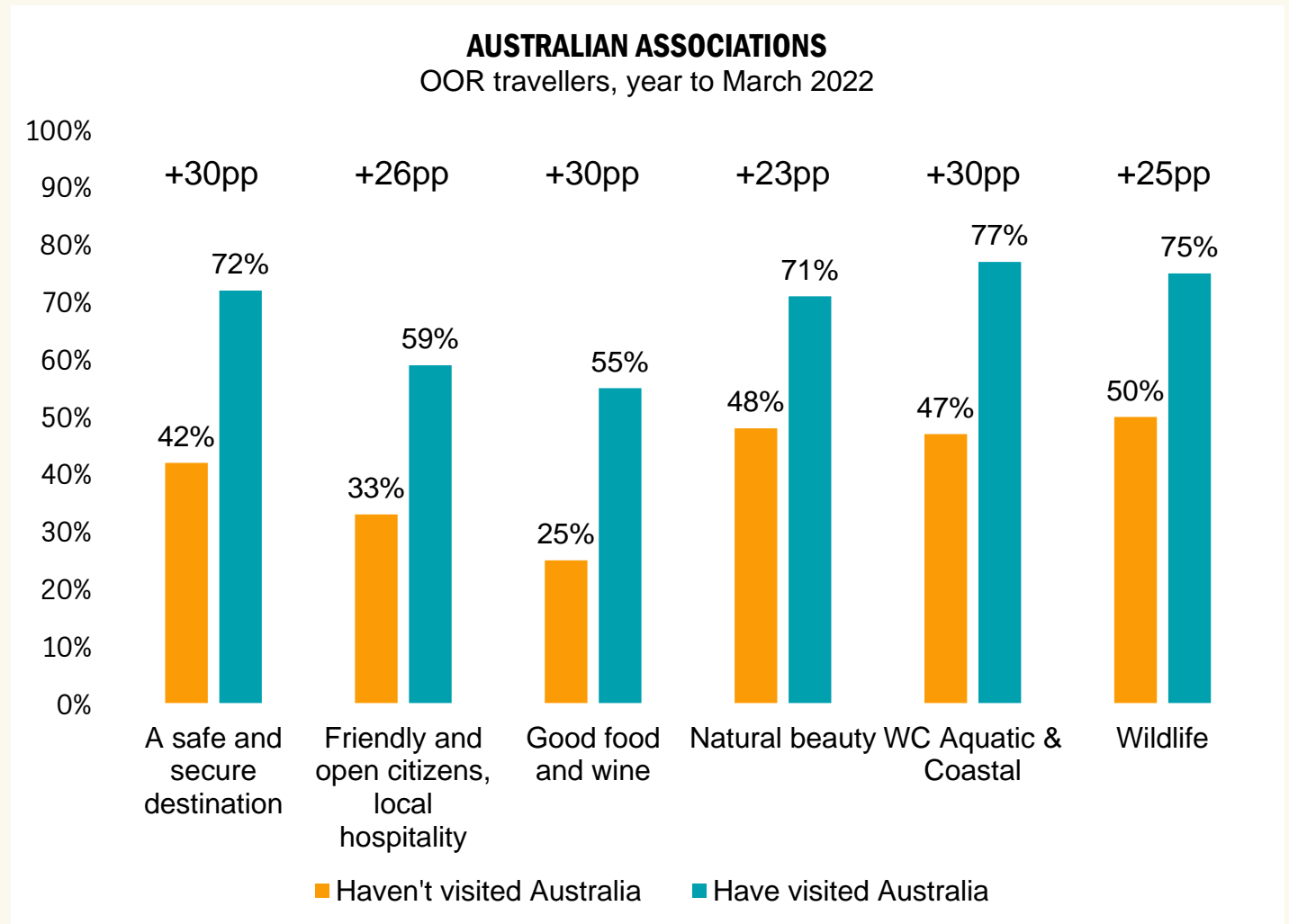
**WEALTH
CONCERNS**

FINANCIAL CONCERNS HAVE OVERTAKEN COVID-19 FEARS AS THE MAIN BARRIER FOR INTERNATIONAL TRAVEL



Source: Tourism Australia International Sentiment Tracker, Waves 33 - 38

WE NEED TO KEEP DOING WHAT WE ALWAYS DO – OVERDELIVER WITH EXTRAORDINARY TOURISM EXPERIENCES



Source: Tourism Australia CDP year to March data

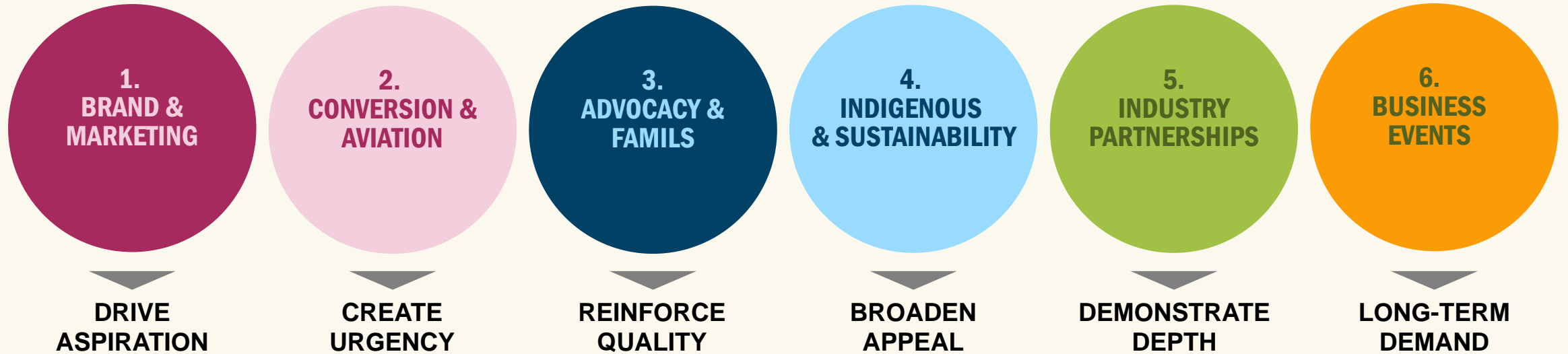
GLOBAL DEMAND IS STILL PREDICTED TO RETURN TO 2019 LEVELS BY 2024, AND THEN GROW STRONGLY FROM THERE



Source: Oxford Economics, Global Travel Services, CY2010 – CY2030 (forecasted)

WHAT WE'VE BEEN UP TO

AREAS OF FOCUS 2023



1. GLOBAL ANNOUNCEMENT

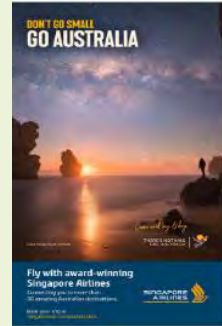
ANNOUNCEMENT UK & US



**DESTINATION
AUSTRALIA**
Reimagining the future of tourism

2. CONVERSION & ADVOCACY

DON'T GO SMALL, GO AUSTRALIA UK & US



ATE22
AUSTRALIAN TOURISM EXCHANGE

Live - 16-18 May
Online - 23-25 May

Germany, France, Italy



3. GLOBAL BRAND LAUNCH

COME SAY G'DAY BRAND LAUNCH

JAN

FEB

MAR

APR

MAY

JUN

JUL

AUG

SEPT

OCT

NOV

DEC

WORKING HOLIDAY MAKER



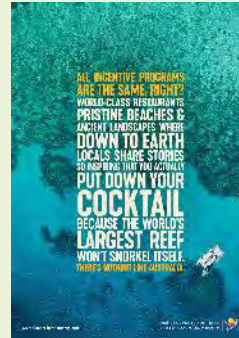
YOURS TO EXPLORE



Singapore, Malaysia,
Indonesia, India, South Korea
and Japan

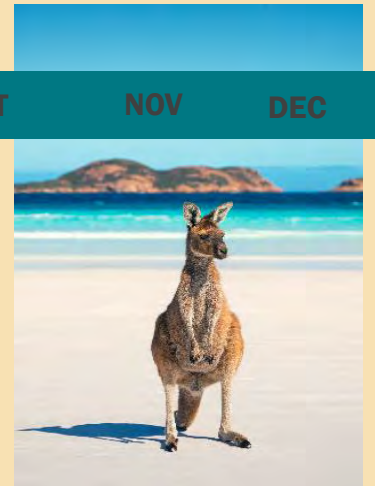
BUSINESS EVENTS International & Domestic

Australia
ON TOUR
North America 2022



AUSTRALIA MARKETPLACE

North America (Aug)
Korea & Japan (Sep)
UK & EU (Nov)



PR

FAMILS

PARTNERSHIPS

AUSTRALIA IS YOURS TO EXPLORE

Singapore, Japan, India, Malaysia, Indonesia & South Korea

Japan.
街と海がマリアージュする最高の席で。
ワクワク大陸、いよいよ再開。

ゴールドコースト(クイーンズランド州)

旅の計画は、オーストラリア政府観光局
公式ウェブサイトへ australia.jp

ここにしかない驚き。
オーストラリア

Singapore.
FOLLOW IN ANCIENT FOOTSTEPS.
AUSTRALIA IS YOURS TO EXPLORE

There's nothing like Australia.

Singapore.
PULL UP THE BEST SEAT IN THE HOUSE.
AUSTRALIA IS YOURS TO EXPLORE

There's nothing like Australia.

Singapore.
COME DOWN TO THE TOP OF THE WORLD.
AUSTRALIA IS YOURS TO EXPLORE

There's nothing like Australia.

Singapore.
DIVE INTO NEW ADVENTURES.
AUSTRALIA IS YOURS TO EXPLORE

There's nothing like Australia.

Singapore.
DISCOVER A GREAT DEAL MORE.
AUSTRALIA IS YOURS TO EXPLORE

Rottneet Island, Western Australia AUSTRALIA



Instagram

australia.jp

詳しくはこちら

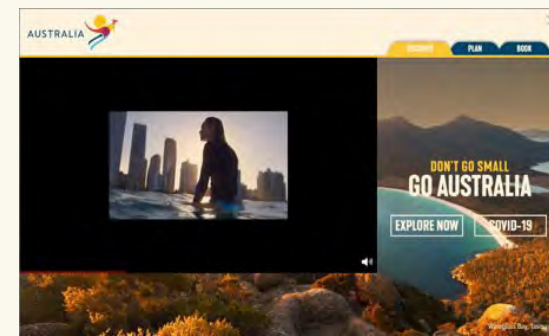
いいね! : mtsukak. @400人

australia.jp さま、ワクワク大陸オーストラリアへ！
日本のみなさん、オーストラリアがいよいよ再開です！

書きとあった空想と海、壮大な大地、とれたてのシーフード、キュートな動物たち、そしてフレンドリーな人々。

GO AUSTRALIA

UK, US, Germany,
France, Italy



GO AUSTRALIA 30”



WORKING HOLIDAY MAKERS

Message: Come and experience the enjoyable Aussie lifestyle

PHASE 1: ANNOUNCE



PHASE 2: CONSIDER & BOOK



BUSINESS EVENTS



BUSINESS EVENTS 60”



WHERE TO FROM HERE?

OPPORTUNITIES & SECTORS FOR THE FUTURE

ADVENTURE



**INCLUDES PHYSICAL
ACTIVITY, A CULTURAL EXCHANGE &
A CONNECTION WITH NATURE**

WELLNESS



**PROMOTES HEALTH &
WELL-BEING WITH A REGENERATIVE
FOCUS**

YOUTH



**A FOCUS ON YOUNG TRAVELLERS –
BACKPACKERS, WORKING HOLIDAY
MAKERS AND EDUCATION TRIPS**

AGRITOURISM



**WEAVES INTO AN EXPERIENCE OR
DESTINATION A CONNECTION TO
FOOD, DRINK OR PRODUCE**

EVENTS



**BOOSTING DESTINATION APPEAL,
AND VISITATION, AROUND EVENTS**

**INDIGENOUS
SUSTAINABILITY
ACCESSIBILITY**

WHAT HYTS **SEEK** FROM EXPERIENCES



Sensory Immersion

Pent-up demand to deeply indulge multiple senses

Uniqueness

A local twist showcasing the unique flavour of the destination makes it memorable as something they can't do at home

Familiarity

Exposure domestically piques interest in trying internationally

Fame / Icons

Turn an itinerary builder into a driver of destination choice

Experiential learning

Interactive, hands-on and active learning – as distinct from passive lecturing/listening

WHAT MAKES AN EXPERIENCE DESIRABLE AND MEMORABLE?

What it is

- ✓ Pleasurable in the moment
- ✓ Makes vivid memories or Instagrammable pictures
- ✓ Something you can only experience in the destination
- ✓ Deepens understanding of place and/or people
- ✓ Sensorial: touch, taste, scent, visuals, sounds
- ✓ Immersive and creates connection – to the extent the traveller wants



What it is not

- ⊘ Strenuous effort
- ⊘ Time consuming to access
- ⊘ Accessed easily or cheaply at home
- ⊘ Dangerous (some risk works for thrill-seekers, within acceptable safety standards)

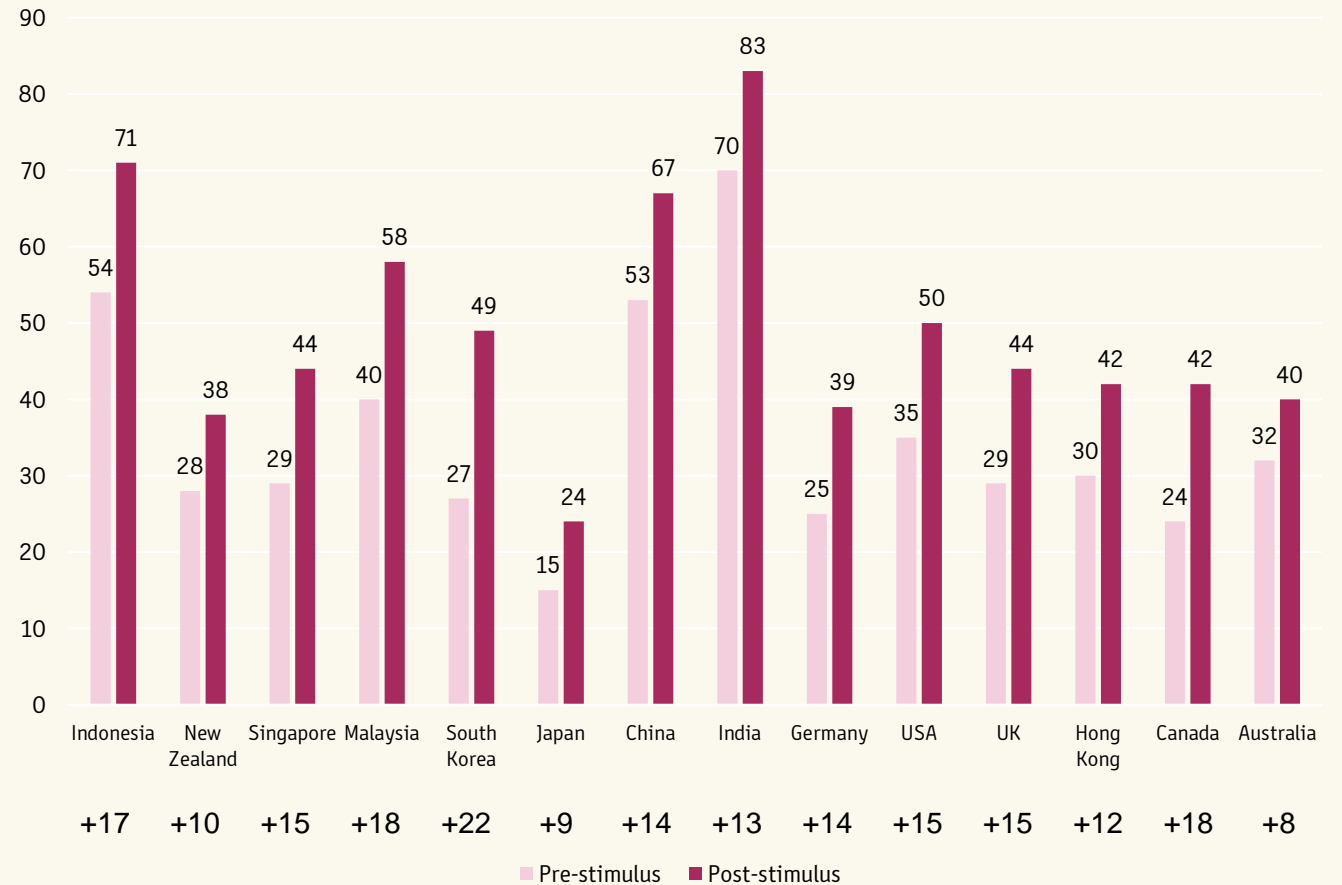
AWARENEES OF INDIGENOUS TOURISM EXPERIENCES OFFERED IN AUSTRALIA IS LOW, AT HOME AND ABROAD



Source: CDP Jan 2021 (11 market average). *How aware are you of the Aboriginal tourism experiences offered in Australia?*

HOWEVER, DESIRE OF ABORIGINAL EXPERIENCES RISES DRAMATICALLY WITH AWARENESS

INTENTION TO ENGAGE IN INDIGENOUS EXPERIENCES (% respondents in each market)



Source: CDP Jan 2021 (11 market average). How likely would you be to engage in Aboriginal tourism experiences if you were traveling in Australia for a holiday in the next 3 years? Having seen this information, how likely would you be to engage in Aboriginal tourism experiences if you were traveling to Australia for a holiday in the next 3 years?



EXCLUSIVE ACCOMMODATION



ACTIVE ADVENTURES



ART & MUSEUMS



BUSH & OUTBACK



COASTAL & AQUATIC



CULINARY EXPERIENCES



IMMERSIVE JOURNEYS



NATURE & WILDLIFE³¹

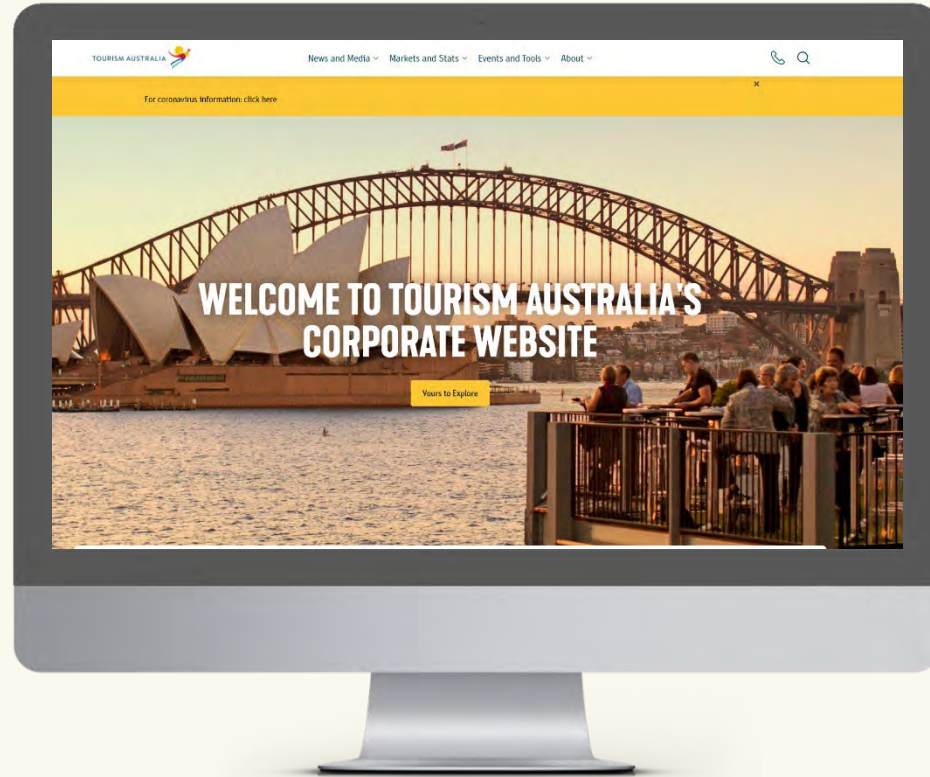


URBAN CULTURE

COME ALONG WITH US ON THE JOURNEY

TOURISM AUSTRALIA'S CORPORATE WEBSITE

Home to all of the tools and resources needed to help you optimise your business for the international market.

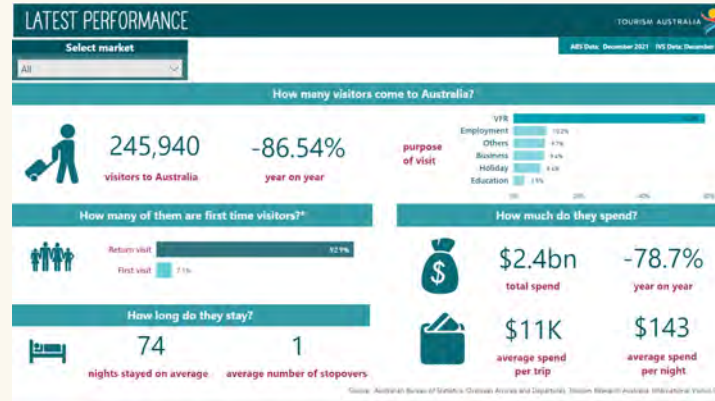


TOURISM.AUSTRALIA.COM

RESEARCH & INSIGHTS

Dashboards and Factsheets covering arrivals, consumer profiles, market values, aviation routes and more.

Also includes sentiment tracking for both domestic and international consumers.



15 MARKET SUMMARY

General confidence is down this month, but travel sentiment is stronger. Both travel intention and booking intention continue to grow while the perception that Australia is a safe destination is also up significantly this wave.



AUSTRALIA'S AVIATION ROUTE MAP

Total Flights Per Week: 766 | Number of Origin Cities: 48



Select: Year-Month: May-22 | Select: Australian Airport: All

Select: Origin Country: All | Select: Origin Airport: All | Select: Airline: All

Origin Country/Airport/Airline	Average Flights Per Week*
Singapore	172
Singapore Changi Airport	172
New Zealand	123
Auckland International Airport	86
Christchurch International Airport	21
Wellington International Airport	15
Queenstown International Airport	2
United States	65
Los Angeles International Airport	38
Daniel K Inouye International Airport	14
San Francisco International Airport	7
Dallas Fort Worth International Airport	6
United Arab Emirates	57
Total	766



*Flights per week is a calculation based on the average number of flights within the selected month. Please Note: Due to the dynamic situation regarding travel restrictions, advance airline schedules may not offer the normal degree of accuracy in predicting future operations. Data refreshed: 04/06/2022

[TOURISM.AUSTRALIA.COM/STATS](https://tourism.australia.com/stats)

GENERATING PUBLICITY

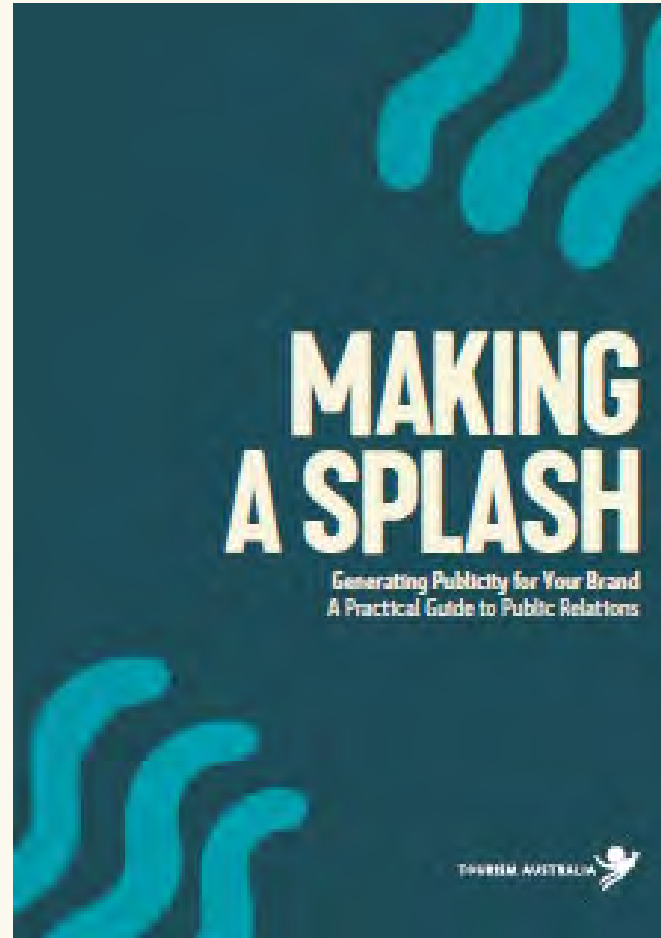
Building media relationships

Writing a media release

Using images & video

Hosting media

Getting involved in TA & STO programs including 'The Hot List' and 'Australian Stories'



TOURISM.AUSTRALIA.COM/WORKINGWITHMEDIA

**SEND YOUR STORIES TO
INTERNATIONALMEDIA@TOURISM.AUSTRALIA.COM**

GETTING INVOLVED: MEDIA HOSTING

Tourism Australia's Media Hosting team works closely with the Australian tourism industry to host approximately 1,000 journalists, digital influencers, opinion leaders and broadcast crew from around 16 countries each year.

We partner with the STOs and industry to deliver the program. To get involved, ensure you connect with your RTO or STO in the first instance.

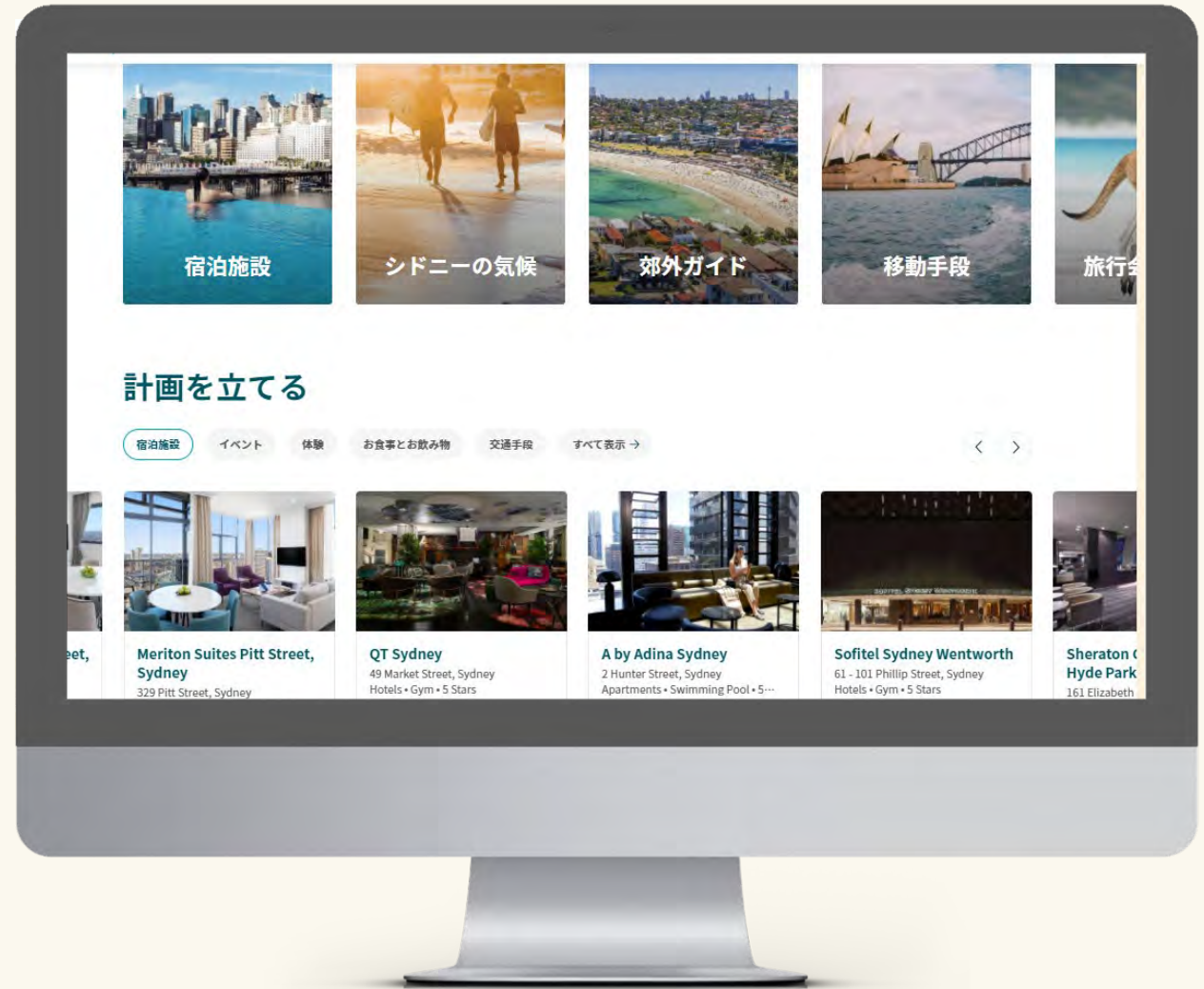


CONTACT: INTERNATIONALMEDIA@TOURISM.AUSTRALIA.COM

AUSTRALIA.COM

Enhanced ATDW integration within our consumer site.

Ensure that your product is listed via ATDW including relevant offers.



[DNSW.COM.AU](https://www.dnsw.com.au) / [GETCONNECTED](https://www.getconnected.com.au)

PREPARING FOR INBOUND TOURISM

Advice on becoming export ready

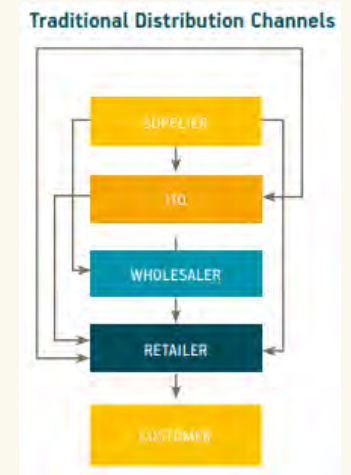
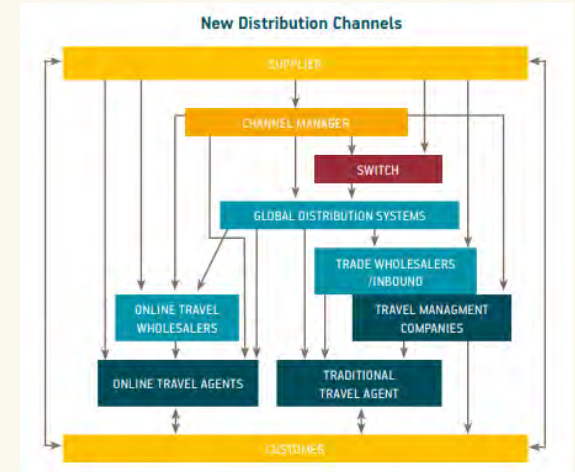
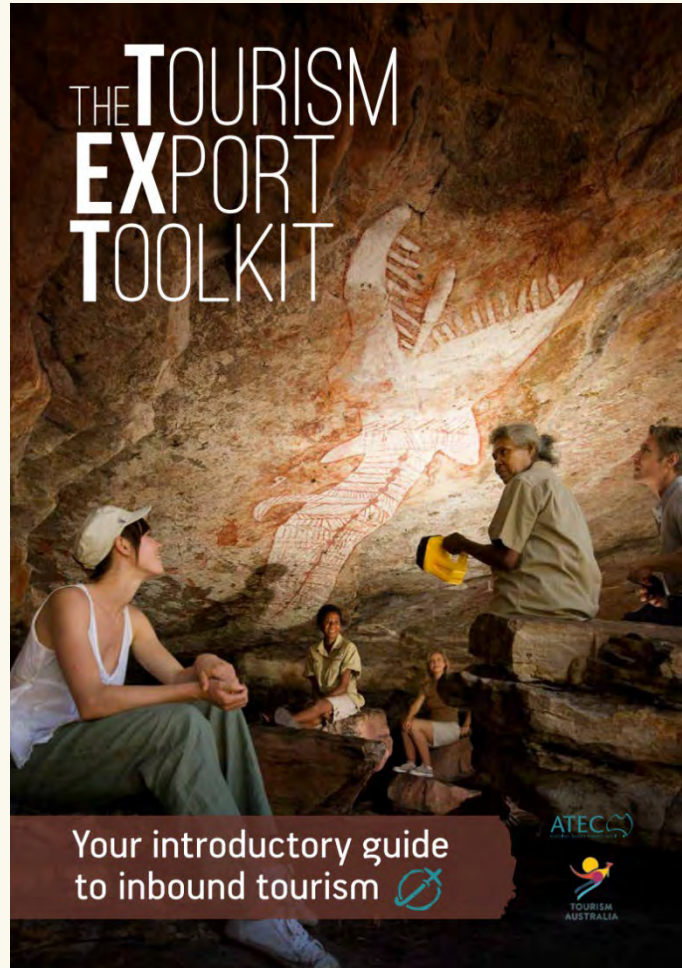
Inbound rate structures

Inbound tourism trends

Distribution networks

ITO's, OTA's, Inbound Wholesalers

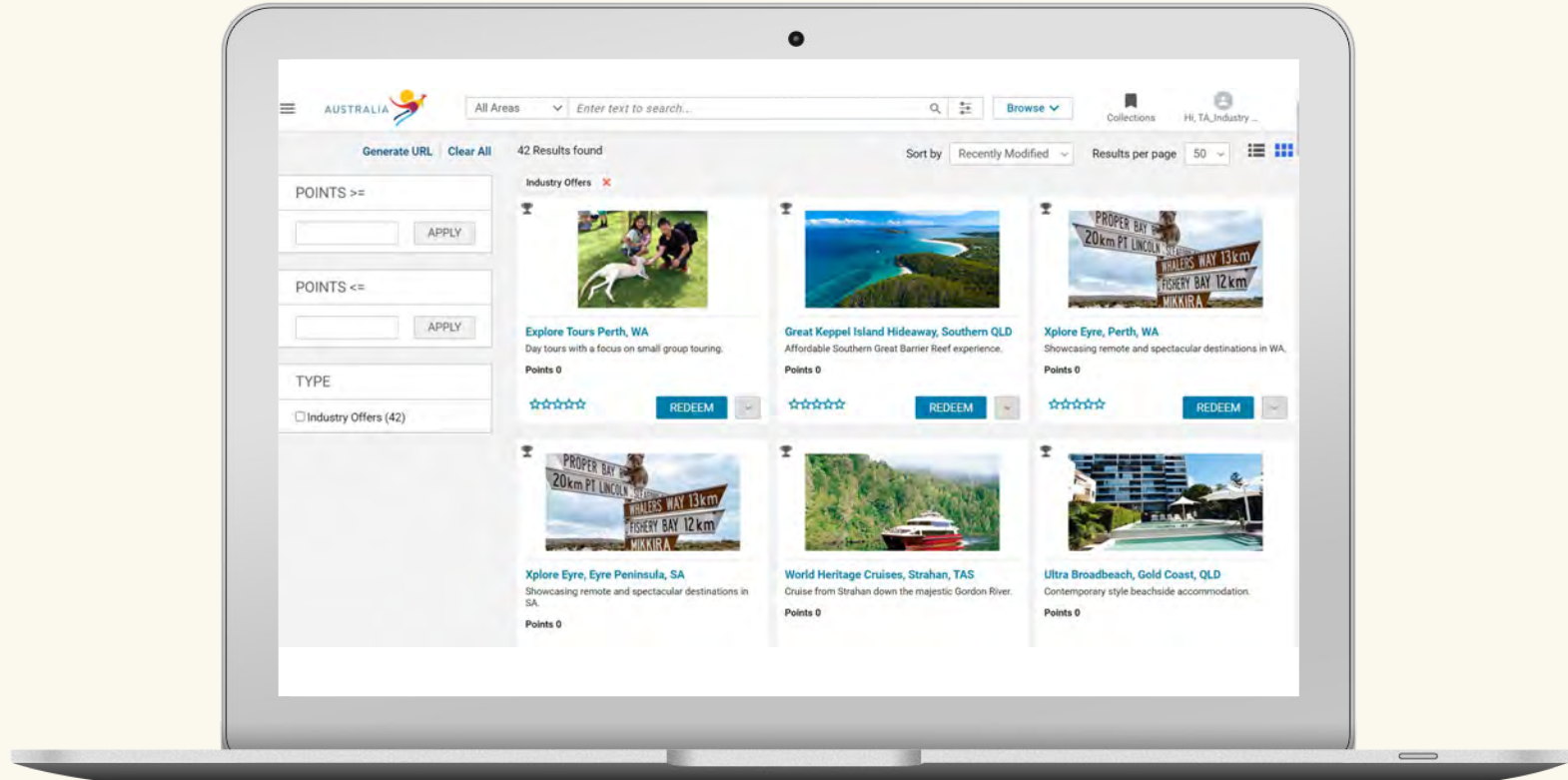
Stay tuned for the new 'Tourism Trade Ready' program and guide, coming soon!



[TOURISM.AUSTRALIA.COM/EXPORTTOOLKIT](https://www.tourism.australia.com/exporttoolkit)

THE AUSSIE SPECIALIST PROGRAM

Tourism Australia's platform to train over 35,000 frontline travel agents and distribution partners.



[TOURISM.AUSTRALIA.COM/TRAVELCLUB](https://www.tourism.australia.com/travelclub)

TRADE EVENTS

Including Australian Tourism Exchange
and Marketplace Events

Australia Marketplace Events:

07 – 10 August (North America)

26 – 30 September (Japan / South Korea)

14 – 16 November (UK / Europe)

Australian Tourism Exchange 2023

30 April – 4 May Gold Coast



[TOURISM.AUSTRALIA.COM/EVENTS](https://www.tourism.australia.com/events)

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Follow us on [Linkedin](https://www.linkedin.com/company/tourism-australia)

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THANK YOU!

