



# TOURISM AUSTRALIA UPDATE

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

# ORGANISATIONAL STRUCTURE

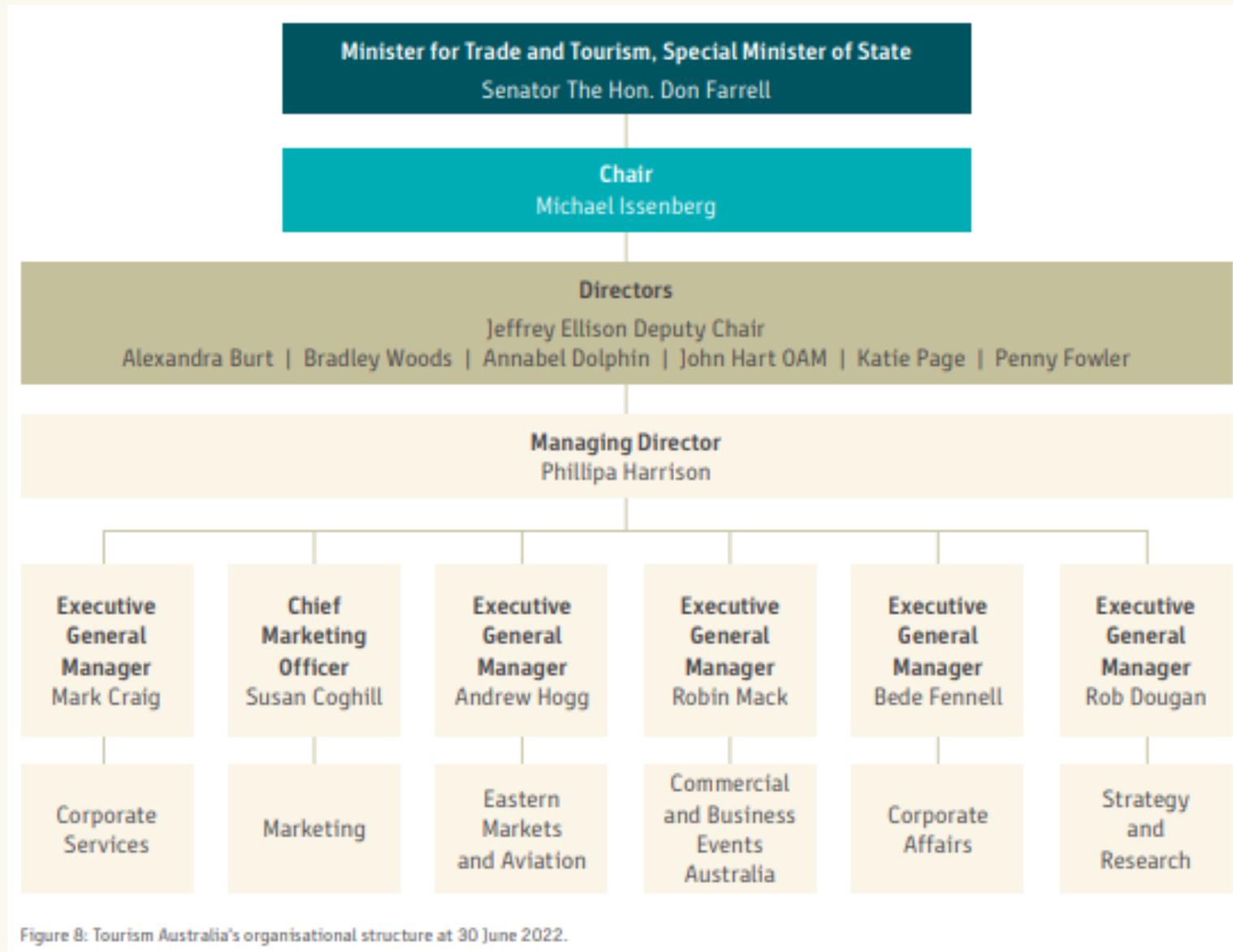
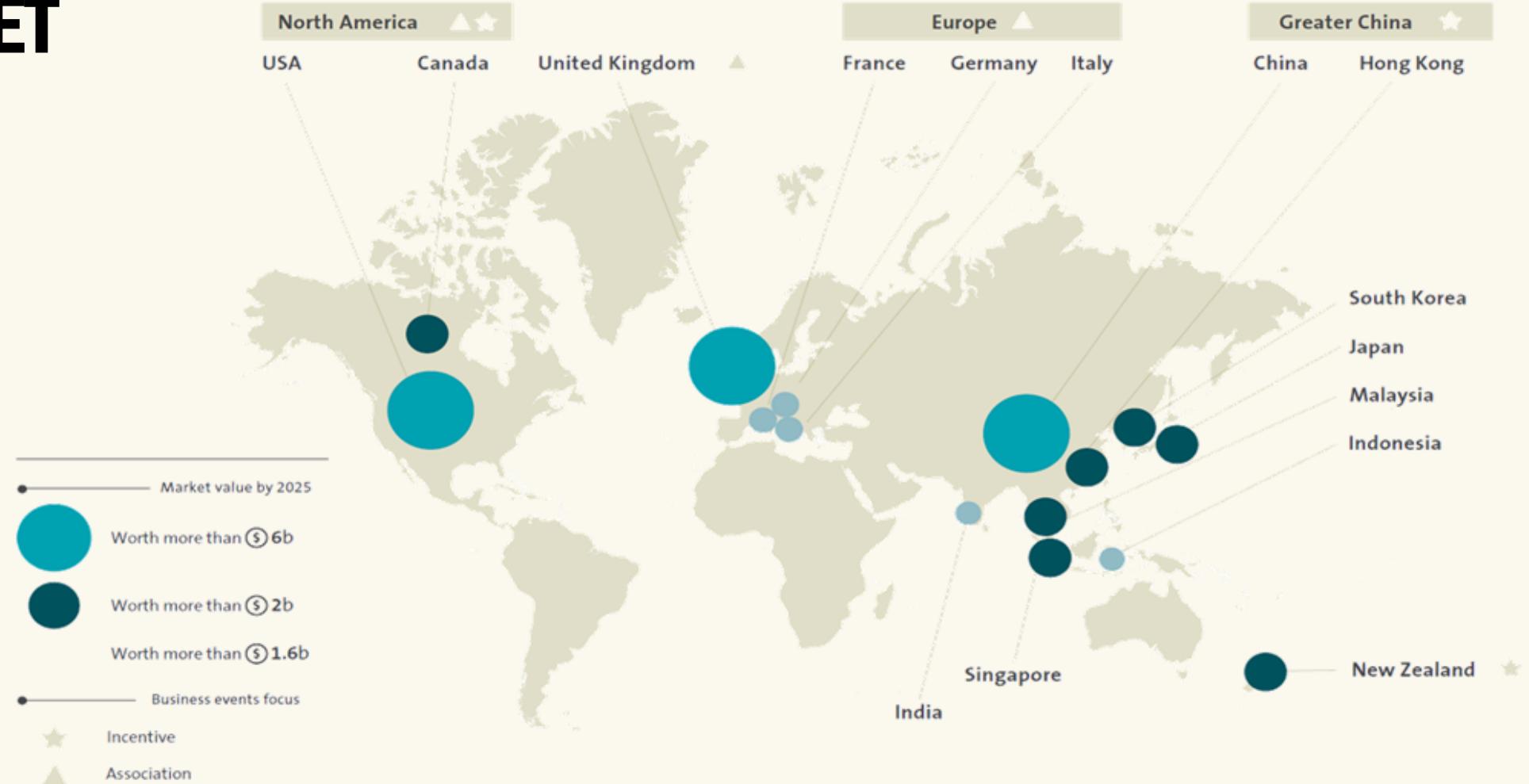


Figure 8: Tourism Australia's organisational structure at 30 June 2022.



## Target markets and their value by 2025

# OUR TARGET MARKETS

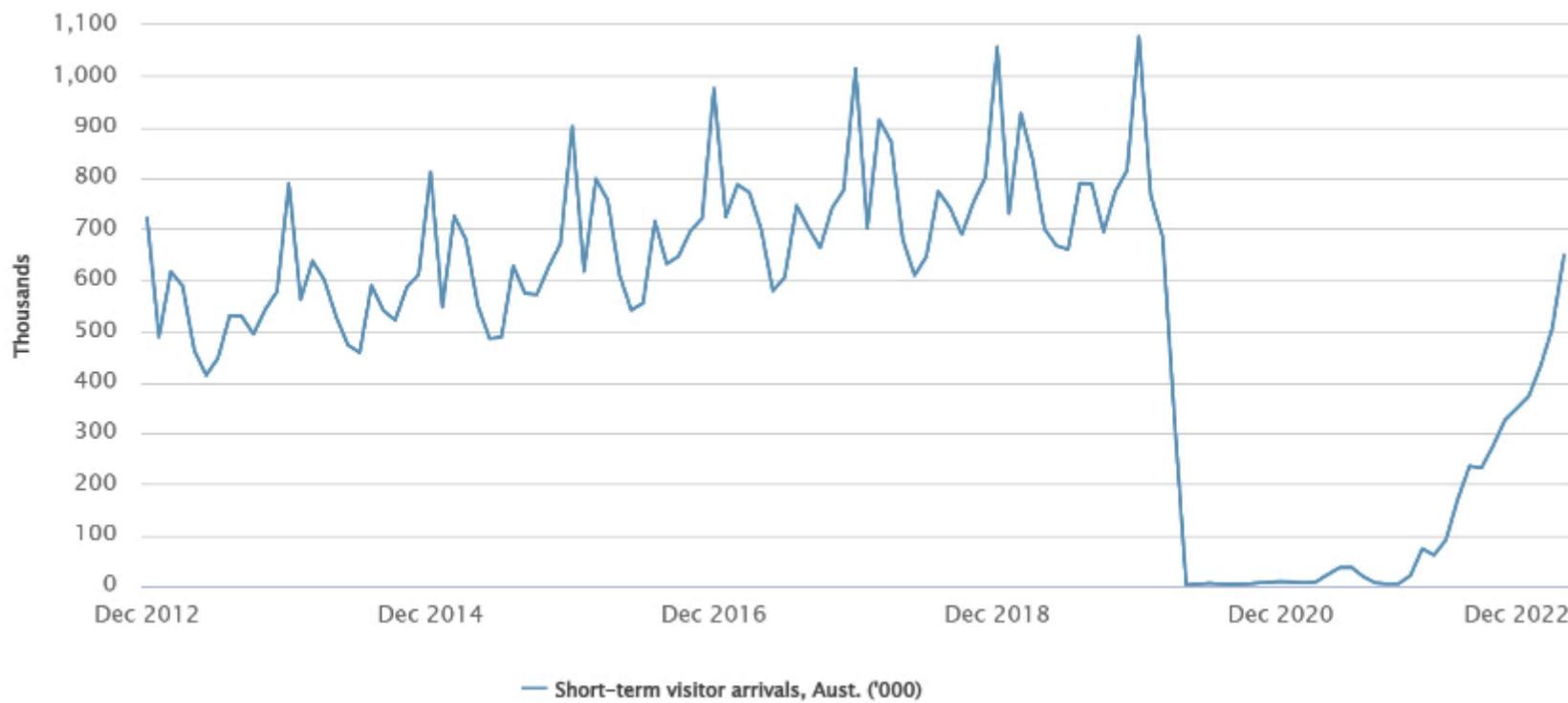
**9.5 MILLION VISITORS**

\*Pre-COVID figures

**\$45 BILLION SPEND****1 IN 13 JOBS**

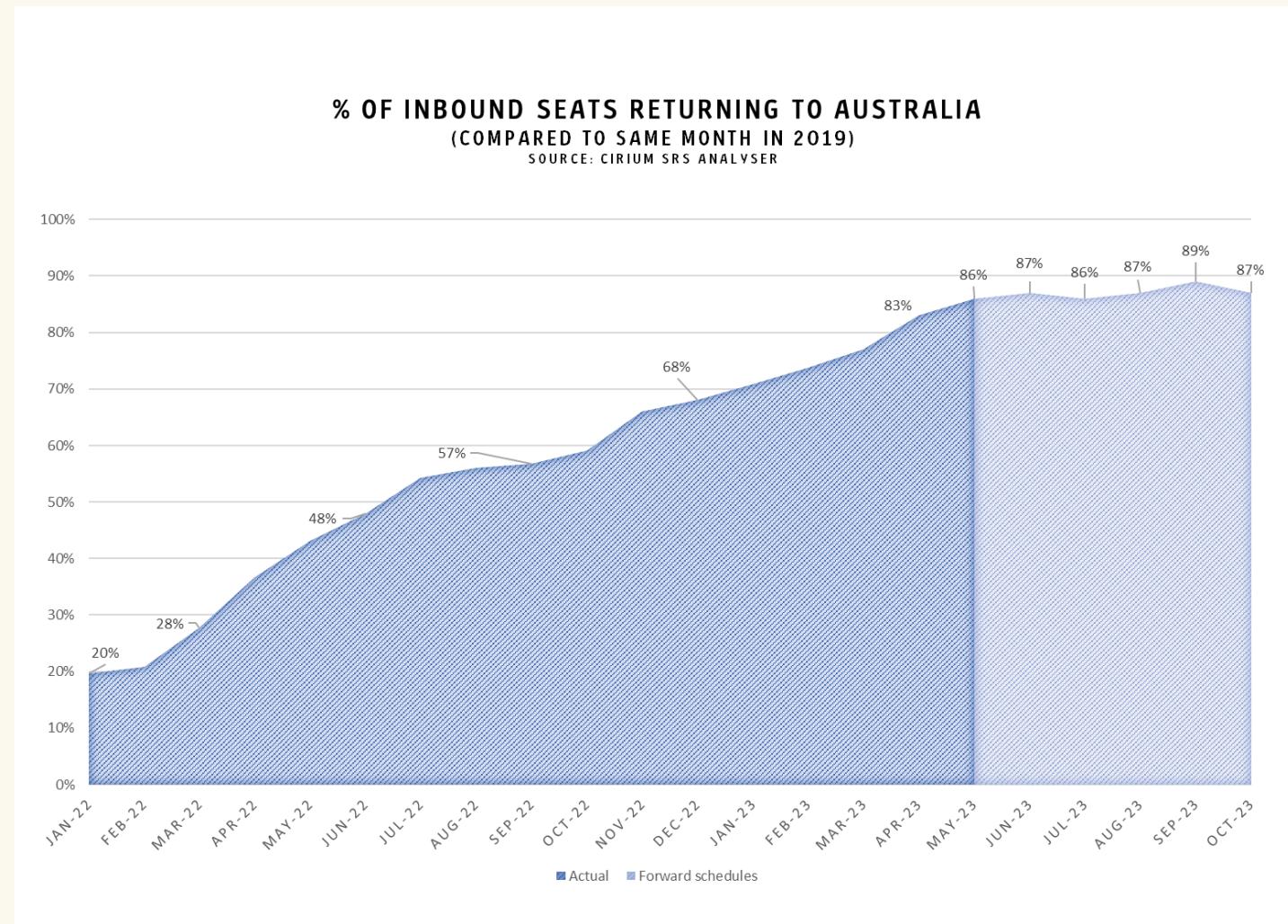
# A TOUGH FEW YEARS HERE, BUT OUR RECOVERY IS PROGRESSING

## 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**



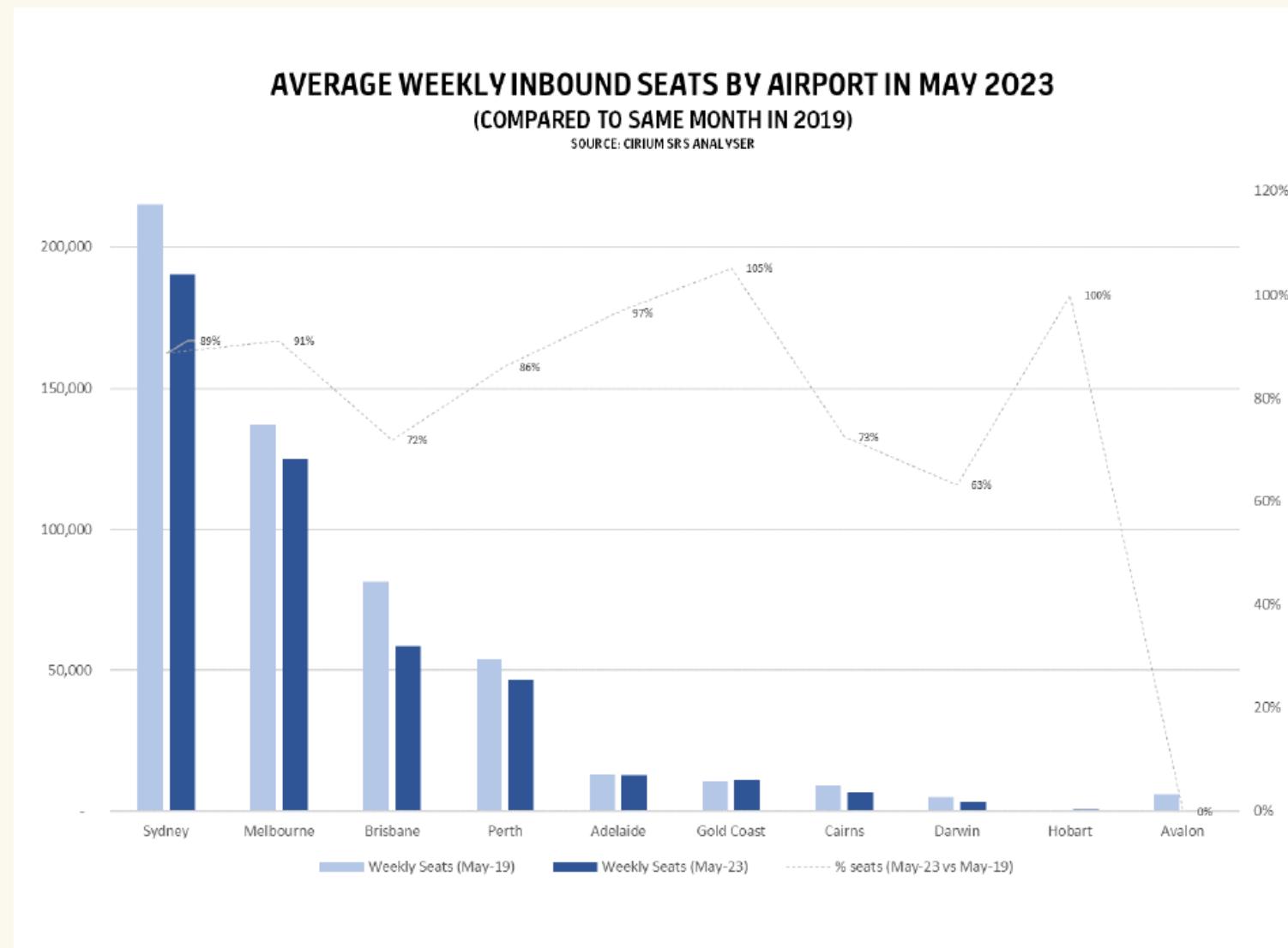
Source: Cirium SRS Analyser air schedules data as at 24 Apr-23

# INTERNATIONAL CAPACITY RETURNS FIRST TO SYDNEY & MELBOURNE

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

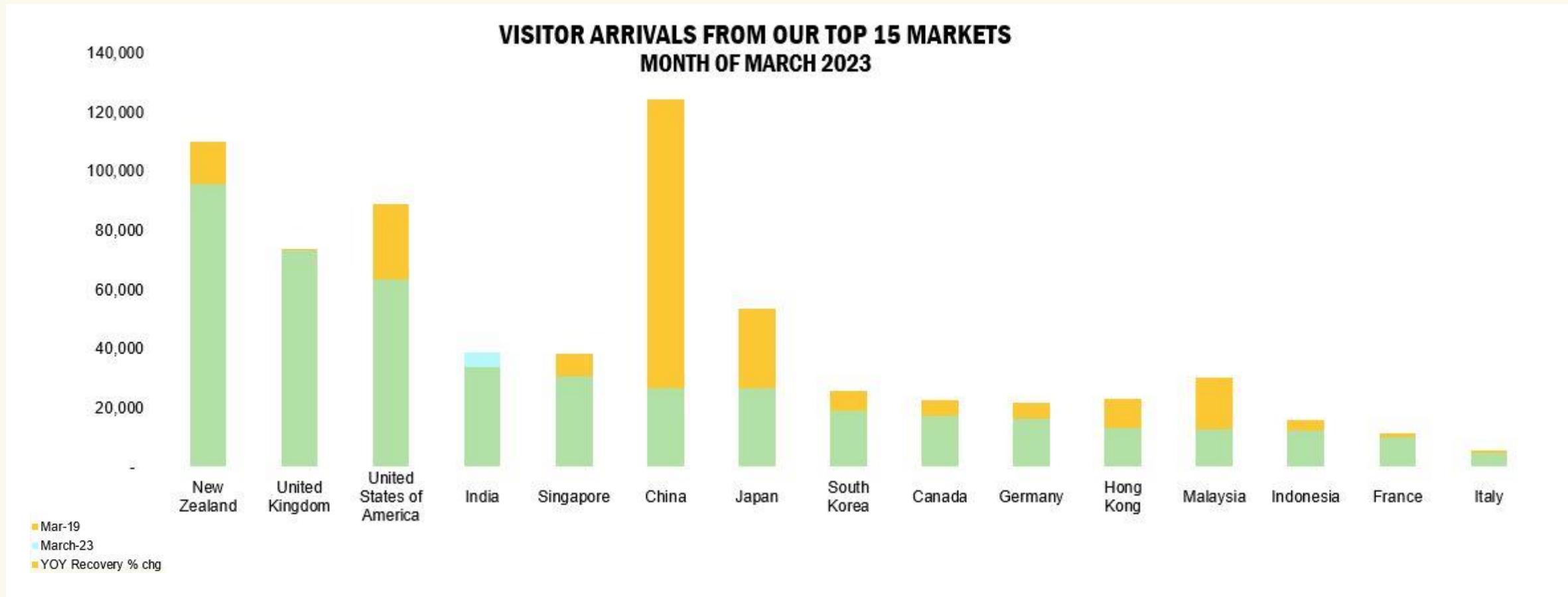
SYD & MEL are the only airports to have capacity from China, so far.

Melbourne Avalon is yet to secure international flights.



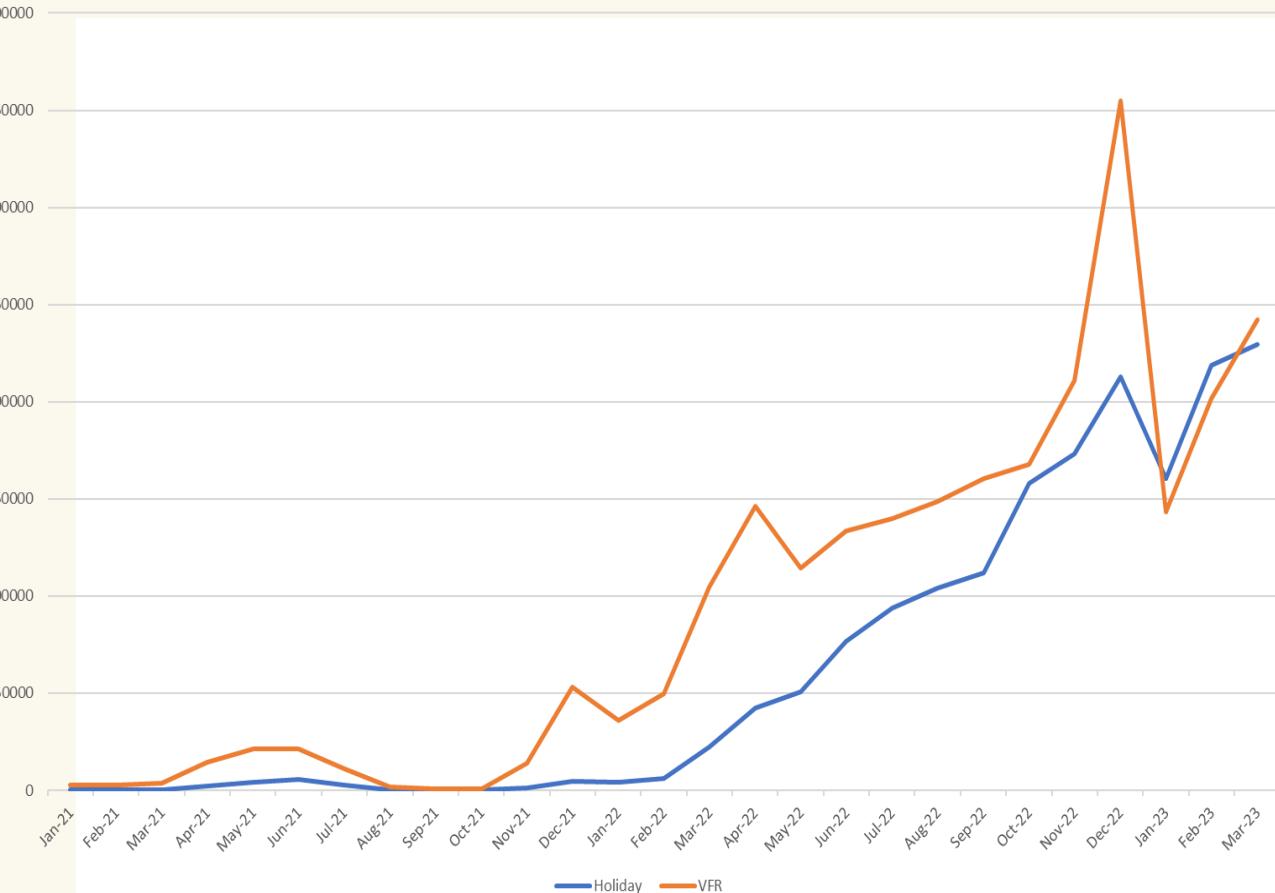
Source: Cirium SRS Analyser air schedules data as at 24 Apr-23

# MARCH ARRIVALS WERE STRONG AT 73% OF 2019

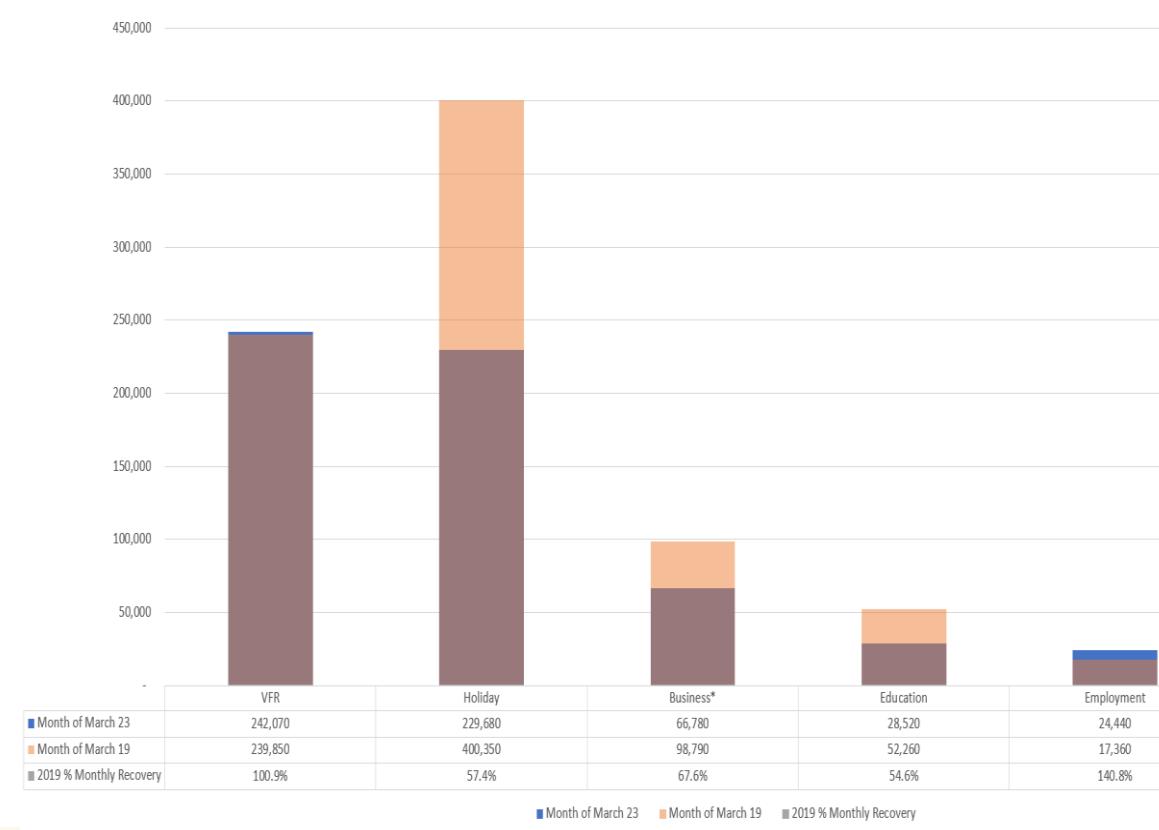


# VOLUME OF HOLIDAYMAKERS vs. VFR

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

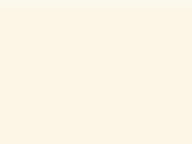
3. LEVERAGE THE FIFA WOMENS WORLD CUP

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



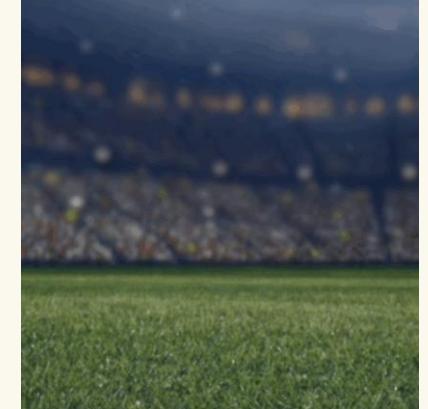
China launch



PARTNERS



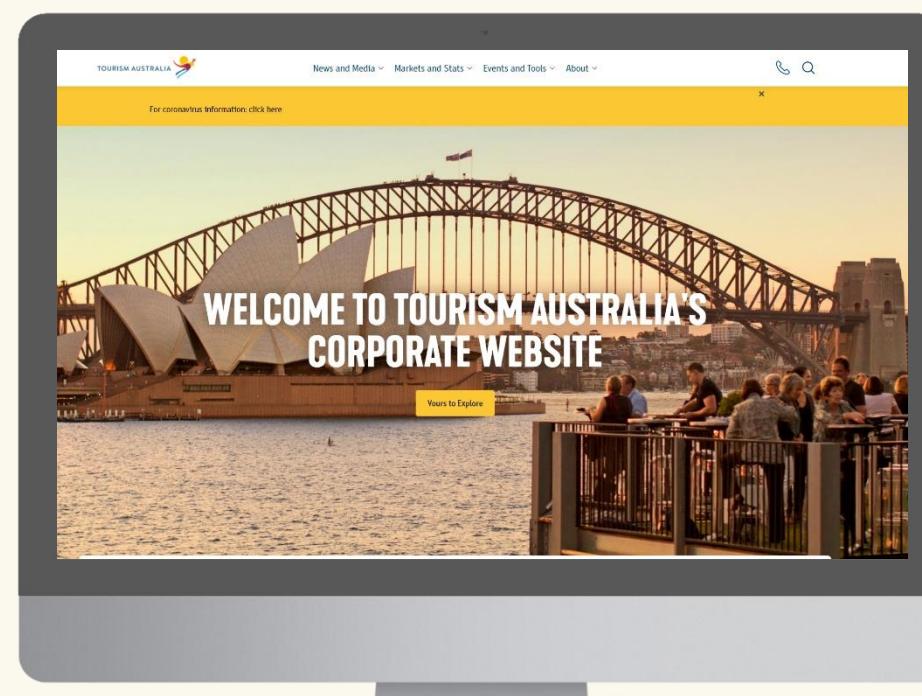
Working holiday



Cultural spikes

# TOURISM AUSTRALIA'S CORPORATE WEBSITE

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

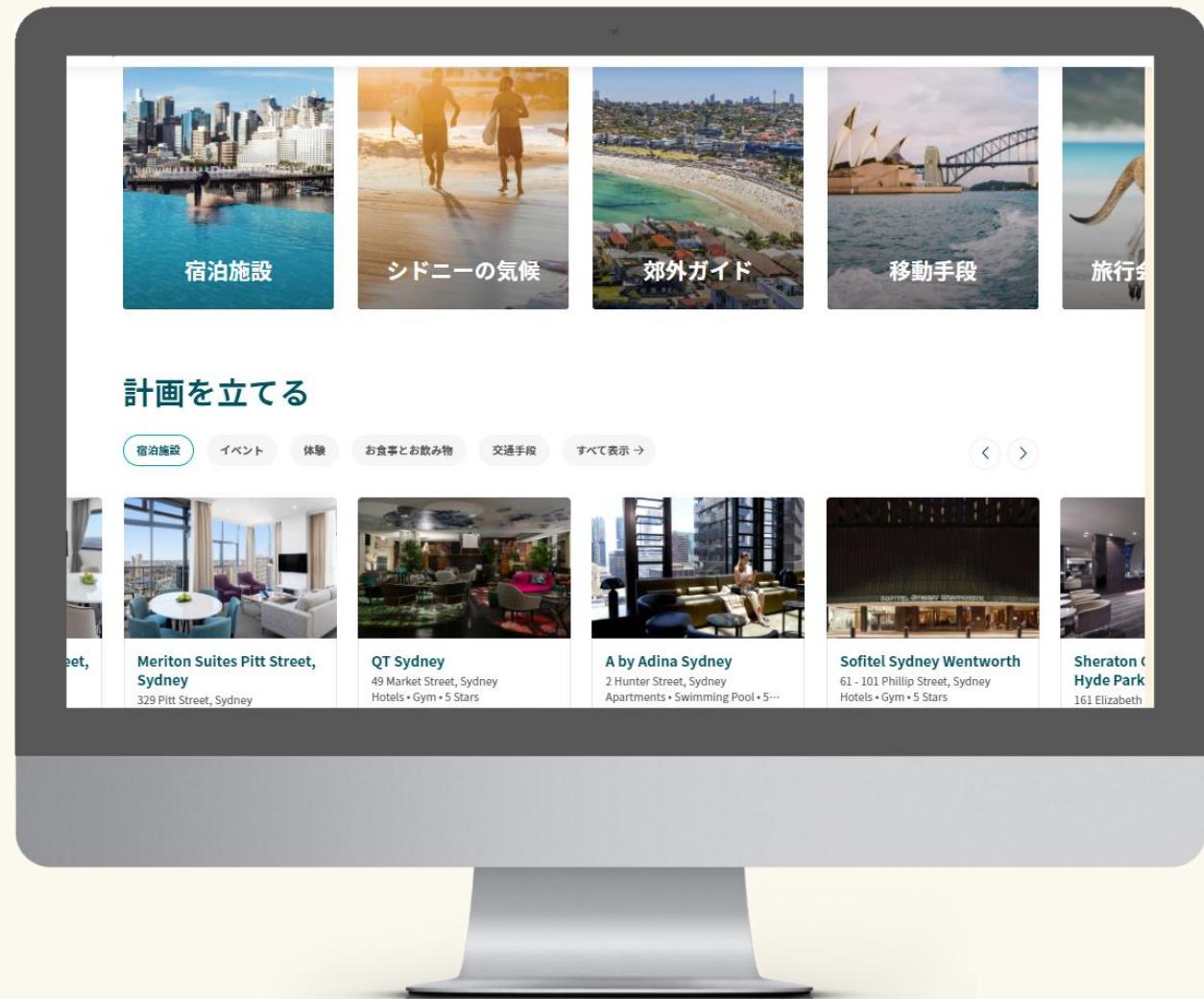


**TOURISM.AUSTRALIA.COM**

# 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

**24%**

Travellers considering Australia have an accessibility need

**86%**

Travellers say accessibility influences their choice of destination

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

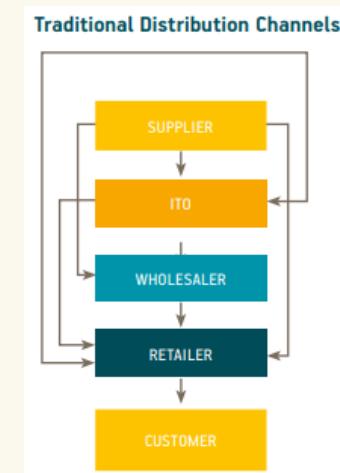
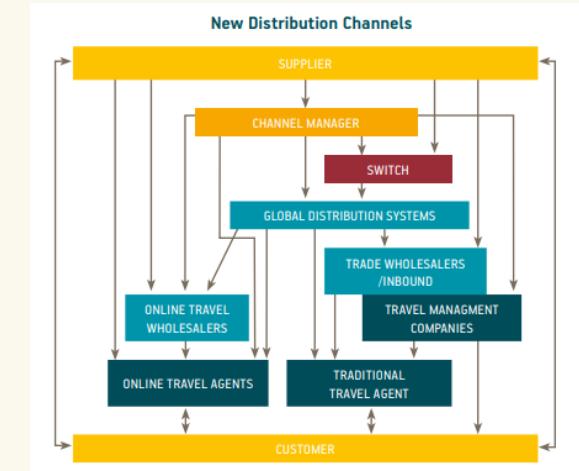
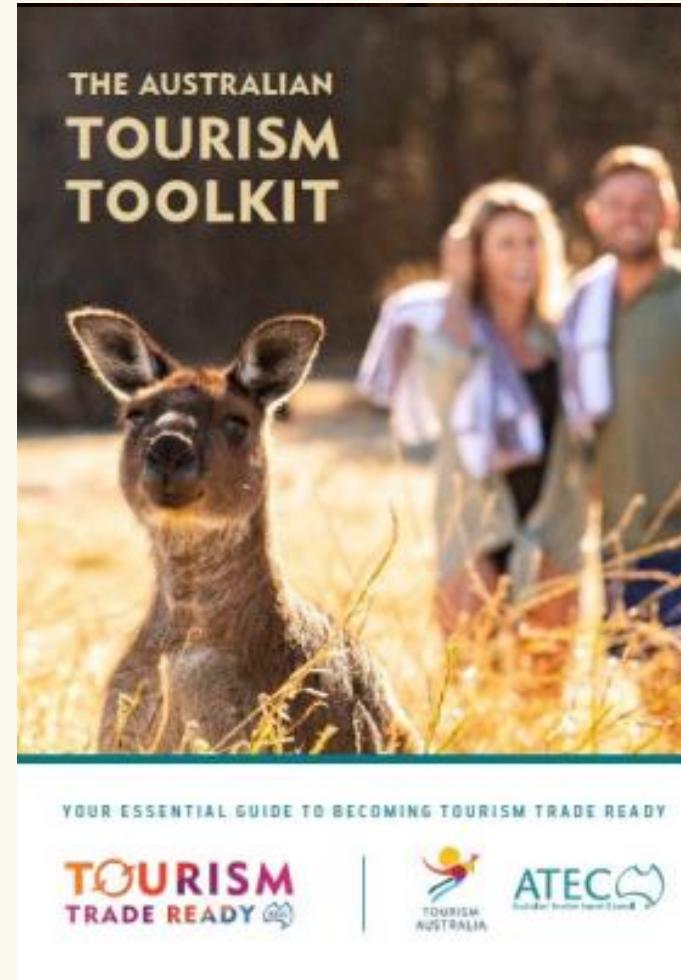
*Source: National Visitor Survey*

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

*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:

ATEC Australian Tourism Export Council

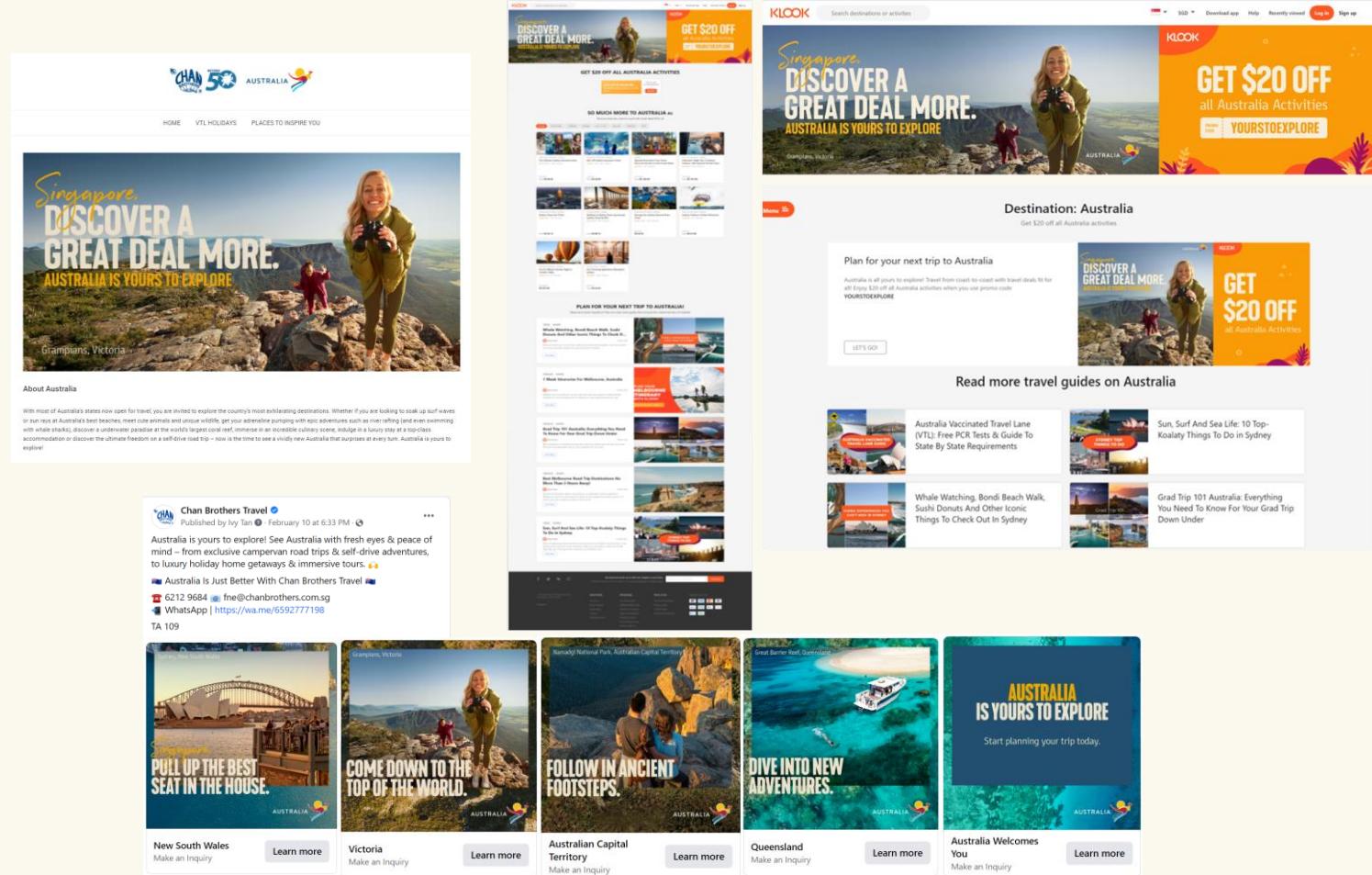
Have a question or need assistance? Email: [training@atec.net.au](mailto:training@atec.net.au)

TOURISM AUSTRALIA

# 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.

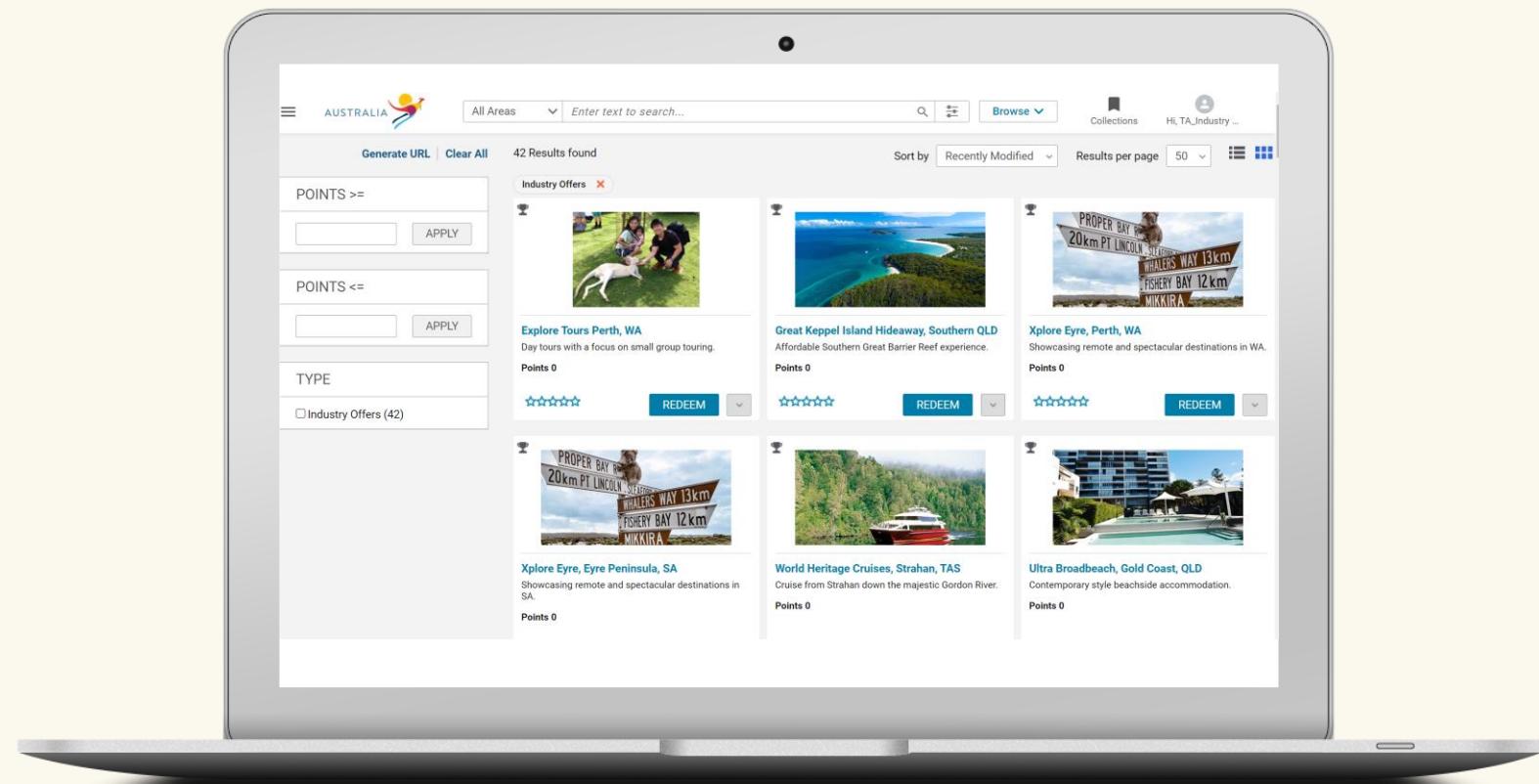


**TOURISM.AUSTRALIA.COM/MARKETREGIONS**

**“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.COM/SOCIALMEDIA



# GENERATING PUBLICITY

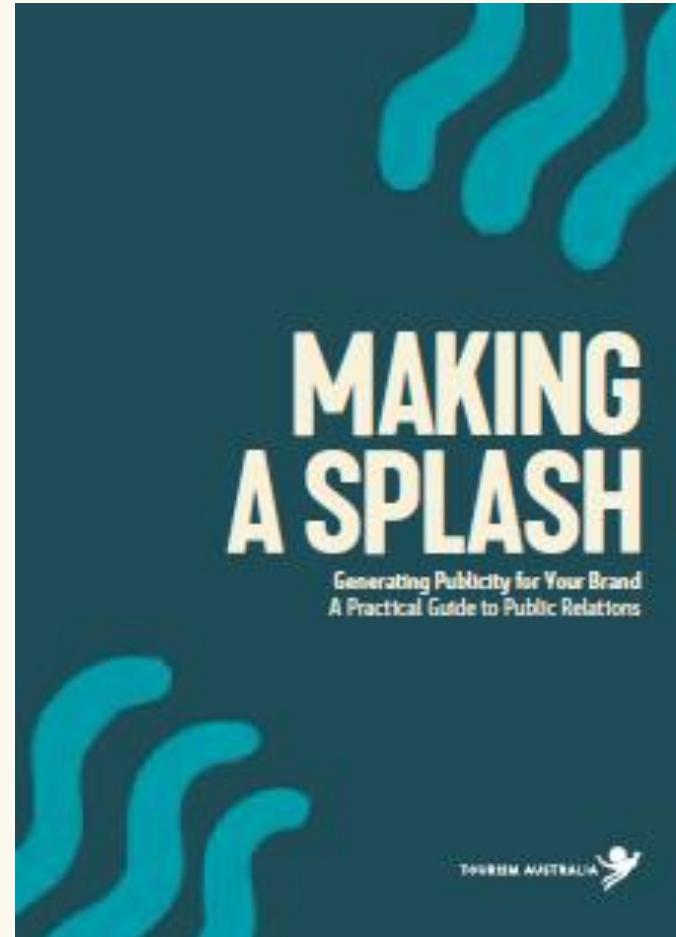
Building media relationships

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](mailto: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.tourismaustralia.com/en/insights/consumer-research/future-of-demand.html>



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June 2023

- 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)

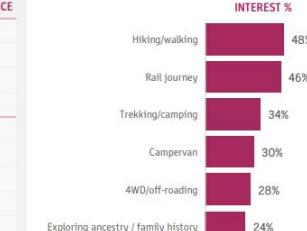
Market	Interest %	Rank out of 89 Experiences	Sizing ('000)
GLOBAL	35%	22	40,198
Canada	48%	6	2,995
India	50%	7	1,842
New Zealand	50%	7	372
USA	41%	9	10,901
UK	41%	12	3,929
Singapore	40%	13	622
Thailand	46%	13	975
Italy	37%	21	1,144
Philippines	46%	21	1,271
Germany	34%	22	1,930
France	29%	24	2,158
South 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

**fiftyfive5** Base: Future Of Demand research 2022, Total out of region travellers, global excluding Australia (n=22,190), Interested in Road trips (n=7,909)

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

TOURISM AUSTRALIA

## AFFINITY WITH OTHER EXPERIENCES (TOP 10)



## WINE, BEER OR LIQUOR TASTING TOURS

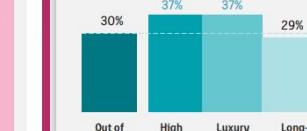
SENSORY • FOOD & DRINK

<https://www.tourismaustralia.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



## TRAVELLER TESTIMONIALS

### WHY TRAVELLERS LOVE THIS

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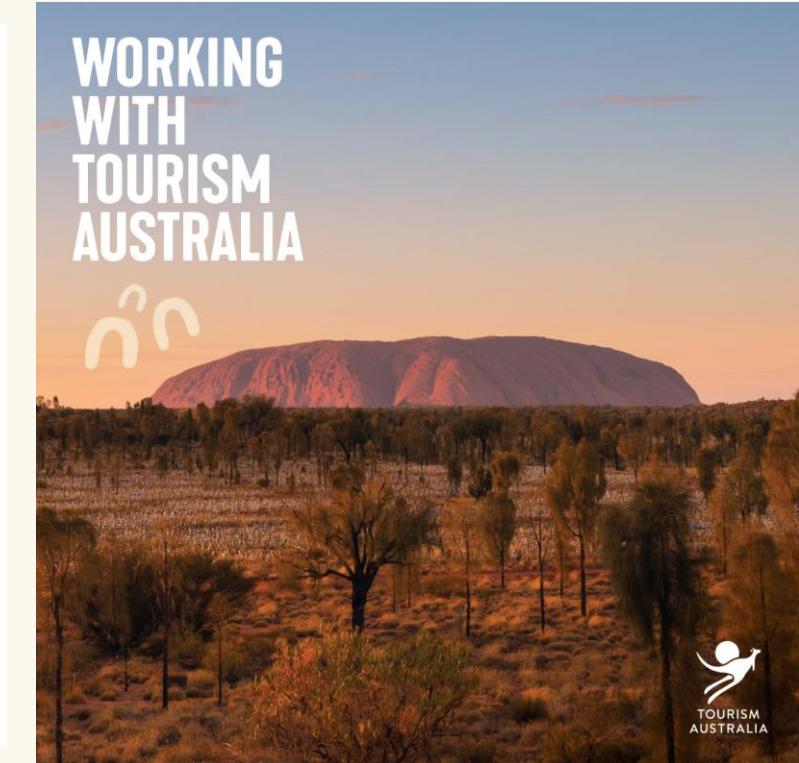
**Kristy Malapa**

Industry Relations Manager

[kmalapa@tourism.australia.com](mailto:kmalapa@tourism.australia.com)

+61 404 054 543

**THANK YOU!**





**PUFFING BILLY RAILWAY**