

TOURISM AUSTRALIA: THE RETURN OF INTERNATIONAL

Dominic Mehling – Industry Relations Manager
July 2023 – Destination North Coast

TODAY'S UPDATE



A BIT ABOUT US



HOW ARE THINGS LOOKING?



WHAT ARE WE DOING ABOUT IT?



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**.

OUR VISION

To make Australia the most desirable & memorable destination on earth

OUR PURPOSE

To create demand enabling a sustainable and competitive Australian tourism industry



BRAND & MARKETING

Providing the overall **tourism** messaging under which **overseas** consumers view Australia through activities including marketing campaigns

PARTNERSHIPS & DISTRIBUTION

Working with over 200 commercial partners annually, as well as managing the Aussie Specialist Program

AVIATION

Leading a Team Australia approach with the involvement of airports, STOs, Austrade, DFAT, DITRDC and Home Affairs

PUBLIC RELATIONS & FAMILS

Including Public Relations, the International Media Hosting and Friends of Australia programs

INSIGHTS

Including the Consumer Demand Project and the Future of Demand

AUSTRALIA.COM & SOCIAL

Running the Australia.com consumer site and Tourism Australia's social media presence

BUSINESS EVENTS AUSTRALIA

Business Events Australia (BEA) is a specialist business unit of TA dedicated to promoting Australia as a destination for business events

INDUSTRY EVENTS

Key onshore and offshore B2B industry events including ATE and Australia Marketplace events

OUR TARGET MARKETS



Target markets and their value by 2025



9.5 MILLION VISITORS

\$45 BILLION SPEND

1 IN 13 JOBS

*Pre-COVID figures

STRATEGIC PRIORITIES FY24

GROW DEMAND TO ENABLE A COMPETITIVE AND SUSTAINABLE TOURISM INDUSTRY

**1.
CREATE
DEMAND WITH
'COME AND SAY
GDAY'**

**2.
CONVERT
DEMAND WITH
PARTNERS**

**3.
LEVERAGE THE
FIFA WOMENS
WORLD CUP**

**4.
PROMOTE
WORKING
HOLIDAYS**

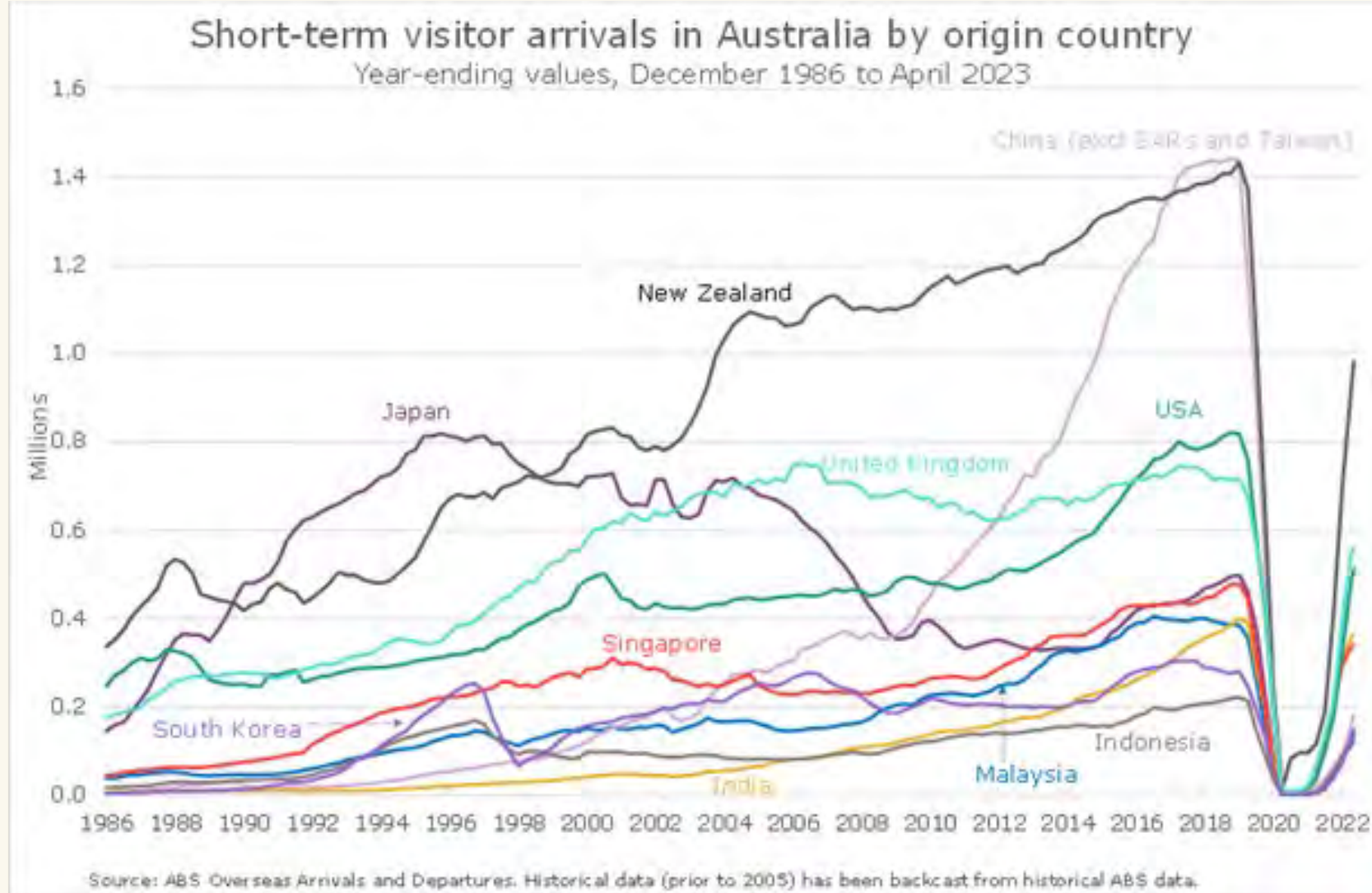
**5.
SUPPORT
INDUSTRY
RECOVERY**

**6.
INDIGENOUS,
SUSTAINABLE,
AND
ACCESSIBLE**

**7.
GROW
BUSINESS
EVENTS**

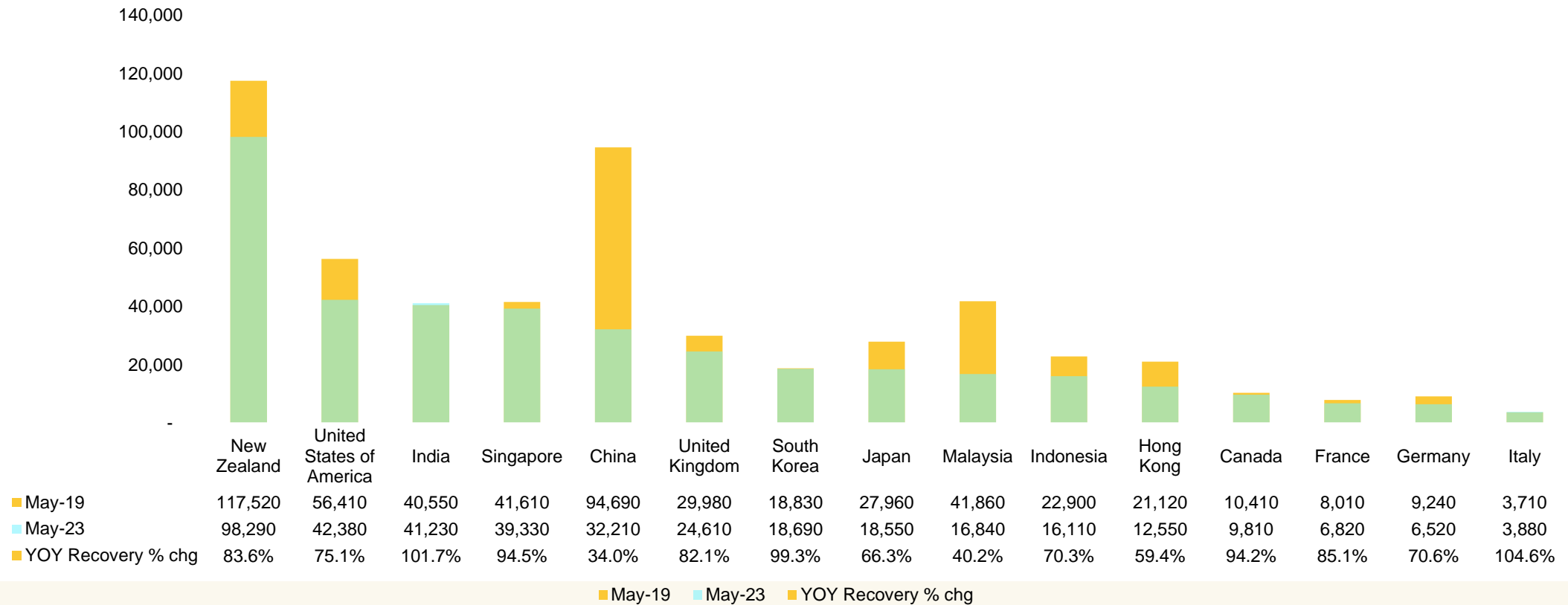
How are things looking?

A GOOD REMINDER THAT 'NORMAL' NEVER REALLY IS



MAY ARRIVALS WERE STRONG AT 77% OF 2019

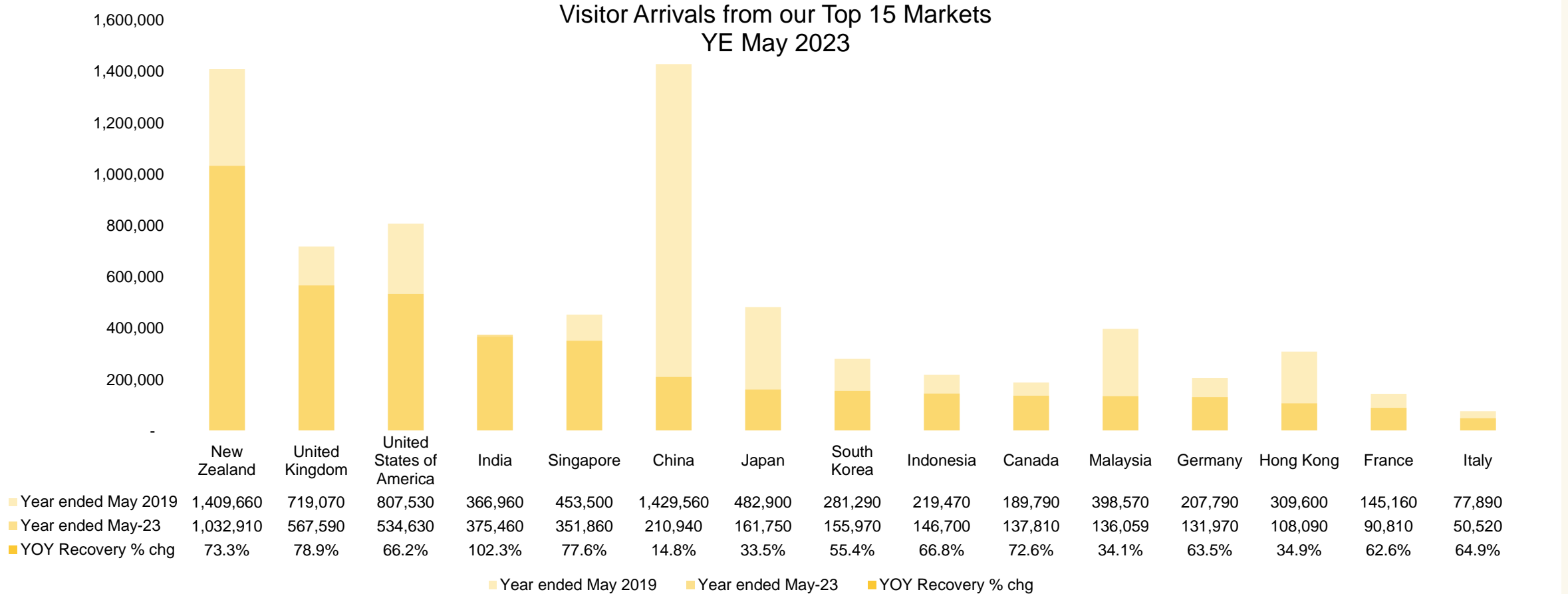
Visitor Arrivals from our Top 15 Markets
Month of May 2023



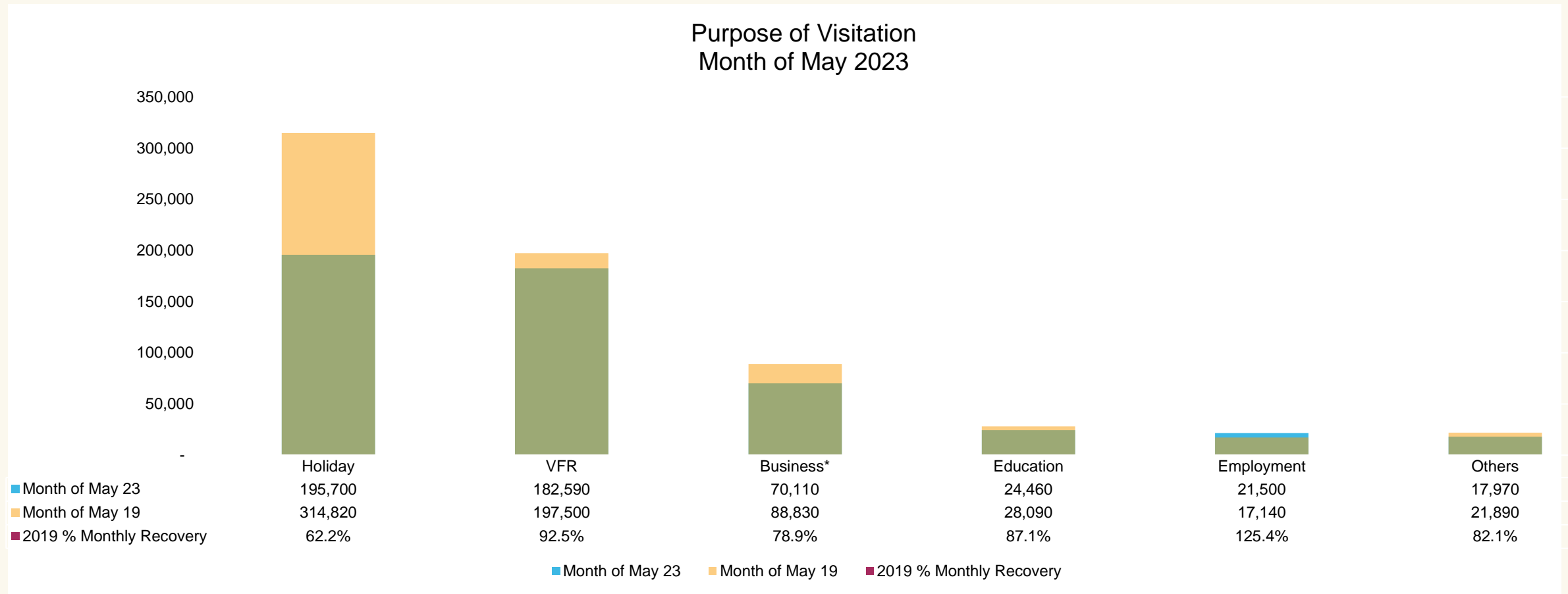
Source: ABS Arrivals Short Term Visitor Arrivals

INDIA IS THE STAR WHEN IT COMES TO YTD RECOVERY SO FAR

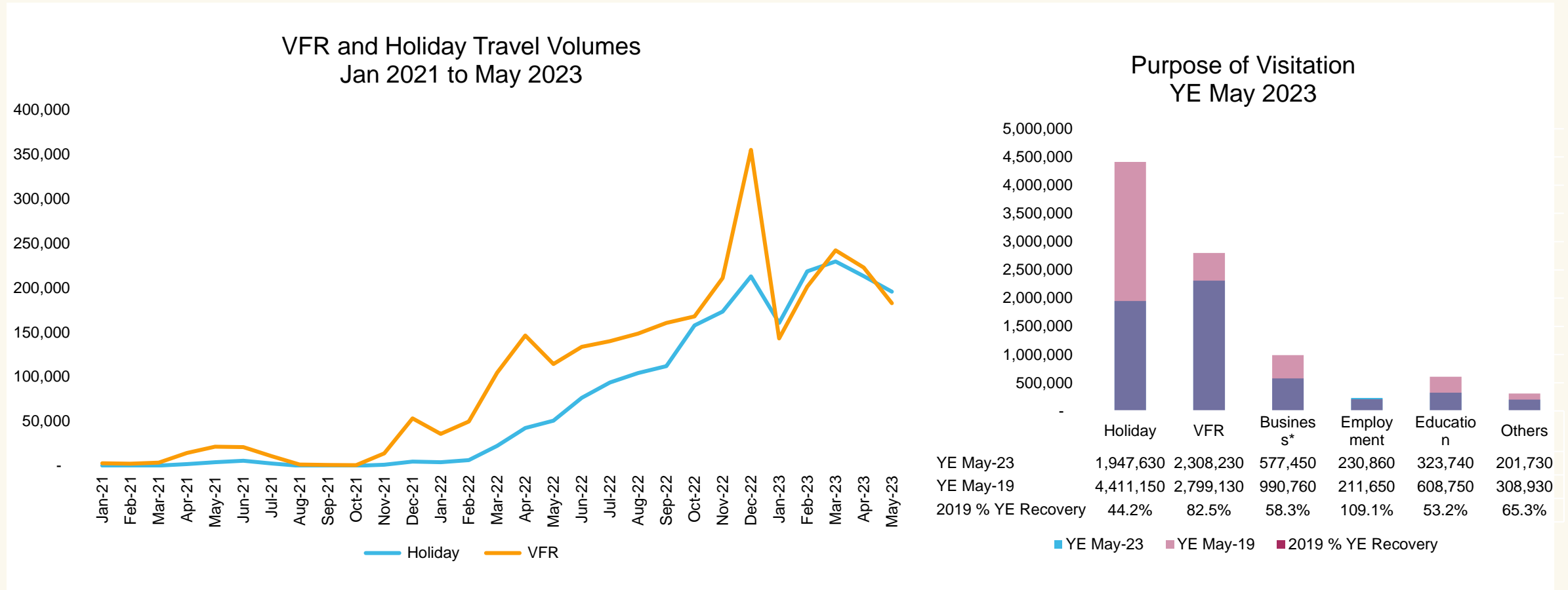
Visitor Arrivals from our Top 15 Markets
YE May 2023



THE OPPORTUNITY EXISTS IN THE HOLIDAY SPACE

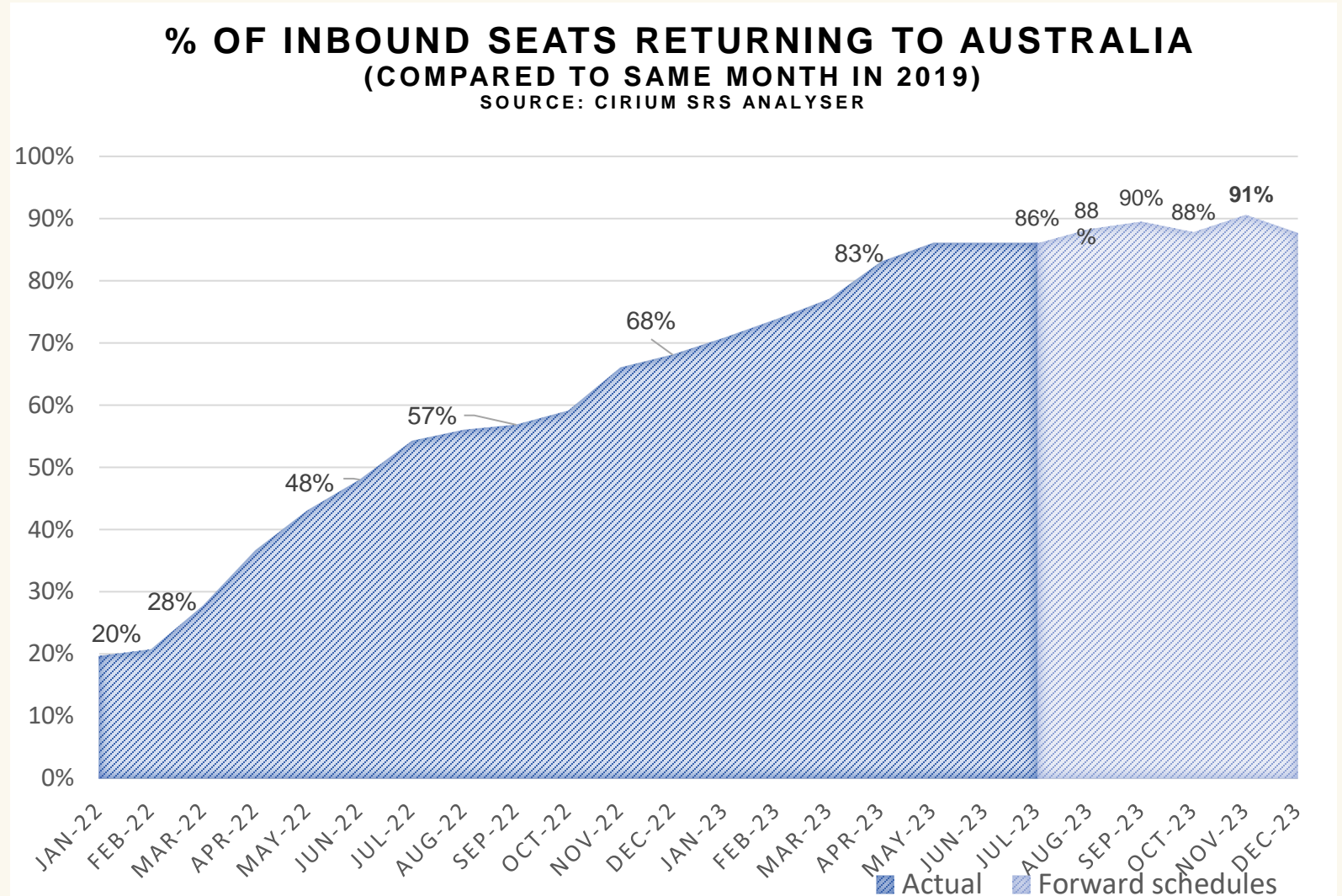


VOLUME OF HOLIDAYMAKERS IS STRENGTHENING



Source: ABS Arrivals Month of March 2023

INTERNATIONAL AVIATION CAPACITY INTO AUSTRALIA HAS RETURNED TO 86% OF PRE-COVID LEVELS IN JUL-23, REACHING 91% BY NOV-23



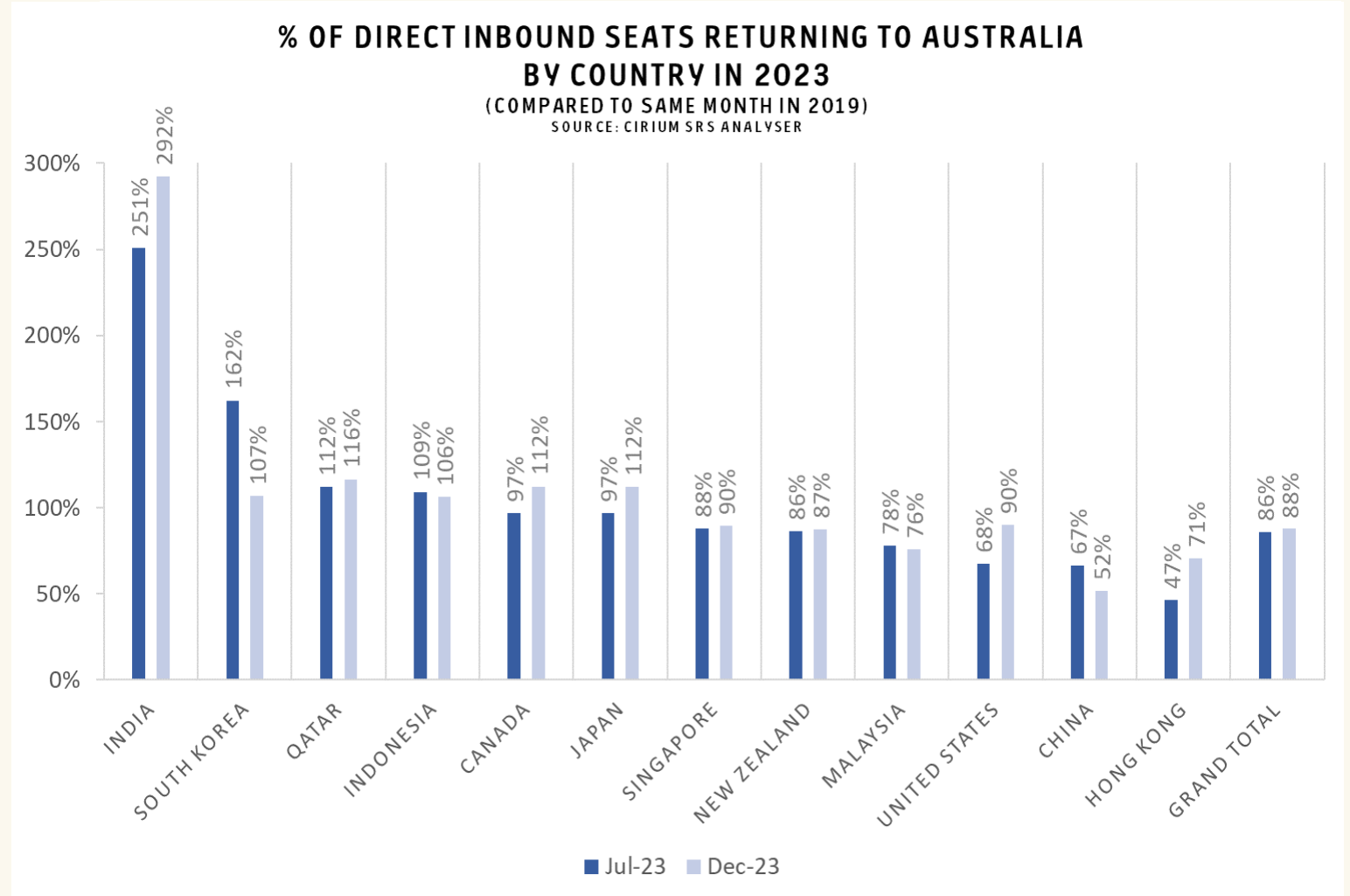
Source: Cirium SRS Analyser air schedules data, July 2023

CAPACITY RETURNING WITH SOME STANDOUT MARKETS/CARRIERS

July 2023 levels:

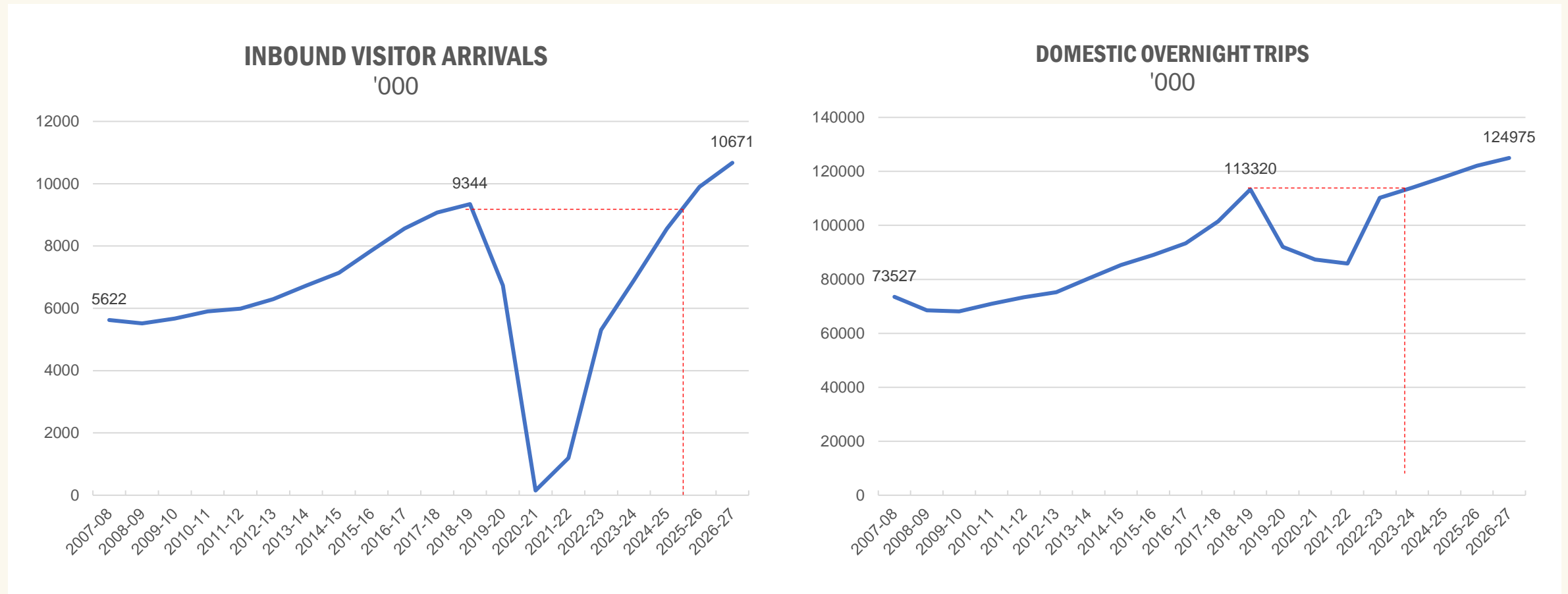
India:	251% of seats scheduled
South Korea:	162% of seats scheduled
Qatar:	112% of seats scheduled
Indonesia:	109% of seats scheduled
Japan:	97% of seats scheduled
Canada:	97% of seats scheduled
Singapore:	88% of seats scheduled
NZ:	86% of seats scheduled
Malaysia:	78% of seats scheduled
USA:	68% of seats scheduled
China:	67% of seats scheduled
Hong Kong:	47% of seats scheduled

Singapore Airlines:	87% of seats scheduled
Emirates:	85% of seats scheduled
Qantas:	83% of seats scheduled
Cathay Pacific:	58% of seats scheduled
Etihad:	42% of seats scheduled



Source: Cirium SRS Analyser air schedules data, July 2023

DOMESTIC BACK THIS YEAR, STRONG FUTURE GROWTH IN INBOUND

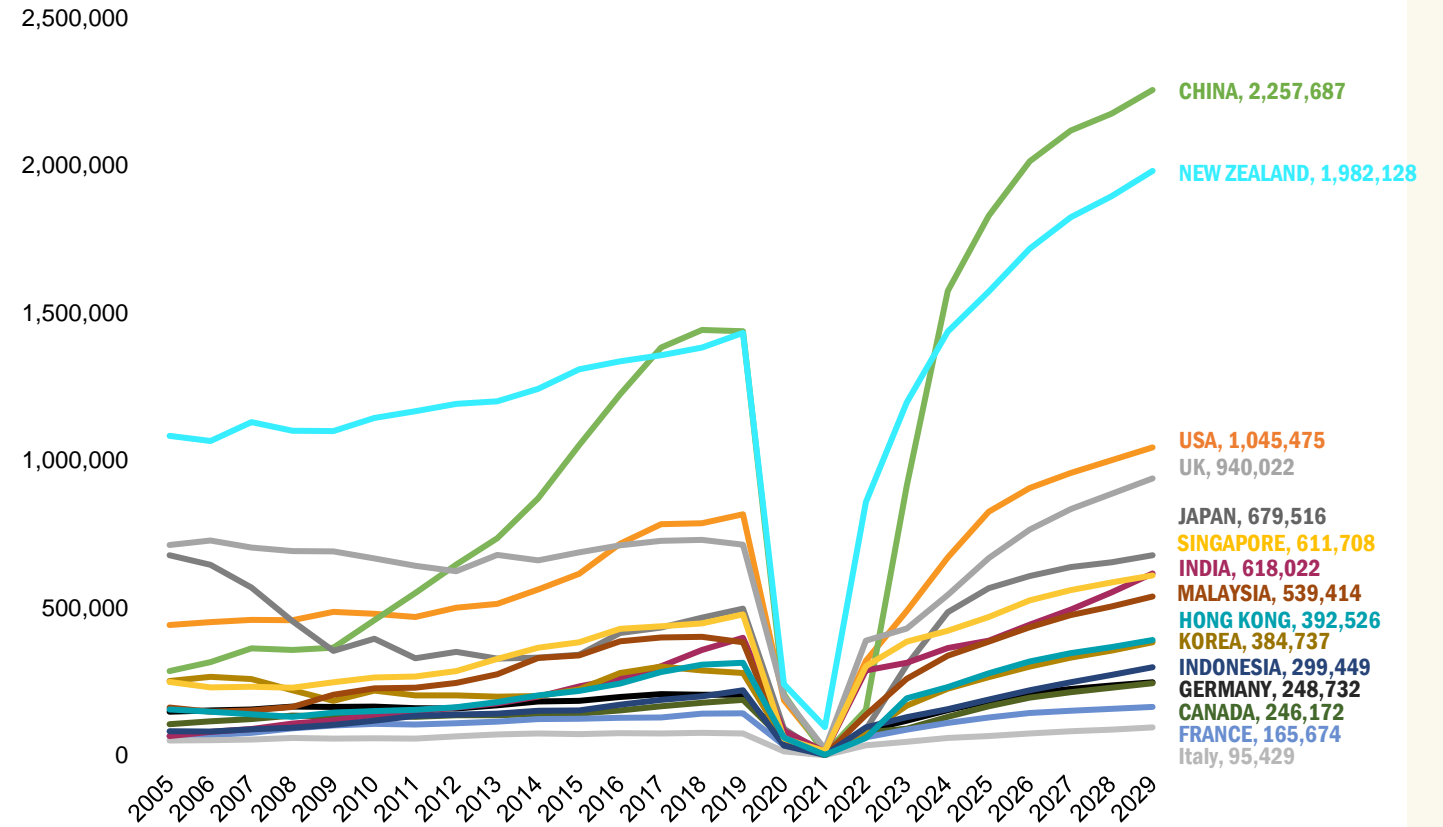


Source: TRA Forecasts at March 2023

CHINA WILL STILL BE THE DOMINANT FORCE IN AUSTRALIAN INBOUND TOURISM FOR THE NEXT DECADE

PAST & PREDICTED OOR VISITATION ARRIVALS TO AUSTRALIA FROM TOP 15 MARKETS

CY 2005 - CY 2029

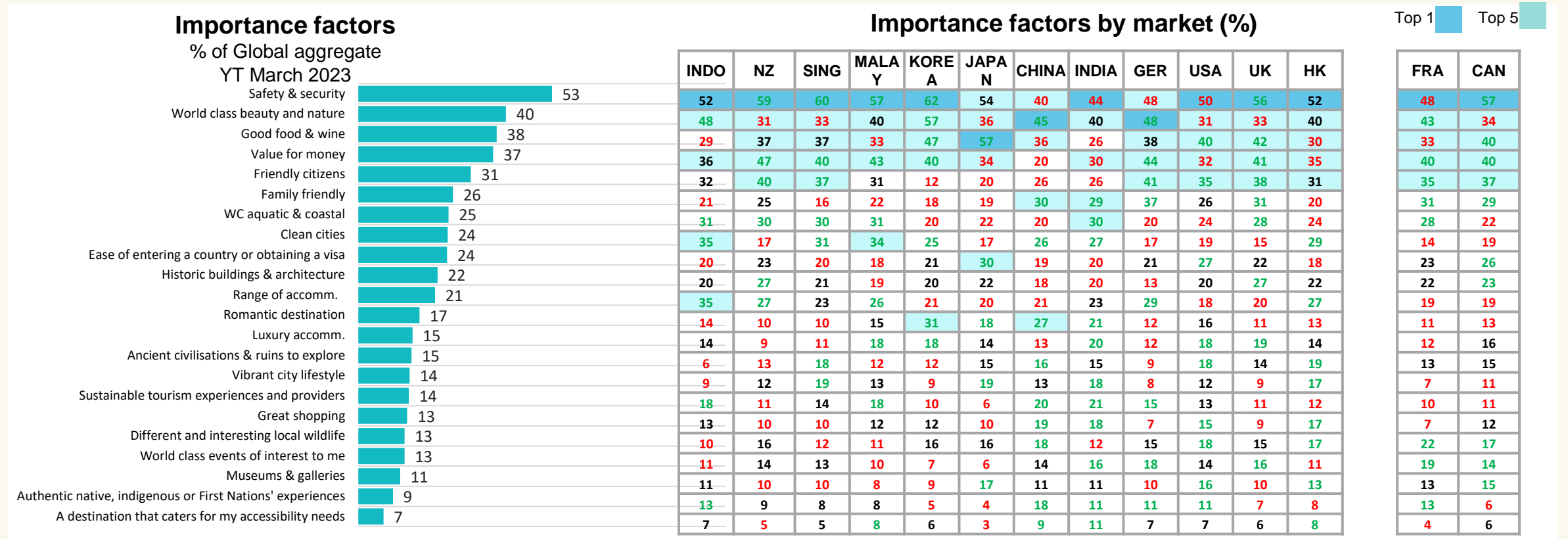


Source: Oxford Economics
2022 Onwards represents estimated forecasted data

What's on people's minds?

WHAT ARE VISITORS LOOKING FOR?

Safety remains #1 in most markets. World class nature is also important for most and leads for China and Germany. Good F&W is the most important factor for Japan, and important for most (though not in the top 5 for India or Indonesia). Value for money also important though lower for China.



Question: Thinking about choosing a holiday destination, which of the following factors is more important to you?

*A destination that caters for my accessibility needs added in Dec 22

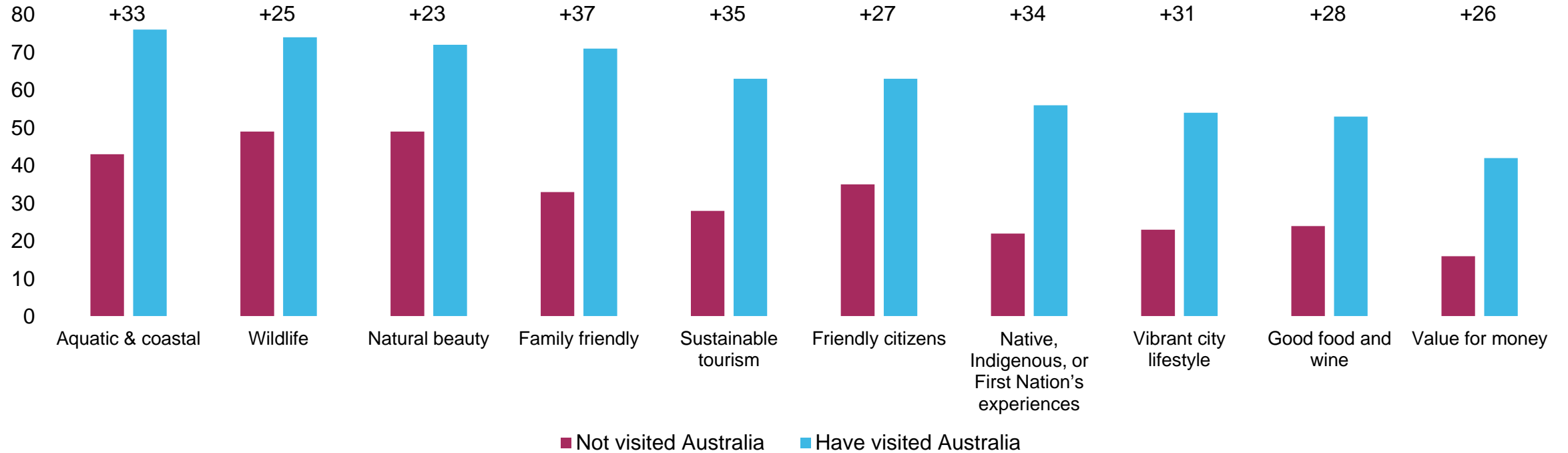
Global aggregate includes Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK and Hong Kong.

Source: Tourism Australia Consumer Demand Project March 2023 via BDA Marketing Planning

xx% Indicates a statistically significant difference to Global aggregate

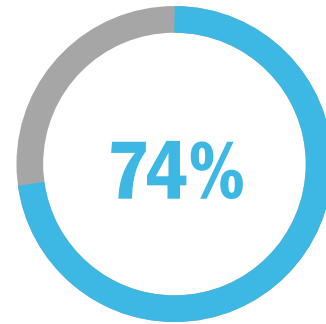
AUSTRALIA OVERDELIVERS VS EXPECTATIONS

AUSTRALIA'S ASSOCIATIONS: HAVE VS HAVEN'T VISITED

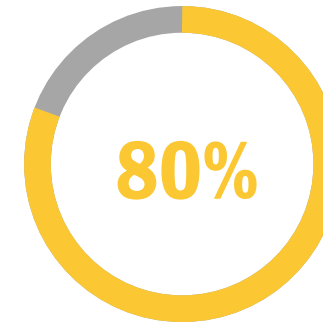


Question: You said [factor] is important to you. Which of these destinations do you associate with [factor]? (Those who ever visited Aus vs those who have not)
 Global aggregate includes Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK and Hong Kong.
 Source: Tourism Australia Consumer Demand Project December 2022 via BDA Marketing Planning

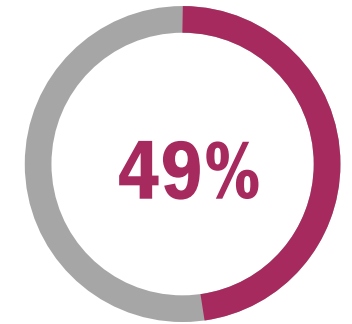
THE RISING TIDE OF SUSTAINABILITY IN TRAVEL CONTINUES



Believe people need to act now and make some more sustainable choices to save the planet for future generations
(up from 66% in 2022)

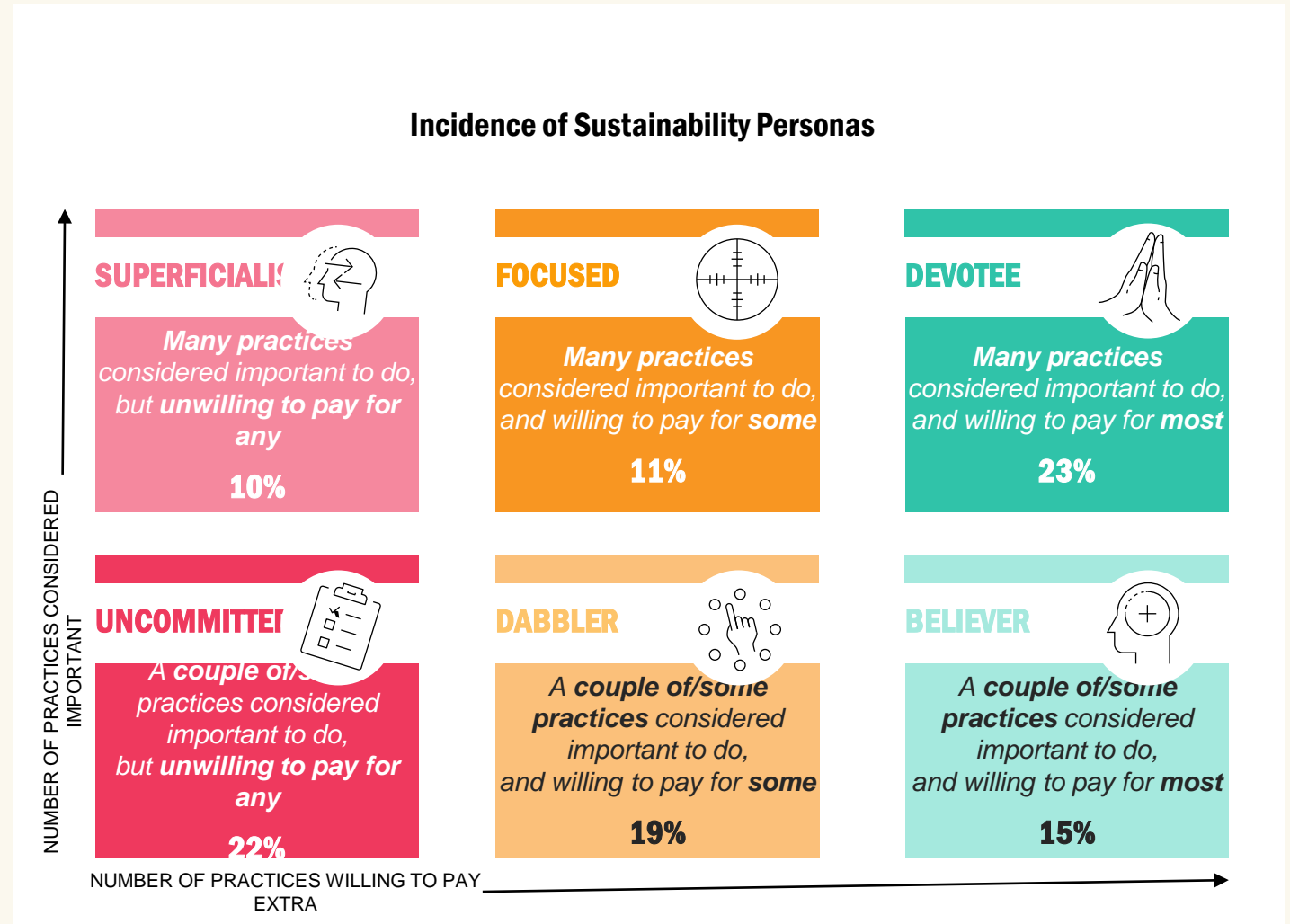


Confirm that travelling more sustainably is important to them



Believe more sustainable travel options are too expensive

MORE THAN 75% OF TRAVELLERS ARE COMMITTED TO SUSTAINABILITY IN SOME WAY & 1 IN 3 ARE SUSTAINABILITY DEVOTEES OR BELIEVERS



Future of Global Tourism Demand Research, Quantitative validation phase, April-May 2022

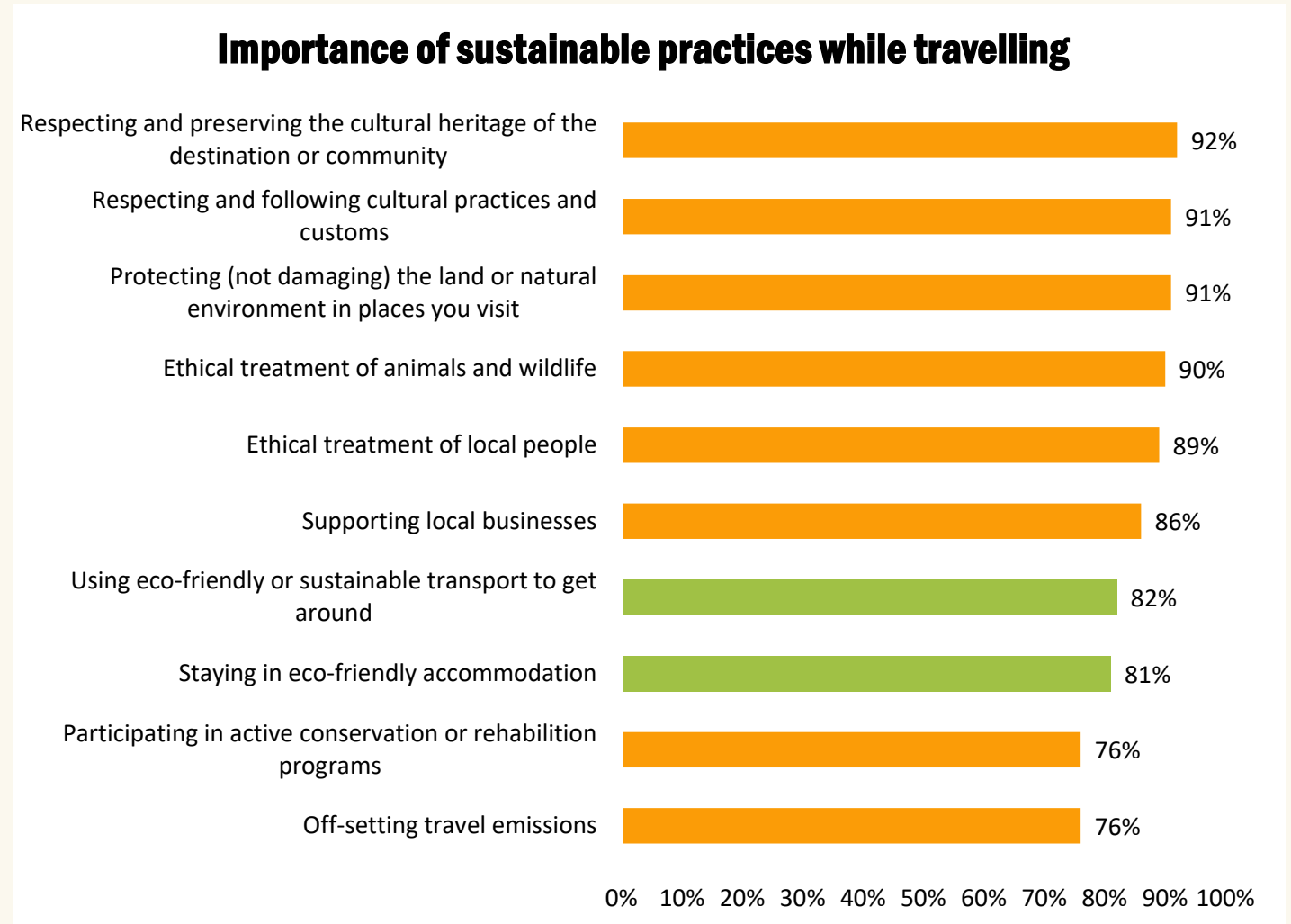
Segmentation based on two questions: E1. How important are each of the following to you when travelling? E2. Imagine you have identified two experiences that offer everything you are looking for on your next vacation. If one experience offered the following, and the other did not, which statement best applies to you?

Base: Global excl. Australia (n = 22,190)

IMPORTANCE OF SUSTAINABILITY PRACTICES WHILE TRAVELLING

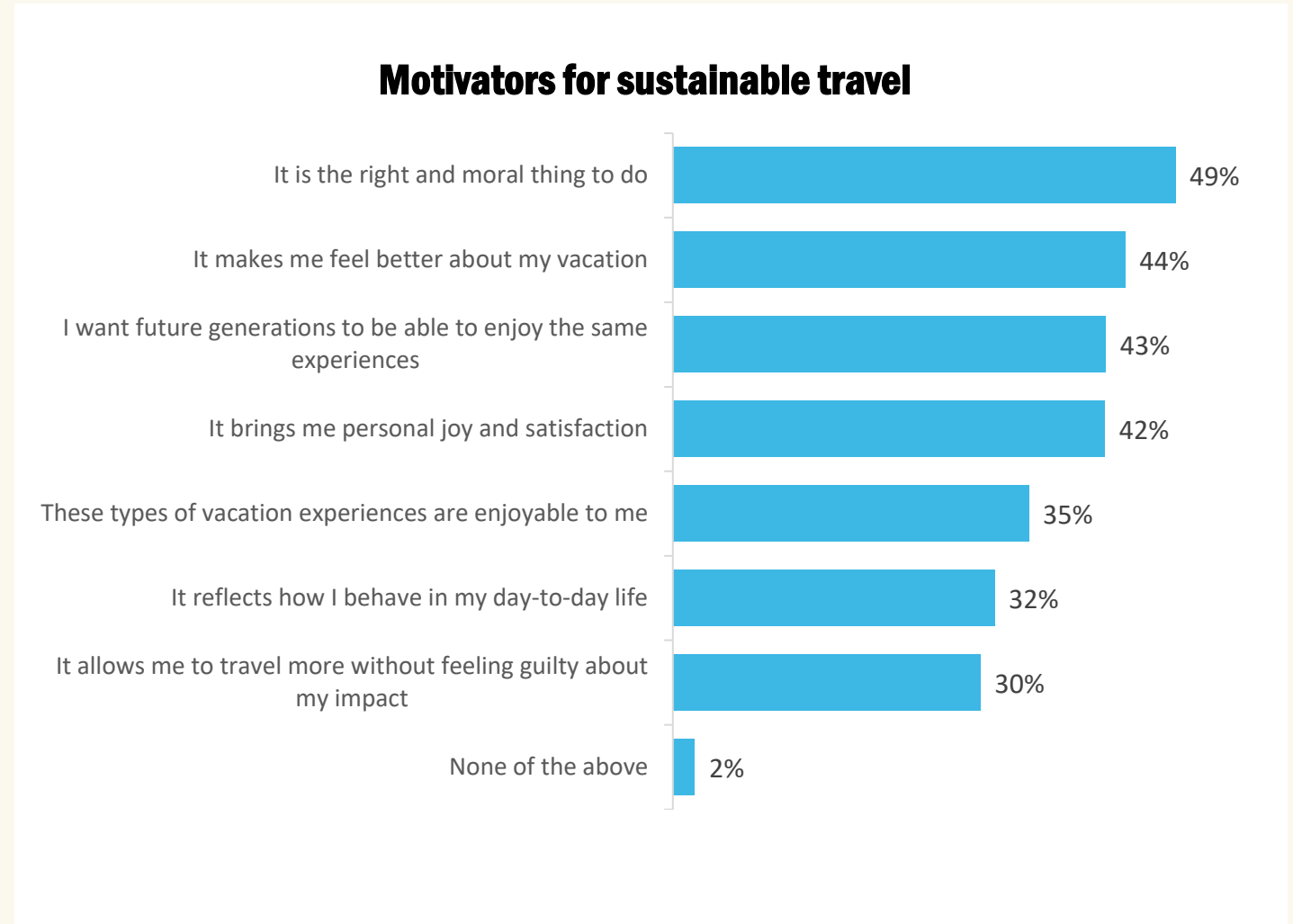
4 in 5 global travellers think that eco friendly transport and accommodation is important when travelling

But a much larger range of sustainability practices are now part of the understanding by consumers.



E1 - How important are each of the following to you when travelling?
 Base: Global excl. Australia (n = 21,322)
 Source: Tourism Australia Future of Demand – quantitative deep-dive 2022

CONSUMERS HAVE MANY REASONS TO TRAVEL SUSTAINABLY



E3. Which of these best describe why sustainability considerations are important to you when travelling?
 Base: Global excl. Australia (n 10,646)
 Source: Tourism Australia Future of Demand – quantitative deep-dive 2022

What are we doing about it?

THE AVERAGE TRAVELLER IS ONLY CONSIDERING THREE PLACES

TRAVELLERS ARE CHOOSING BETWEEN AUSTRALIA'S DIRECT COMPETITORS, THE INCREDIBLE DESTINATIONS BELOW



JAPAN



USA



NEW ZEALAND



SOUTH AFRICA



CANADA



FRANCE



HAWAII

THIS IS A MOMENT OF EXTREME COMPETITION



FEWER TRAVELLERS

Airline **capacity** to Australia is still constrained (Seats + Cost)

Travellers are more worried about their **finances**

People are still staying closer to **home**

MORE COMPETITION



All countries **rebuilding** their visitor economies

Media costs & inflation continue to rise

Global **creative** work is better than ever

COME AND SAY G'day

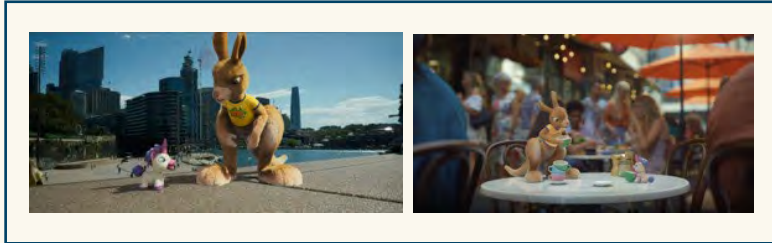


AUSTRALIA



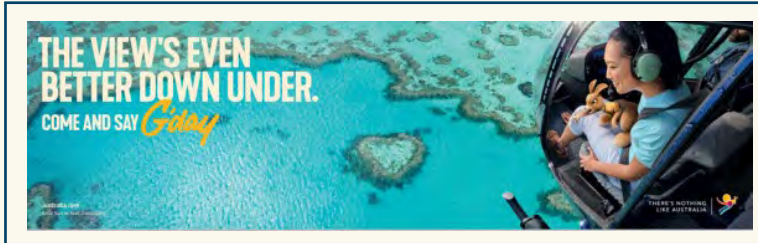
Uluru-Kata Tjuta National Park

COME & SAY G'DAY CAMPAIGN APPROACH



SHORT FILM

Drive **fame and impact** for launch.
Platform for PR amplification.
Establish story of Ruby, our new “brand ambassador”.



ADVERTISING & MID-FUNNEL CONTENT

Hardworking advertising and content partnerships to **showcase our destinations, experiences** and welcoming Australians.



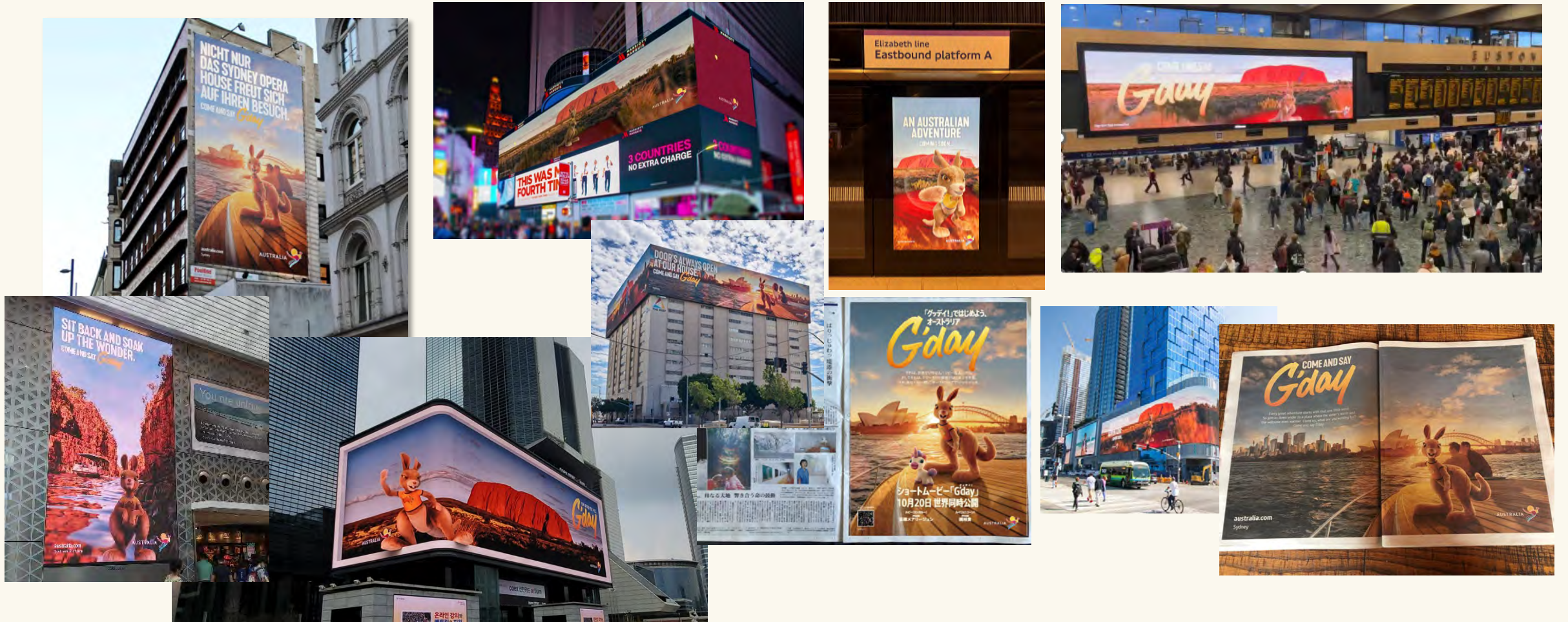
PARTNERSHIPS

Capture demand from high yield travellers through strategic partnerships with airlines and key distribution partners.

60" TVC



CAMPAIGN ACTIVITY AROUND THE WORLD



PARTNER CAMPAIGN EXAMPLES

GREAT AUSTRALIAN DEALS.
COME AND SAY *G'day*

705N
Perth & Pink Lake

The Pinnacles | Geraldton | Kalbarri | Enjoy Lobster Meal

2023 Jan 19 | Feb 22 | Mar 3 | Apr - Oct

FROM RM 9,699

Book your trip at:

APPLE

GREAT AUSTRALIAN DEALS.

Downunder

AUSTRALIA

COME ON UP OUR DRIVEWAY.

FLIGHT CENTRE

secret Escapes

AUSTRALIEN
COME AND SAY *G'day*

Jetzt entdecken

AUSTRALIA

MEER POOL VERGNÜGEN.
COME AND SAY *G'day*

Flüge nach Australien ab

1.046 €

Platzes See Bree Resort and Golfclub in der Touristenaussicht!

opodo

AUSTRALIA

AUSTRALIA? WE KNOW THE PLACE WELL.

AUSTRALIA

AUSTRALIA? WE KNOW THE PLACE WELL.
COME AND SAY *G'day*

Cape Hillborough, Queensland

GROUP HOLIDAYS WITH FLIGHTS STARTING AT *3 82 000.00

11 Days - Australian Extravaganza
11 Days - Spirit of Australia

PERSONALIZED HOLIDAYS STARTING AT *1 82 000.00

10 Days - Essence of Australia
10 Days - Australian Delight
12 Days - Magical Australia

Search for the Certified Aussie Specialists to Plan Your Holiday

Thomas Cook

Book at thomascok.in | 1800 2099 100

딱 한 번 가려면, 호주
친짜 호우를 만날 시간. *G'day*

원클랜드 알아보기

호주관광청 바로가기

ICI, ON A PISCINE TOUTE L'ANNÉE.

eDreams

AUSTRALIA

GREAT AUSTRALIAN DEALS.
COME AND SAY *G'day*

805N
Tasmania

Cradle Mountain | Freycinet National Park | Cradle Valley | Curlew Farm | Mt. Wellington

2023 Jan 18 | Feb 12-23 | Mar 1 | Apr - Oct

FROM RM 12,599

Book your trip at:

APPLE

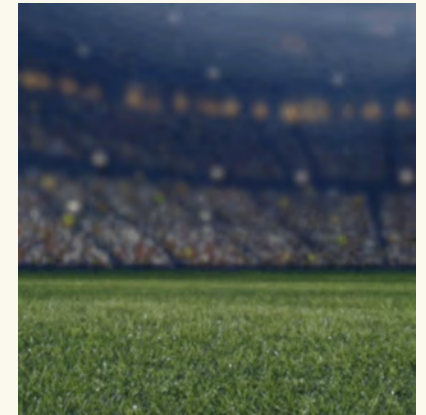
STAY THE COURSE: FRESH AND FAMILIAR



CHINA LAUNCH



PARTNERS



CULTURAL SPIKES



WORKING HOLIDAY

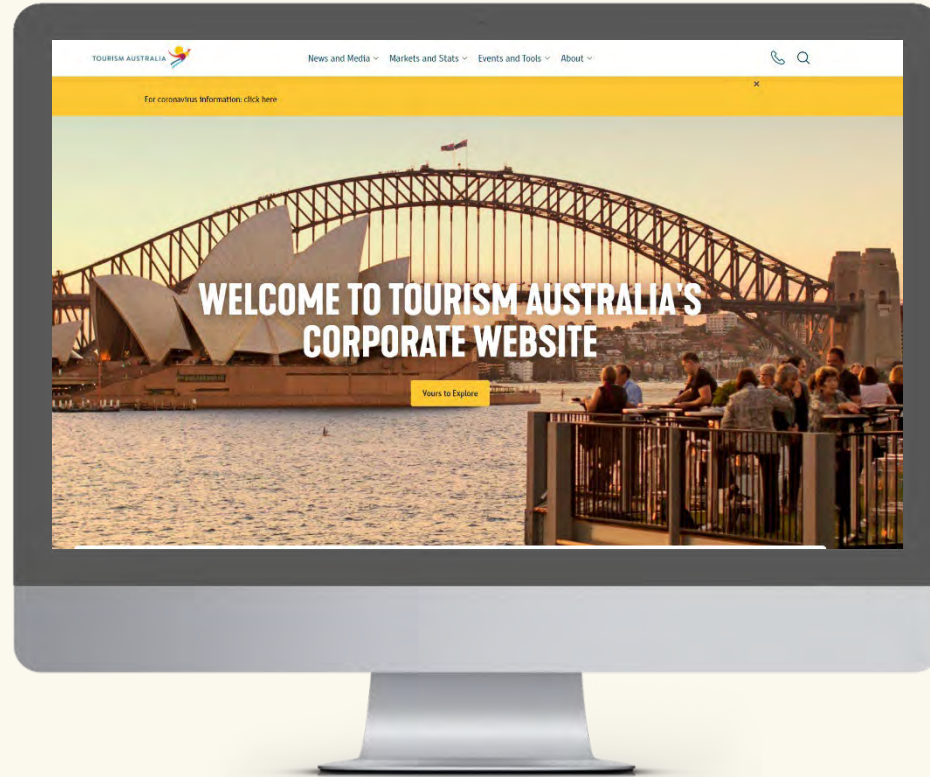
HOLIDAY HIGHLIGHTS 30" TVC



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

A FULL SUITE OF NEW RESEARCH



The main report brings together the wealth of data and insights from the research into a single, detailed document.



Interest in the experience globally, by segment and by market; profiling of those interested; and cross-sell and partnership opportunities.



A snap shot for each of the 20 markets, plus a global summary, showing their interest in experiences and sub-experiences.

ATEC 'HOST' MARKET SPECIALIST TRAINING SERIES

Learn more about select inbound markets identified as high yielding travellers to Australia, as well as key sectors within the Australian tourism industry.

Discover how to effectively attract and service these exciting market opportunities, and how to work with key players in the travel trade.

The 'Host' series is a commercially valuable brand, endorsed by government and trade.



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THANK YOU!

