



TOURISM AUSTRALIA UPDATE

THERE'S NOTHING
LIKE AUSTRALIA



TODAY

- *Tourism 2020*
- State of Play
- What we need –
Markets, Access, Product & Demand
- Cruising – as part of the mix



TOURISM 2020

FROM:

A\$70 BILLION

in overnight spend in 2010

TO:

A\$140 BILLION

in overnight spend by 2020

ACHIEVING OUR AMBITION

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NOW:

A\$74 B

in overnight spend in 2011

Key Results

- Record 6 million international visitors for June YE (+1.2%)
- 73.3 million overnight trips for March 2012 YE (+5%)



STATE OF PLAY

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CRUISE SECTOR – OUR OPPORTUNITY

- Island nation with approx 30 ports
- Strong interest and demand
- Projected growth of 15% to 2020, but 2011-12 saw 30% growth

POTENTIAL TO 2020

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CRUISE SECTOR

- 30% growth in 2011-12
- 736 cruise ship visits
- 46% increase in passenger expenditure

STATE OF PLAY

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WHAT WE NEED...

- The Markets
- The Access
- The Product
- The Demand

ACHIEVING OUR AMBITION

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Key markets	2011 overnight spend (\$billions nominal) A\$	2020 potential (\$billions nominal) A\$
China	\$3.8	\$7.4 - \$9.0
UK	\$2.9	\$5.5 - \$6.7
USA	\$2.2	\$4.5 - \$5.5
NZ	\$2.2	\$3.4 - \$4.2
Japan	\$1.4	\$2.7 - \$3.3
Korea	\$1.3	\$2.8 - \$3.4
Singapore	\$1.3	\$2.3 - \$2.8
Malaysia	\$1.0	\$2.0 - \$2.5
Germany	\$0.9	\$1.9 - \$2.3
India	\$0.8	\$1.9 - \$2.3
France	\$0.6	\$1.2 - \$1.4
Australian overnight domestic	\$43.5	\$62.9 - \$76.6



THE MARKETS

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CRUISE SECTOR

TA's efforts are concentrated on the US market which offers the greatest opportunities for Australian tourism

THE MARKETS

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- Access is an opportunity for growth
- Focus on aviation partnerships to grow air capacity
- Similar opportunity for cruise sector and sea ports



THE ACCESS

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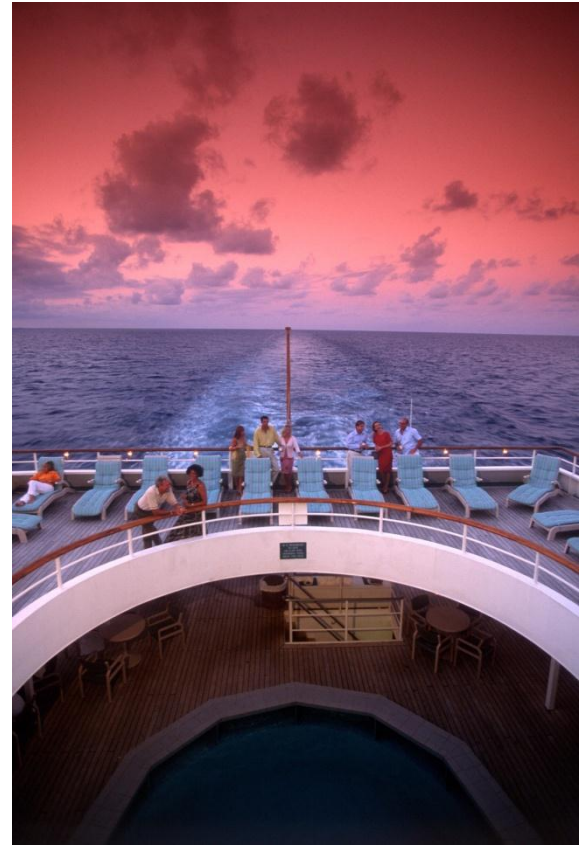
THE PRODUCT

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TA's activities in Cruise sector

- **Goway travel campaign**
- **Aussie Specialist Cruise module**
- **Cruise3sixty conference**, 25-30 April 2012
- **Australian Superyacht & Marine Export Conference (ASMEX)** 22-23 May 2012
- **2012 Inaugural VIP Cruise Famil**, September 2012
- Ongoing work with Cruise Down Under on opportunities



THE DEMAND

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OUR INSIGHT

The world
travels to
experience
difference

Australia is
different,
compellingly
so

THE DEMAND

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A composite image showing a woman in a black swimsuit and yellow snorkel gear sitting on the edge of a white boat. Below the waterline, a man in white shorts and a blue snorkel mask is swimming horizontally. The background is a vibrant, colorful coral reef with various types of coral and small fish swimming around.

....IT'S A STRATEGY IN A LINE

- 200 PLUS COMMERCIAL PARTNERS

- 25 MARKETS / 17 LANGUAGES

There's nothing like Australia

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THE NEXT PHASE – WHY?

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LEADING WITH OUR BEST

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A person is lying on a hammock in a lush, sun-dappled forest. The hammock is strung between two trees and is covered with a light-colored cloth. The person is wearing a light blue shirt and dark pants. The forest is dense with green foliage and tall trees with thick trunks. Sunlight filters through the leaves, creating a warm and peaceful atmosphere.

IT'S NOT JUST ABOUT THE BIG AD...
IT'S ABOUT THE COMPLETE STORY

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There's nothing like Australia



For more info ^



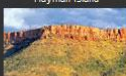
Freycinet



Bungle Bungle Ranges



Hayman Island



El Questro



Sydney v

Our feature destinations:

HOME | BUNGLE BUNGLE RANGES | CANBERRA | CAPE LEVEQUE | EL QUESTRO | FREYCINET | GOLD COAST
GREAT OCEAN ROAD | HAYMAN ISLAND | KANGAROO ISLAND | LIZARD ISLAND | MELBOURNE | SYDNEY | ULURU | WOLGAN VALLEY

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our new app!



Available on the
App Store

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20 MILLION VIEWS

REAL TIME RESULTS

WHAT CONSUMERS ARE SAYING

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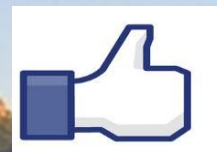


WORD OF MOUTH IS ALL POWERFUL

THERE'S NOTHING
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Reaching over 1 million unique users daily



500 – 1,000

SeeAustralia photos
on Instagram per day

1,400+

Facebook photos to
our wall per week

408,000,000



3,400,000

ADVOCACY

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Digital Capability



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THERE'S NOTHING
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- Australian tourism is an industry of opportunity
- Cruising is part of the mix

SUMMARY

THERE'S NOTHING
LIKE AUSTRALIA



THERE'S NOTHING LIKE AUSTRALIA

THANK YOU

THERE'S NOTHING
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