

TOURISM AUSTRALIA UPDATE

Kristy Malapa– Industry Relations Manager
June 2023– Yarra Ranges Tourism

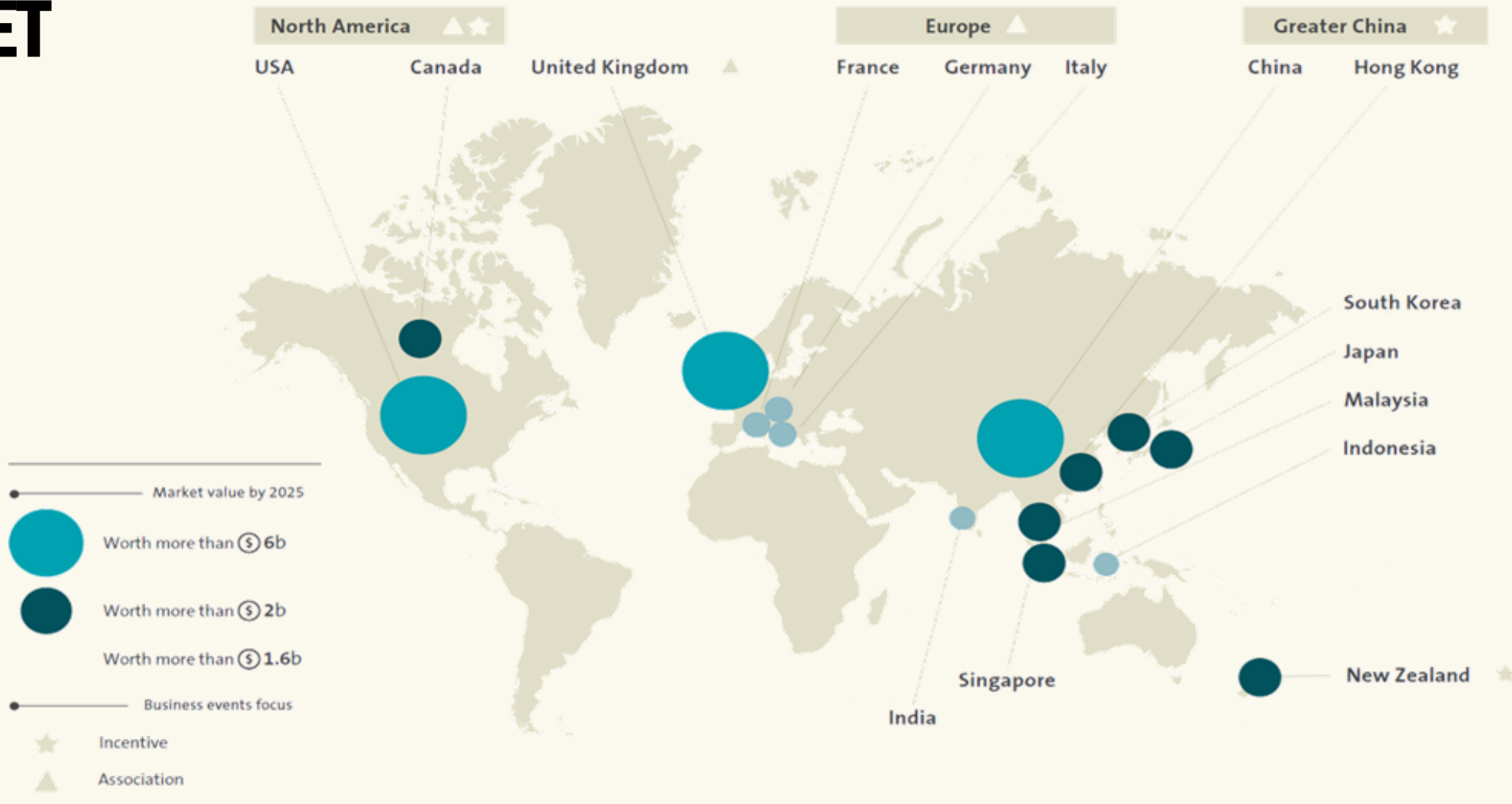
ORGANISATIONAL STRUCTURE



Figure 8: Tourism Australia's organisational structure at 30 June 2022.

Target markets and their value by 2025

OUR TARGET MARKETS



9.5 MILLION VISITORS

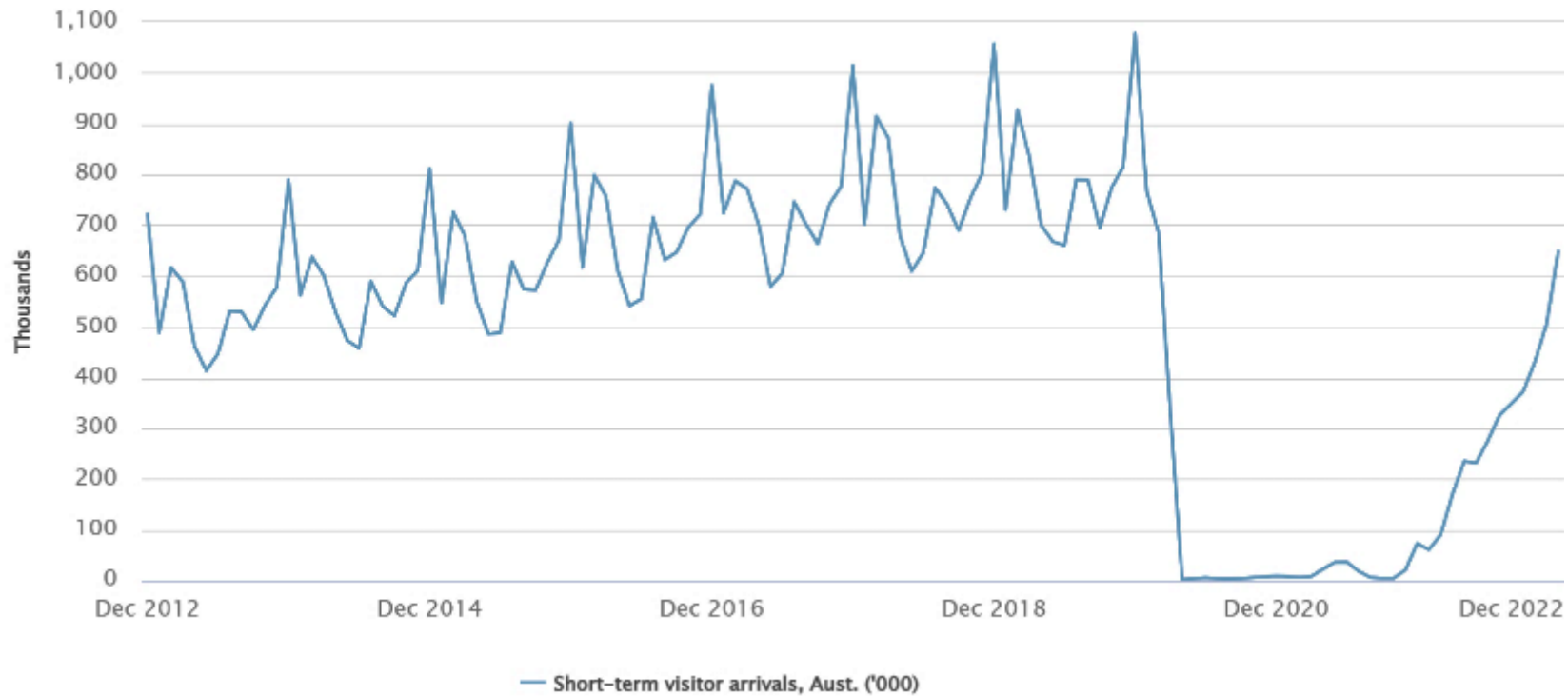
\$45 BILLION SPEND

1 IN 13 JOBS

*Pre-COVID figures

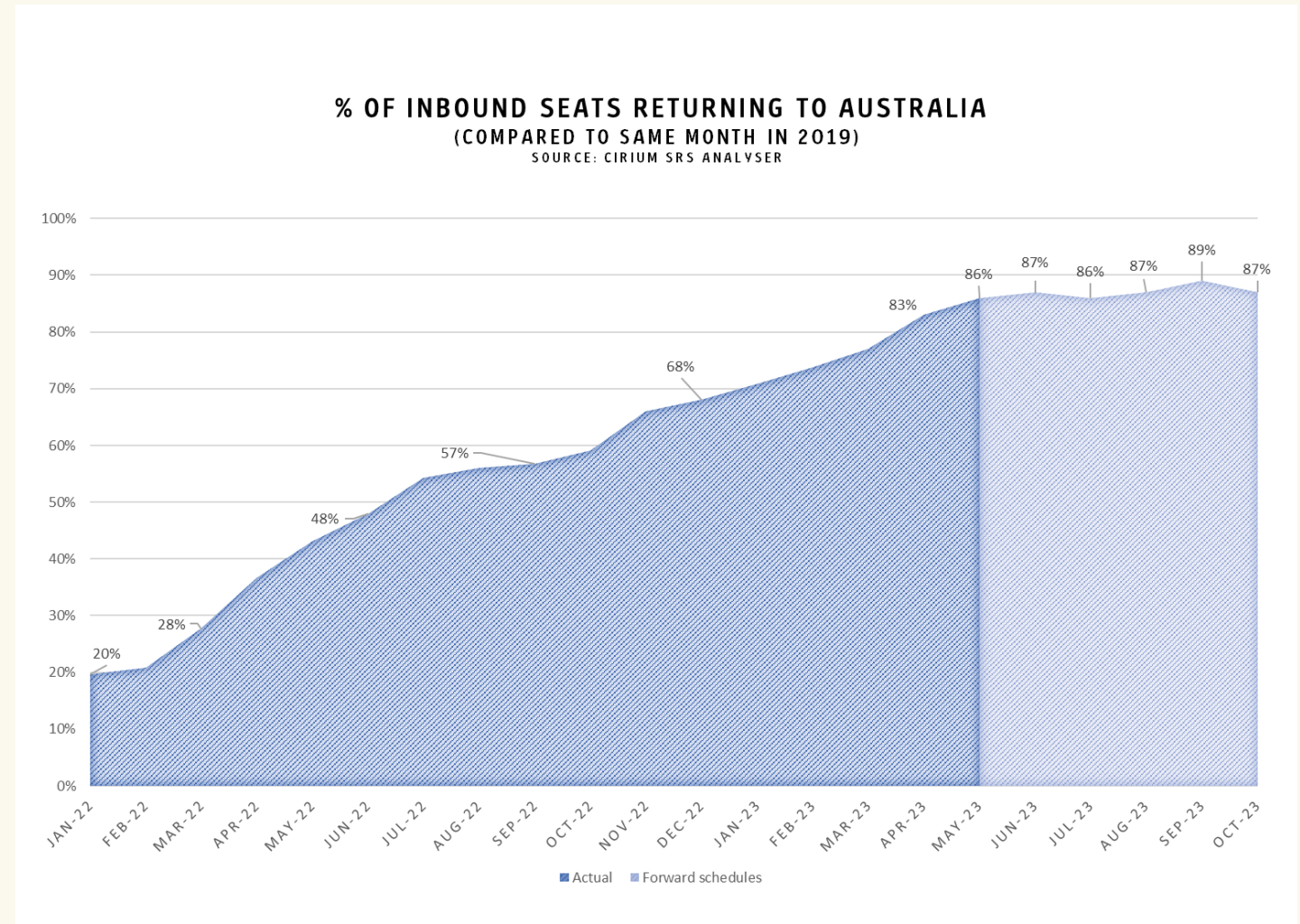
A TOUGH FEW YEARS HERE, BUT OUR RECOVERY IS PROGRESSING

SHORT TERM VISITOR ARRIVALS



Source: Australian Bureau of Statistics, Overseas Arrivals and Departures, Australia, December 2022

**INTERNATIONAL
AVIATION CAPACITY INTO
AUSTRALIA IS
BOUNCING BACK, AND
WITH MORE
COMPETITION WE
EXPECT PRICING TO
IMPROVE BY NEXT YEAR**



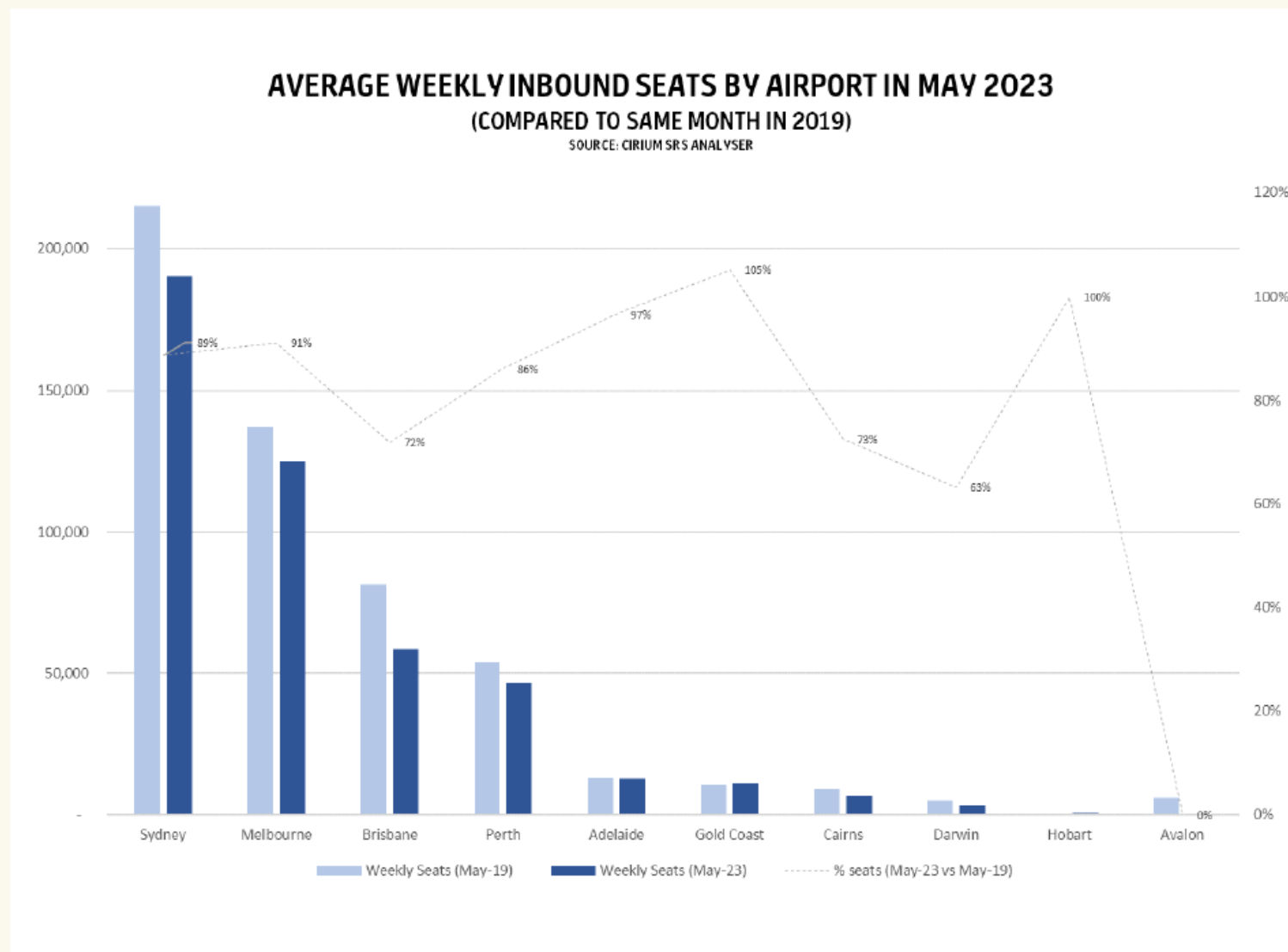
Source: Cirium SRS Analyser air schedules data as at 24 Apr-23

INTERNATIONAL CAPACITY RETURNS FIRST TO SYDNEY & MELBOURNE

Melbourne Tullamarine tops the majors with 91% of seats in May-23.

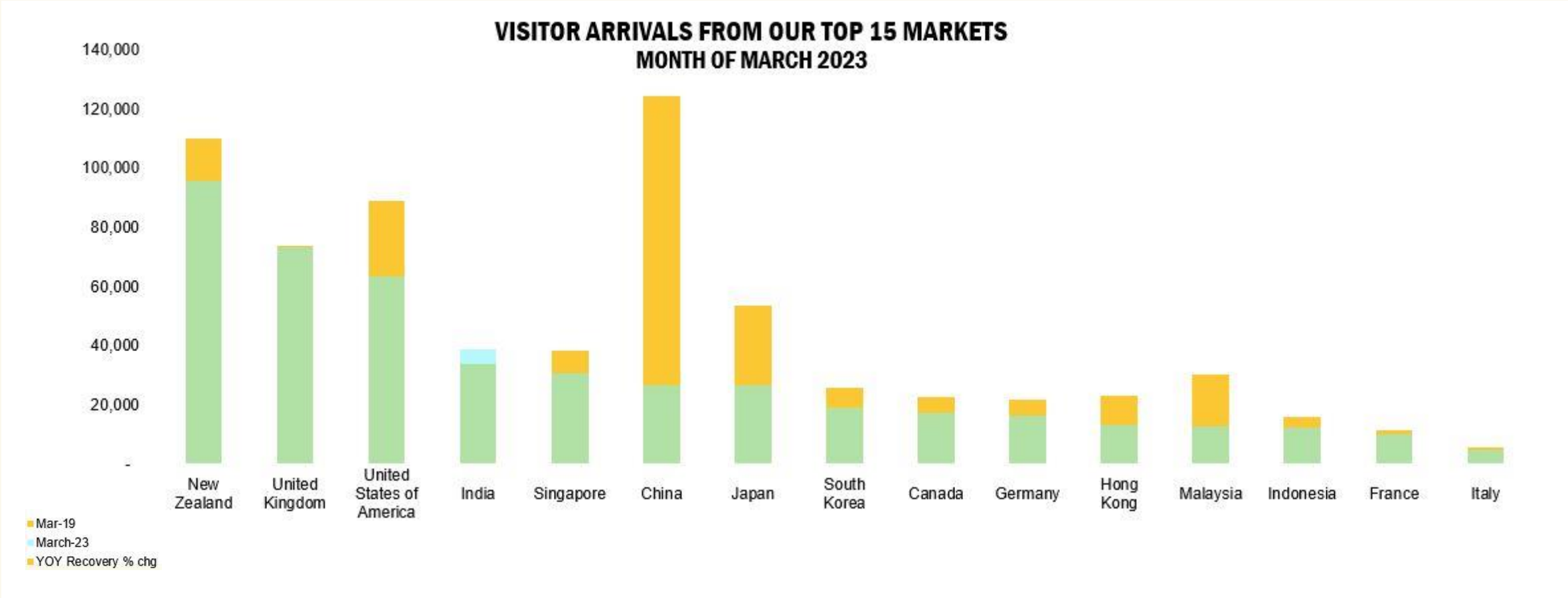
SYD & MEL are the only airports to have capacity from China, so far.

Melbourne Avalon is yet to secure international flights.



Source: Cirium SRS Analyser air schedules data as at 24 Apr-23

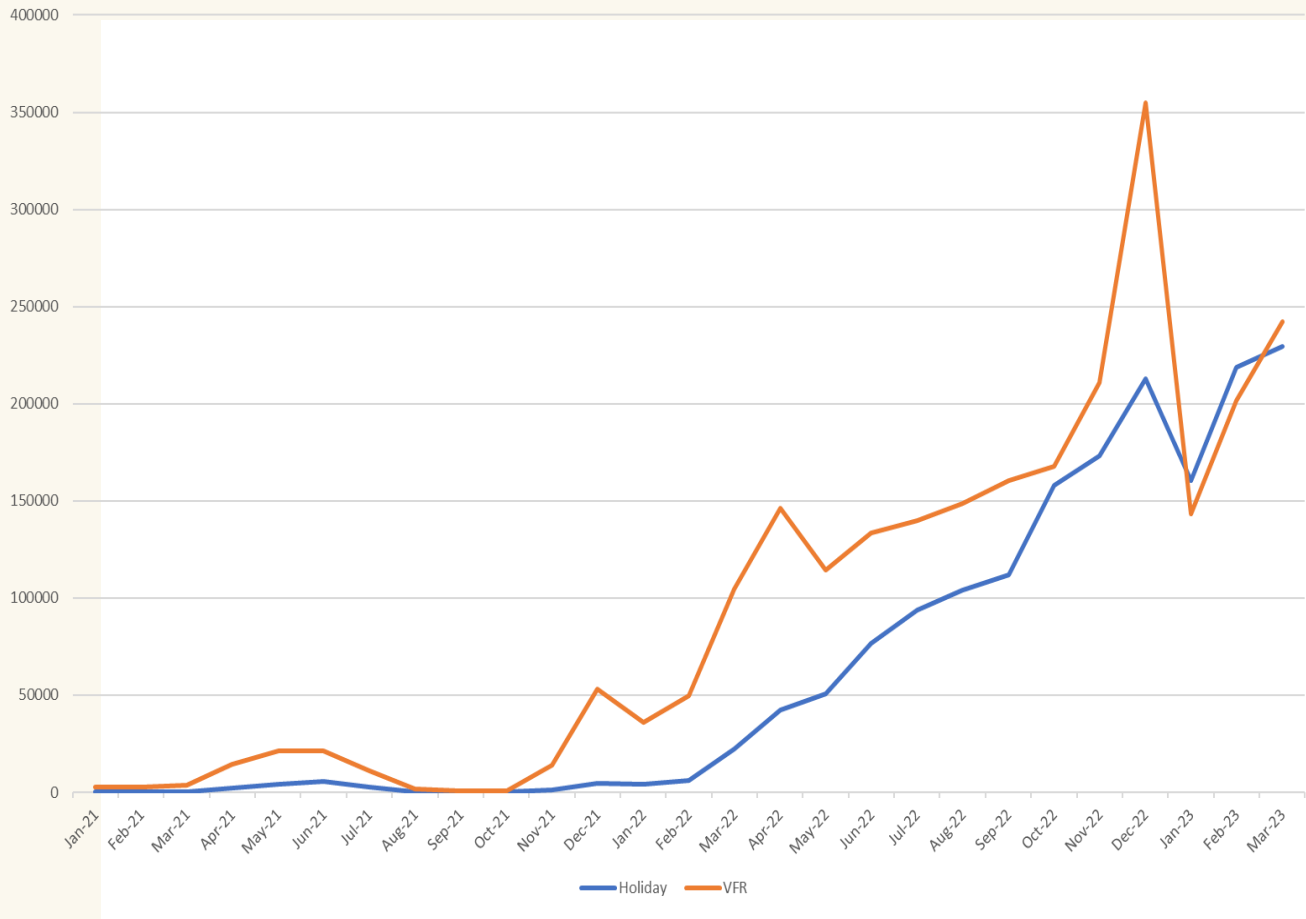
MARCH ARRIVALS WERE STRONG AT 73% OF 2019



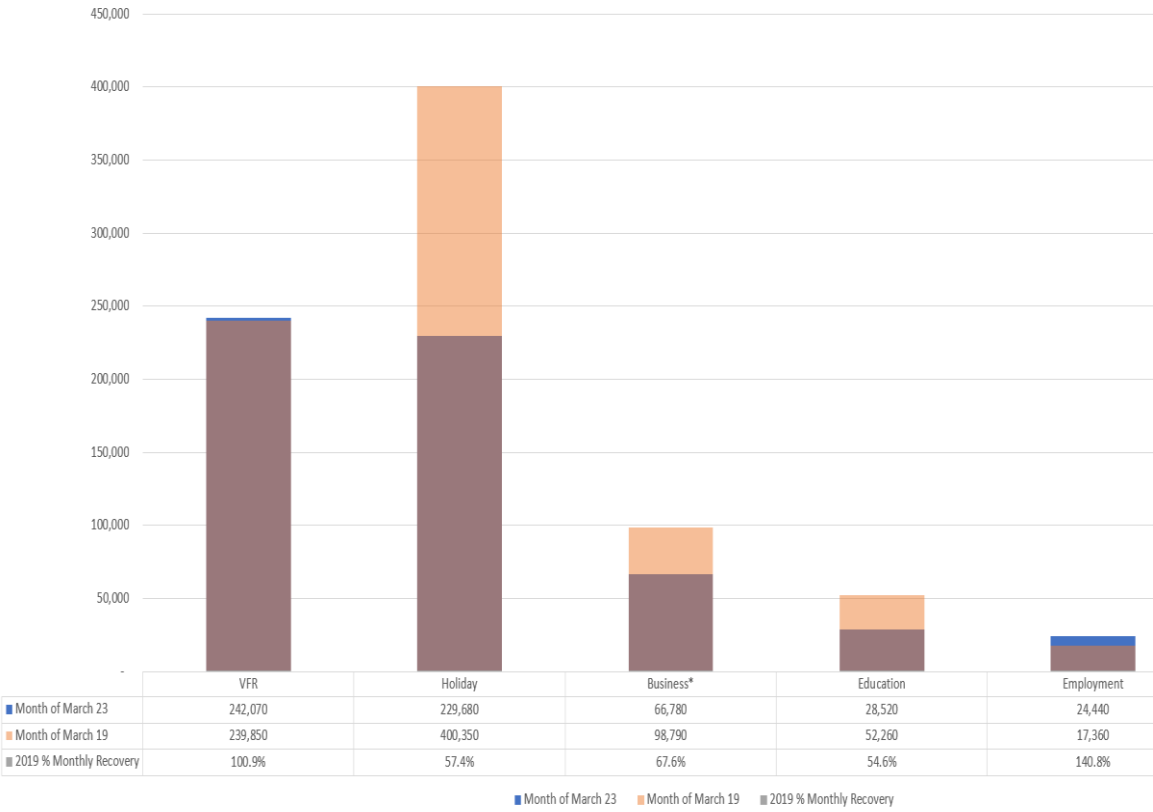
Source: ABS Arrivals Short Term Visitor Arrivals

VOLUME OF HOLIDAYMAKERS vs. VFR

VFR and Holiday Travel Volumes
Jan 2021 to Mar 2023



Purpose of Visitation
Month of March 2023



Source: ABS Arrivals Month of March 2023

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**

COME AND SAY



Uluru-Kata Tjuta National Park
June 2023

AUSTRALIA



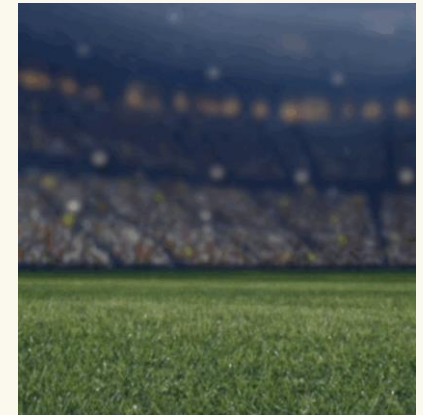
STAY THE COURSE: FRESH AND FAMILIAR



China launch



PARTNERS



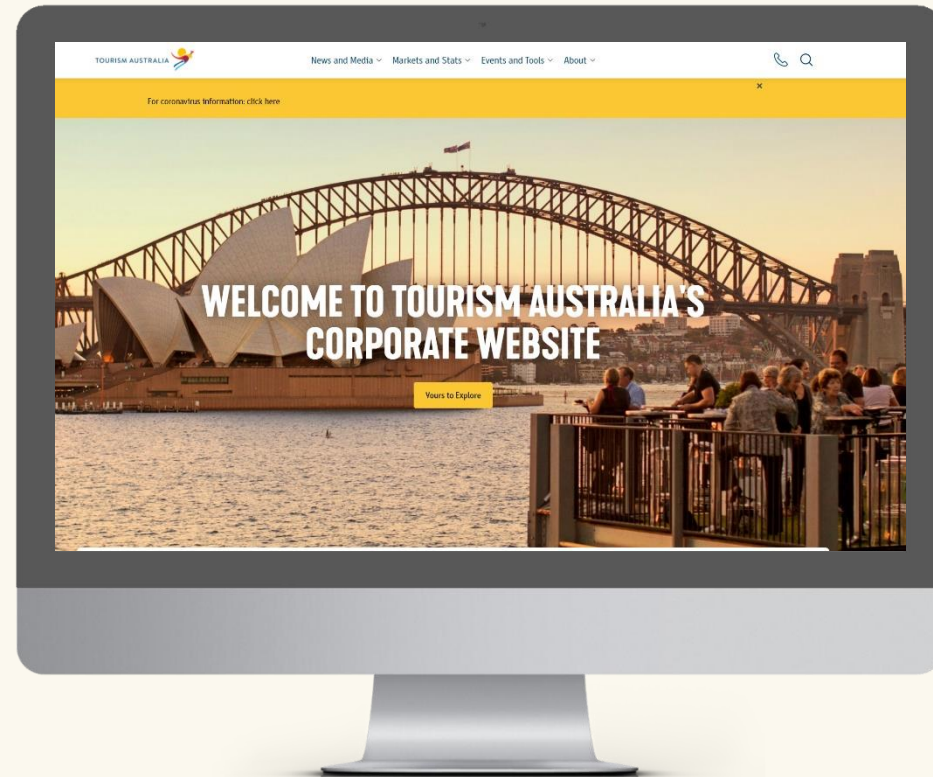
Cultural spikes

Working holiday



TOURISM AUSTRALIA'S CORPORATE WEBSITE

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

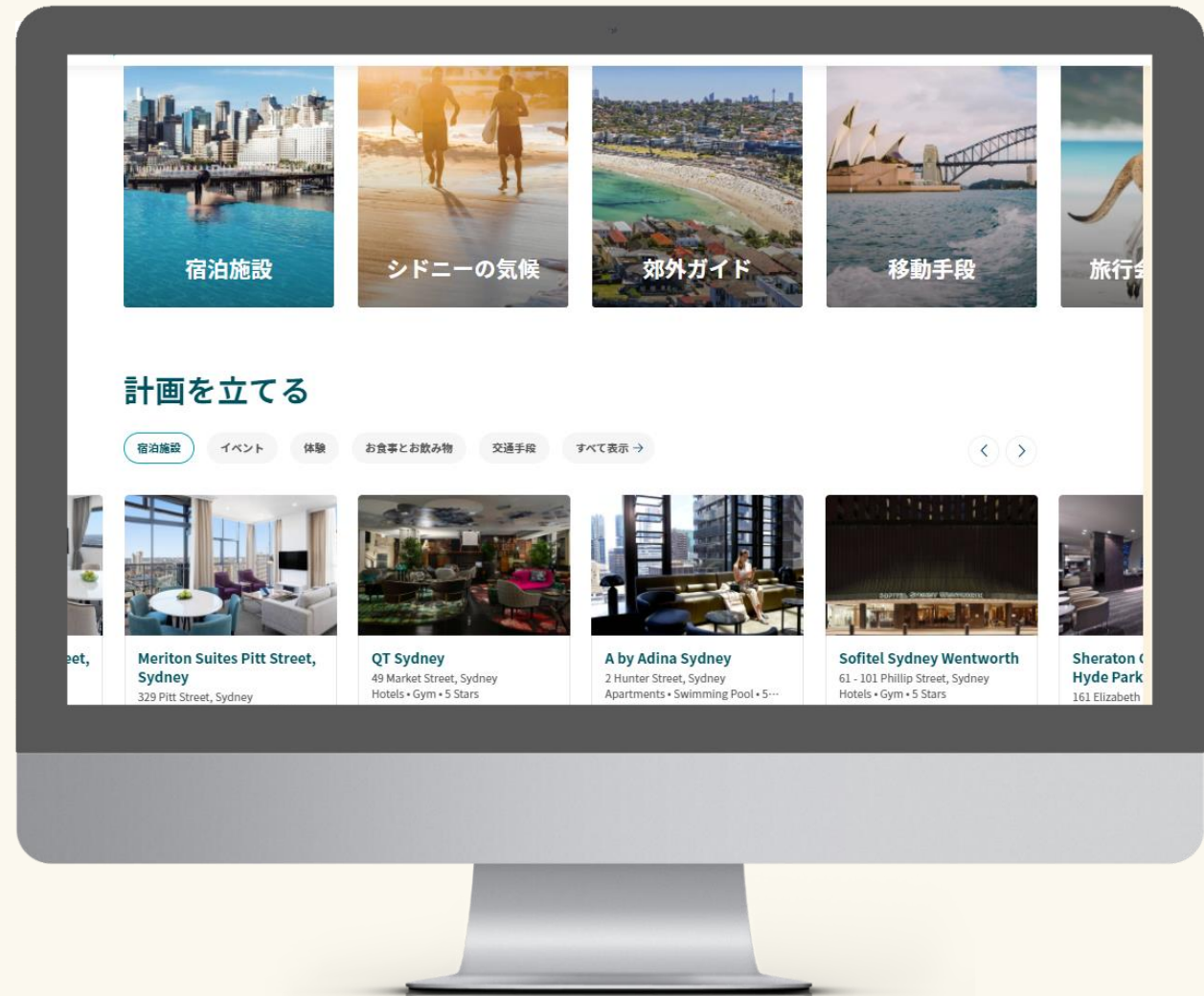


TOURISM.AUSTRALIA.COM

AUSTRALIA.COM

Enhanced ATDW integration within our consumer site.

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



ATDW-ONLINE.COM.AU

ACCESSIBLE & INCLUSIVE TRAVEL IS A HUGE OPPORTUNITY

\$13.5B

Contribution to the
visitor economy in 2021,
or 17% of domestic day
and overnight trips

*Travel groups including
people with disability or
long term health
condition in Australia*

*Source: National Visitor
Survey*

24%

Travellers
considering
Australia have an
accessibility need

*Tourism Australia's 2022
Future of Demand
Accessibility Impact Survey*

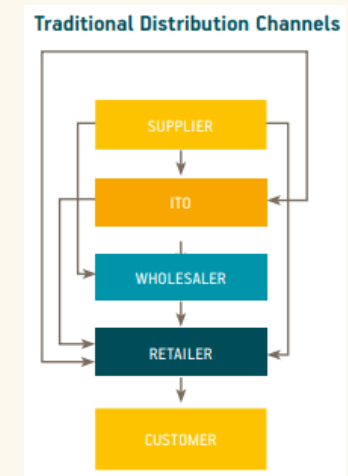
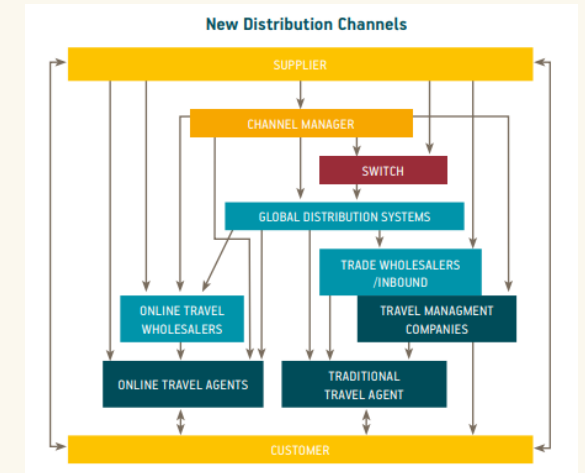
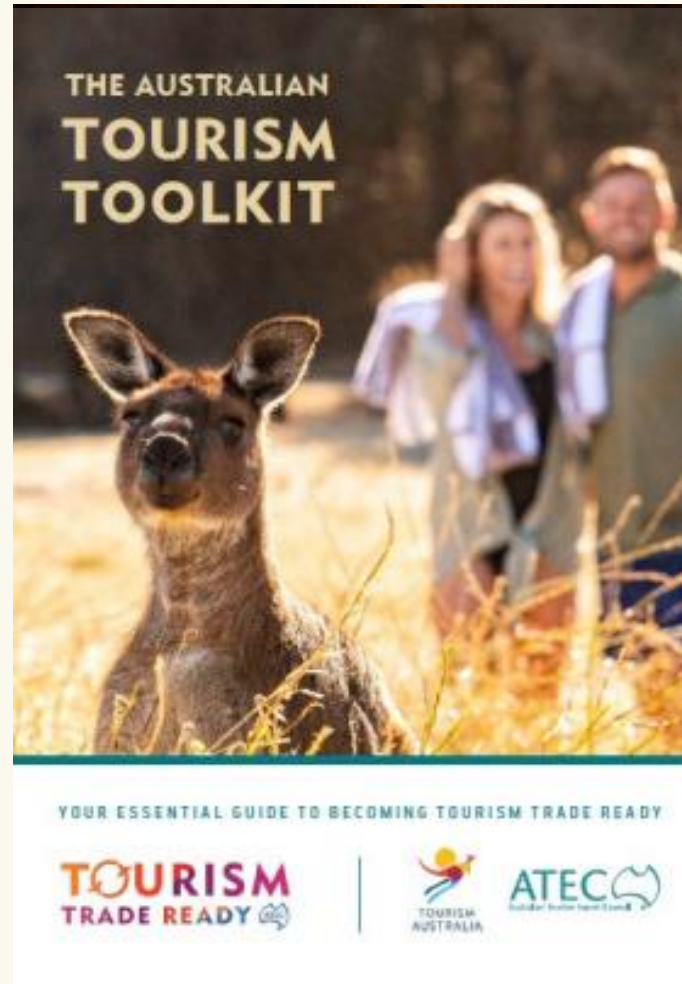
86%

Travellers say
accessibility influences
their choice of
destination

*Accessibility needs have a
big influence on many
aspects of travel, especially
choice of destination and
activities/experiences*

TOURISM TRADE READY & THE AUSTRALIAN TOURISM TOOLKIT

This introductory course to inbound tourism and accompanying guide has been produced by the Australian Tourism Export Council (ATEC) in partnership with Tourism Australia, and as a result of collaborative participation from all state and territory tourism organisations.



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.



Available now



Pre-order available now



Pre-order available now



Read more and complete the EOI



Available now



Available now



Complete the China Host - recovery EOI

The 'Host' series is available to Australian based businesses and is proudly brought to you by:

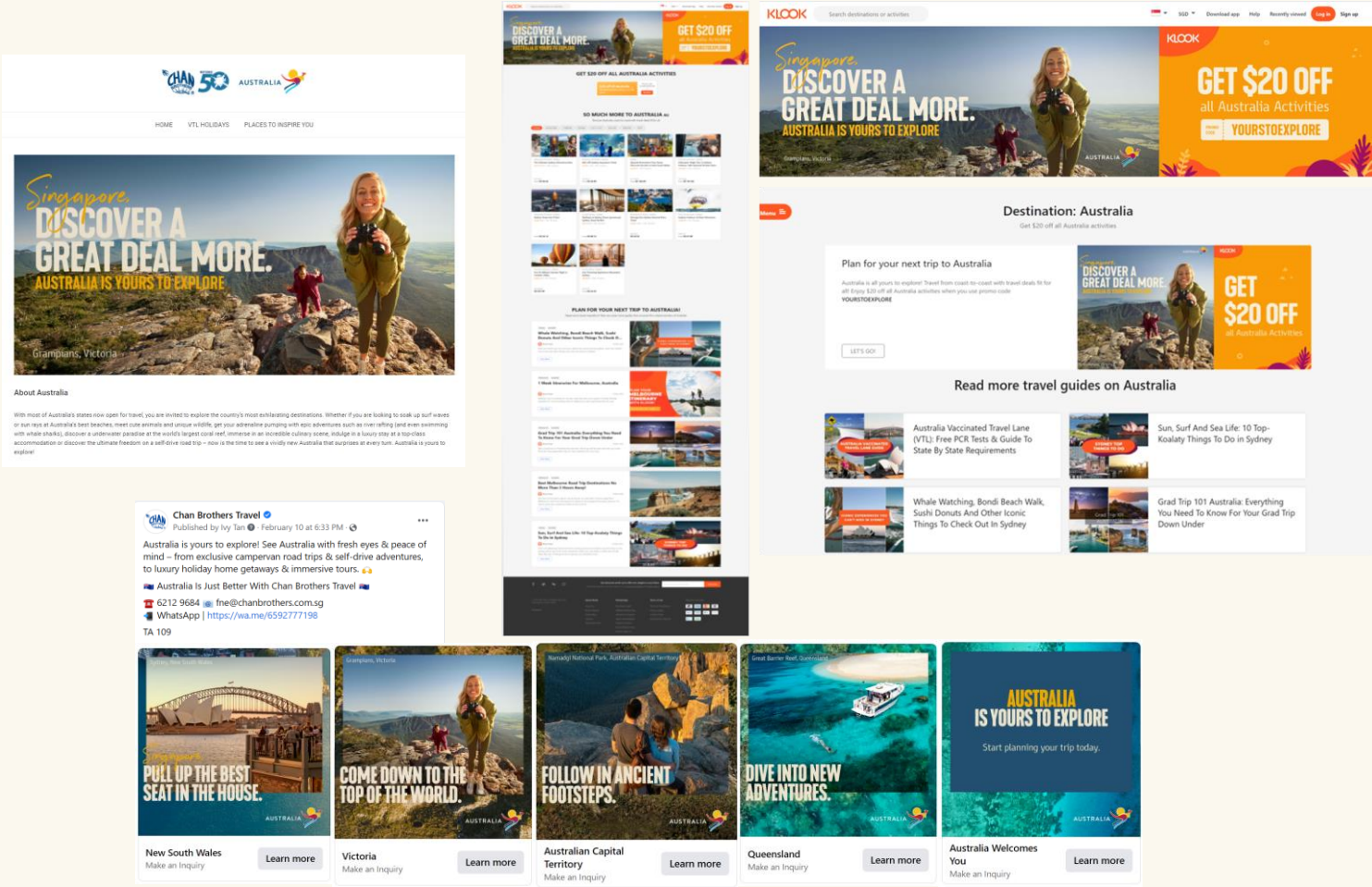


Have a question or need assistance? Email: training@atec.net.au

KEY DISTRIBUTION PARTNERS

As a partnership marketing organisation, we work with over 200 commercial partners annually, including Airlines, Key Distribution Partners, STOs and Affinity partners, to engage and convert Australia's target customers.

To make the most of our campaigns it helps to be aware of who these are for each market.

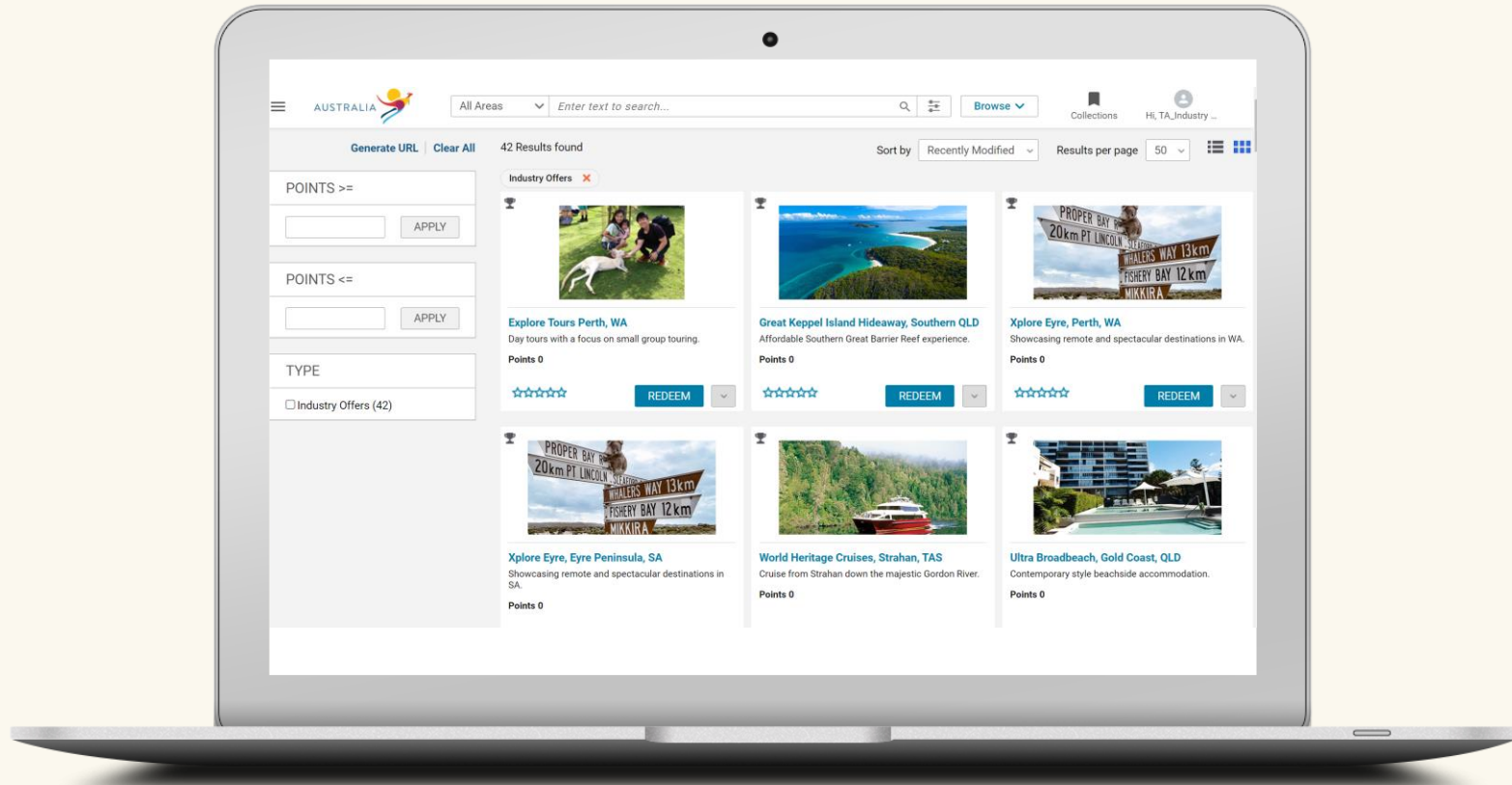


TOURISM.AUSTRALIA.COM/MARKETREGIONS

“Working in Market”

THE AUSSIE SPECIALIST PROGRAM

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



TOURISM.AUSTRALIA.COM/TRAVELCLUB

TRADE EVENTS

Including Australian Tourism Exchange
and Marketplace Events

Australia Marketplace Events:

19 -21 July 2023 (South East Asia)

23 – 26 July 2023 (India)

6 – 8 August (North America)

Early December (China)

Australian Tourism Exchange 2024

19-23 May in Melbourne



WHAT'S NEXT – ATE24 MELBOURNE

5
DAYS

2,300
DELEGATES

623
BUYERS
32
COUNTRIES

45,000
MEETINGS



GET INVOLVED WITH SOCIAL MEDIA

Tips & Tricks Webinars plus Fact Sheets on English-language plus Chinese-language Platforms.

@Australia
#SeeAustralia



TOURISM AUSTRALIA SOCIAL MEDIA FACTSHEET

Tourism Australia's social program focuses on driving desirability for and stimulating conversation about Australia through key platforms, including Facebook, Instagram and Twitter globally, and WeChat & Weibo in China.

In order to do that effectively, we carefully curate assets that will deliver strong reach and engagement on our channels.

We publish thought-leadership content of the best that Australia has to offer providing inspiration, motivating the decision to travel and facilitating bookable experiences via tourism operators.

We post mainly user-generated and industry-sourced content, which encourages travellers to continue sharing their own stories and experiences on an ongoing basis. When selecting assets, we ensure they:

- Are visually appealing (uses a sense of urgency)
- Are full of vibrant and inspiring colours (but not obviously edited)
- Have strong sense of place (only call a destination's name)
- Show country flags or our new followers a sense of scale
- Are square or vertical (optimized for mobile)

Timing is Key!

Whenever possible, we promote content that is seasonally timely. We post about holiday season during the summer, winter promotions during winter, and so on, while being as engaging as possible.

CONTENT PILLARS

We only feature the most two-worthy user-generated and industry-sourced content available, ensuring we not only capture attention and inspire dreaming, but also drive a sense of urgency to book travel and specific experiences. When choosing content we align to the following core pillars across all channels:

PILLAR	NATURAL BEAUTY	NATIVE WILDLIFE	CULTURE
MESSAGE	Australia's diverse landscape and expansive coastline make it the #1 destination for those looking for incredible outdoor experiences.	Australia has a large variety of wildlife, of which many (95%+) can be found nowhere else in the world. You are bound to come across at least one of these quirky native animals on your visit.	Australia's rich indigenous and multicultural history influences everything from the food we eat to our art, music, sporting culture and the many events and festivals we celebrate and share around the country.
CREATING	Aerial views, unique phenomena, dramatic scenery, beautiful coastline, vibrant colours, waterfalls, unexpected angles.	Native animals in the wild, unusual wildlife events, quirky animals, cute and cuddly close-ups, candid shots.	Dramatic cityscapes, famous streets, landmarks and iconic architecture, outdoor adventures, sporting events, food and wine.
WHO WE ARE	We're that friend who always has a fabulous story to tell. We're glistening, high-beamed and infectious. We're keeping coming back to us for inspiration, motivation, and to learn a thing or two about this great big country of ours. We're a bit cheeky sometimes, and will always do our best to make you smile - sometimes a little, and often a lot.	We're those people who are so lovely you're not. We're lovely enough to be a national holiday, so we need for everyone there to be thinking here. We're welcoming and funny, but never crude or vulgar; instead, there's a cheeky, right? We don't like anyone feeling left out, so we only share those lovely moments that you can't imagine happening yourself (except, well, us).	We're those people who are so lovely you're not. We're lovely enough to be a national holiday, so we need for everyone there to be thinking here. We're welcoming and funny, but never crude or vulgar; instead, there's a cheeky, right? We don't like anyone feeling left out, so we only share those lovely moments that you can't imagine happening yourself (except, well, us).

TOURISM.AUSTRALIA.COM/SOCIALMEDIA

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

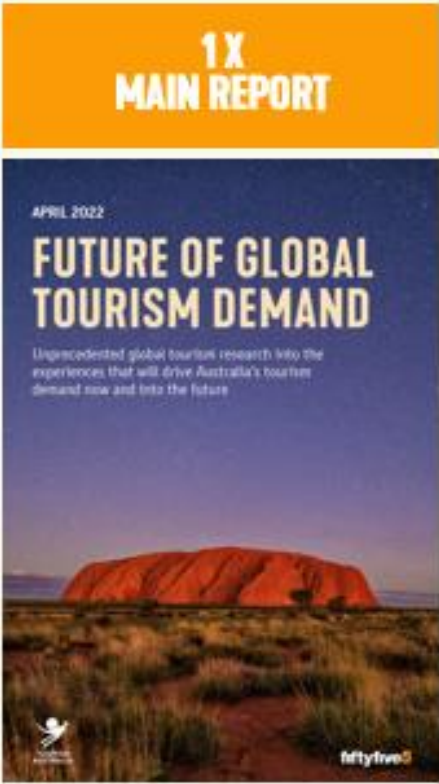
Tourism Australia's Media Hosting team works closely with the Australian tourism industry to host approximately 1,000 journalists, digital influencers, opinion leaders and broadcast crew from around 16 countries each year.

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.

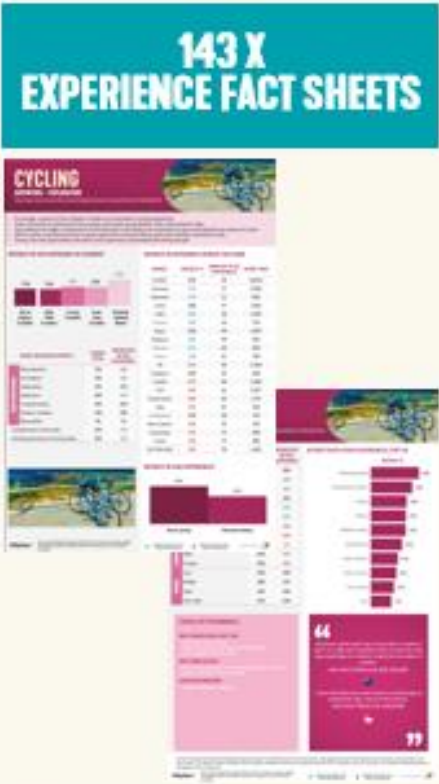


CONTACT: INTERNATIONALMEDIA@TOURISM.AUSTRALIA.COM

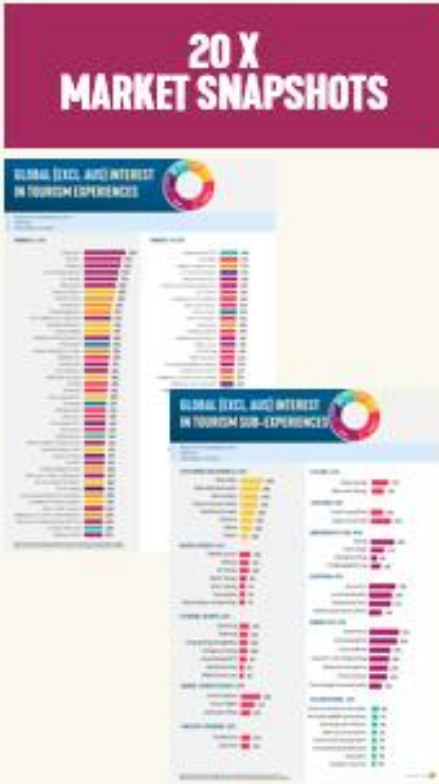
A FULL SUITE OF NEW RESEARCH



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.

ROAD TRIPS

ADVENTURE • EXPLORATION

<https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html>

- More than a third of Out of Region Travellers are interested in road trips, with greater interest among key segments
- Canada, India and New Zealand, as well as Australia, show particularly strong interest in road trips
- Those interested in road trips tend to be motivated by exploration when they travel
- Cross-sell opportunities include a range of other soft adventure activities including hiking/walking, trekking/camping, rail journeys and campervan

INTEREST IN THE EXPERIENCE BY SEGMENT



INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	35%	22	40,198
Canada	48%	6	2,995
India	50%	7	1,842
New Zealand	50%	7	372
USA	41%	9	10,901
UK	41%	12	3,929
Singapore	40%	13	622
Thailand	46%	13	975
Italy	37%	21	1,144
Philippines	46%	21	1,271
Germany	34%	22	1,930
France	29%	24	2,158
South Korea	34%	27	3,369
Malaysia	33%	37	541
Indonesia	35%	38	478
Taiwan	30%	42	812
Japan	17%	54	1,348
China	17%	64	4,776
Hong Kong	19%	67	235
Vietnam	23%	72	499
AUSTRALIANS	49%	5	4,258

TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
Reconnection	17%	18%
Into Nature	17%	18%
Exploration	17%	20%
Adventure	14%	14%
Transformation	13%	12%
Passion, hobbies	14%	13%
Restoration	7%	6%
Consideration of Australia	37%	45%
Actively planning to visit Australia	15%	18%



fiftyfive5 Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,390), interested in Road trips (n=7,309)

● Significantly higher than those not interested ● Significantly lower than those not interested

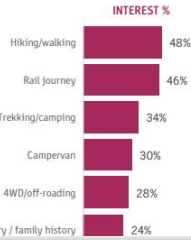
ROAD TRIPS

ADVENTURE • EXPLORATION

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DEMOGRAPHIC PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
LIFESTYLE		
Young Singles/Couples (Under 45)	36%	36%
Older Singles/Couples (45+)	16%	17%
Young Families	32%	31%
AGE		
Older Families	16%	16%
18-29	30%	31%
30-39	26%	25%
40-49	22%	21%
50-64	22%	23%
Average age	38	38
GENDER		
Male	50%	50%
Female	50%	50%
INCOME		
Low	25%	24%
Middle	28%	27%
High	24%	24%
Very high	22%	25%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



Exploring ancestry / family history

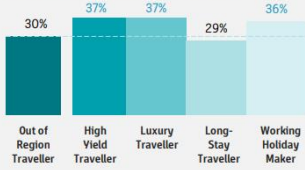
WINE, BEER OR LIQUOR TASTING TOURS

SENSORY • FOOD & DRINK

<https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html>

- Overall 3 in 10 are interested in wine, beer or liquor tasting tours, with greater interest among higher-yielding audiences and Working Holiday Makers
- Greatest demand for this experience from the US market, followed by South Korea and Canada – all of whom rank this in their top 20
- Those interested in tasting tours have higher incomes
- Key cross-sell opportunities include other culinary experiences such as food and drink pairings, meet the maker tours and winery/agricultural region stays, as well as nightlife

INTEREST IN THE EXPERIENCE BY SEGMENT



TRAVEL BEHAVIOUR PROFILE	GLOBAL TOTAL	INTERESTED IN THIS EXPERIENCE
Reconnection	17%	18%
Into Nature	17%	16%
Exploration	17%	19%
Adventure	14%	12%
Transformation	13%	13%
Passion, hobbies	14%	15%
Restoration	7%	6%
Consideration of Australia	37%	44%
Actively planning to visit Australia	15%	19%



fiftyfive5 Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,390), interested in Wine, beer or liquor tasting tours (n=6,864)

INTEREST IN EXPERIENCE ACROSS THE GLOBE

MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	30%	35	40,019
USA	39%	17	10,200
South Korea	38%	19	3,710
Canada	38%	19	2,354
China	29%	22	8,399
New Zealand	37%	24	276
UK	33%	25	3,187
Japan	29%	27	2,312
Thailand	35%	29	746
Hong Kong	32%	30	393
Italy	33%	32	1,013
Germany	26%	38	1,443
Singapore	26%	40	398
Taiwan	30%	43	810
France	22%	45	1,611
Philippines	34%	45	954
Vietnam	28%	62	589
India	27%	64	1,008
Malaysia	21%	71	348
Indonesia	20%	73	267
AUSTRALIANS	38%	19	3,307

● Significantly higher than those not interested ● Significantly lower than those not interested

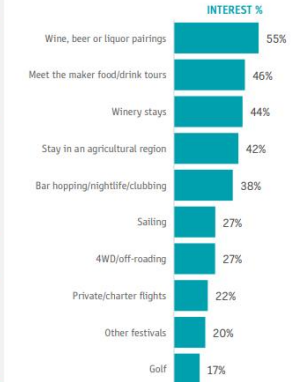
WINE, BEER OR LIQUOR TASTING TOURS

SENSORY • FOOD & DRINK

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30-39	26%	27%
40-49	22%	23%
50-64	22%	22%
Average age	38	39
GENDER		
Male	50%	53%
Female	50%	47%
INCOME		
Low	25%	19%
Middle	28%	27%
High	24%	26%
Very high	22%	27%

AFFINITY WITH OTHER EXPERIENCES (TOP 10)



TRAVELLER TESTIMONIALS

WHY TRAVELLERS LOVE THIS

- Opportunity to try new beverages and flavours
- Discover something new that is unavailable at home
- Interested in the process of wine making, beer brewing, and/or alcohol distilling methods

WHY SOME DO NOT

- Do not enjoy alcohol
- Prefer to drink but don't need to do in-depth tour

HERO DESTINATIONS

- Destinations known for wine, beer or liquor
- Notable destinations such as tequila in Mexico, beer in Germany, scotch in Scotland
- Australian wineries

“
In addition to my love for wine, I also enjoy exploring breweries and distilleries. What would make it better would be if there was a package that offered multiple types of samplings (i.e. wine, beer and liquor)
HIGH YIELD TRAVELLER, UNITED STATES
One of the key objectives of traveling is to try the beer/wine. So this is a must do experience for me. Maybe a knowledge tour combined with a much more enhanced experience
HIGH YIELD TRAVELLER, INDIA
”

Tourism Australia commissioned independent global research to identify and size the travel sectors and experiences that the Australian tourism industry and operators can own and win. The research project included cultural insights, qualitative research and a global survey of 23,771 travellers across 20 markets. The research measured interest in 143 global tourism experiences.

fiftyfive5 Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,390), interested in Wine, beer or liquor tasting tours (n=6,864)

● Significantly higher than those not interested ● Significantly lower than those not interested

TOURISM AUSTRALIA

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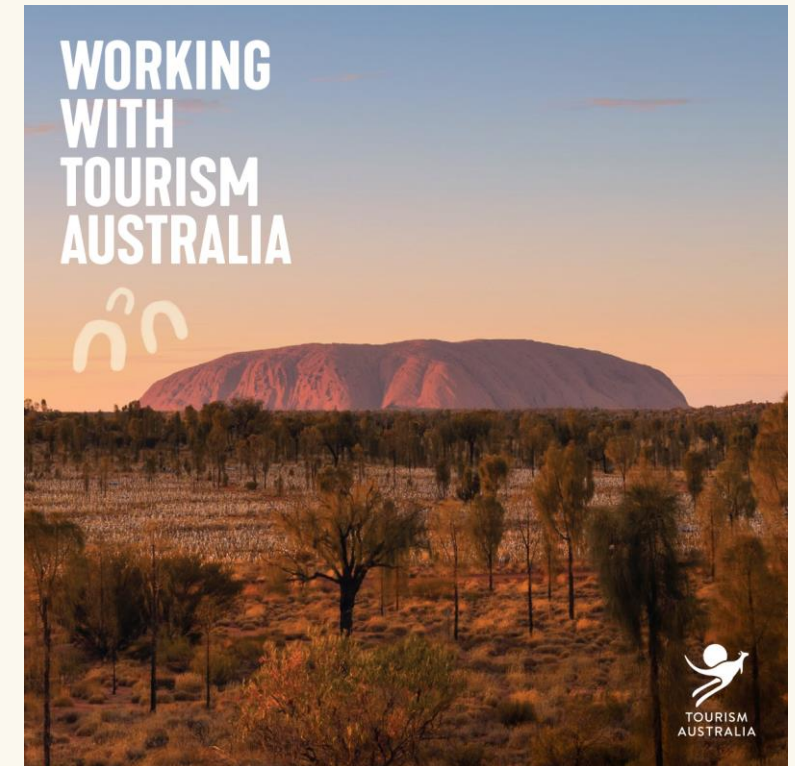
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THANK YOU!





PUFFING BILLY RAILWAY