

AUSTRALIA OVERVIEW

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EXECUTIVE GENERAL MANAGER CORPORATE AFFAIRS
TOURISM AUSTRALIA



TOURISM AUSTRALIA

OUR VISION

For Australia to be the most desirable and memorable destination on Earth

OUR PURPOSE

To grow demand and foster a competitive and sustainable tourism industry

Target markets and their value by 2025*



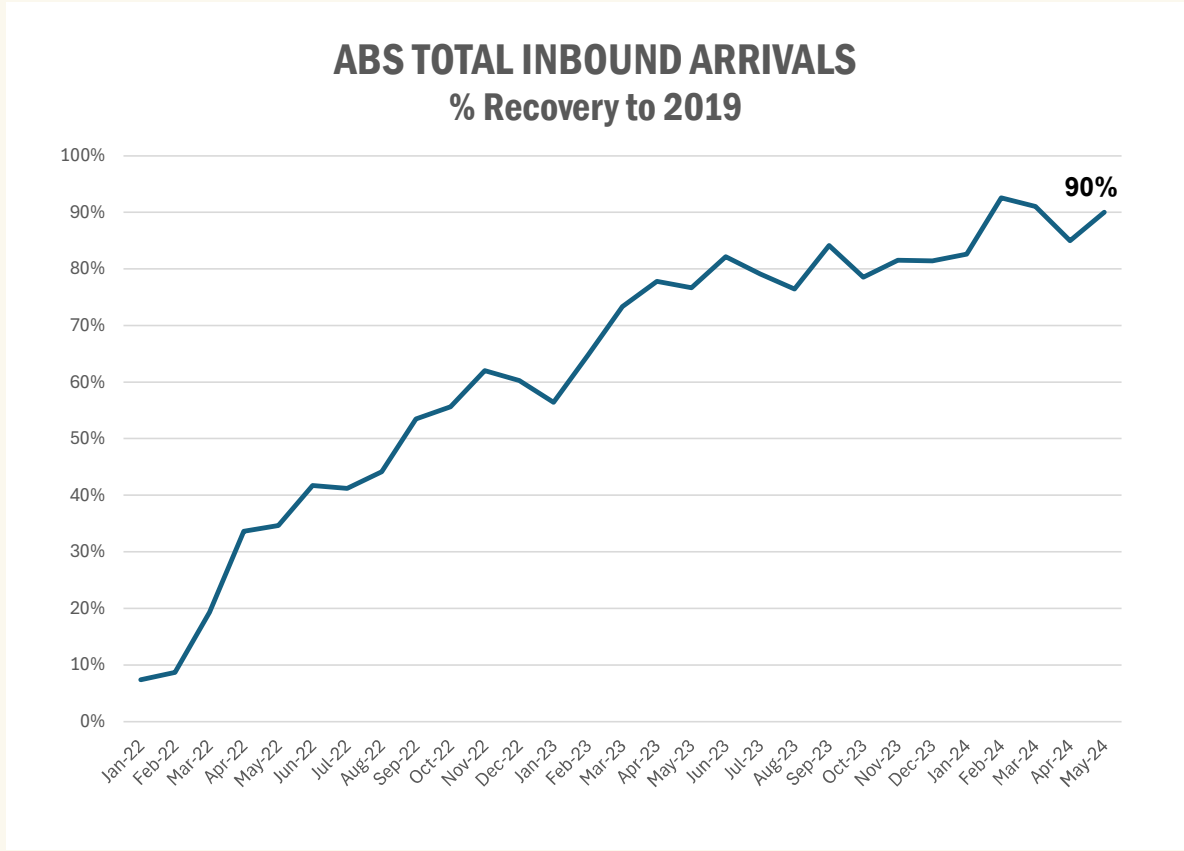
9.5 MILLION VISITORS

\$45 BILLION IN SPEND

1 IN 13 JOBS

*Pre-COVID figures

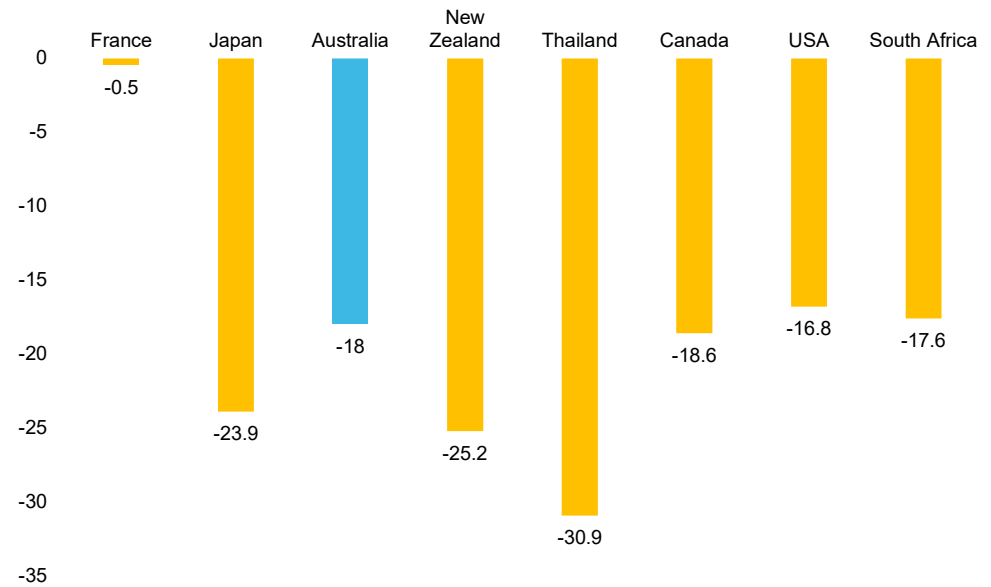
INTERNATIONAL ARRIVALS ARE ALMOST BACK TO 2019 LEVELS



Source: Australian Bureau of Statistics (ABS) Short-Term Arrivals

AUSTRALIA'S RECOVERY IS IN LINE WITH OUR DIRECT COMPETITORS

RECOVERY BY MARKET: YTD 2023 vs 2019

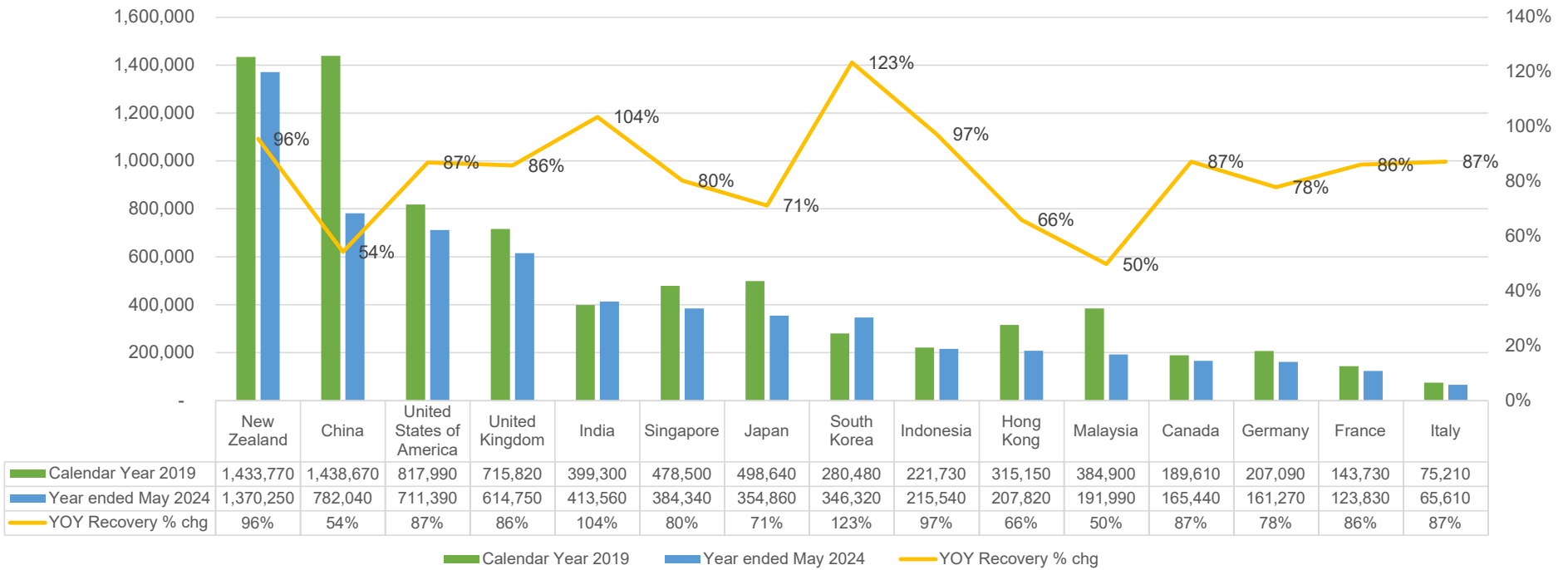


Source: ABS Short-Term Arrivals



RECOVERY VARIES AT THE NATIONAL LEVEL

ABS SHORT-TERM ARRIVALS
Rolling YE May 2024 recovery

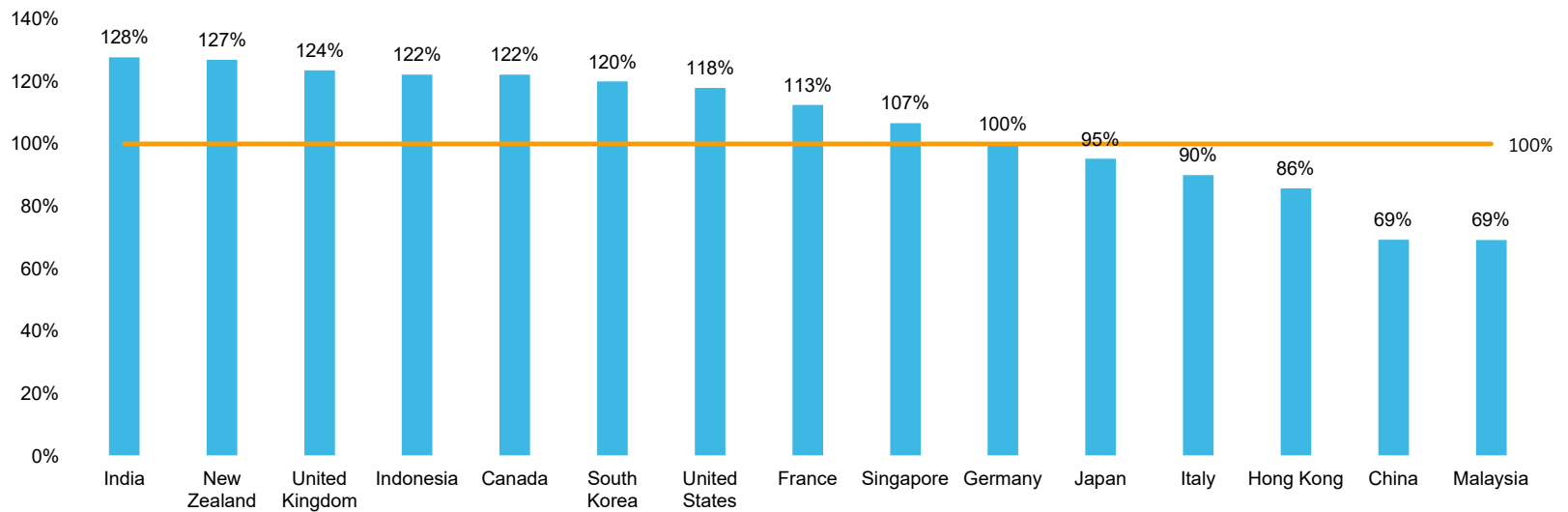


Source: Australian Bureau of Statistics (ABS) Short-Term Visitor Arrivals.

RECOVERY OF SPEND BY MARKET IS STRONG

TOURISM AUSTRALIA 15 KEY MARKETS: EXPENDITURE RECOVERY CY 2019, TOTAL TRIP SPEND VS. YE MARCH 2024

Source TRA IVS, March 2024

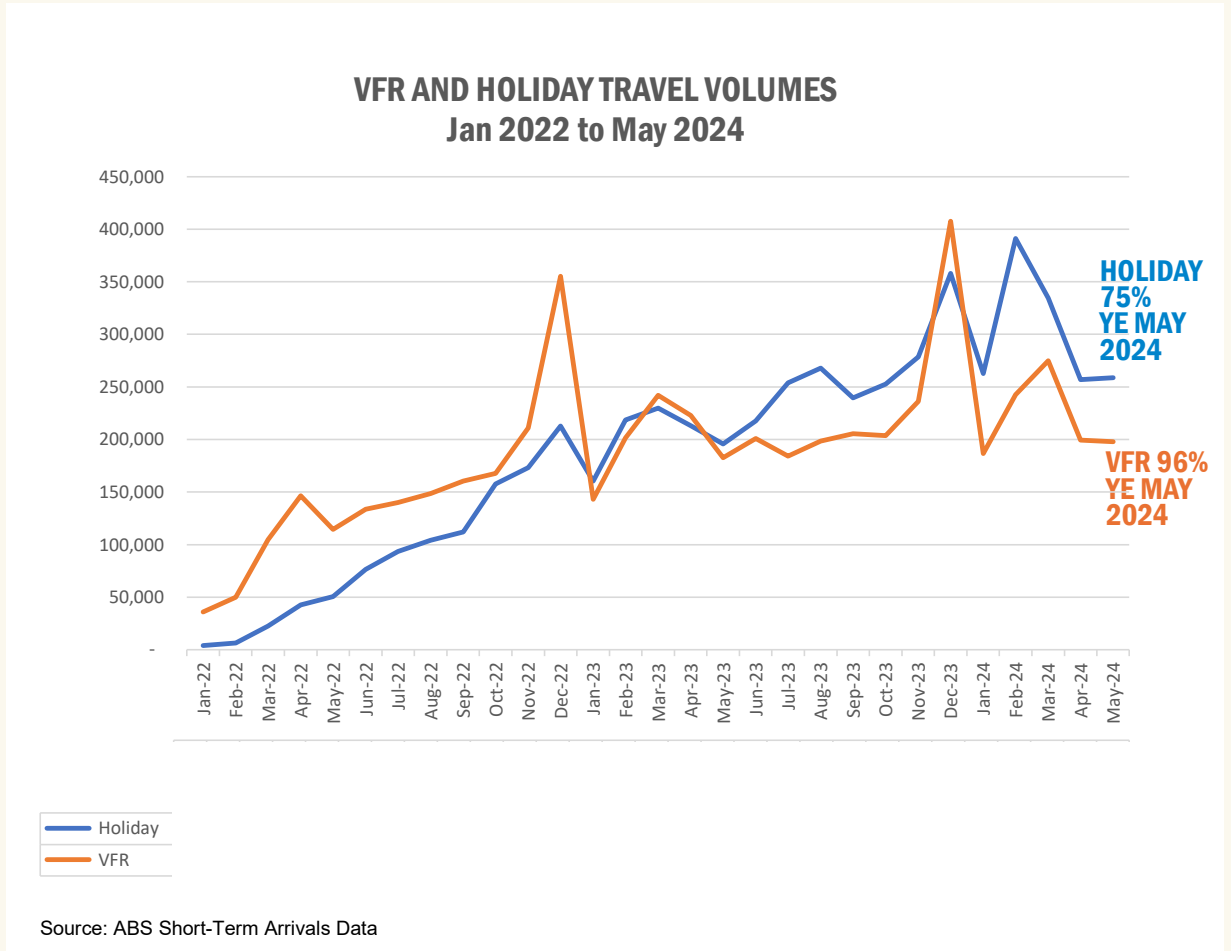


Source: Tourism Research Australia, International Visitor Survey, March 2024 Qtr.

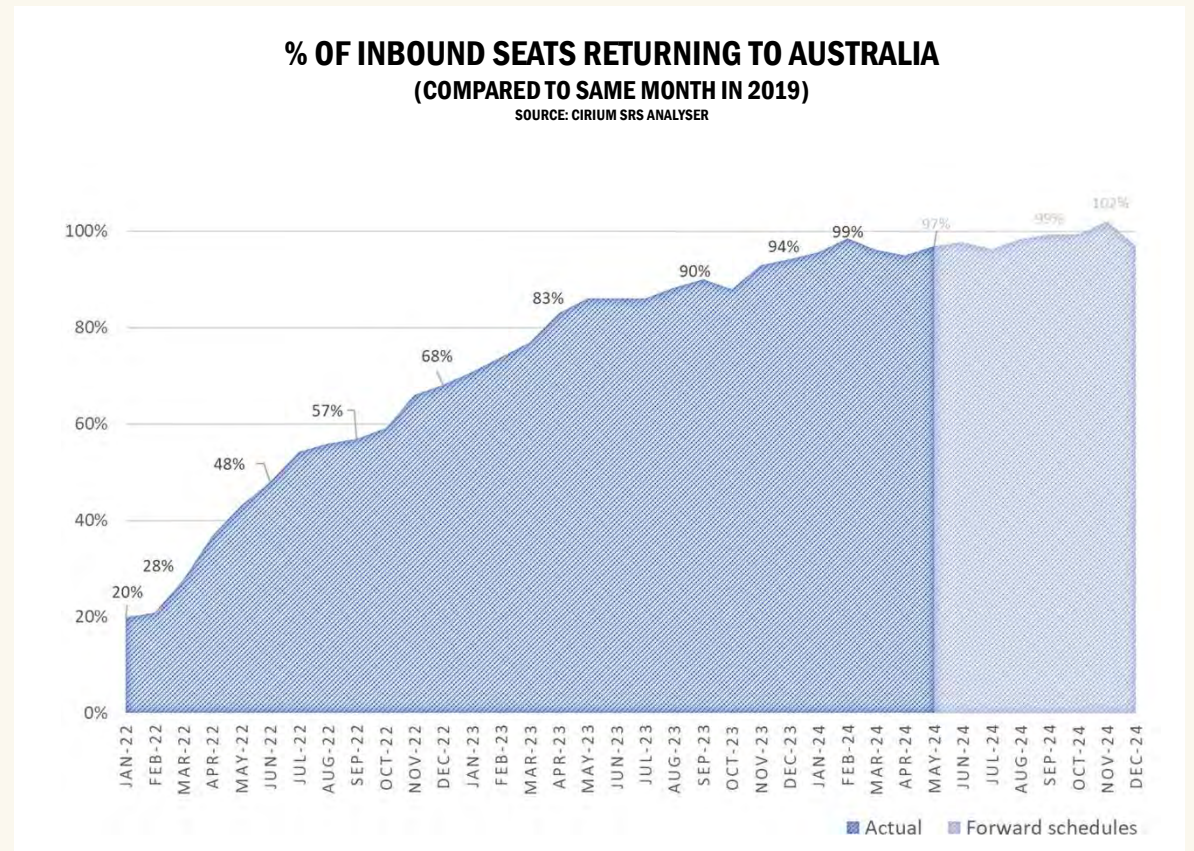


FACTORS INFLUENCING RECOVERY

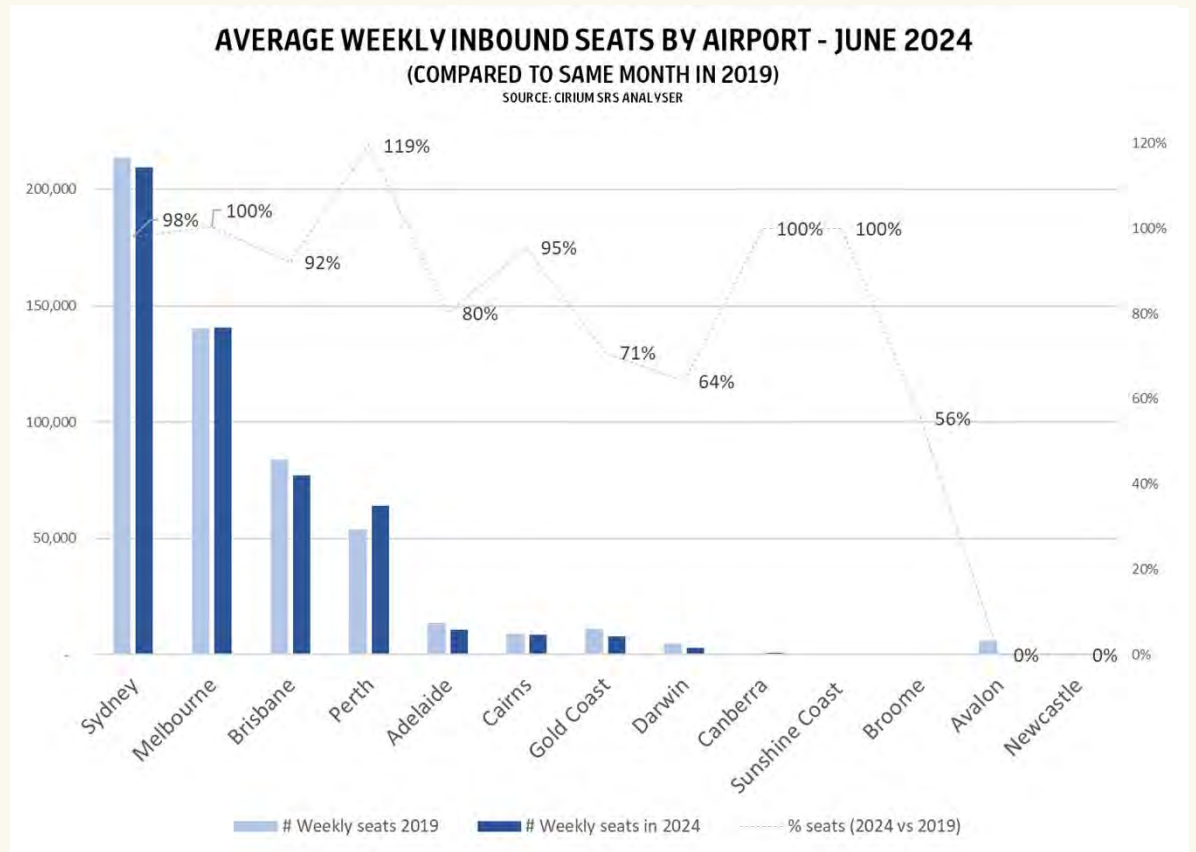
TRAVEL FOR HOLIDAY PURPOSES IS ABOVE VISITING FRIENDS & RELATIVES (VFR), WITH FURTHER ROOM FOR RECOVERY



THE RETURN OF AVIATION CAPACITY IS CRITICAL



INTERNATIONAL CAPACITY INTO AUSTRALIA VARIES BY DESTINATION

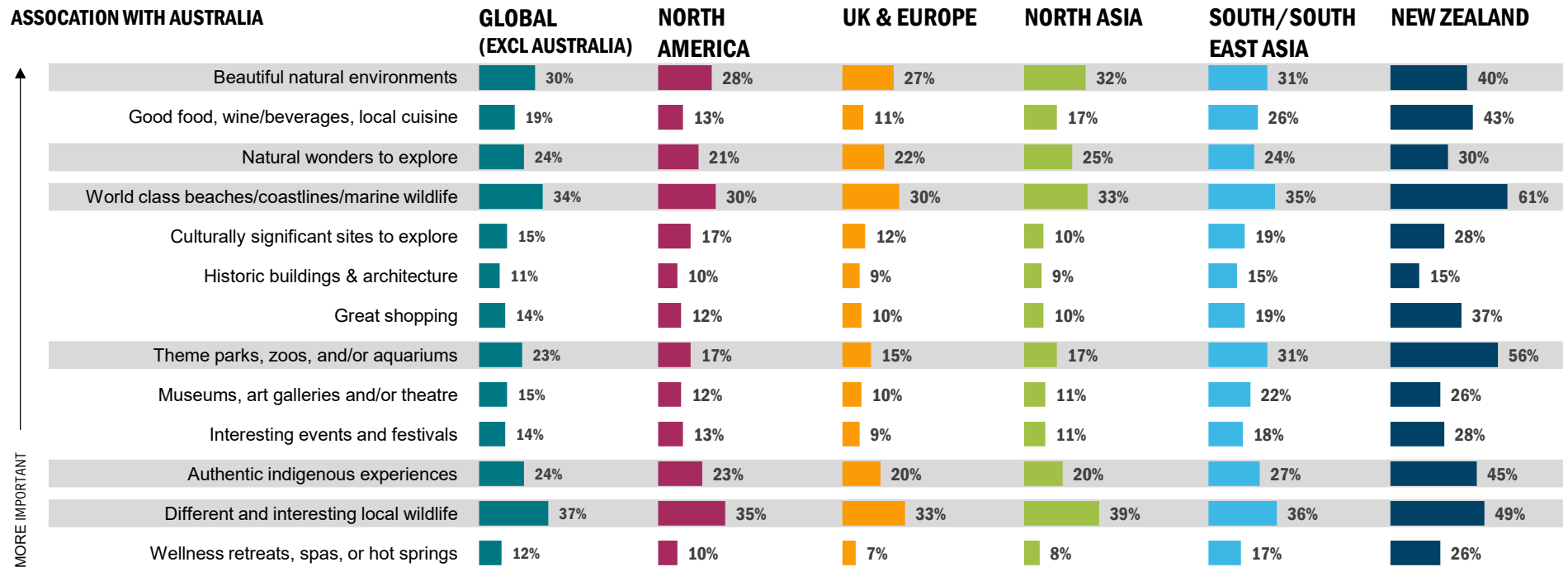


Source: Cirium SRS Analyser air schedules data



TOURISM OUTLOOK

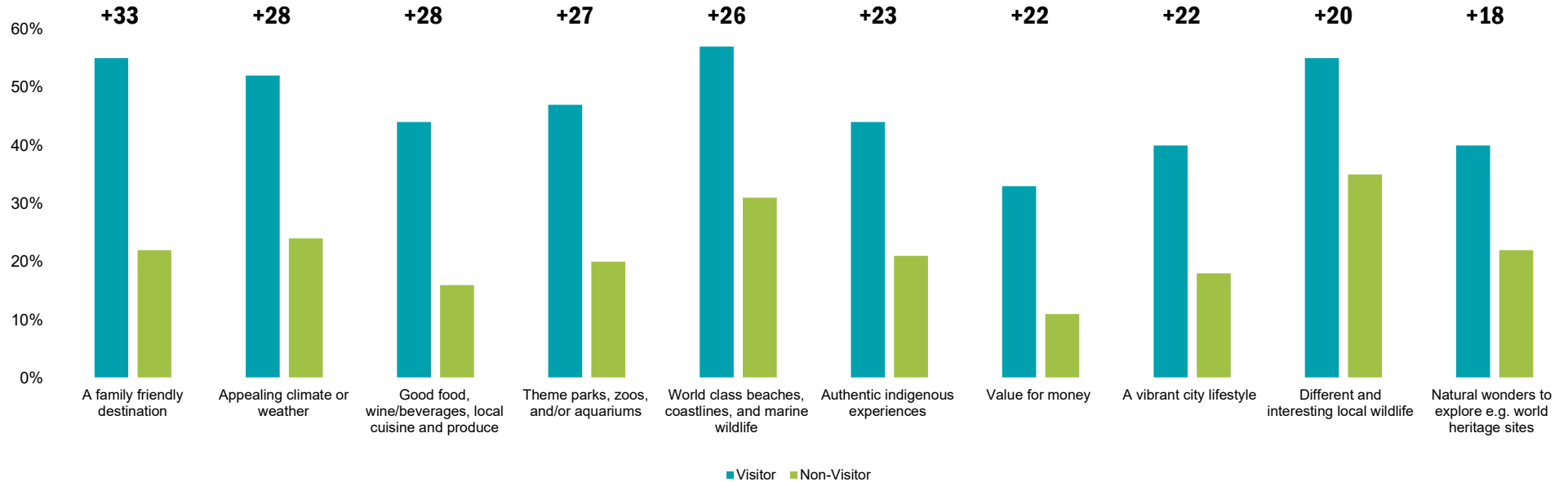
AUSTRALIA IS HIGHLY ASSOCIATED WITH THESE EXPERIENCES



A12. When you are deciding on which holiday destination(s) to visit, which of the following factors are most important to you? Please rank up to 5, where 1 is the most important.
 A15. Which holiday destinations come to mind when you think of the following holiday experiences?
 Base: Global (excl Australia) n=6,489, North America n=766, UK & Europe n=1,559, North Asia n=1,849, South, Southeast n=1,842, Australia n=466, New Zealand n=463

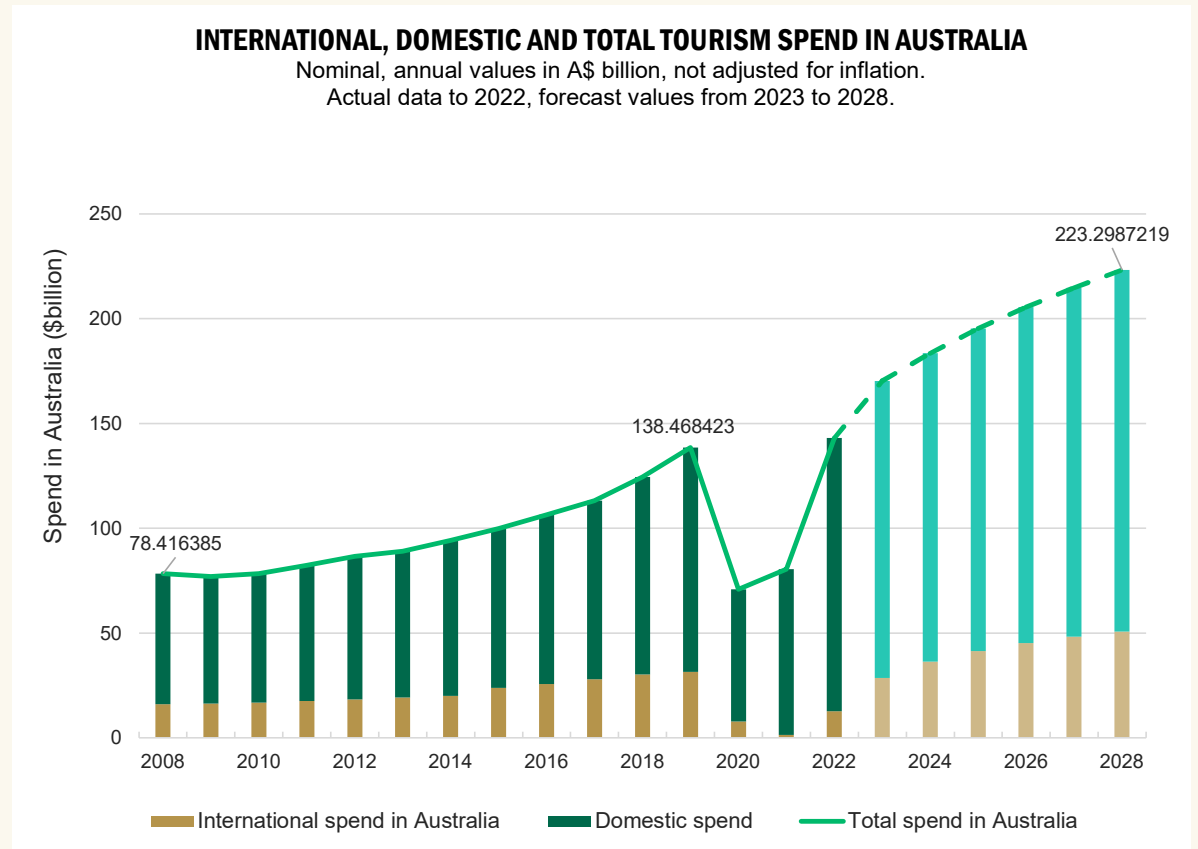
AUSTRALIA OVER DELIVERS IN ALL AREAS

DESTINATION ASSOCIATIONS – BY PAST FIVE YEARS VISITATION



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 August 2023 via BDA Marketing Planning

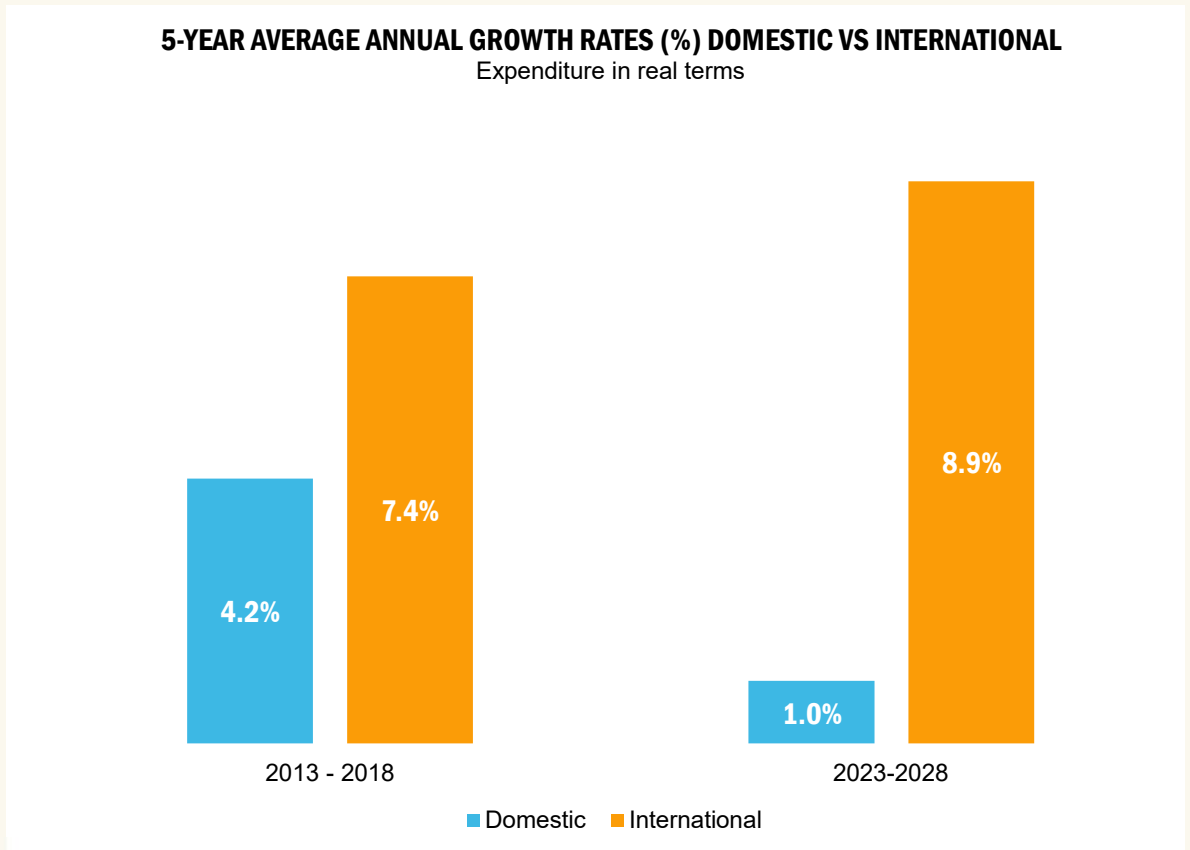
NATIONAL GROWTH PROJECTIONS FOR INTERNATIONAL AND DOMESTIC SPEND IN AUSTRALIA IS STRONG, ACCORDING TO TRA FORECASTS



Sources: TRA International Visitor Survey, National Visitor Survey, and forecast data



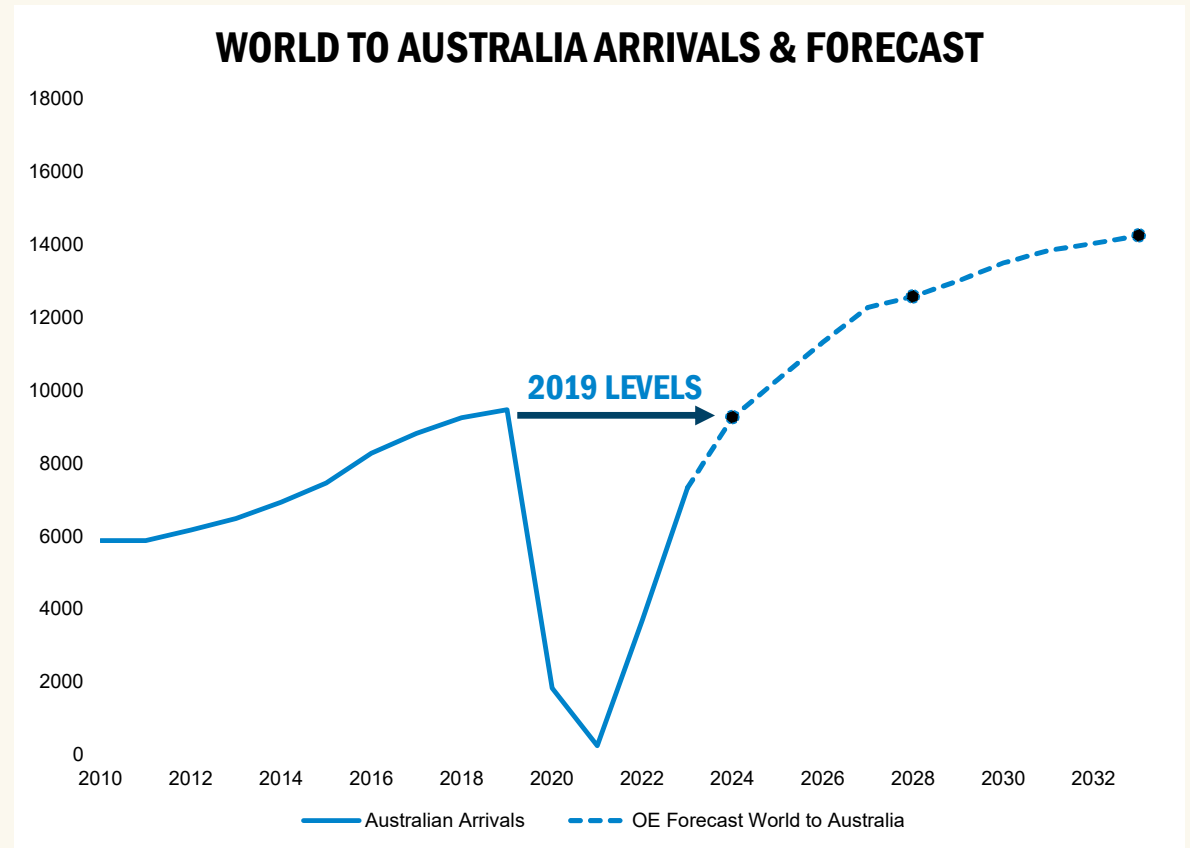
TOURISM GROWTH IN AUSTRALIA WILL BE SIGNIFICANTLY HIGHER FOR INTERNATIONAL RATHER THAN DOMESTIC



Source: Tourism Research Australia, Tourism forecasts for Australia 2023 to 2028

**AS WE RECOVER,
WE COLLECTIVELY
SHIFT OUR
FOCUS...**

**TO THE NEXT
CHAPTER OF
SUSTAINABLE
GROWTH ... YIELD &
NOT JUST VOLUME**



Sources: Oxford Economics (OE) Forecasts, December 2023.



OUR FOCUS ON DRIVING DEMAND



TOURISM AUSTRALIA'S FOCUS FOR THE YEAR AHEAD

Grow demand and enable a competitive and sustainable tourism industry

1.



Create and convert demand through campaigns and partnerships.

2.



Drive destination & product awareness through PR, famils and Aussie Specialist Program training.

3.



Be a platform for industry and connect operators to buyers around the world.

4.



Harness consumer drivers - Indigenous, sustainability, accessible tourism.

5.

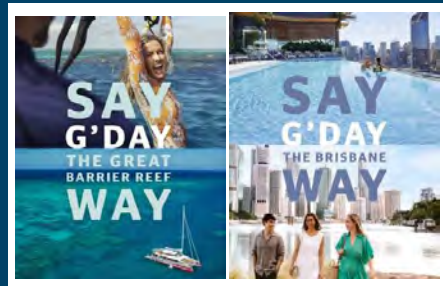


Build a strong pipeline of international business events.

Leverage the decade of green and gold across key markets



THE BRAND CAMPAIGN CONTINUES TO SPEARHEAD OUR WORK



PARTNERSHIPS

HIGH YIELDING TRAVELLERS

CULTURE & EVENTS



SUPPORTED BY A BREADTH OF ACTIVITIES



CONTENT CAMPAIGNS



EVENTS



BROADCAST & IMHP



WORKING HOLIDAY MAKER



TOPICAL MOMENTS



SOCIAL MEDIA



GLOBAL PR



ADVOCACY



CONTENT PARTNERSHIPS



BUSINESS EVENTS

CREATING DEMAND TO FILL INBOUND SEATS VIA AIRLINE PARTNERSHIPS



CHINA

HONG KONG & SOUTH KOREA

MALAYSIA

MALAYSIA

SOUTH KOREA



JAPAN

8 X MARKETS

7 X MARKETS

USA

CANADA



WHAT'S NEXT...



TOURISM FOCAL POINTS FOR THE YEAR AHEAD



Budi Bin Cultural Landscape, Tourism, VIC

1.

INDIGENOUS CULTURE

There's a heightened sense of purpose, and connection to community & indigenous culture.



Sunrise Journeys, Uluru NT



Bullo Station, WA

2.

PREMIUM REDEFINED

Premium is being redefined with a focus on self care, reconnection & wellness.



Forest Therapy, RBG Melbourne VIC



Victoria Spotlight

3.

DISTRIBUTION

Disintermediation is possible with AI but do consumers want that? The landscape is evolving, and agents are still key.

DISTRIBUTION 2035



Grandon, VIC

4.

AGRITOURISM

Back of house is coming to the fore, with the continued emergence of our world class food & wine.



Breakfast with Alpacas, Jiliby NSW



Blue on Broadbeach QLD

5.

STORYTELLING

Travel inspiration & research is "always on" - creating a step change in marketing to drive demand.



Pure South Australia



Royal Caribbean Wiggles Cruise

6.

CRUISE & SELF DRIVE

Modes of travel continue to shift, with a surge in cruise, & self drive - leading to great dispersal.



Oak Hill Bathurst, NSW



THANK YOU

