

An aerial photograph showing a dense forest in the foreground, with a city skyline visible in the background. Three hot air balloons are floating in the sky above the city. The text 'PHILLIPA HARRISON' is written in large, bold, white capital letters across the middle of the image, with 'MANAGING DIRECTOR, TOURISM AUSTRALIA' written in smaller, bold, white capital letters below it.

**PHILLIPA HARRISON**  
**MANAGING DIRECTOR, TOURISM AUSTRALIA**

**1**

**RECOVERY**

**2**

**OUTLOOK**

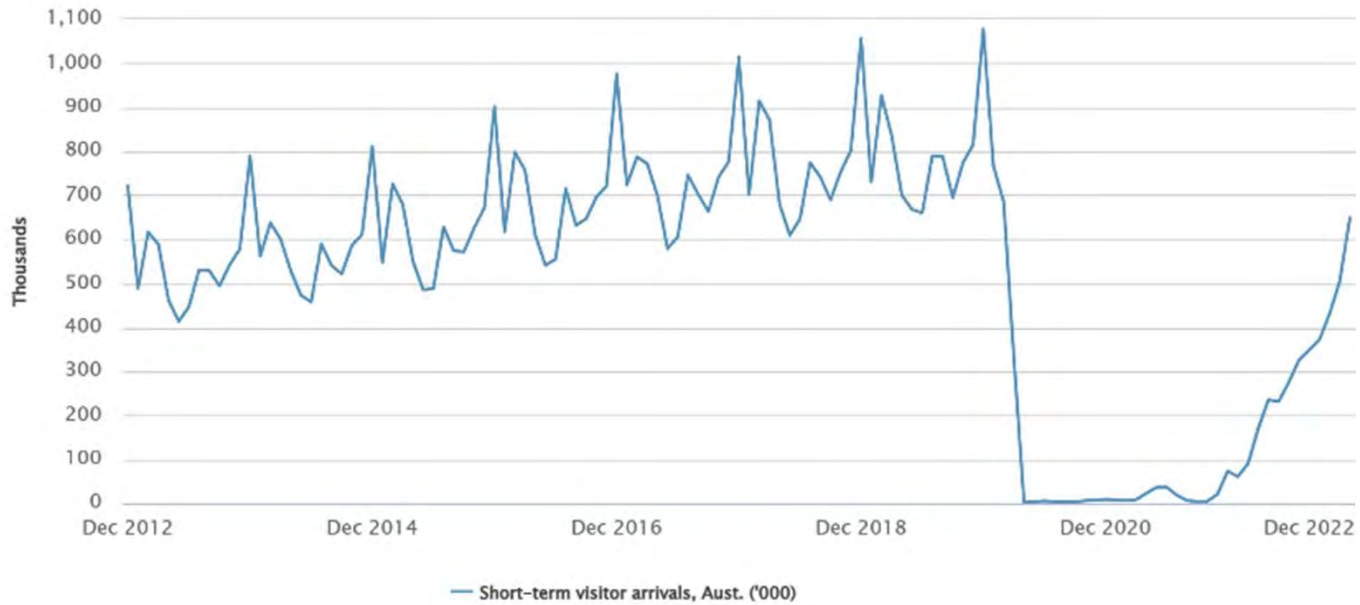
**3**

**TOURISM  
AUSTRALIA'S  
RESPONSE**

# 1. RECOVERY

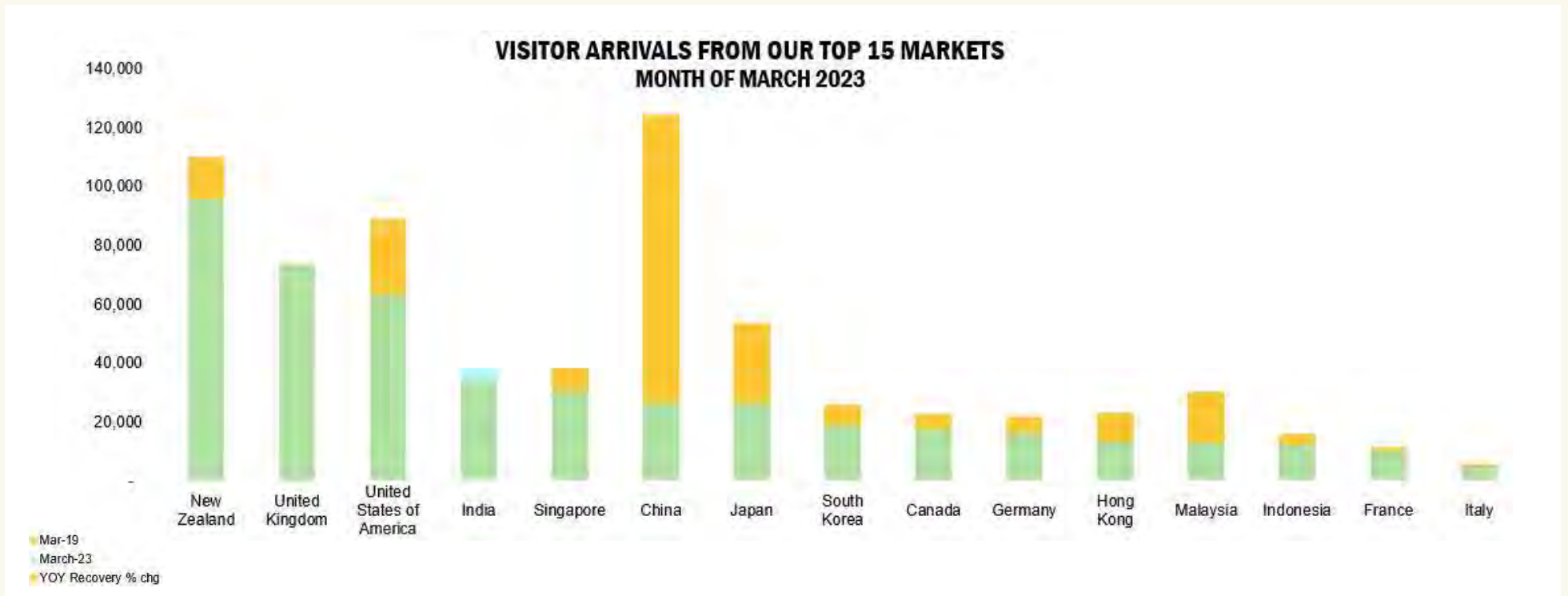
# A TOUGH FEW YEARS HERE, BUT OUR RECOVERY IS PROGRESSING

### SHORT TERM VISITOR ARRIVALS



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

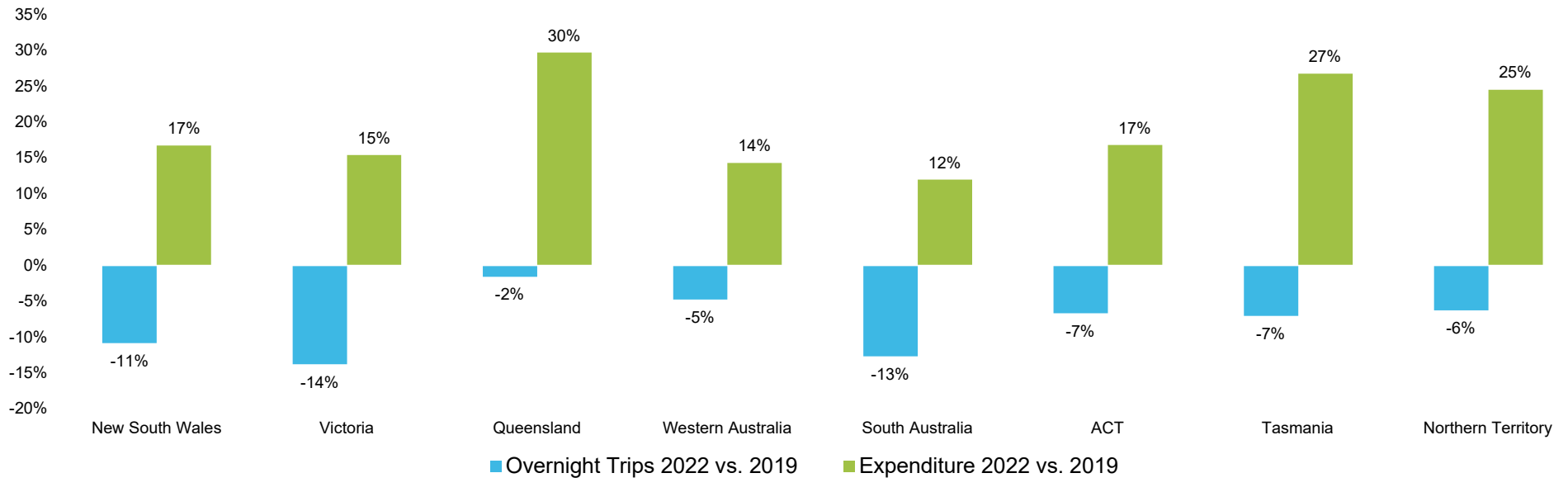
# MARCH ARRIVALS WERE STRONG AT 73% OF 2019



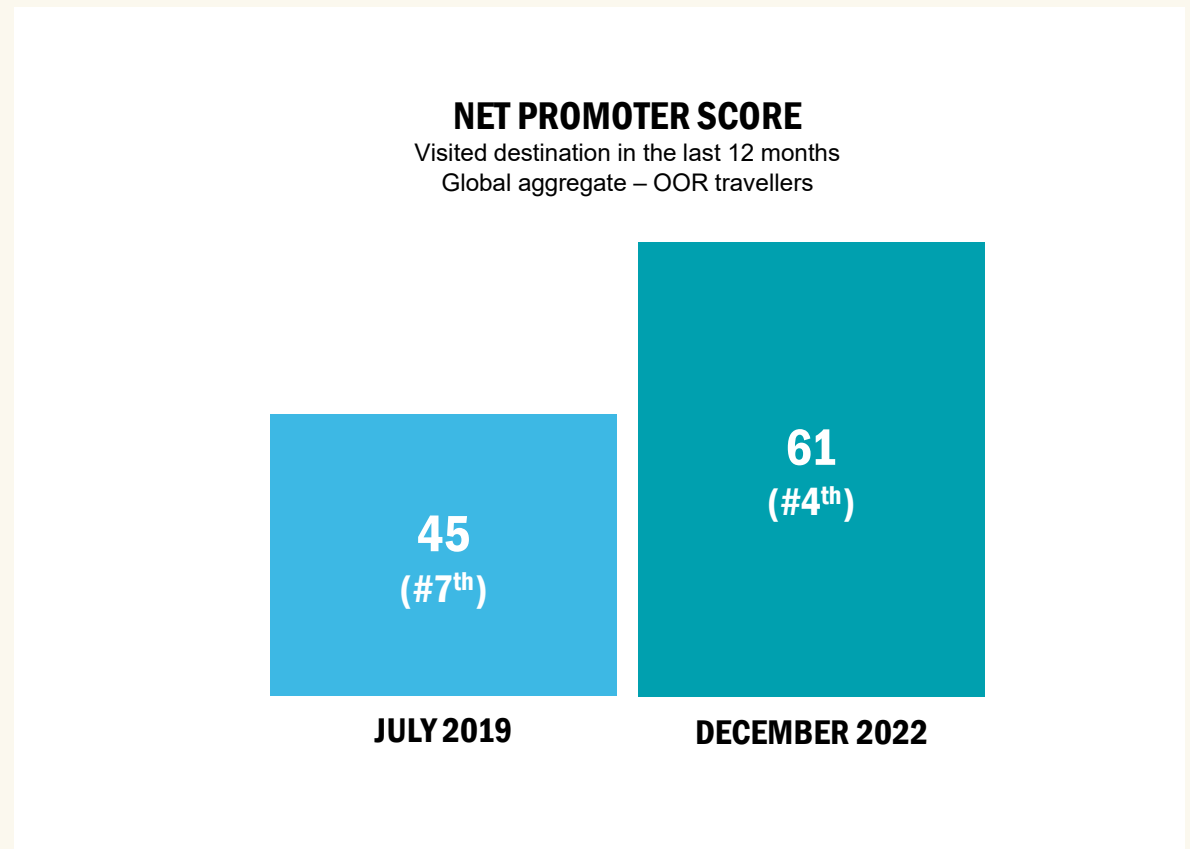
Source: ABS Arrivals Short Term Visitor Arrivals

# DOMESTIC TRIPS ARE DOWN, BUT SPENDING IS UP

**AUSTRALIAN DOMESTIC OVERNIGHT TRIPS VS. EXPENDITURE BY STATE**  
YE December 2019 vs. 2022



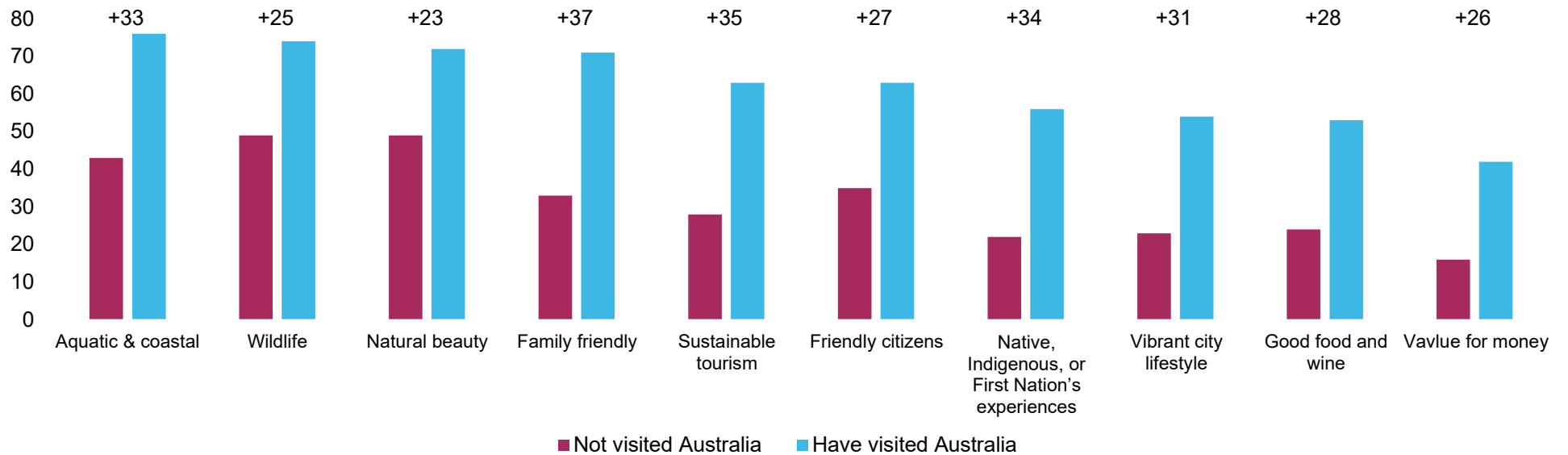
# AUSTRALIA IS STILL VERY COMPETITIVE IN THIS MOMENT. OUR NET PROMOTER SCORE HAS INCREASED SHARPLY POST PANDEMIC



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**

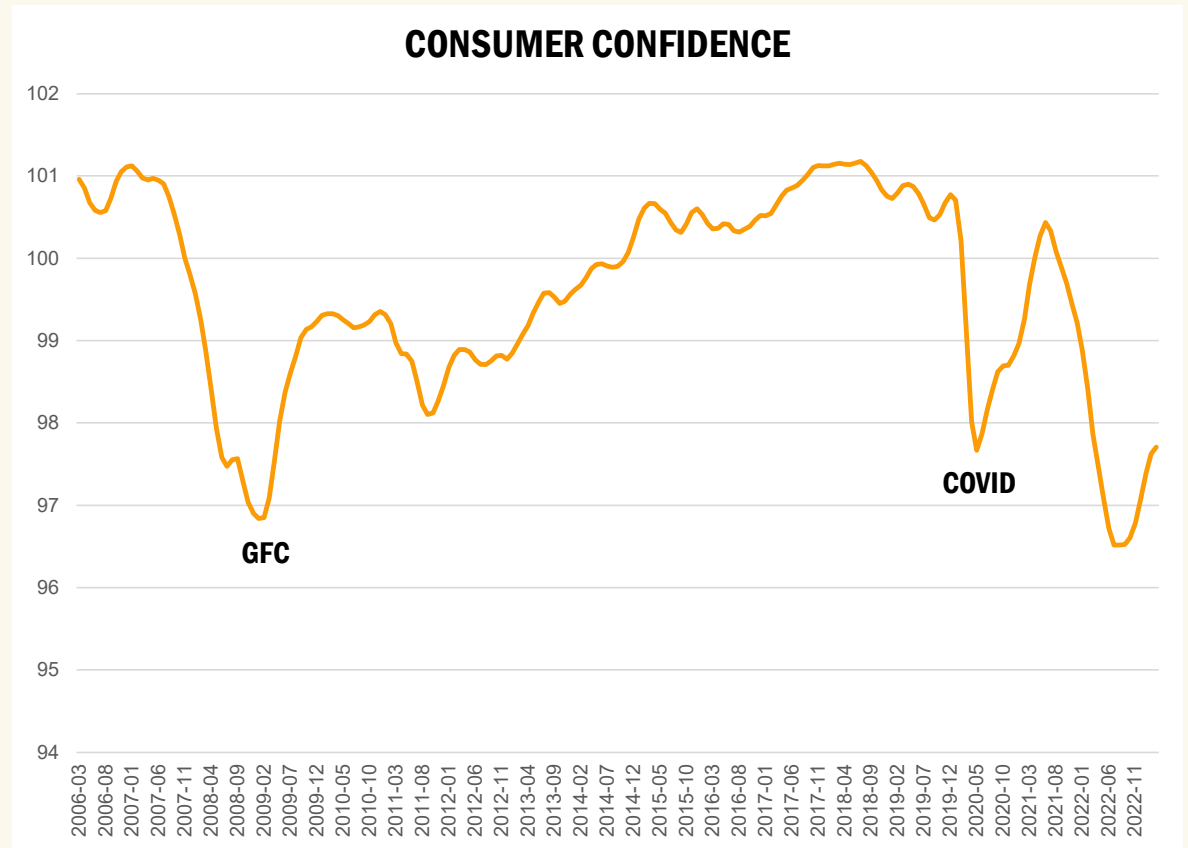


Question: You said [factor] is important to you. Which of these destinations do you associate with [factor]? (Those who ever visited Aus vs those who have not)  
 Global aggregate includes Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK and Hong Kong.  
 Source: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



# 2. OUTLOOK

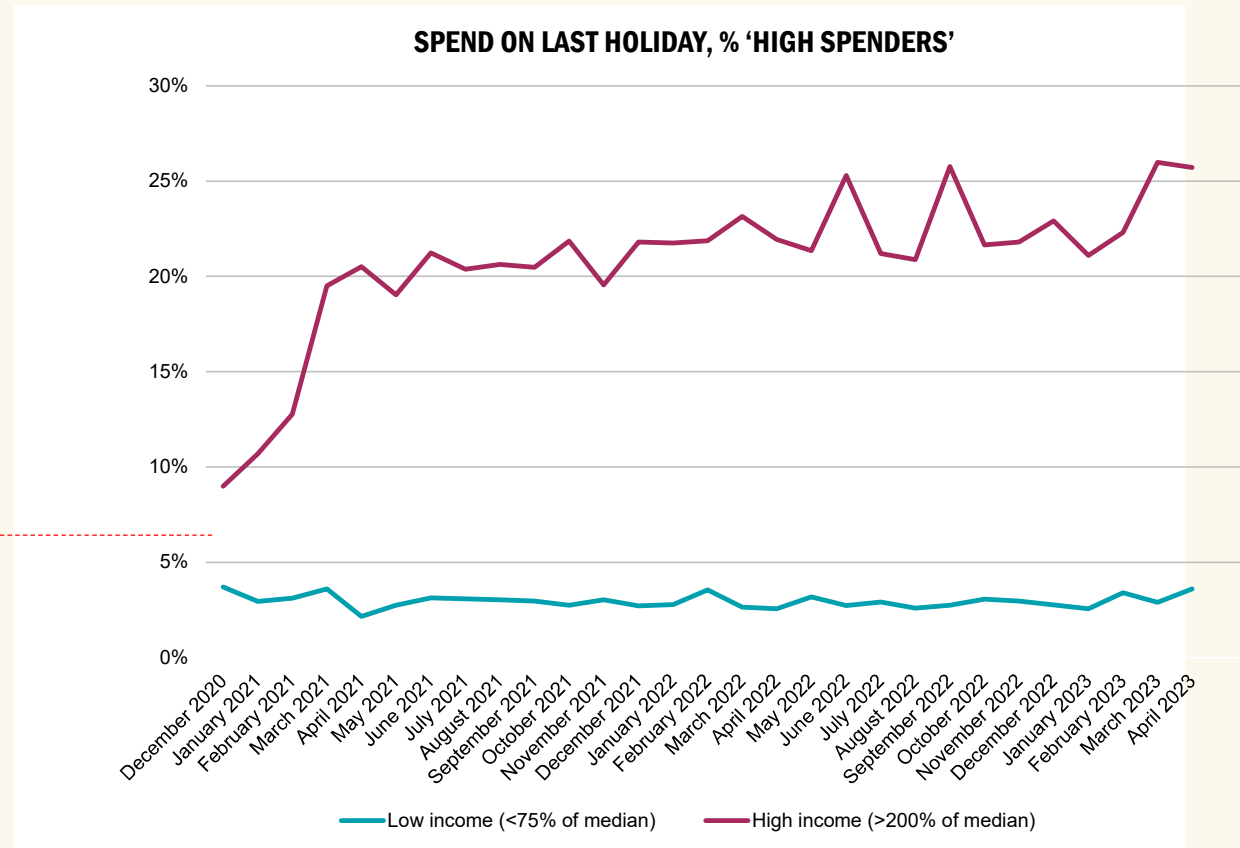
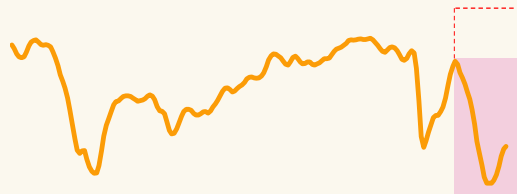
# RECOVERY HAS BEEN ROBUST IN THE FACE OF CONSIDERABLE ECONOMIC HEADWINDS



SOURCE: OECD

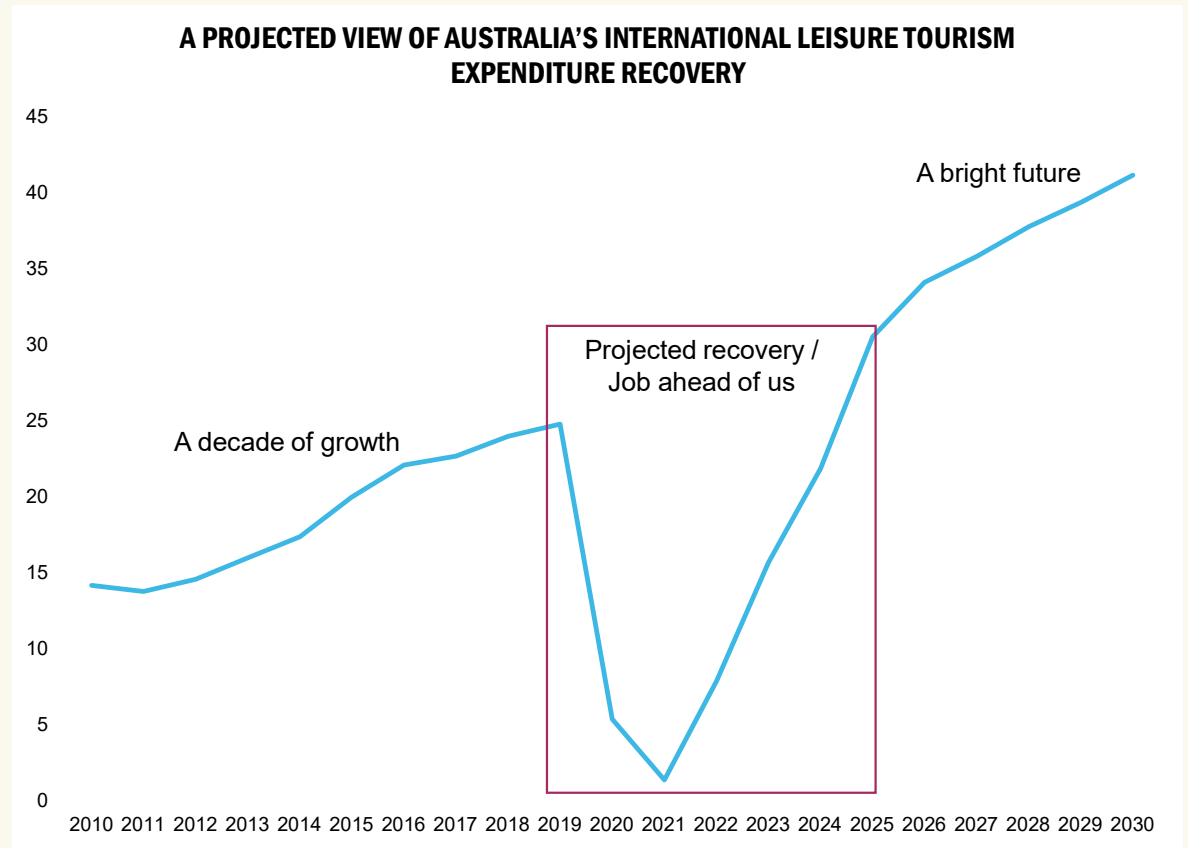
# DURING THIS DROP IN CONSUMER CONFIDENCE, HIGH YIELDING TRAVELLERS CLAIMING TO SPEND MORE ON TRAVEL

15



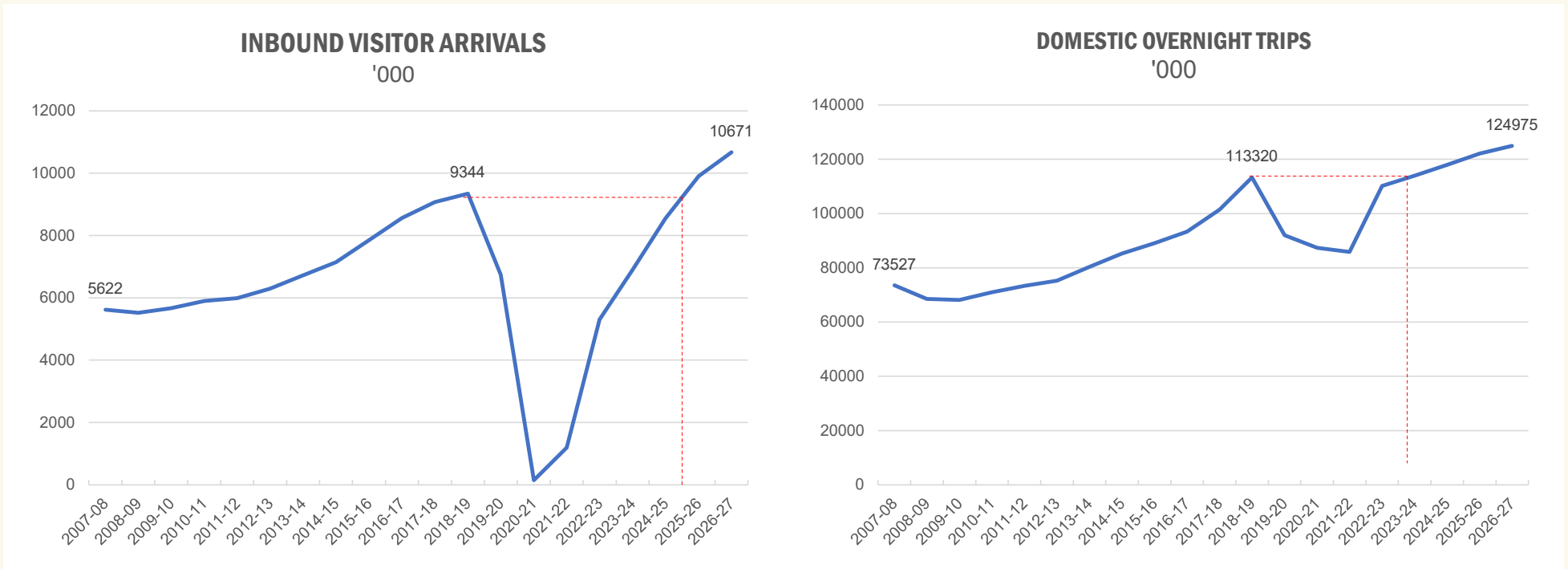
Source: YouGov.

# THE FUTURE FOR TOURISM IS BRIGHT, BUT WILL BE HARD FOUGHT



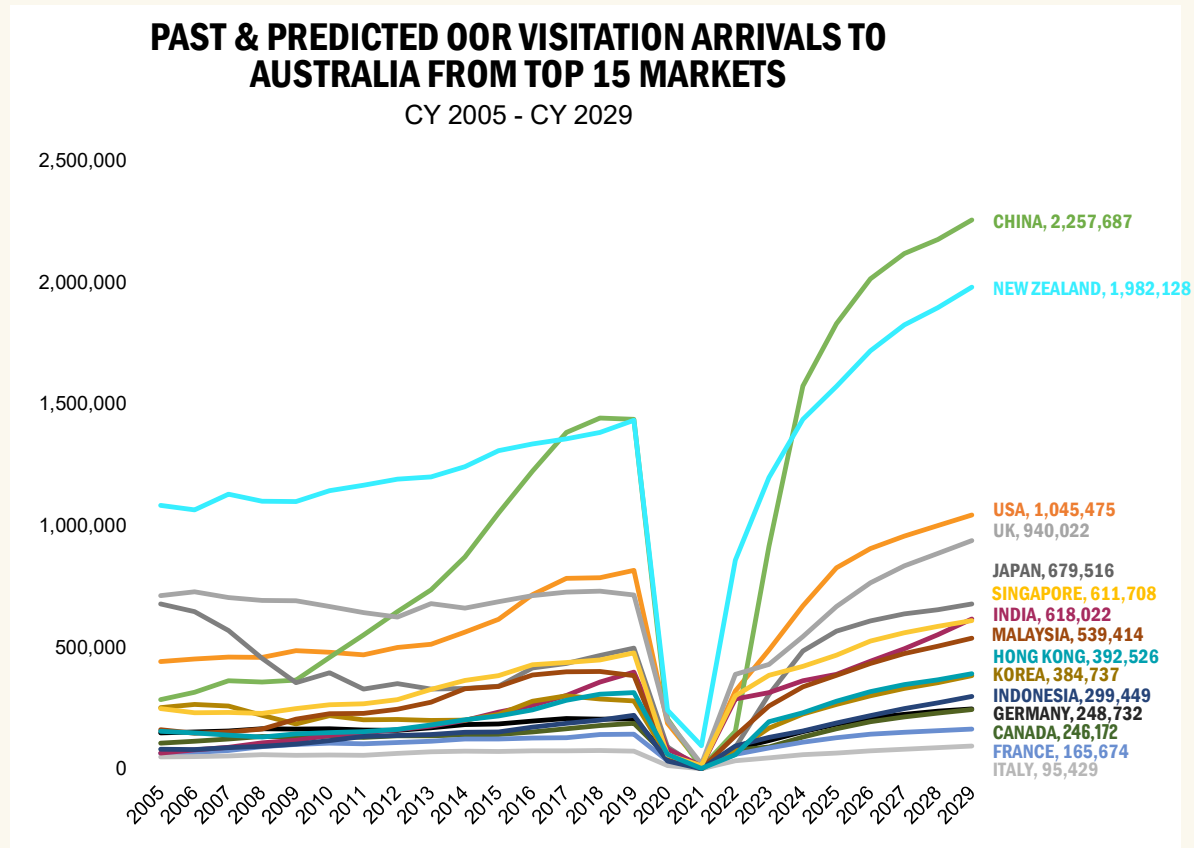
Source: Tourism Research Australia, International Visitor Survey YE December 2010- 2021; Thrive 2030 A Reimagined Visitor Economy YE December 2024 & 2030; Oxford Economics Forecast Arrivals, Australia Expenditure. \*Total Visitor Expenditure, YE December, excluding expenditure of long-term international students.

# DOMESTIC BACK THIS YEAR, STRONG FUTURE GROWTH IN INBOUND



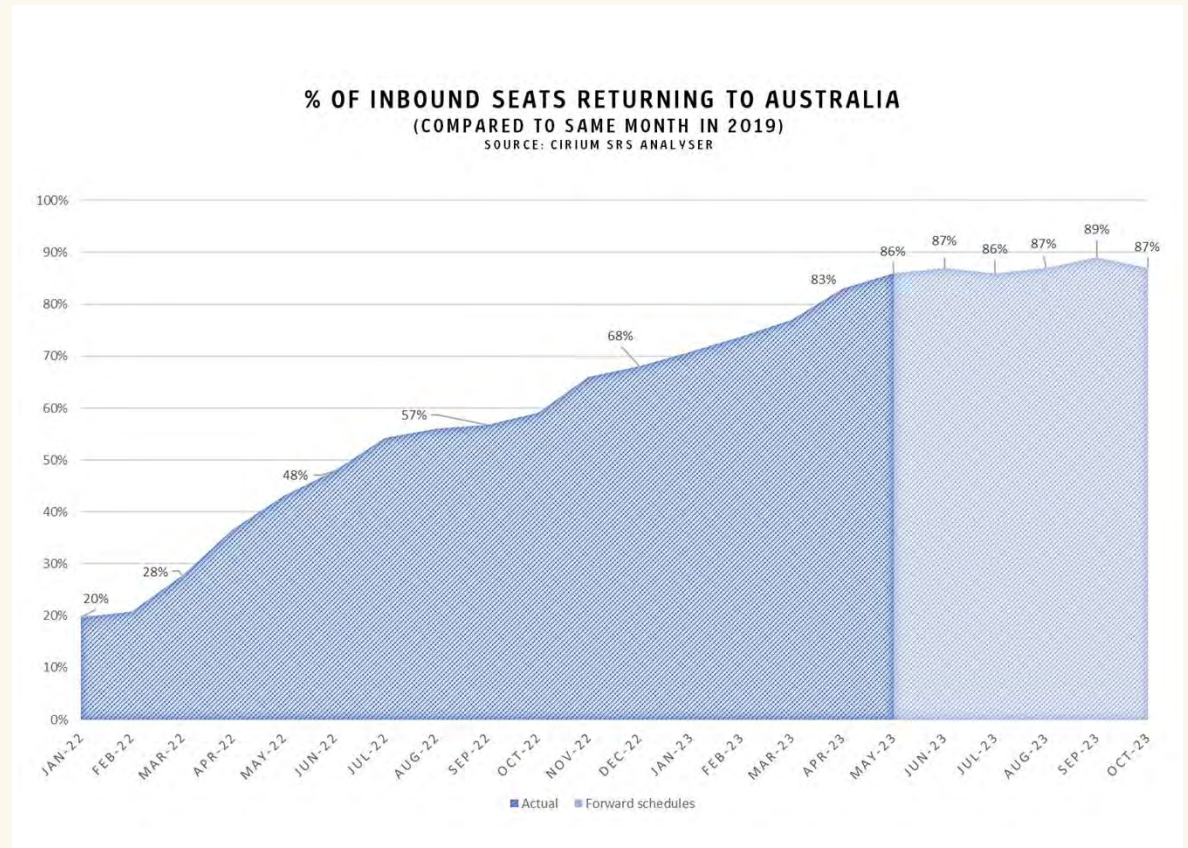
Source: TRA Forecasts at March 2023

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



Source: Oxford Economics  
 2022 Onwards represents estimated forecasted data

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



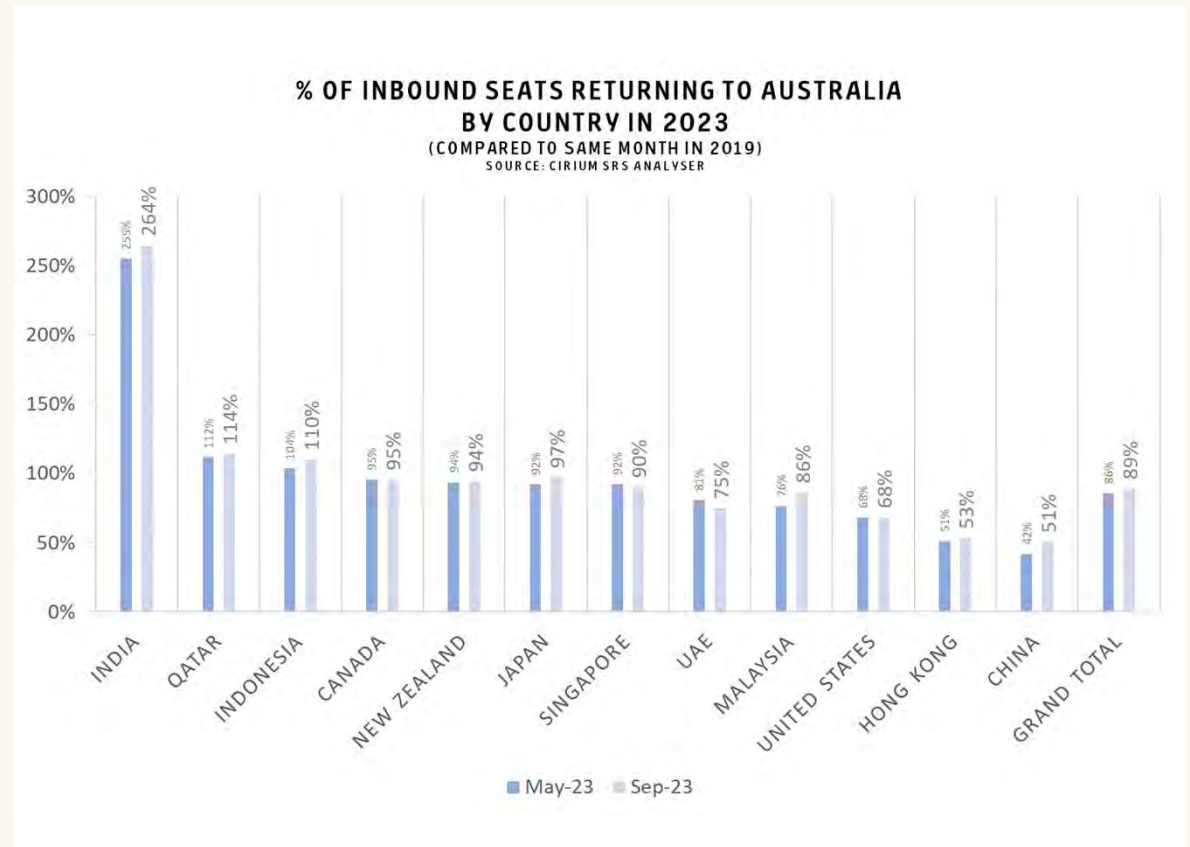
Source: Cirium SRS Analyser air schedules data as at 24 Apr-23

# CAPACITY IS RETURNING WITH SOME STANDOUT MARKETS/CARRIERS

## May 2023 levels:

- India:** 255% of seats scheduled
- Indonesia:** 110% of seats scheduled
- South Korea:** 161% 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
- Etihad:** 39% of seats scheduled
- Qatar:** 112% of seats scheduled



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



# EMERGING TRENDS FOR 2023

1

Health concerns have shifted to wealth concerns

2

Consumer demand for premium and luxury is continuing to grow, as is our offer in this space

3

There is an increased desire for purposeful travel – travel that feels good and does good

4

Broad trends of nature, wellness, and adventure continue to grow

5

Being inclusive and accessible broadens the net

6

Digital nomads are settling in and putting their feet up

7

Travel planning has fundamentally shifted to “Always on Discovery”

8

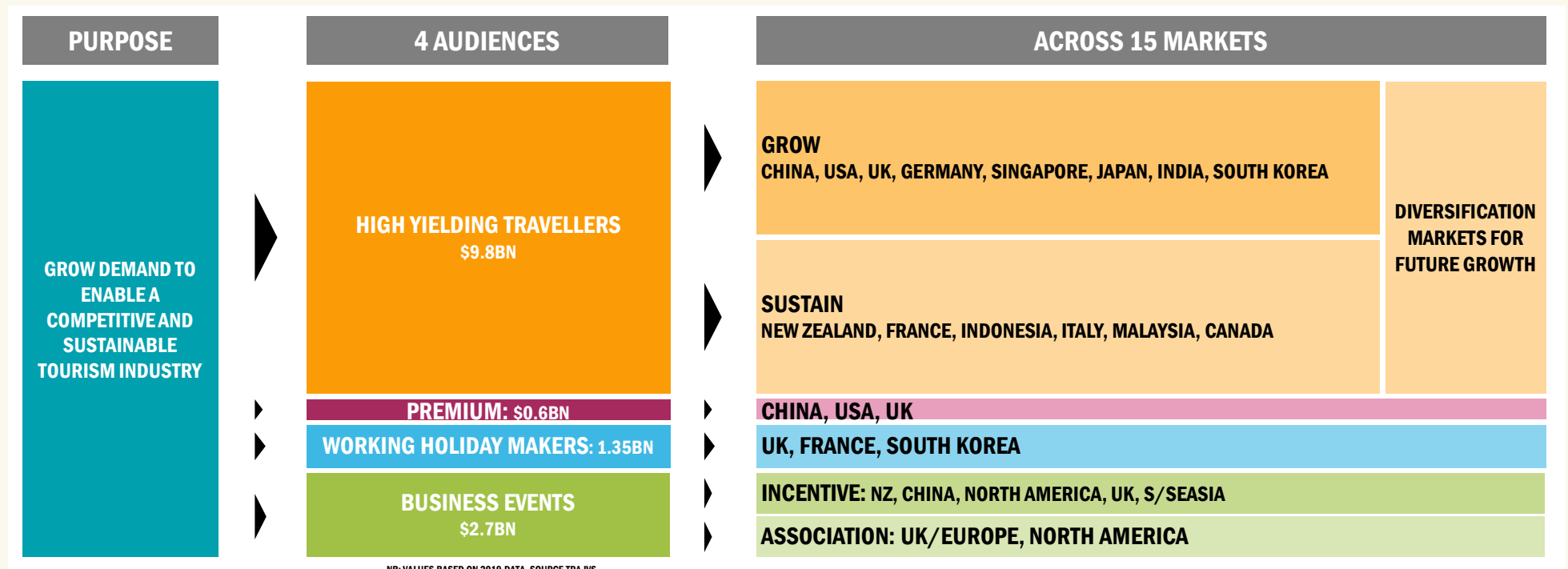
We’re at a technological inflexion point, and it’s as easy as GPT

# 3. TOURISM AUSTRALIA'S RESPONSE



**TA'S PURPOSE**  
**GROW DEMAND TO ENABLE A COMPETITIVE  
AND SUSTAINABLE TOURISM INDUSTRY**

# FY24 AUDIENCE AND MARKET PRIORITISATION



NB: VALUES BASED ON 2019 DATA, SOURCE TRA IVS

# 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 *G'day*



Uluru-Kata Tjuṯa National Park

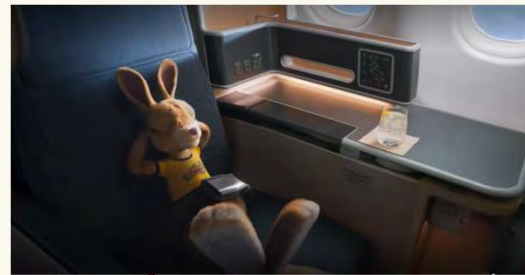
AUSTRALIA



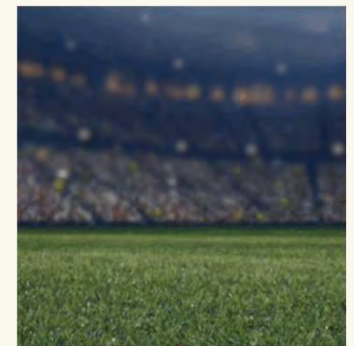
# STAY THE COURSE: FRESH AND FAMILIAR



CHINA LAUNCH



PARTNERS



CULTURAL SPIKES

WORKING HOLIDAY



# TOURISM AUSTRALIA'S PARTNERSHIP WITH INDUSTRY

## EDUCATION



## G'DAY AUSTRALIA & TRADE FAMILS



## TRADE PLATFORMS



## MARKETING



## EVENTS





# BRINGING THE EXPERIENCES TO LIFE THROUGH OUR INDIGENOUS STORYTELLERS

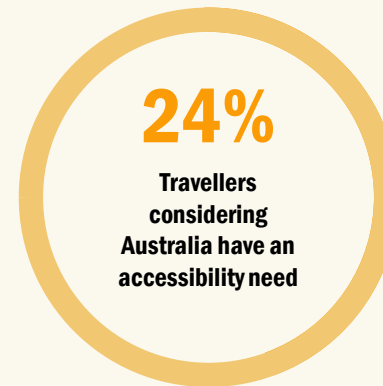


# ACCESSIBLE & INCLUSIVE TRAVEL IS A HUGE OPPORTUNITY



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

*Source: National Visitor Survey*



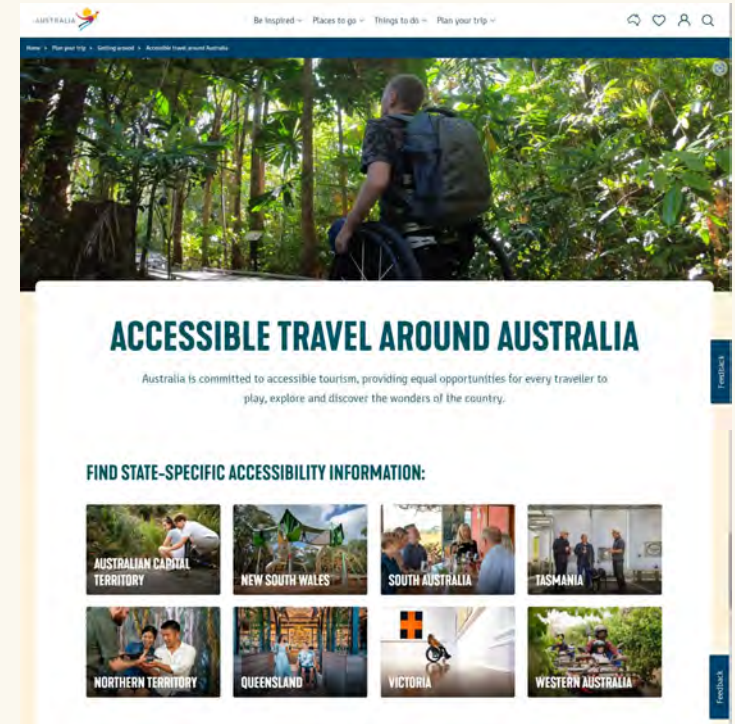
*Tourism Australia's 2022 Future of Demand Accessibility Impact Survey*



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

# COME & SAY G'DAY CAMPAIGN

CALL TO ACTION:  
AUSTRALIA.COM



# CONSUMERS HAVE MANY REASONS TO TRAVEL SUSTAINABLY

## MOTIVATORS FOR SUSTAINABLE TRAVEL



E3. Which of these best describe why sustainability considerations are important to you when travelling?  
Base: Global excl. Australia (n 10,648)  
Source: Tourism Australia Future of Demand – quantitative deep-dive 2022

# STRIVE 4 SUSTAINABILITY SCORECARD

S4S Scorecard will assist businesses to measure where they are currently placed in four key areas – providing a baseline to measure year on year:

- a. Sustainable management
- b. Environmental impacts and management
- c. Socio-economic impacts
- d. Cultural impacts



Cookie Bar, Melbourne, VIC  
Tourism Australia

## Strive 4 Sustainability Scorecard Essentials

Your guide to starting your sustainable tourism journey



# WHAT'S NEXT – ATE24 MELBOURNE

**5**  
DAYS

**2,300**  
DELEGATES

**623**  
BUYERS  
**32**  
COUNTRIES

**45,000**  
MEETINGS



**THANK YOU**