



MARKETING AUSTRALIA TO THE WORLD

Dominic Mehling – Industry Relations Manager – Tourism Australia
25 May 2023

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

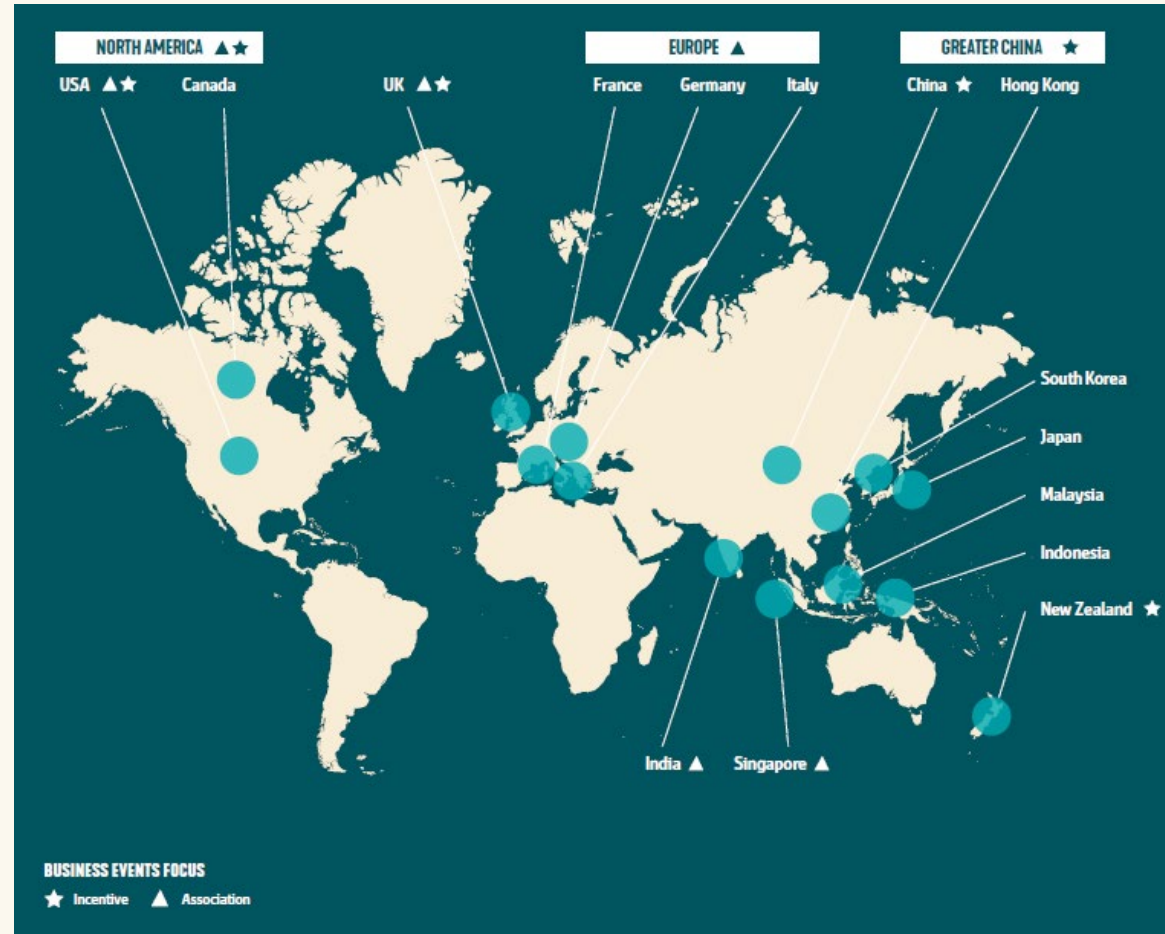
BUSINESS EVENTS AUSTRALIA

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



9.5 MILLION VISITORS

\$45 BILLION SPEND

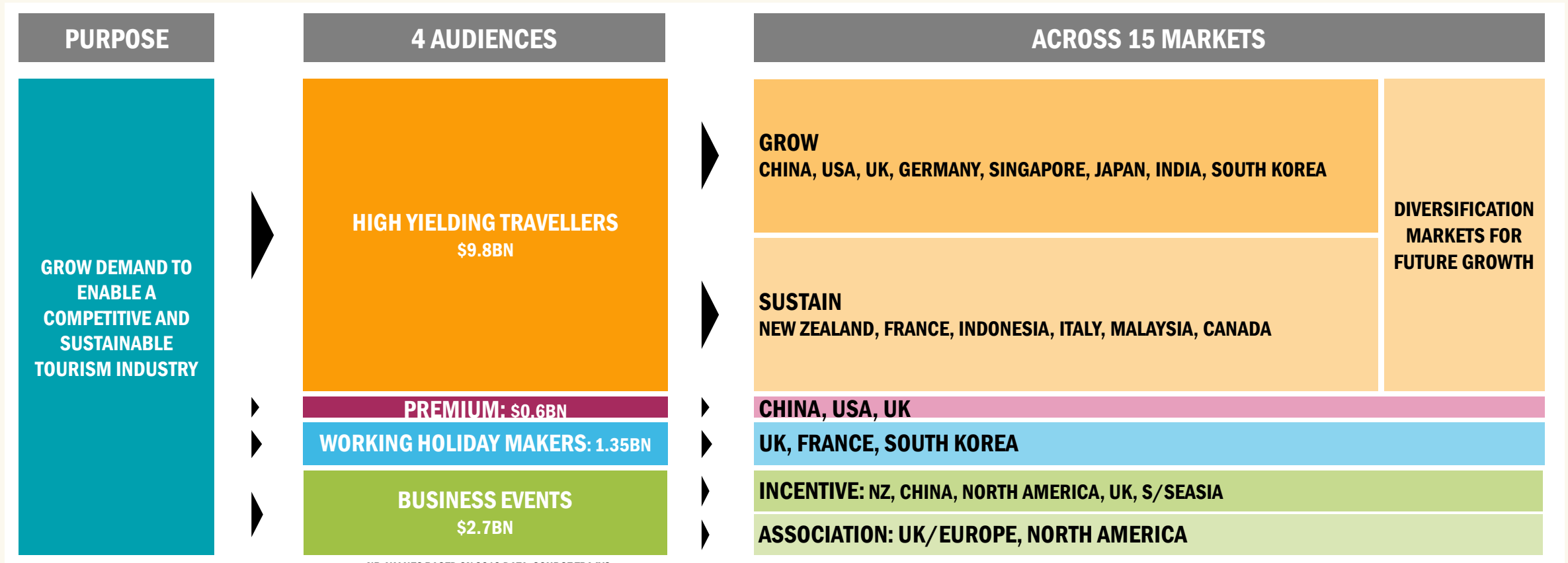
1 IN 13 JOBS

*Pre-COVID figures

OUR TARGET SEGMENTS



FY24 AUDIENCE AND MARKET PRIORITISATION

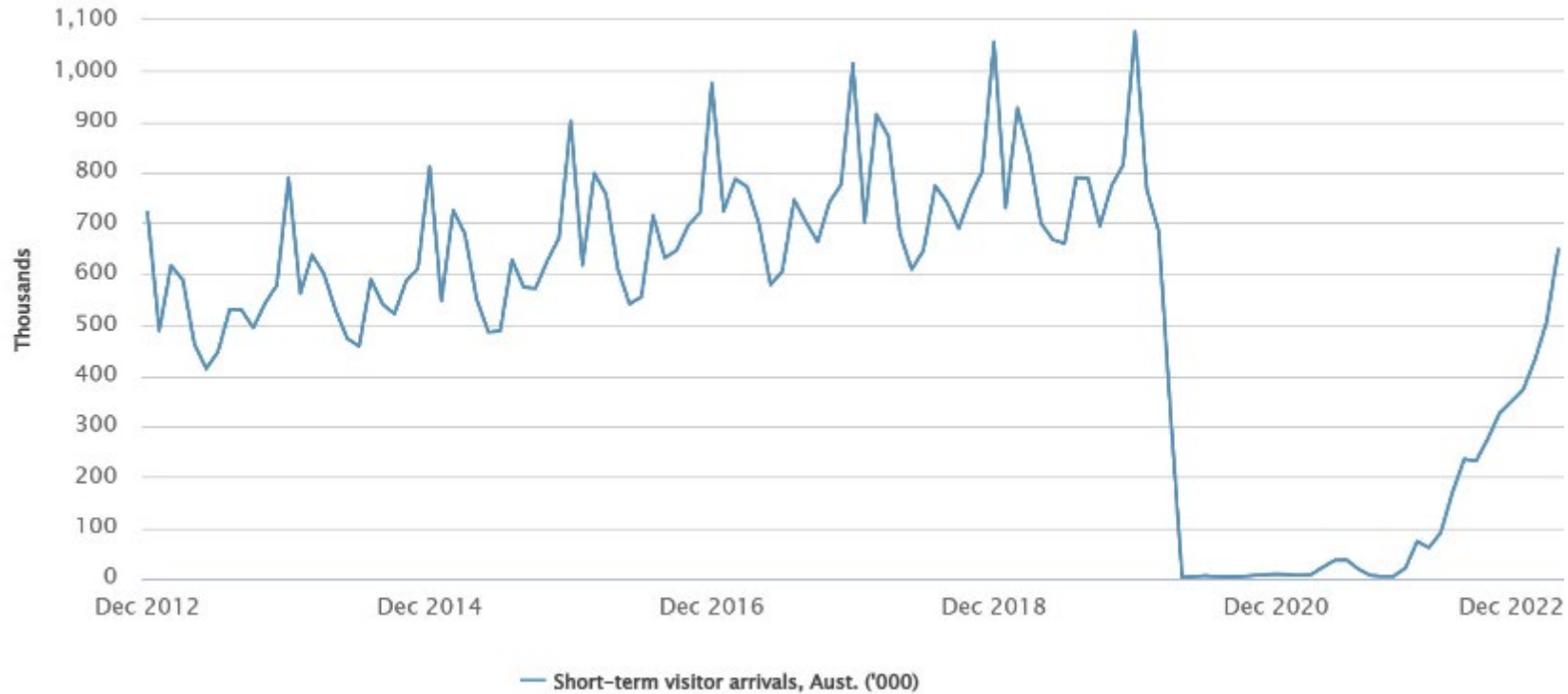


NB: VALUES BASED ON 2019 DATA, SOURCE TRA IVS

How are things looking?

A TOUGH FEW YEARS HERE, BUT OUR RECOVERY IS PROGRESSING

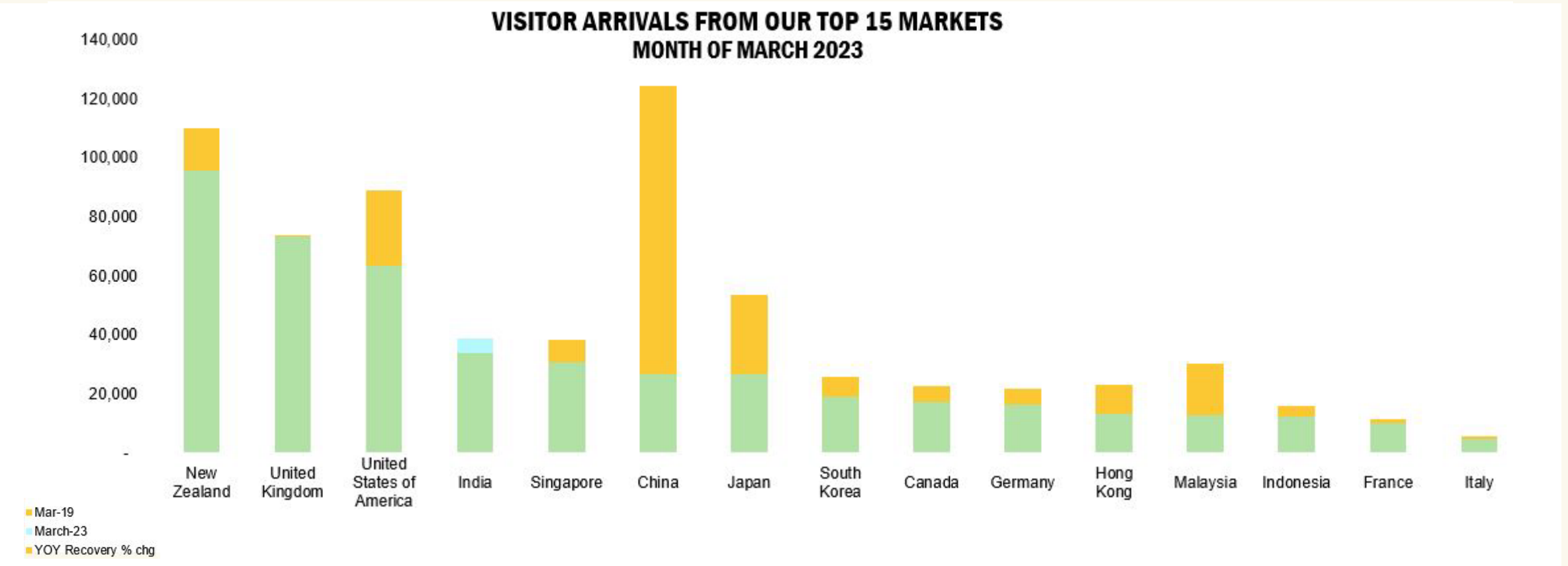
SHORT TERM VISITOR ARRIVALS



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

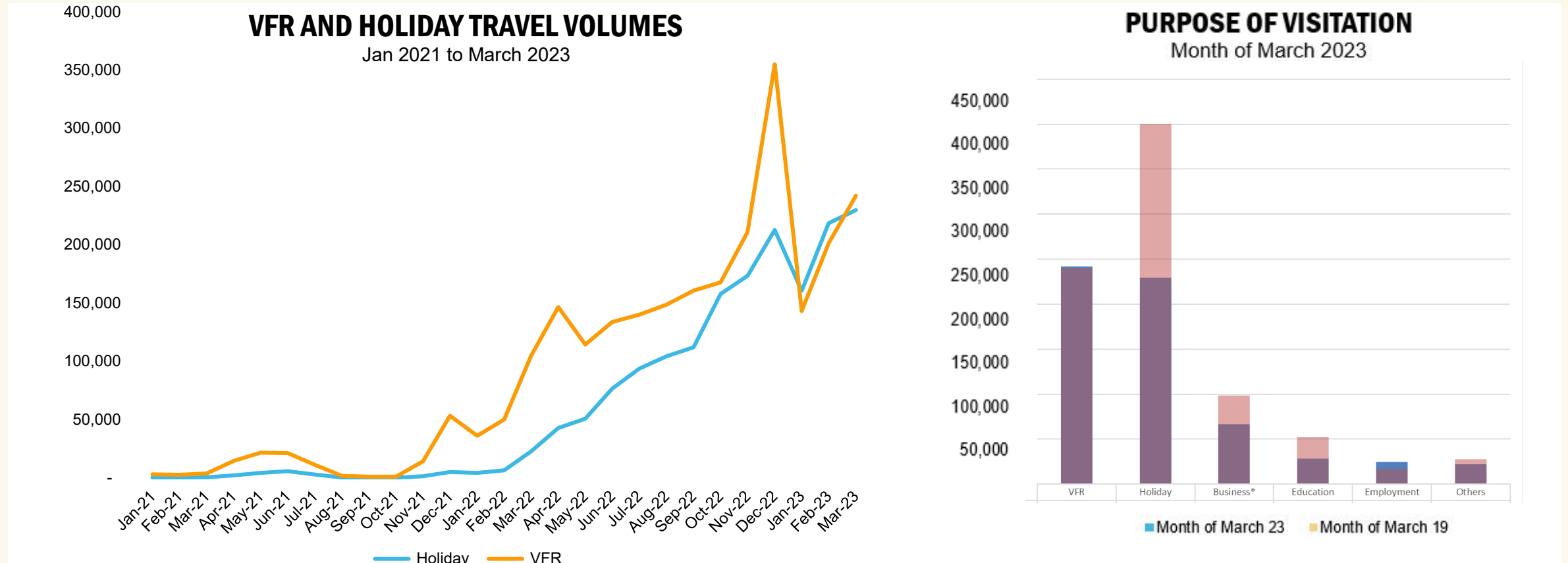
MARCH ARRIVALS WERE STRONG AT 73% OF 2019

**VISITOR ARRIVALS FROM OUR TOP 15 MARKETS
MONTH OF MARCH 2023**



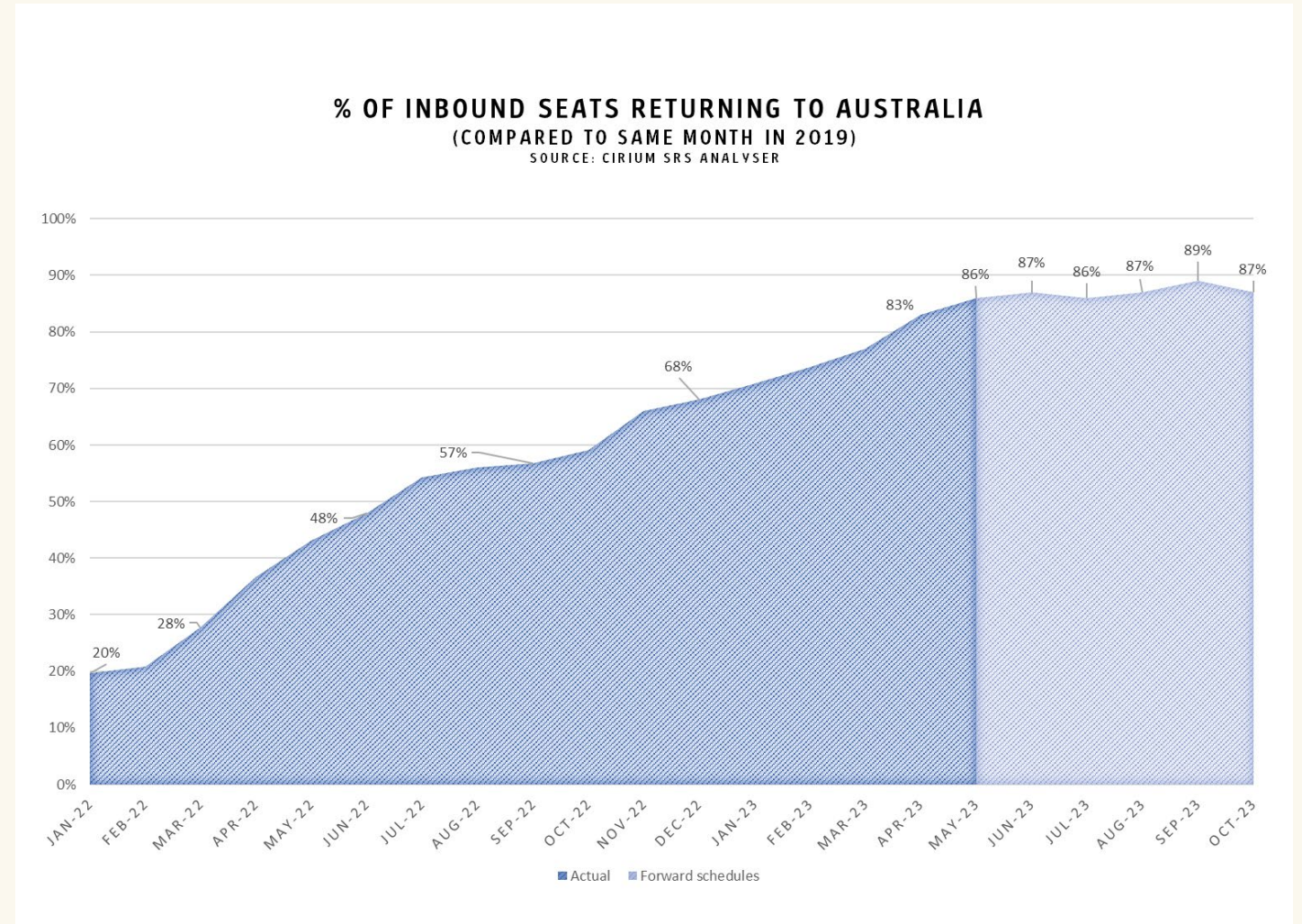
Source: ABS Arrivals Short Term Visitor Arrivals

VOLUME OF HOLIDAYMAKERS IS INCREASING



Source: ABS Arrivals Month of March 2023

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

CAPACITY IS RETURNING WITH SOME STANDOUT MARKETS/CARRIERS

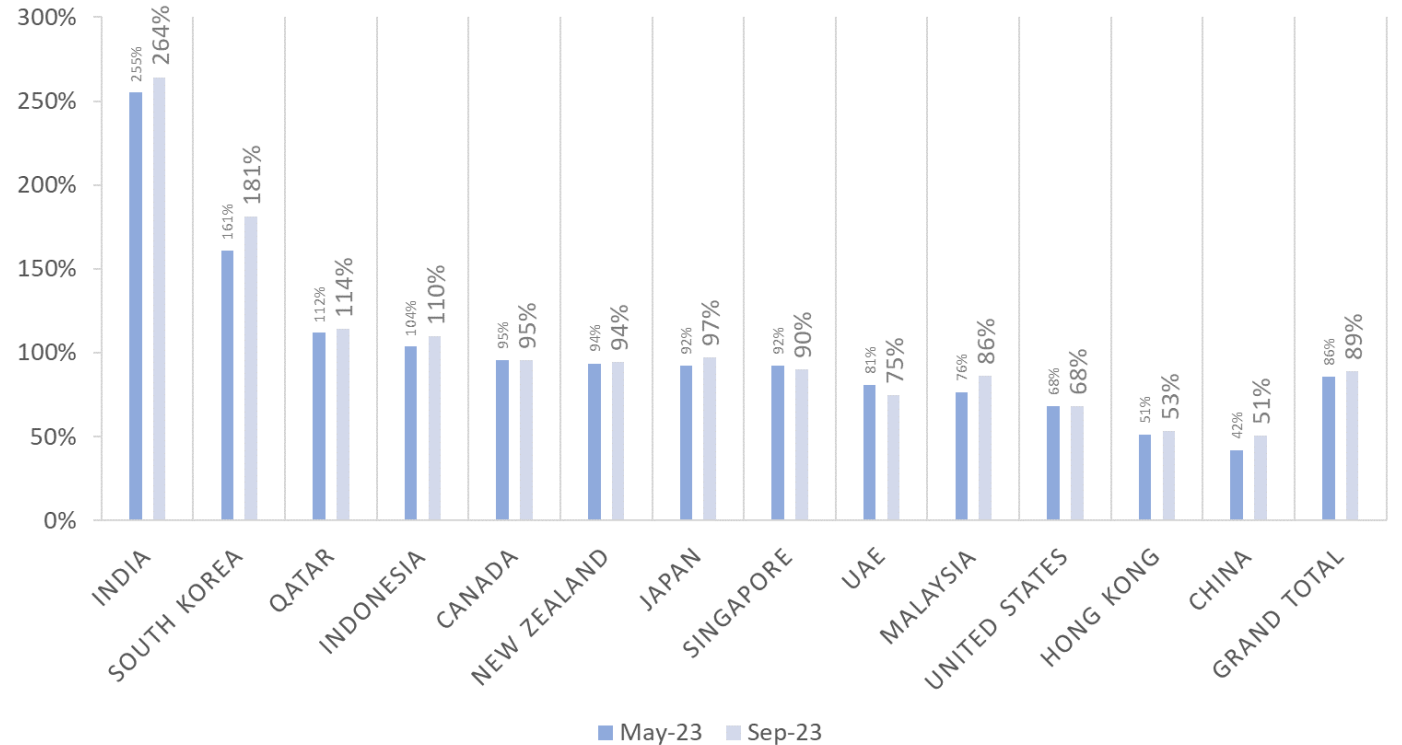
May 2023 levels:

India:	255% of seats scheduled
South Korea:	161% of seats scheduled
Qatar:	112% of seats scheduled
Indonesia:	110% of seats scheduled
Canada:	95% of seats scheduled
NZ:	94% of seats scheduled
Japan:	92% of seats scheduled
Singapore:	92% of seats scheduled
Malaysia:	76% of seats scheduled
USA:	68% of seats scheduled
China:	42% of seats scheduled

Singapore Airlines:	87% of seats scheduled
Emirates:	85% of seats scheduled
Qantas:	84% of seats scheduled
Cathay Pacific:	65% of seats scheduled
Etiad:	39% of seats scheduled

% OF INBOUND SEATS RETURNING TO AUSTRALIA BY COUNTRY IN 2023
(COMPARED TO SAME MONTH IN 2019)

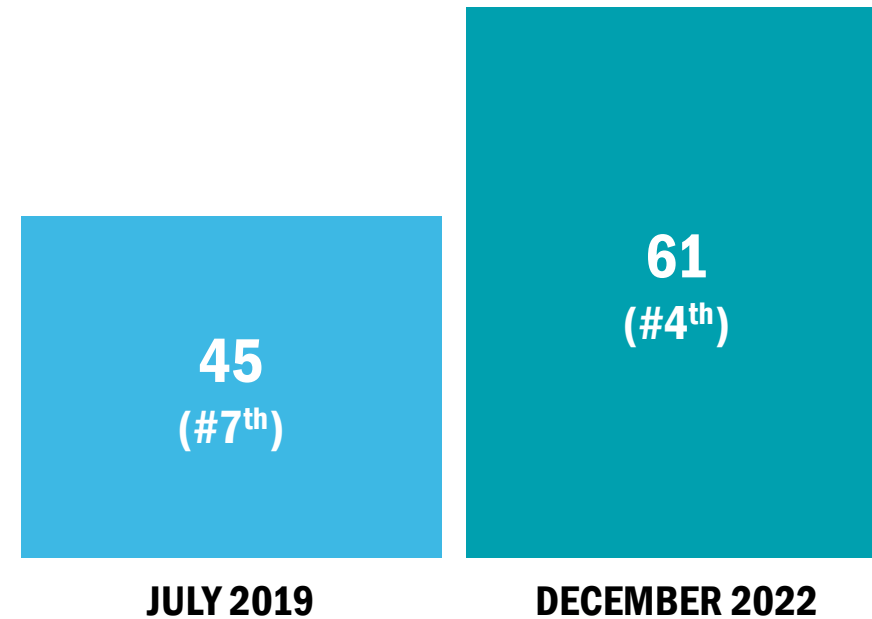
SOURCE: CIRIUM SRS ANALYSER



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

AUSTRALIA IS STILL VERY COMPETITIVE IN THIS MOMENT. OUR NET PROMOTER SCORE HAS INCREASED SHARPLY POST PANDEMIC

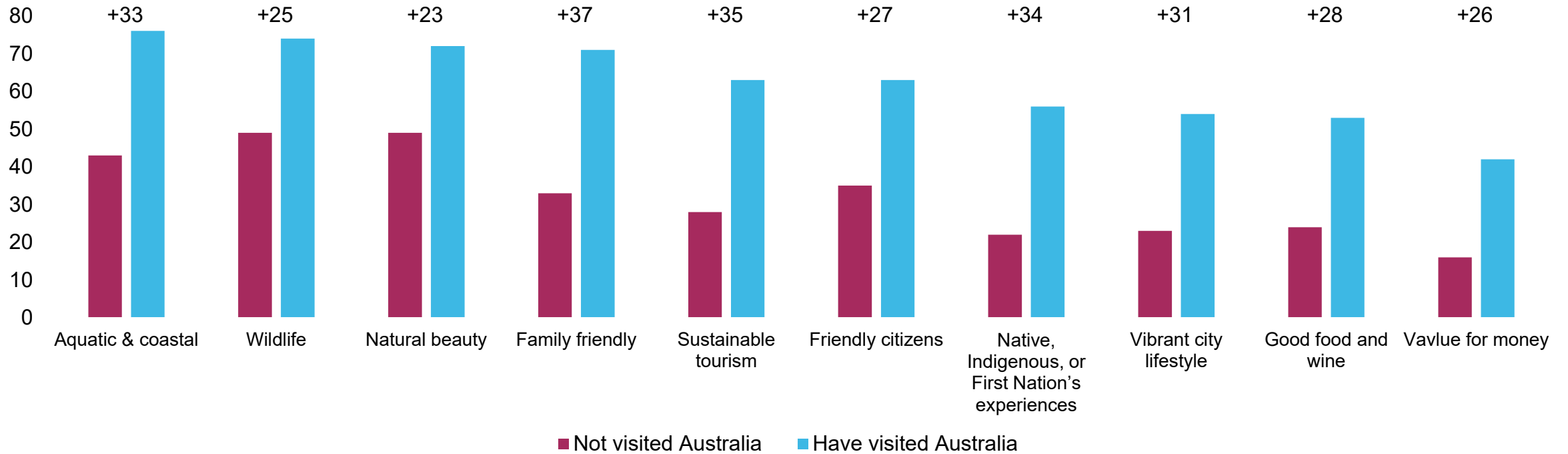
NET PROMOTER SCORE
Visited destination in the last 12 months
Global aggregate – OOR travellers



Question: On a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely, how likely are you to recommend each of the following destination(s) as a holiday destination to a family member, friend or colleague?
Global aggregate includes Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK and Hong Kong. Data before 2016 excludes Hong Kong.
Source: Tourism Australia Consumer Demand Project December 2022 via BDA Marketing Planning

AUSTRALIA OVERDELIVERS VS EXPECTATIONS

AUSTRALIA'S ASSOCIATIONS: HAVE VS HAVEN'T VISITED

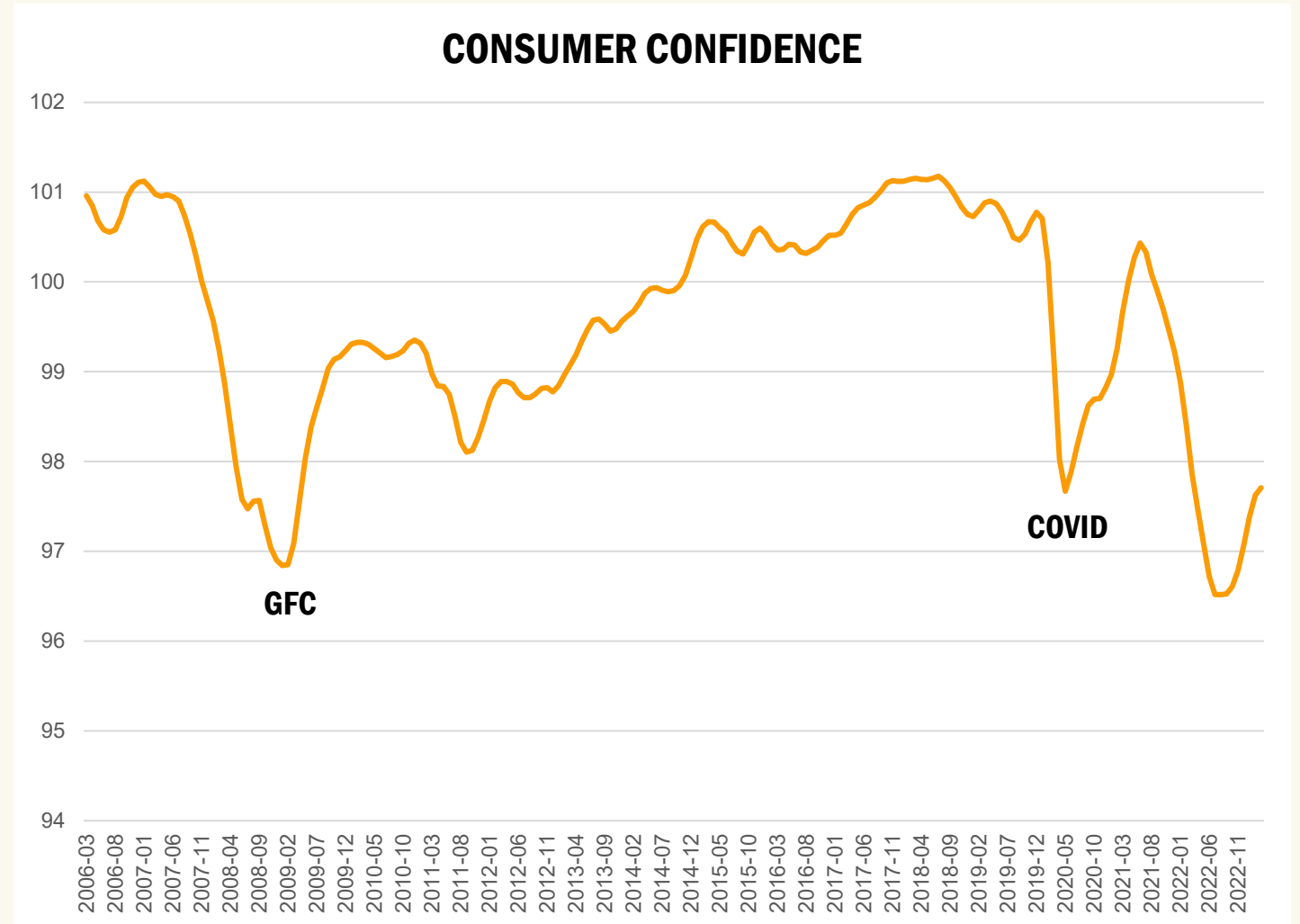


Question: You said [factor] is important to you. Which of these destinations do you associate with [factor]? (Those who ever visited Aus vs those who have not)
 Global aggregate includes Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK and Hong Kong.
 Source: Tourism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

WE'RE THROUGH THE PANDEMIC, BUT NOT OUT OF THE WOODS YET...

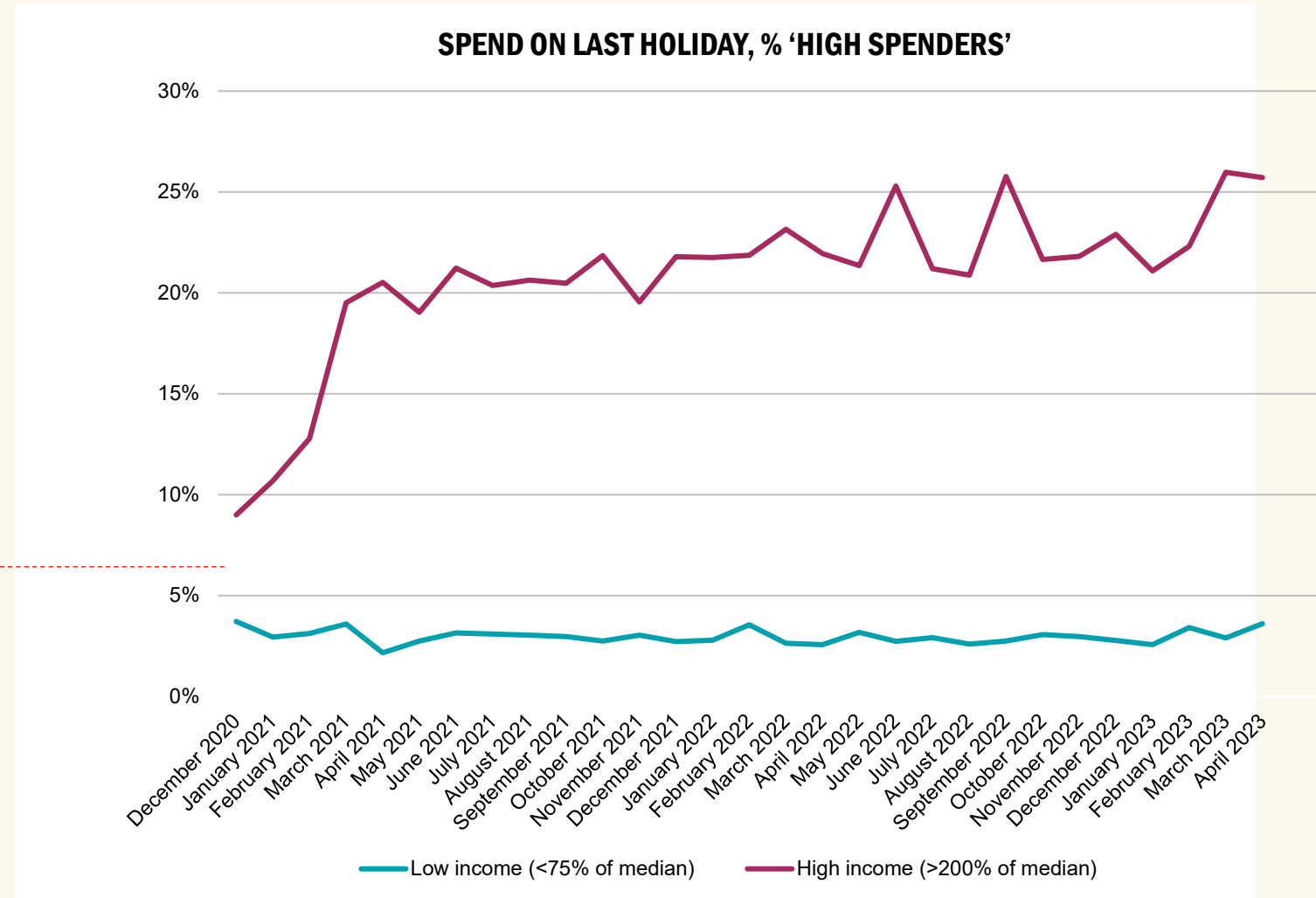
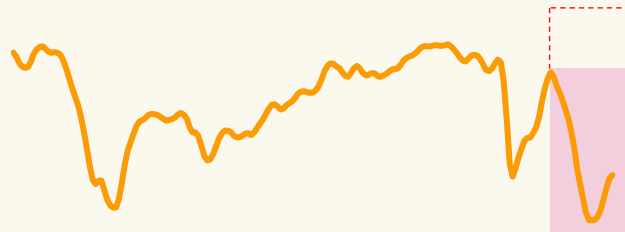


RECOVERY HAS BEEN ROBUST IN THE FACE OF CONSIDERABLE ECONOMIC HEADWINDS



SOURCE: OECD

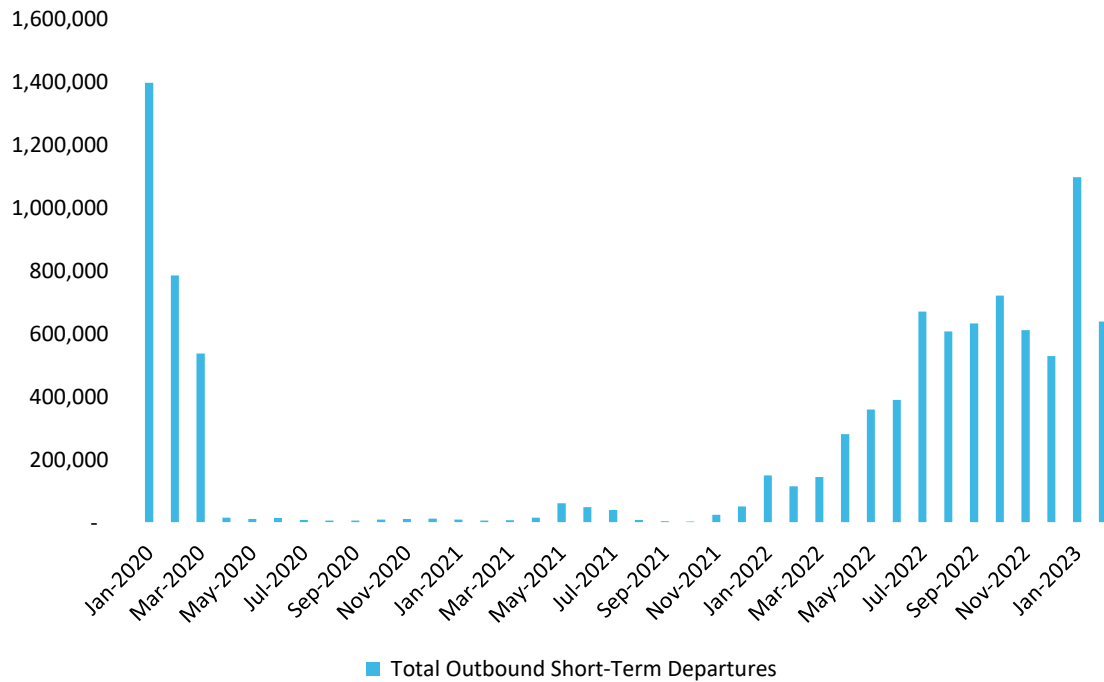
DURING THIS DROP IN CONSUMER CONFIDENCE, HIGH YIELDING TRAVELLERS CLAIMING TO SPEND MORE ON TRAVEL



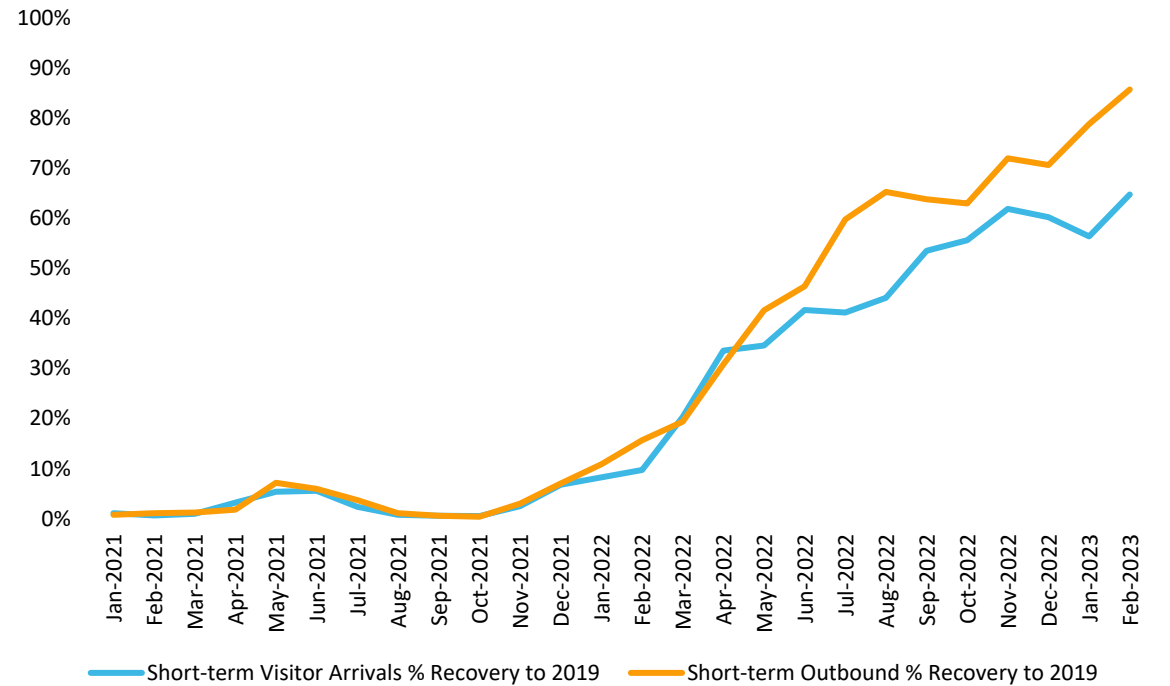
Source: YouGov,

OUTBOUND IS RECOVERING RAPIDLY

Total Outbound Short-Term Australian Resident Departures



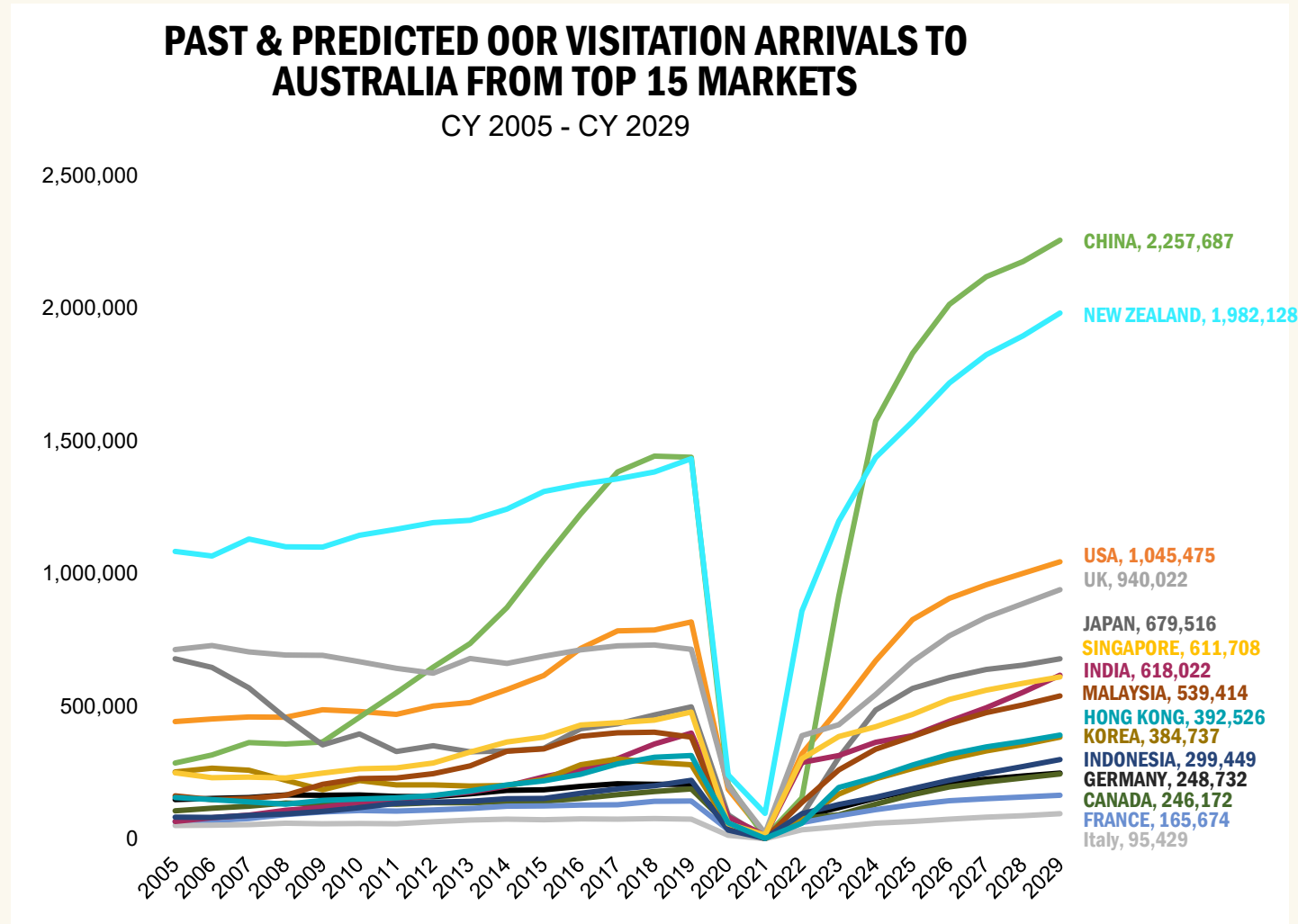
Inbound v Outbound Short-Term Resident Return Travel



Source: ABS

Source: ABS Short-term visitor arrivals and Short-Term Resident return

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

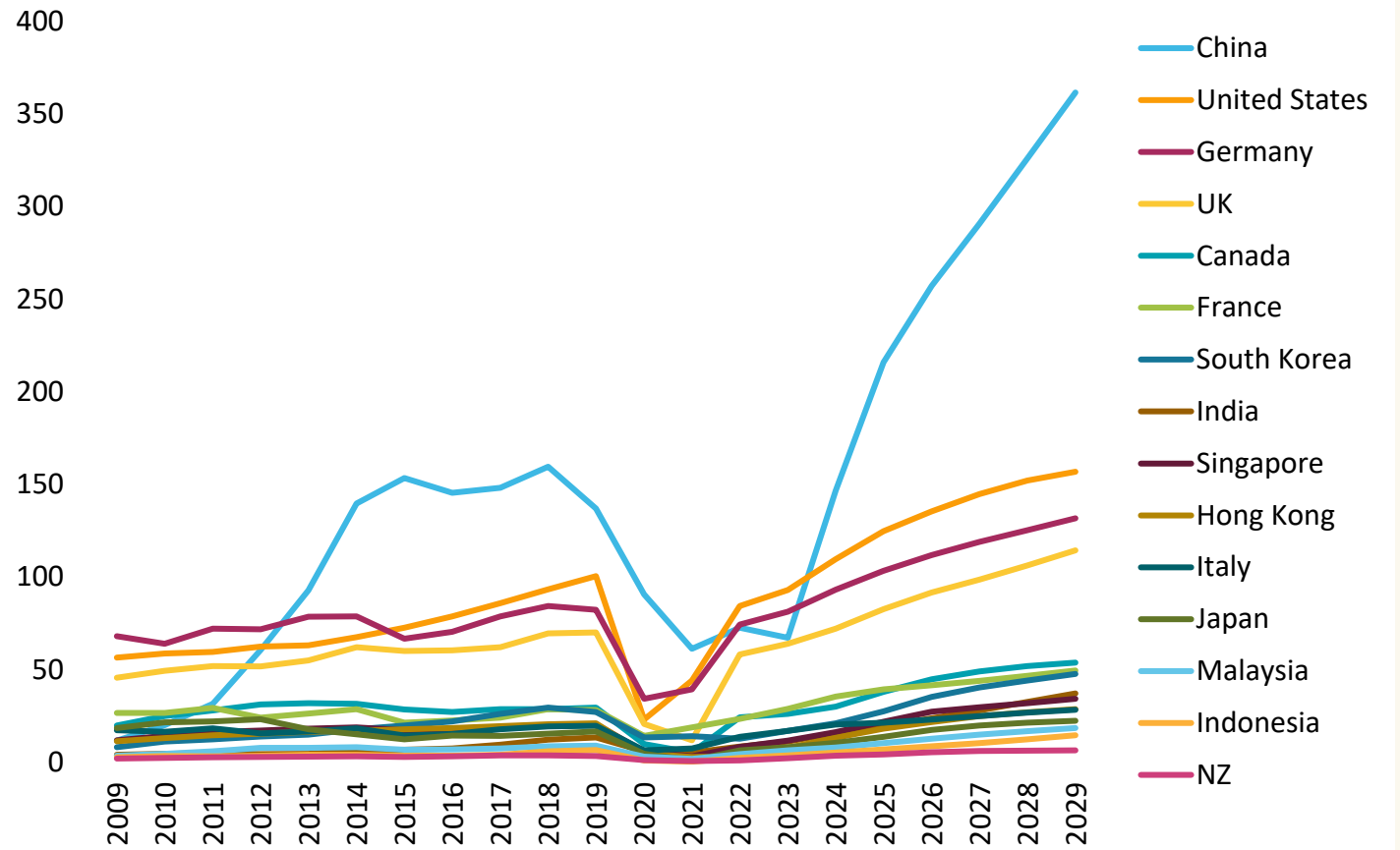


Source: Oxford Economics
 2022 Onwards represents estimated forecasted data

PROJECTED GROWTH IN OUTBOUND LEISURE TOURISM

OUTBOUND LEISURE SPEND: TA15 & SEA MARKETS

\$US bn, 2009 to 2029



THE AVERAGE TRAVELLER IS ONLY CONSIDERING THREE PLACES

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



JAPAN



USA



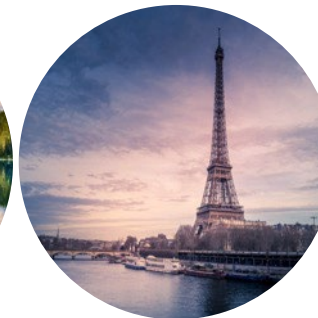
NEW ZEALAND



SOUTH AFRICA



CANADA



FRANCE



HAWAII

What are we doing about it?

A GLOBAL CAMPAIGN LEVERAGING AUSTRALIAN ICONS



TALENT



CHARACTERS



**AUSSIE LOCATIONS, PEOPLE
& EXPERIENCES**



MUSIC

COME AND SAY G'day



AUSTRALIA

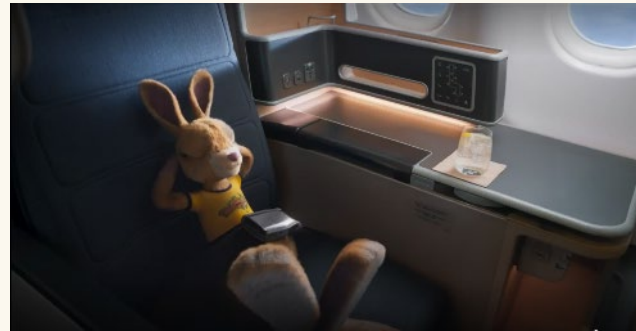


Uluru-Kata Tjuṯa National Park

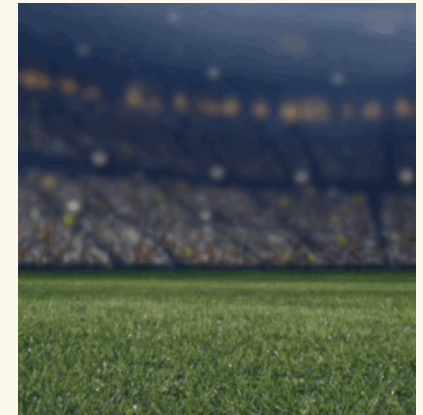
STAY THE COURSE: FRESH AND FAMILIAR



China launch



PARTNERS



Cultural spikes

Working holiday



TOURISM AUSTRALIA 

INDUSTRY TOOLKIT


COME AND SAY *G'day*

Version 1.0 October 2022

Download at www.tourism.australia.com

CAMPAIGN STICKERS

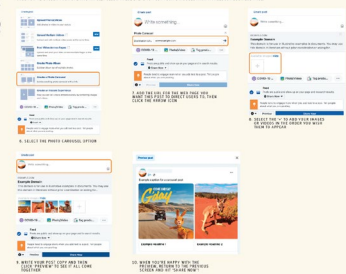
Quality and safety are essential to your business and making sure you're 'Come and Say G'day' is a key part of that. Use the stickers below to show your support for the industry and to help you stand out from the crowd.



HOW TO: FACEBOOK BUSINESS PAGE CAROUSEL BUILDER CONTINUED

ONLY USE TO CREATE YOUR ORIGINAL POST. FOLLOW THESE STEPS TO POST YOUR CAROUSEL FROM A FACEBOOK BUSINESS PAGE.

1. GO TO YOUR BUSINESS PAGE
2. CLICK ON 'POST' IN THE TOP RIGHT CORNER
3. SELECT 'CAROUSEL' AS THE POST TYPE
4. ADD YOUR CAROUSEL IMAGES
5. WRITE YOUR POST COPY
6. SELECT THE POST PRIVACY OPTION
7. CLICK 'POST' TO PUBLISH YOUR CAROUSEL



CAROUSEL BUILDER

Use the most relevant image for the first card of your carousel, and give it the most space. You can also use the carousel builder to create a carousel with your own content.

Download all carousel cards below.

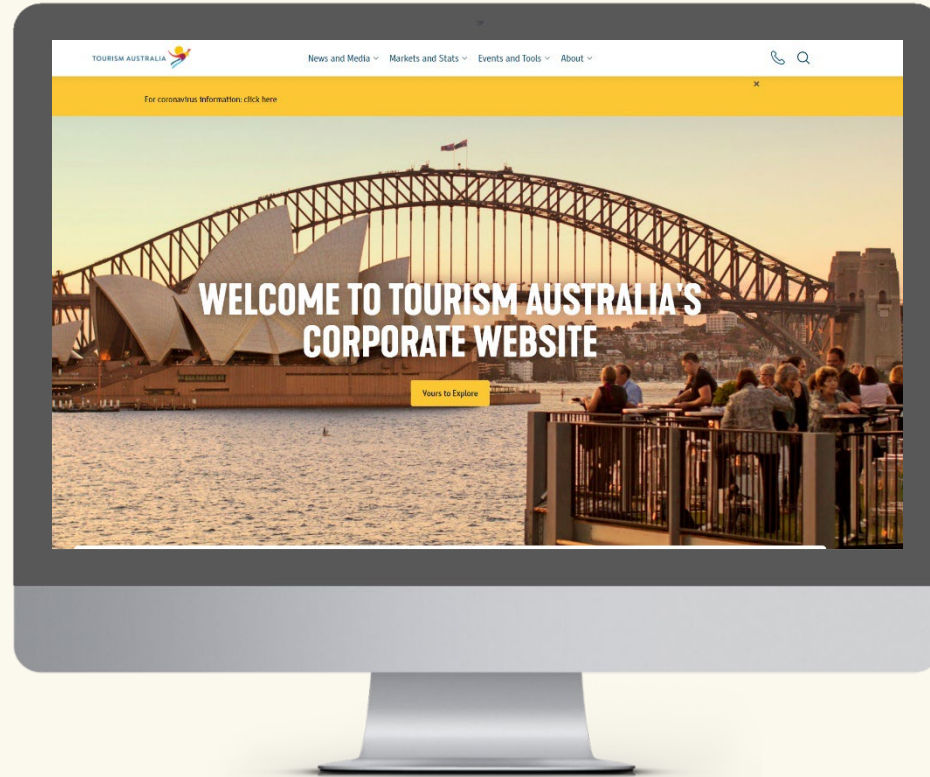


Download Assets

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.



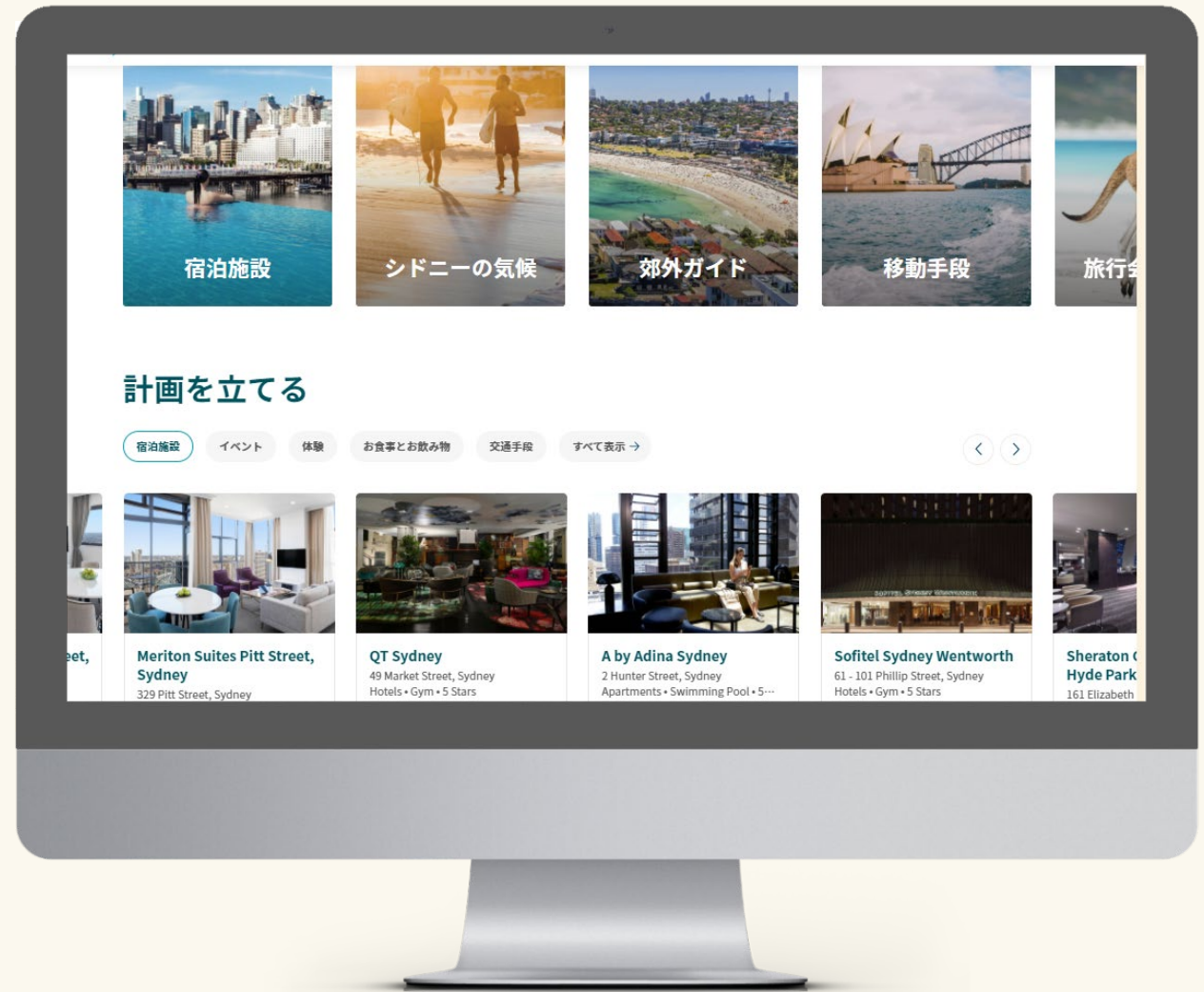
TOURISM.AUSTRALIA.COM

AUSTRALIA.COM

Enhanced ATDW integration within our consumer site.

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

Remember that ATDW also feeds through to many other platforms – Including pulling through any deals and offers.



DNSW.COM.AU/GETCONNECTED

GENERATING PUBLICITY & MEDIA HOSTING

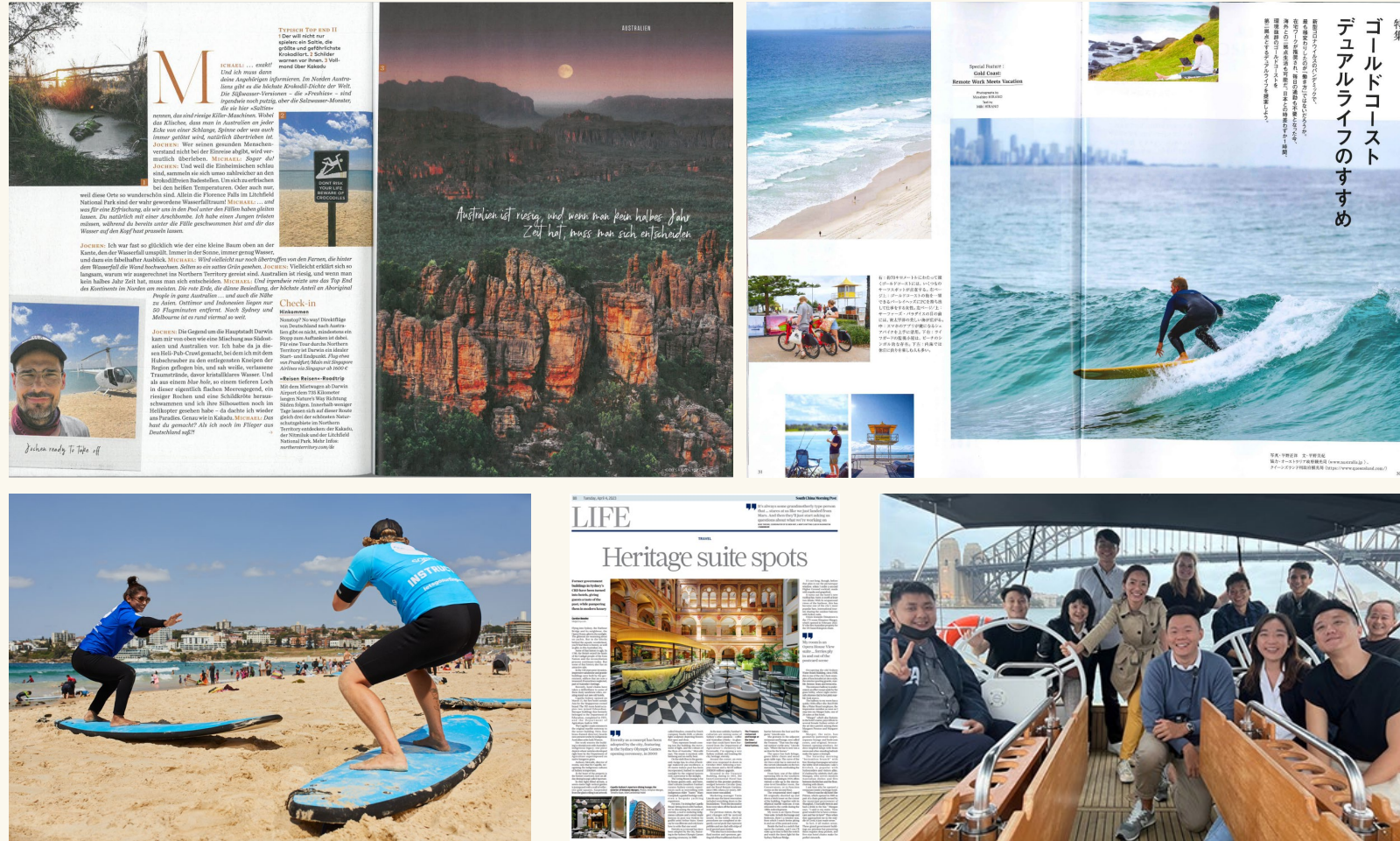
Building media relationships

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](https://www.tourism.australia.com/workingwithmedia)

SEND YOUR STORIES TO
INTERNATIONALMEDIA@TOURISM.AUSTRALIA.COM

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.

The collage displays various digital marketing materials:

- Website Banners:** Two versions of a banner for Singapore, featuring a woman on a cliff and the text "DISCOVER A GREAT DEAL MORE. AUSTRALIA IS YOURS TO EXPLORE." One version includes a "GET \$20 OFF" offer.
- Social Media Post:** A Facebook post from Chan Brothers Travel, dated February 10 at 6:33 PM, with the text "Australia is yours to explore! See Australia with fresh eyes & peace of mind - from exclusive campervan road trips & self-drive adventures, to luxury holiday home getaways & immersive tours."
- Regional Landing Pages:** A row of five landing pages for different Australian regions: New South Wales ("PULL UP THE BEST SEAT IN THE HOUSE"), Victoria ("COME DOWN TO THE TOP OF THE WORLD"), Australian Capital Territory ("FOLLOW IN ANCIENT FOOTSTEPS"), Queensland ("DIVE INTO NEW ADVENTURES"), and Australia Welcomes You ("AUSTRALIA IS YOURS TO EXPLORE"). Each page includes a "Learn more" button.
- Travel Guide Website:** A screenshot of a travel guide website for Australia, showing various travel tips and guides.
- Klook Website:** A screenshot of the Klook website, featuring a similar banner to the one on the left and a "GET \$20 OFF" offer.

TOURISM.AUSTRALIA.COM/MARKETREGIONS

“Working in Market”

TRADE EVENTS

Including Australian Tourism Exchange
and Marketplace Events

Australian Tourism Exchange 2024

19-23 May 2024 (Melbourne)

Australia Marketplace Events:

19 -21 July 2023 (Southeast Asia)

23 – 26 July 2023 (India)

6 – 8 August 2023 (North America)

Early December (China)

G'Day Australia:

9-12 October 2023 (Cairns)



SUSTAINABILITY

Many ways to start and progress your sustainable journey

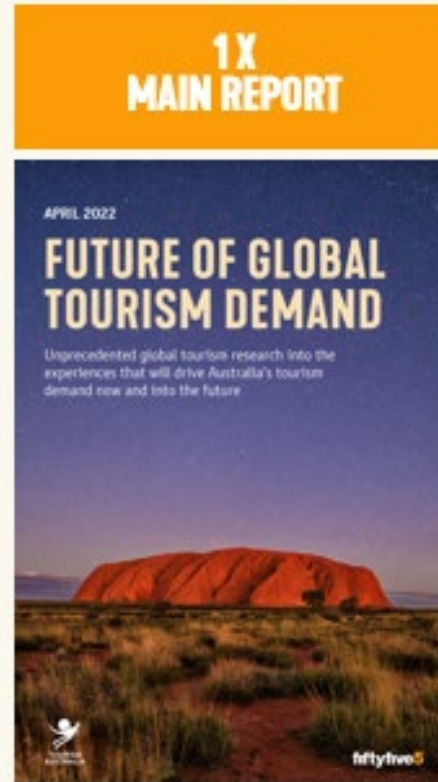
- Earthcheck Academy - Sustainability 101 modules
- Ecotourism Australia – Strive 4 Sustainability
- Accreditation through various organisations such as Earthcheck, Ecotourism Australia, B Corp etc



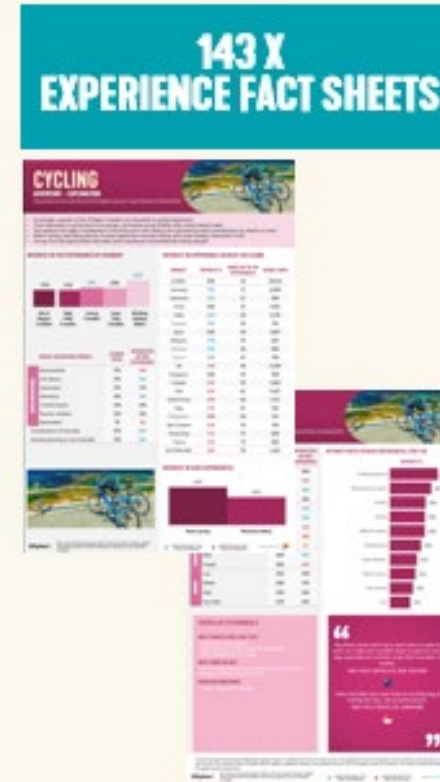
[ECOTOURISM.ORG.AU/STRIVE-4-SUSTAINABILITY](https://ecotourism.org.au/strive-4-sustainability)

[EARTHCHECK.ORG/WHAT-WE-DO/TRAINING/EARTHCHECK-TRAINING](https://earthcheck.org/what-we-do/training/earthcheck-training)

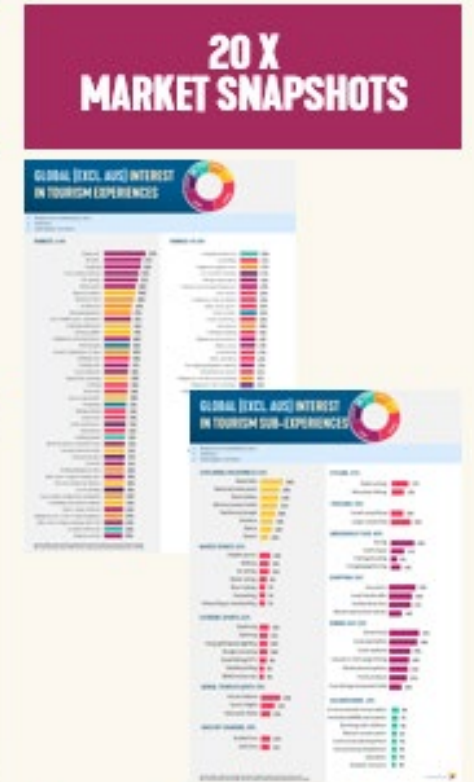
A FULL SUITE OF NEW RESEARCH



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



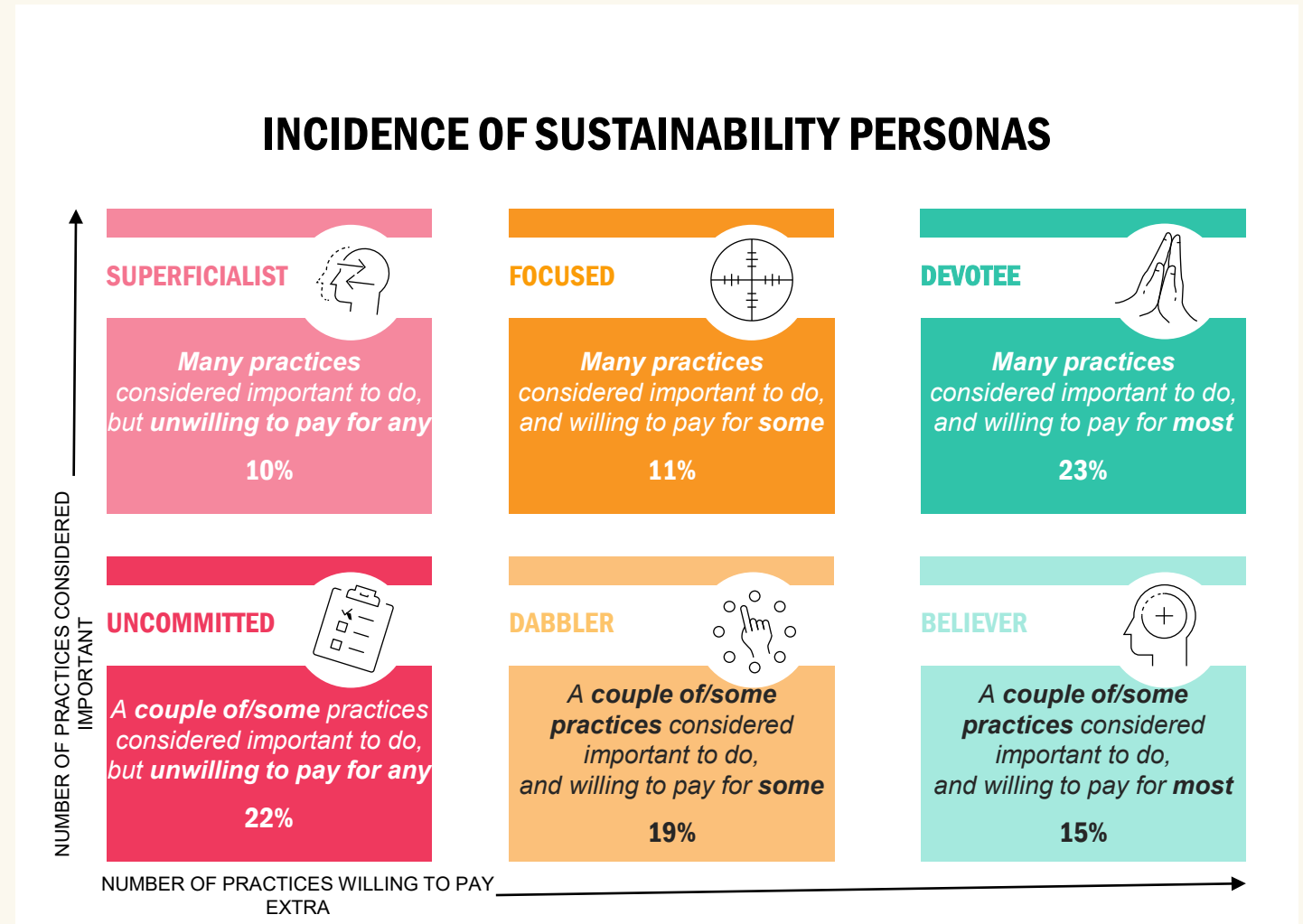
Interest in the experience globally, by segment and by market; profiling of those interested; and cross-sell and partnership opportunities.



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

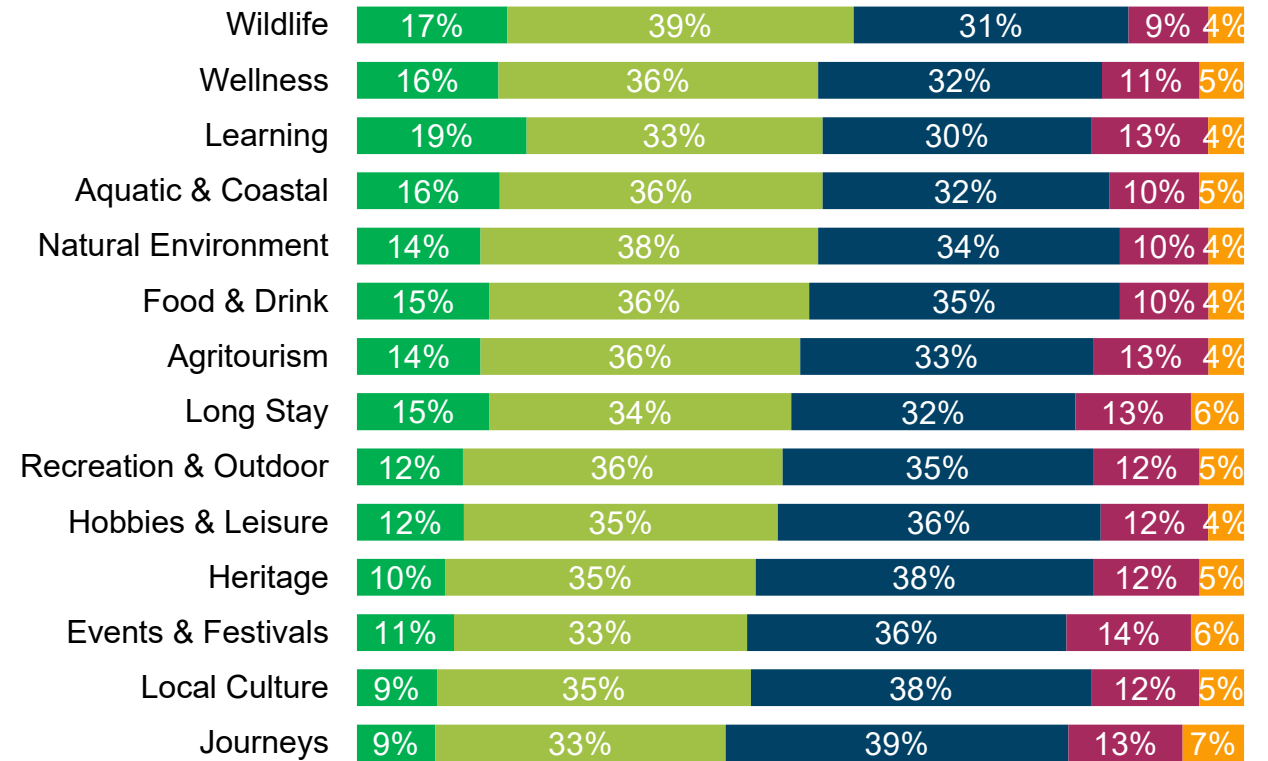
SUSTAINABILITY: MORE THAN 75% OF TRAVELLERS ARE COMMITTED TO SUSTAINABILITY IN SOME WAY

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)



INDIGENOUS: AN ABORIGINAL LENS CAN ENRICH THE OTHER EXPERIENTIAL TERRITORIES TRAVELLERS SEEK

WILLINGNESS TO PAY MORE FOR INDIGENOUS EXPERIENCES



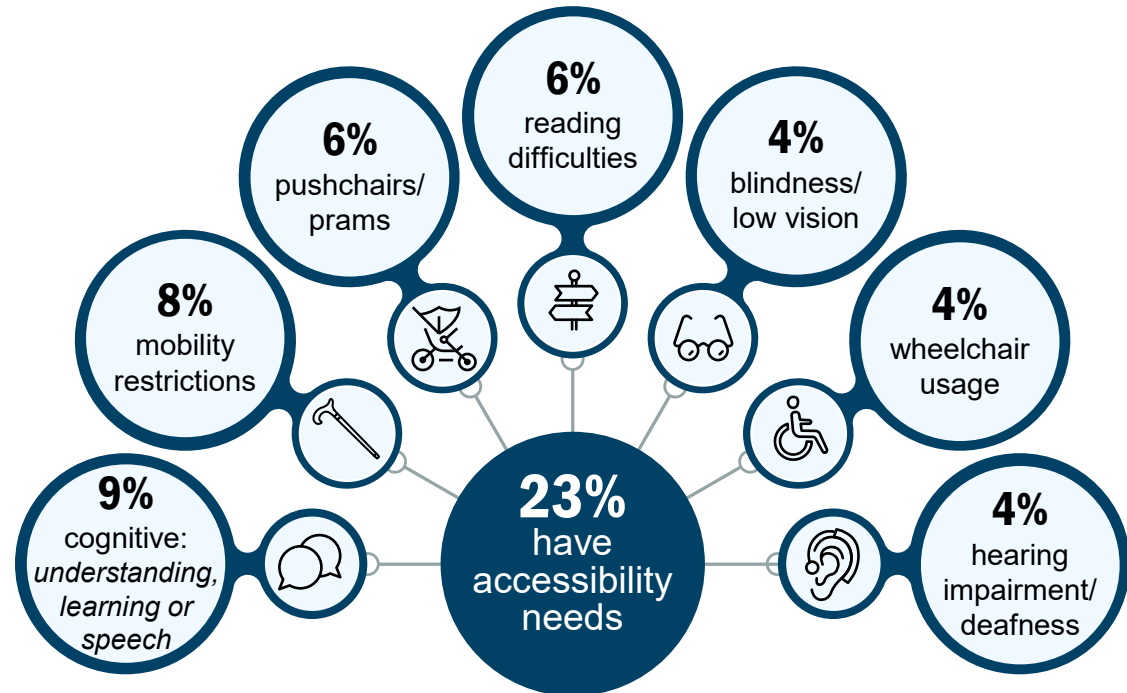
- Pay a lot more for it compared to a non-Indigenous experience
- Pay a little more for it compared to a non-Indigenous experience
- Interested if it cost the same as a non-Indigenous experience
- Interested if it cost less than a non-Indigenous experience
- Not interested, even if it cost less than a non-Indigenous experience

Future of Global Tourism Demand Research, Quantitative validation phase, April-May 2022.
 E5. If you had the opportunity to do the following types of experiences in an Indigenous setting or with Indigenous people, which of the following is true?
 Base: Global excl. Australia (n = 1,536 to 8,251)

ACCESSIBILITY: THOSE WITH DIVERSE NEEDS REPRESENT A SIGNIFICANT OPPORTUNITY

Future of Global Tourism Demand Research, Quantitative validation phase, April-May 2022
 A5. What accessibility needs do you or anyone you travel with have when travelling?
 Base: Global excl. Australia (n=22,190)

INCIDENCE OF ACCESSIBILITY NEEDS (NET SELF/COMPANIONS)



Questions?

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Follow us on [Linkedin](#)

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THANK YOU!

