

An aerial photograph of a large, historic stone building complex, likely a government or institutional site, situated in a lush green rural landscape. The building has multiple wings and a prominent central tower. The surrounding area is filled with green fields, trees, and some residential buildings. In the background, rolling hills are visible under a clear blue sky.

TOURISM AUSTRALIA UPDATE

Dominic Mehling
September 2023 – Maitland NSW

TODAY'S UPDATE



A little bit about us



Recovery and Outlook



Current Tourism Australia activity



Come along with us on the journey

A little bit about us...

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

Target markets and their value by 2025

OUR TARGET MARKETS



9.5 MILLION VISITORS

\$45 BILLION SPEND

1 IN 13 JOBS

*Pre-COVID figures

OUR TARGET SEGMENTS



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**

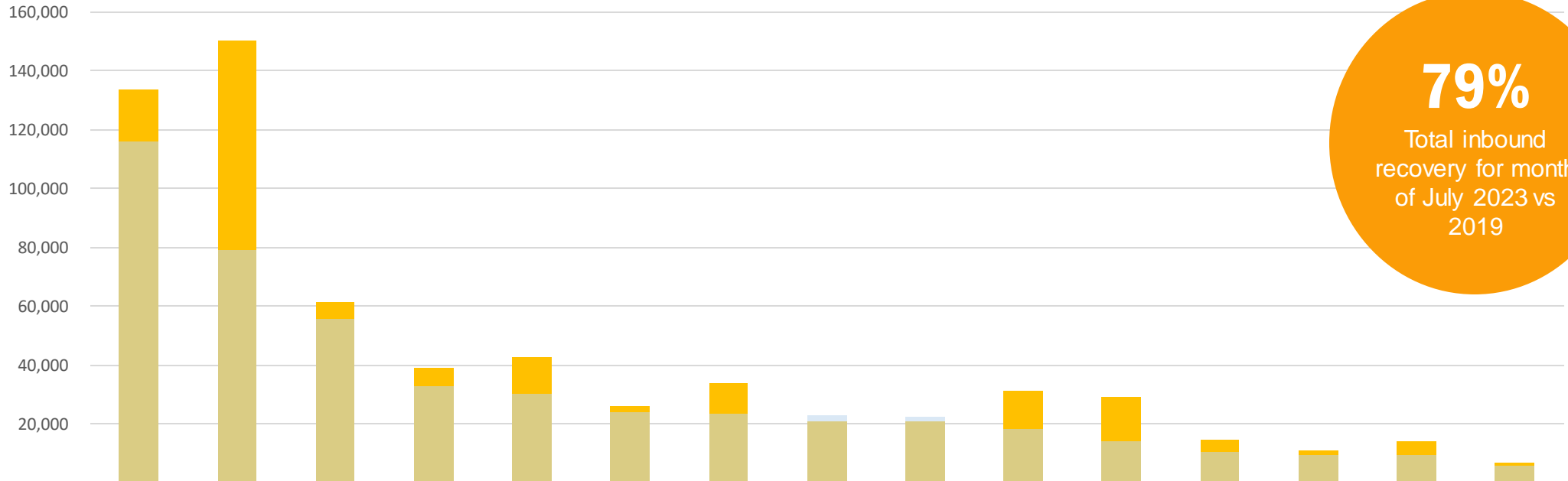
**6.
INDIGENOUS,
SUSTAINABLE,
AND
ACCESSIBLE**

**7.
GROW
BUSINESS
EVENTS**

How is recovery looking and what is the outlook?

STRONG RECOVERY WITH ROOM TO GROW IN PARTS OF ASIA

Visitor Arrivals from our Top 15 Markets
Month of July 2023



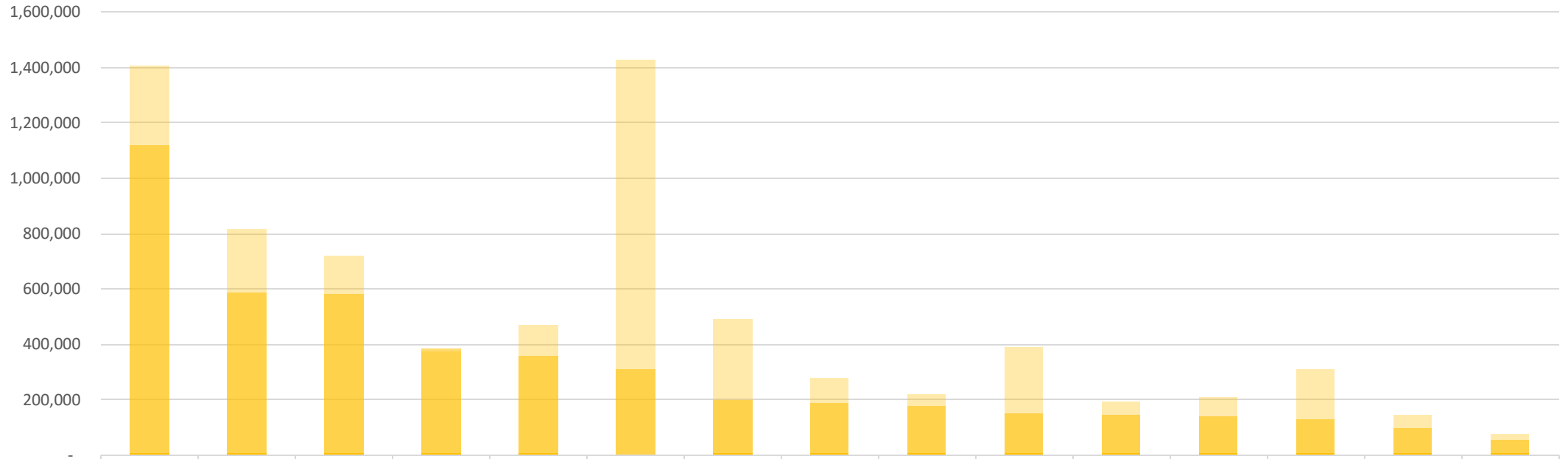
79%
Total inbound recovery for month of July 2023 vs 2019

	New Zealand	China	United States of America	United Kingdom	Japan	India	Singapore	South Korea	Indonesia	Hong Kong	Malaysia	Germany	Canada	France	Italy
Jul-19	133,630	150,390	61,530	39,300	43,000	26,040	34,020	20,930	20,680	31,110	29,440	14,610	11,030	14,040	6,680
July-23	115,960	79,040	55,980	32,990	30,540	24,120	23,560	22,950	22,360	18,450	14,080	10,530	9,680	9,480	5,750
Month Recovery % chg	86.8%	52.6%	91.0%	83.9%	71.0%	92.6%	69.3%	109.7%	108.1%	59.3%	47.8%	72.1%	87.8%	67.5%	86.1%

Jul-19 July-23 Month Recovery % chg

INBOUND ARRIVALS HAVE RECOVERED TO 66% YTD

Visitor Arrivals from our Top 15 Markets
YE July 2023

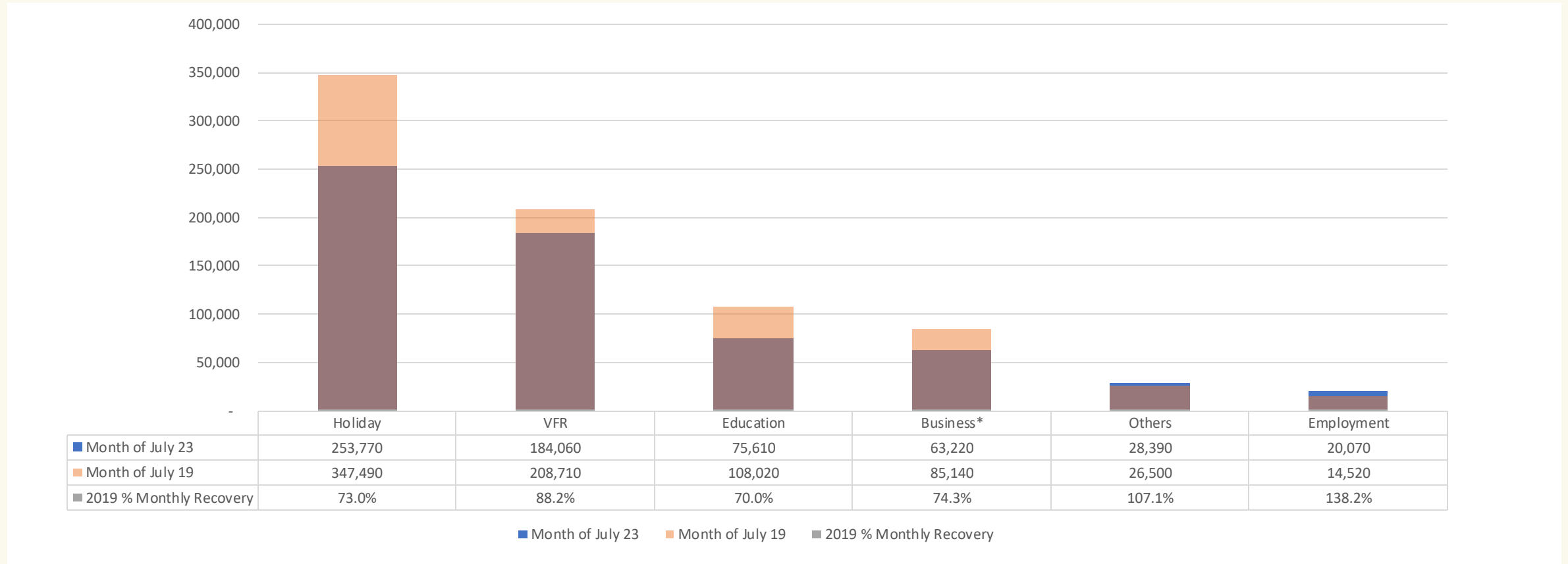


	New Zealand	United States of America	United Kingdom	India	Singapore	China	Japan	South Korea	Indonesia	Malaysia	Canada	Germany	Hong Kong	France	Italy
Year ended July 2019	1,408,110	816,210	718,670	375,140	468,040	1,429,770	488,660	279,670	217,280	388,970	191,100	207,190	311,570	145,570	77,770
Year ended July-23	1,118,830	586,230	581,220	385,130	357,090	308,370	196,120	185,590	178,220	150,310	144,240	138,370	130,390	98,750	56,050
YOY Recovery % chg	79.5%	71.8%	80.9%	102.7%	76.3%	21.6%	40.1%	66.4%	82.0%	38.6%	75.5%	66.8%	41.8%	67.8%	72.1%

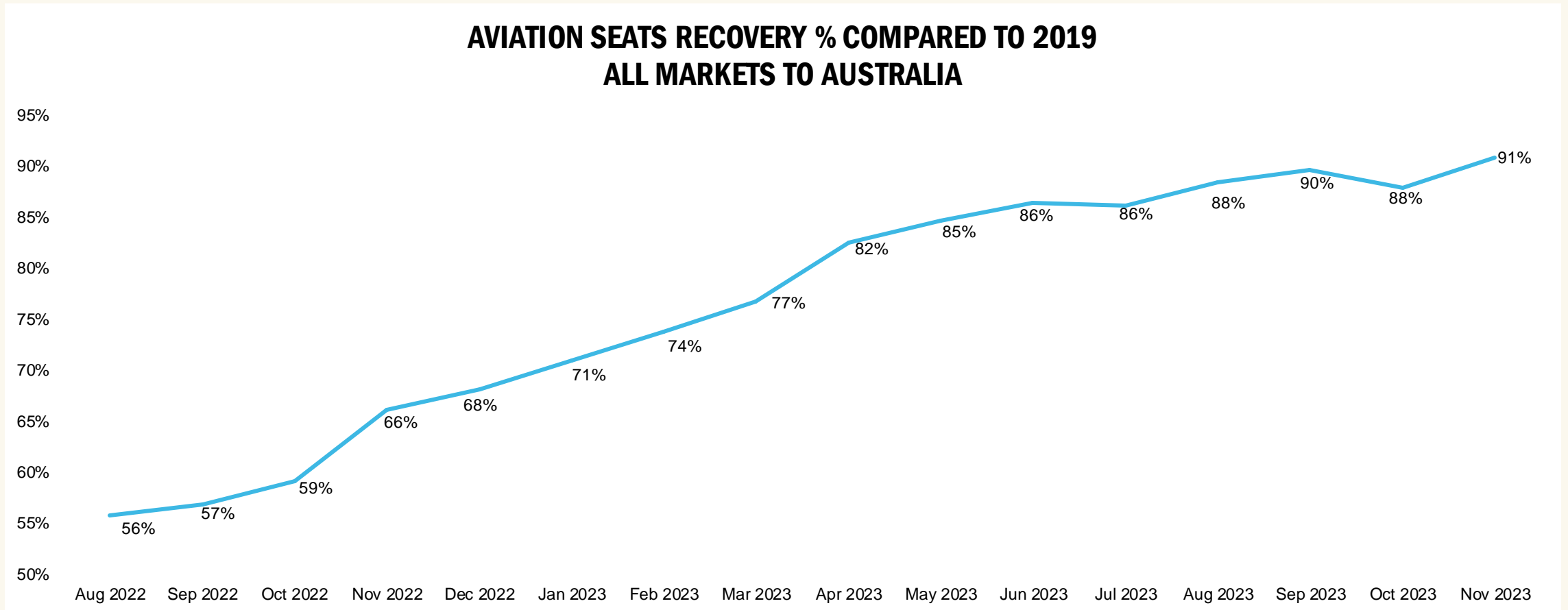
■ Year ended July 2019 ■ Year ended July-23 ■ YOY Recovery % chg

CONTINUED GROWTH IN RECOVERY OF HOLIDAY VS. VFR

Purpose of Visitation
Month of July 2023



AVIATION SEAT RECOVERY: ABOVE 90% BY YEAR END



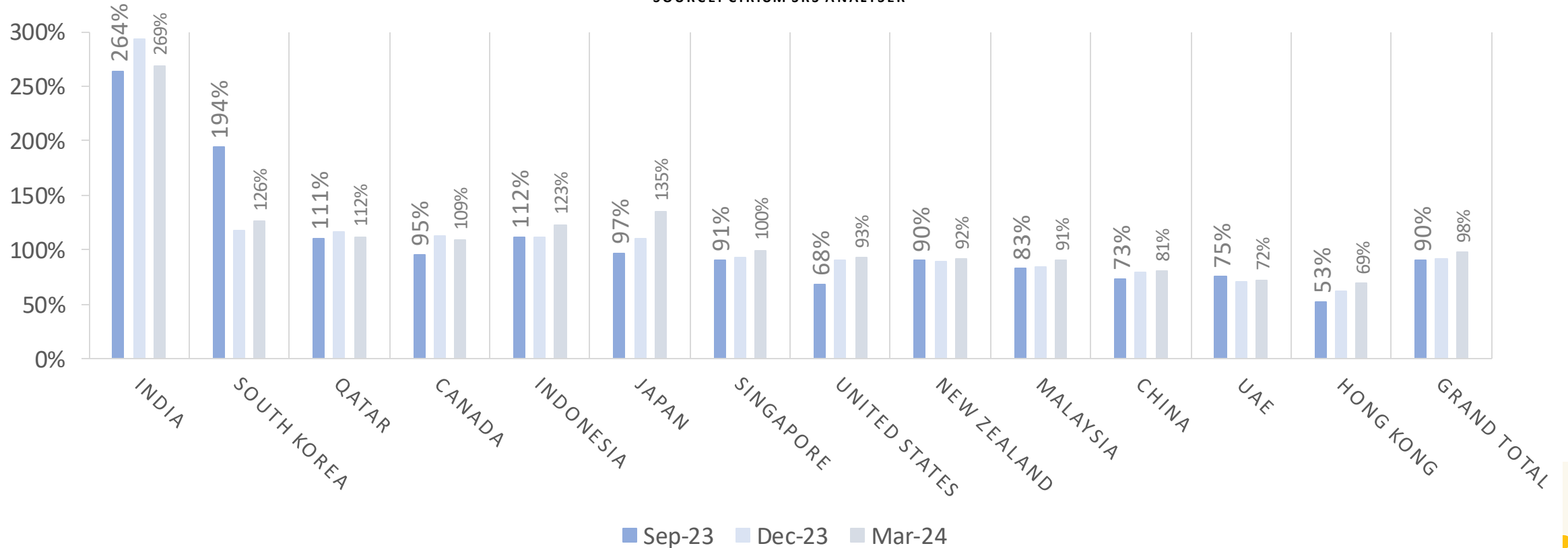
Source: SRS Cirium Analyser, July 2023

AIRLINE SEAT RECOVERY VARIES BY MARKET

% OF DIRECT INBOUND SEATS RETURNING TO AUSTRALIA BY COUNTRY IN 2023

(COMPARED TO SAME MONTH IN 2019)

SOURCE: CIRIUM SRS ANALYSER



THE ECONOMIC HEADWINDS CONTINUE TO BE FELT AROUND THE WORLD, AND INCREASINGLY AT HOME

Savings rates reducing

Risk of recession

Interest rates high

Volatile Exchange rates

Cost of living increasing

Assets decreasing

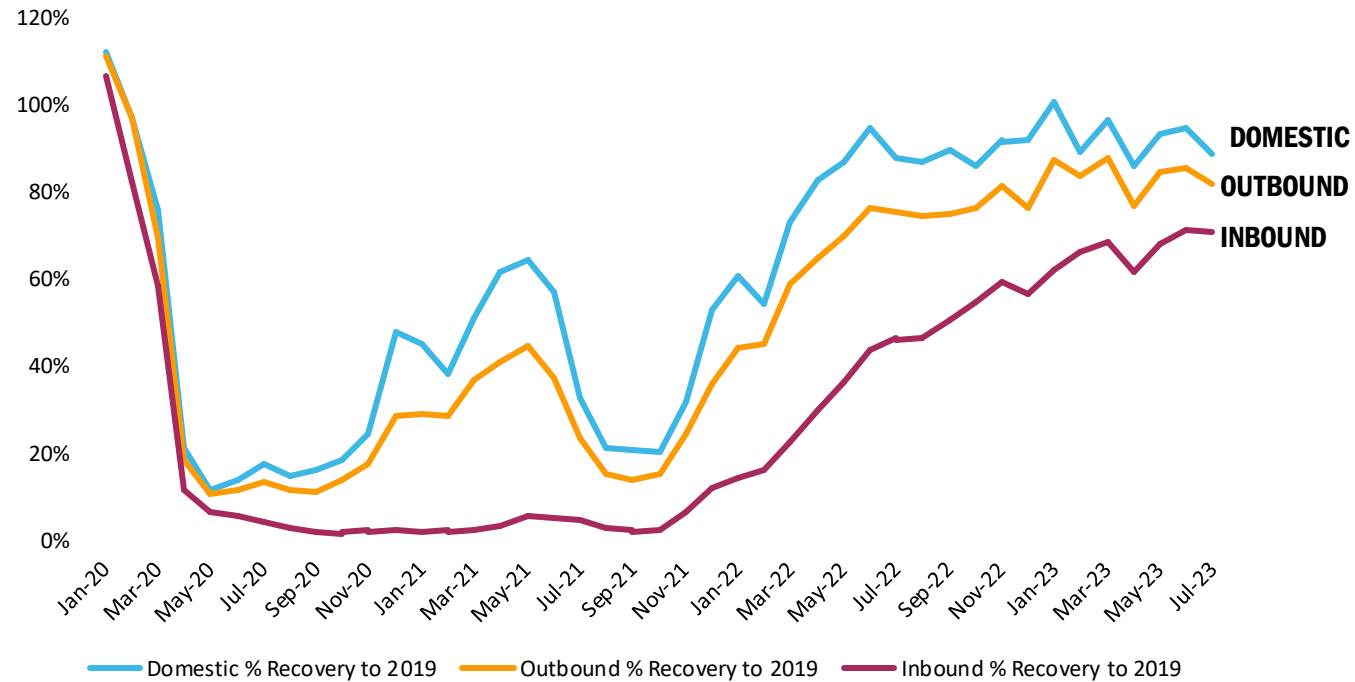
Energy costs high

Airfares high

War in Ukraine

INBOUND EVEN MORE VITAL TO HELP REPLACE SOFTENING DOMESTIC

Inbound vs. Domestic vs. Outbound
IATA GAP Flight Agency
 % Recovery to 2019



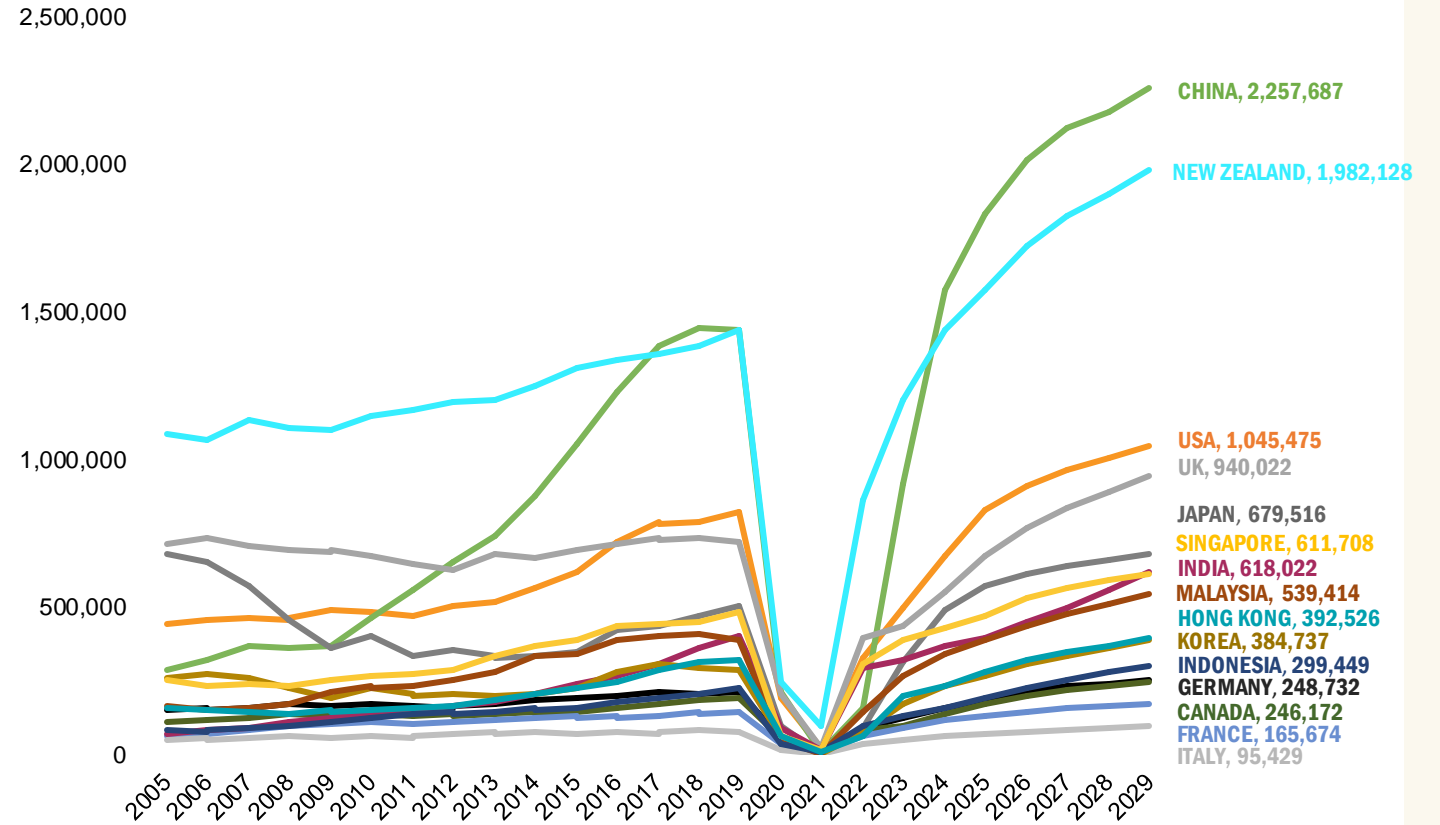
Source: IATA GAP Flight Agency Data

Source: IVS, NVS Overnight, NVS Outbound

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



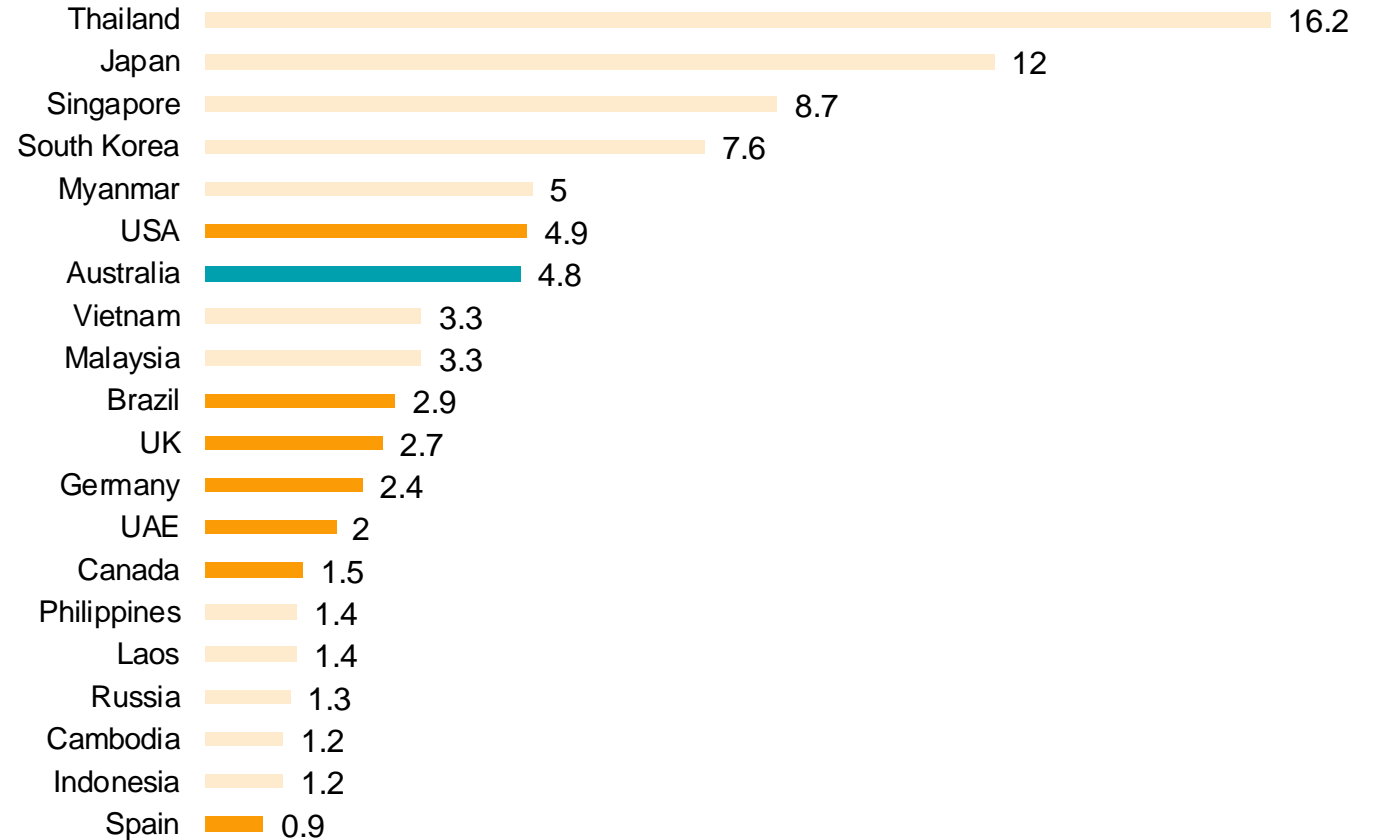
Source: Oxford Economics
2022 Onwards represents estimated forecasted data

AUSTRALIA RANKS SECOND FOR OUT-OF-REGION DESTINATIONS FROM CHINA

International passenger traffic outbound from China bounced back to 52.6% in July 2023 vs the same period in 2019.

Short-distance outbound travel was the first to recover, with 94% of tourists concentrated in Asia.

CHINA OUTBOUND VISITATION
% of outbound, Jan to June 2023

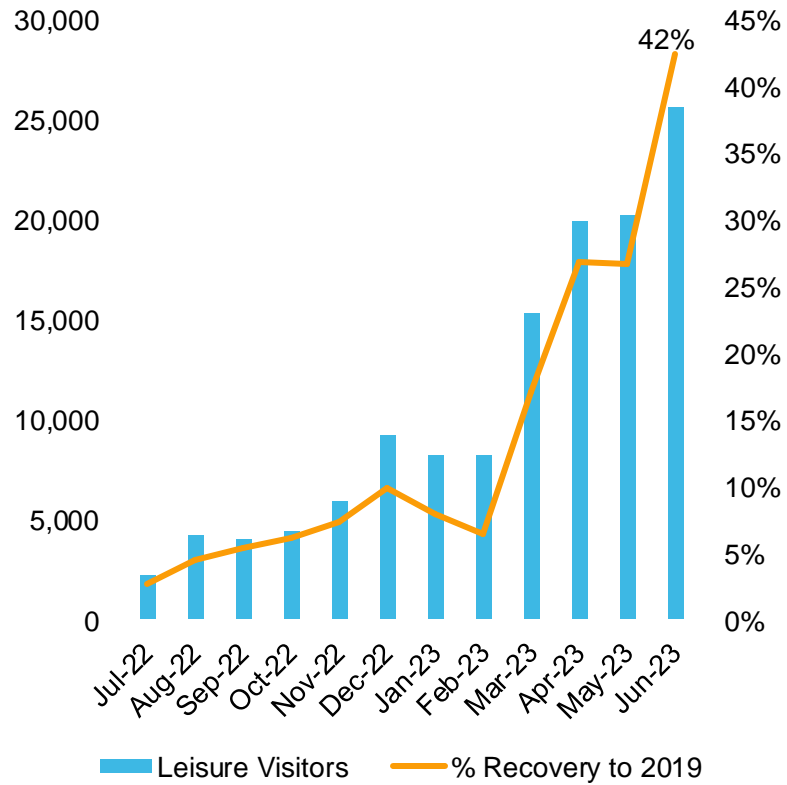


SOURCE: China Tourism Academy has released 2023 H1 China Outbound Tourism Statistics Report on 28 July 2023.

CHINA RECOVERY IS STEADY & UNDERWAY

CHINESE VISITATION TO AUSTRALIA

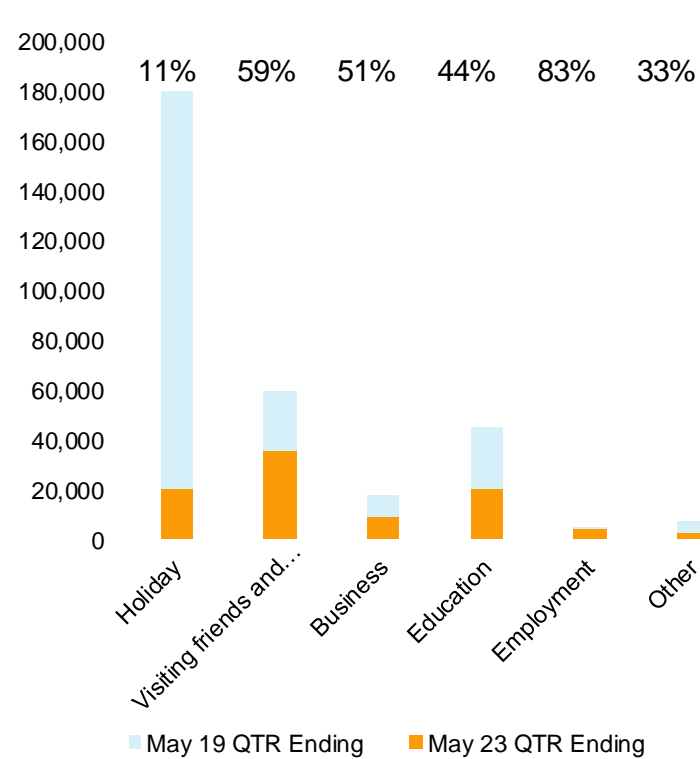
July 22 to June 23, Leisure



Source: ABS Overseas Arrivals and Departures, Short-Term Visitor Arrivals, June 2023

PURPOSE OF CHINESE TRAVEL

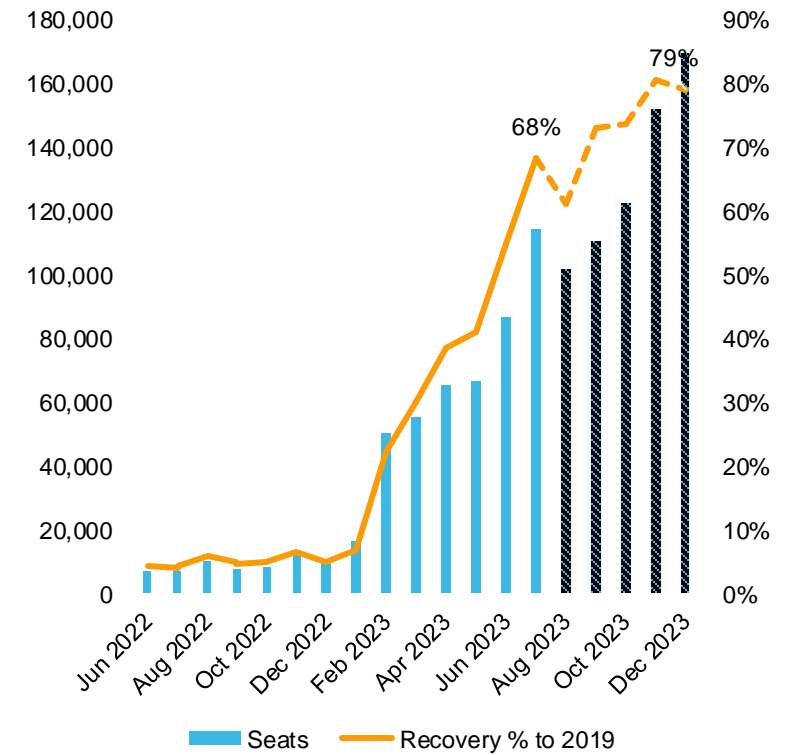
QTR Ending May 23 v QTR Ending May 19



Source: ABS Arrivals Short-Term Visitors

CHINA TO AUSTRALIA AVIATION CAPACITY

June 22 to Dec 23*



Source: SRS Cirium
*Sections with textured fill are forecasted schedules

What is Tourism Australia's current activity?

COME AND SAY



Uluru-Kata Tjuta National Park

AUSTRALIA



60" TVC



STAY THE COURSE: FRESH AND FAMILIAR



China launch

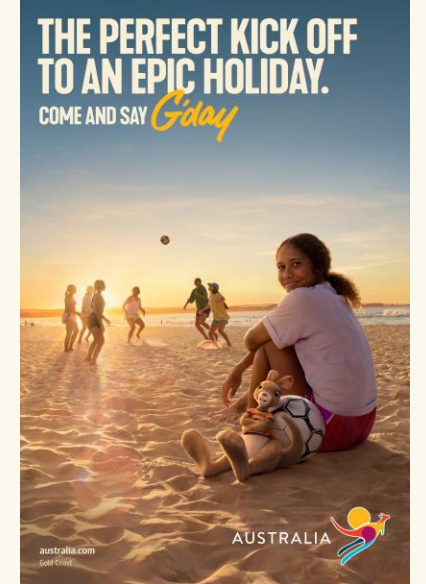


Partners

Working Holiday

Trade Events

Cultural spikes



HOLIDAY HIGHLIGHTS 30" TVC





PARTNER EXAMPLE: TRAILFINDERS 'ONE VOICE' CAMPAIGN – UNITED KINGDOM

Overview

For the first time, Trailfinders, the largest producer of visitors to Australia from the UK, will run an always on 'One Voice' Australia campaign in conjunction with Tourism Australia and all eight State & Territory Tourism Organisations.

Activity will allow us to reach a significant audience to drive awareness of and conversion of Australia bookings.

Timings: August 2023 to June 2024.

Partners: Trailfinders, Tourism Australia & all 8 x State & Territory Tourism Organisations.

Campaign investment: Combined investment of over £1million.

Creative & Channels: *Come and Say G'Day* creative across print, digital and social.

TRAILFINDERS
THE TRAVEL EXPERTS

COME AND SAY G'DAY

AUSTRALIA

NO ONE LOOKS AFTER YOU BETTER

<p>Sydney to Canberra – Coast & Country Loop 14 nights from \$X,XXXX Flights, 11 days fully inclusive car hire, hotel and Hunter Valley Food and Wine Explorer • Sydney & Bondi Beach • Hunter Valley • Blue Mountains Saving over \$200 per couple</p>	<p>Sydney and beyond 14 nights from \$X,XXXX Flights, 11 days fully inclusive car hire, hotel and Hunter Valley Food and Wine Explorer • Sydney & Bondi Beach • Hunter Valley • Blue Mountains Saving over \$200 per couple</p>	<p>Absolute Luxury New South Wales & Uluru 14 nights from \$X,XXXX Flights, 11 days fully inclusive car hire, hotel and Hunter Valley Food and Wine Explorer • Sydney & Bondi Beach • Hunter Valley • Blue Mountains Saving over \$200 per couple</p>
--	--	--

TF TRUST
Tailormade Travel Worldwide
First & Business Class Travel
trailfinders.com
0207 795 4551
0207 795 4552

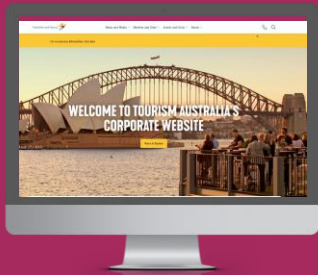
Trustpilot
★★★★★
"Truly excellent: patient, friendly, helpful and a mine of knowledge, tips and advice."

Prices are per person based on a twin/double share & valid for selected XXX departures. Offers are subject to availability & restrictions may apply. Prices correct at time of going to print 23 Jan 23.

Come along with us on the journey

JUST SOME OF THE WAYS TO GET INVOLVED

CORPORATE WEBSITE



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

RESEARCH & INSIGHTS



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

TRADE EVENTS



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

PR, FAMILIS & SOCIAL MEDIA



[TOURISM.AUSTRALIA.COM/
WORKINGWITHMEDIA](https://www.tourism.australia.com/workingwithmedia)

NEWSLETTERS



[TOURISM.AUSTRALIA.COM/
SUBSCRIBE](https://www.tourism.australia.com/subscribe)

WORKING WITH TA GUIDE



[TOURISM.AUSTRALIA.COM/
WORKINGWITHTA](https://www.tourism.australia.com/workingwithta)

KEEP IN TOUCH

Subscribe to our newsletters

tourism.australia.com/subscribe

Follow us on Twitter: [TourismAUS](https://twitter.com/TourismAUS)

Follow us on [LinkedIn](#)

Dominic Mehling

Industry Relations Manager

dmehling@tourism.australia.com

+61 400 935 173

THANK YOU!

