

A tropical beach scene with several palm trees in the foreground. A person is walking on the sand in the lower center. The ocean is visible in the background under a clear sky.

A BRAND NEW WORLD OF TOURISM

PHILLIPA HARRISON

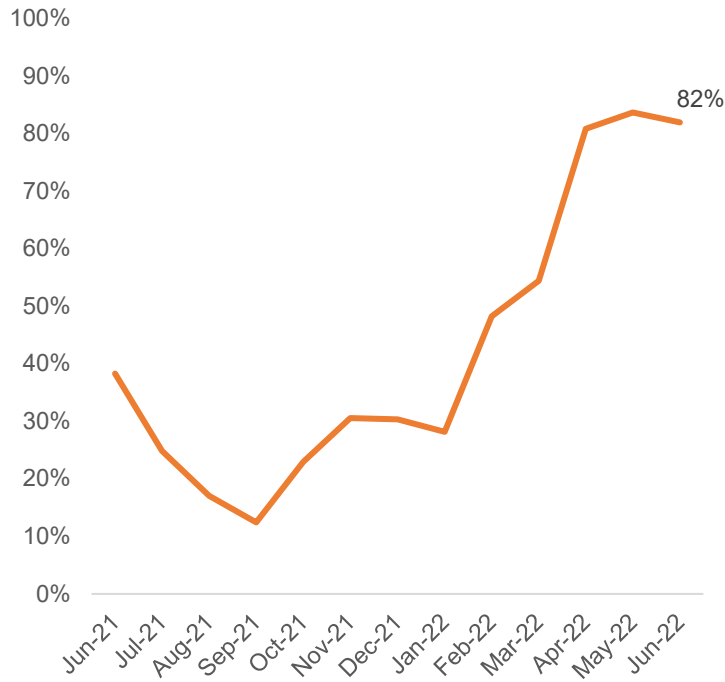
MANAGING DIRECTOR, TOURISM AUSTRALIA

TOWNSVILLE, 8 SEPTEMBER 2022

LEAD AND LAG INDICATORS NOW SHOWING STRONG GROWTH

TOTAL AUSTRALIAN DOMESTIC SEARCHES

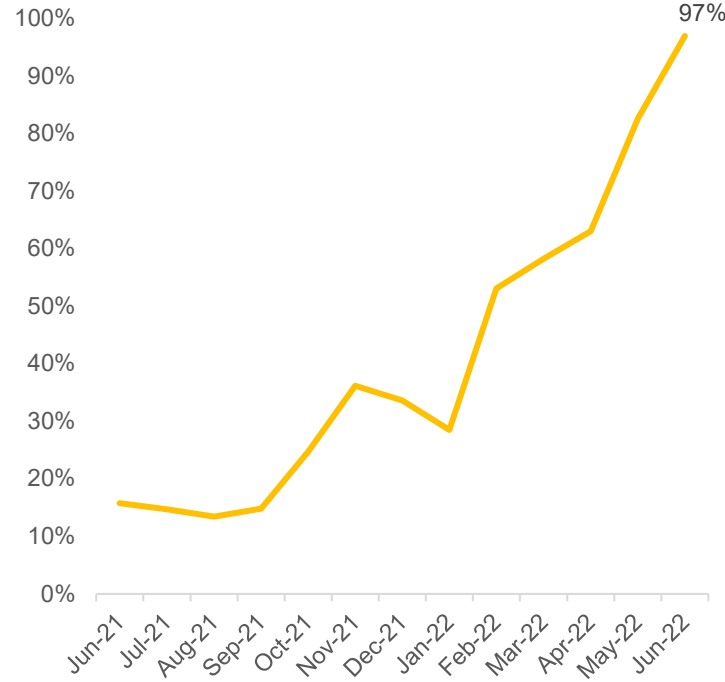
June 21 to June 22. Percentage to 2019



Source: Skyscanner Domestic travel search (Flights)

TOTAL AUSTRALIAN INTERNATIONAL SEARCHES

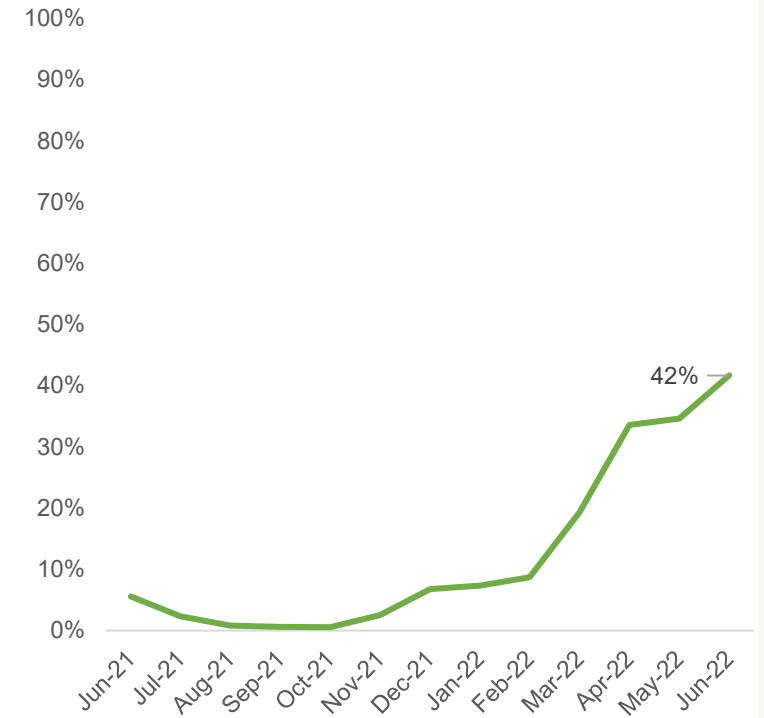
June 21 to June 22. Percentage to 2019



Source: Skyscanner international travel search (Flights)

TOTAL CITIZEN ARRIVALS TO AUSTRALIA

June 21 to June 22. Percentage to 2019



Source: ABS Citizen arrivals

OUR STRATEGY

OUR STRATEGIC PRIORITIES FOR FY23

1. BRAND & MARKETING



- Go Big, Go Australia
- Work and Play the Aussie Way
- Yours to Explore
- Come Say G'day

2. CONVERSION & AVIATION



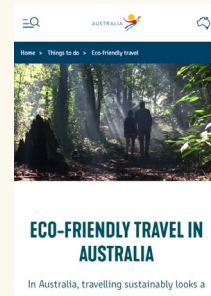
- 150 conversion partnerships between Feb and June
- Team Australia aviation approach

3. ADVOCACY & FAMILS



- Media and trade programs

4. INDIGENOUS & SUSTAINABILITY



- Reconciliation Action Plan
- Dual Naming Convention
- Sustainability itineraries and Aussie Specialist module

5. PARTNERSHIPS



- National Experience Content Initiative
- Events: Australian Tourism Exchange, Destination Australia, Marketplace
- Partnership with ACA & CLIA

6. BUSINESS EVENTS



- Global brand campaign
- Bid Fund Program
- Famils

TARGET SEGMENTS ACROSS 15 CORE MARKETS

1. HIGH YIELDING TRAVELLERS
Worth \$9.8bn in 2019

4. BUSINESS EVENTS
Worth \$2.7bn in 2019

2. PREMIUM
Worth \$0.59bn in 2019

3. WORKING HOLIDAY MAKERS
Worth \$1.35bn in 2019

OUR MARKET PRIORITISATION

GROW

Investing for market share growth

UNITED KINGDOM

USA

GERMANY

SINGAPORE

JAPAN

SOUTH KOREA

MALAYSIA

CANADA

INDIA

WATCH

Budget ring fenced for opening

CHINA

HONG KONG

SUSTAIN

Investing to hold market share

NEW ZEALAND

INDONESIA

FRANCE

ITALY

OUR PATH TO RECOVERY

1. GLOBAL ANNOUNCEMENT

ANNOUNCEMENT

UK & US

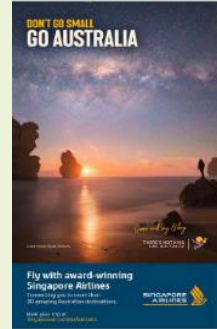


DESTINATION AUSTRALIA
Reimagining the future of tourism

2. CONVERSION & ADVOCACY

DON'T GO SMALL, GO AUSTRALIA

UK & US



Germany, France, Italy



ATE22
AUSTRALIAN TOURISM EXCHANGE

3. GLOBAL BRAND LAUNCH

COME & SAY G'DAY!

JAN FEB MAR APR MAY JUN JUL AUG SEPT OCT NOV DEC

WORKING HOLIDAY MAKER



YOURS TO EXPLORE



Singapore, Malaysia, Indonesia, India, South Korea and Japan

Australia ON TOUR

North America 2022



BUSINESS EVENTS



AUSTRALIA MARKETPLACE

August - November 2022
USA, Japan, South Korea, UK and Europe



PR

FAMILS

PARTNERSHIPS





THE NATIONAL EXPERIENCE CONTENT INITIATIVE

**DEVELOPING NEW IMAGE
AND VIDEO ASSETS**

SPANNING 57 TOURISM REGIONS

**COVERING UP TO 1,300
EXPERIENCES**





“

**CRUISE WILL PLAY A
CRUCIAL ROLE IN
TOURISM'S RECOVERY**

”

CRUISING IS A REWARDING AND EVOCATIVE EXPERIENCE FOR MANY TRAVELLERS



“

A cruise gives me a chance to explore multiple destinations, try different food, see a variety of landscape and have a relaxing time with my family and loved ones.

HYT USA

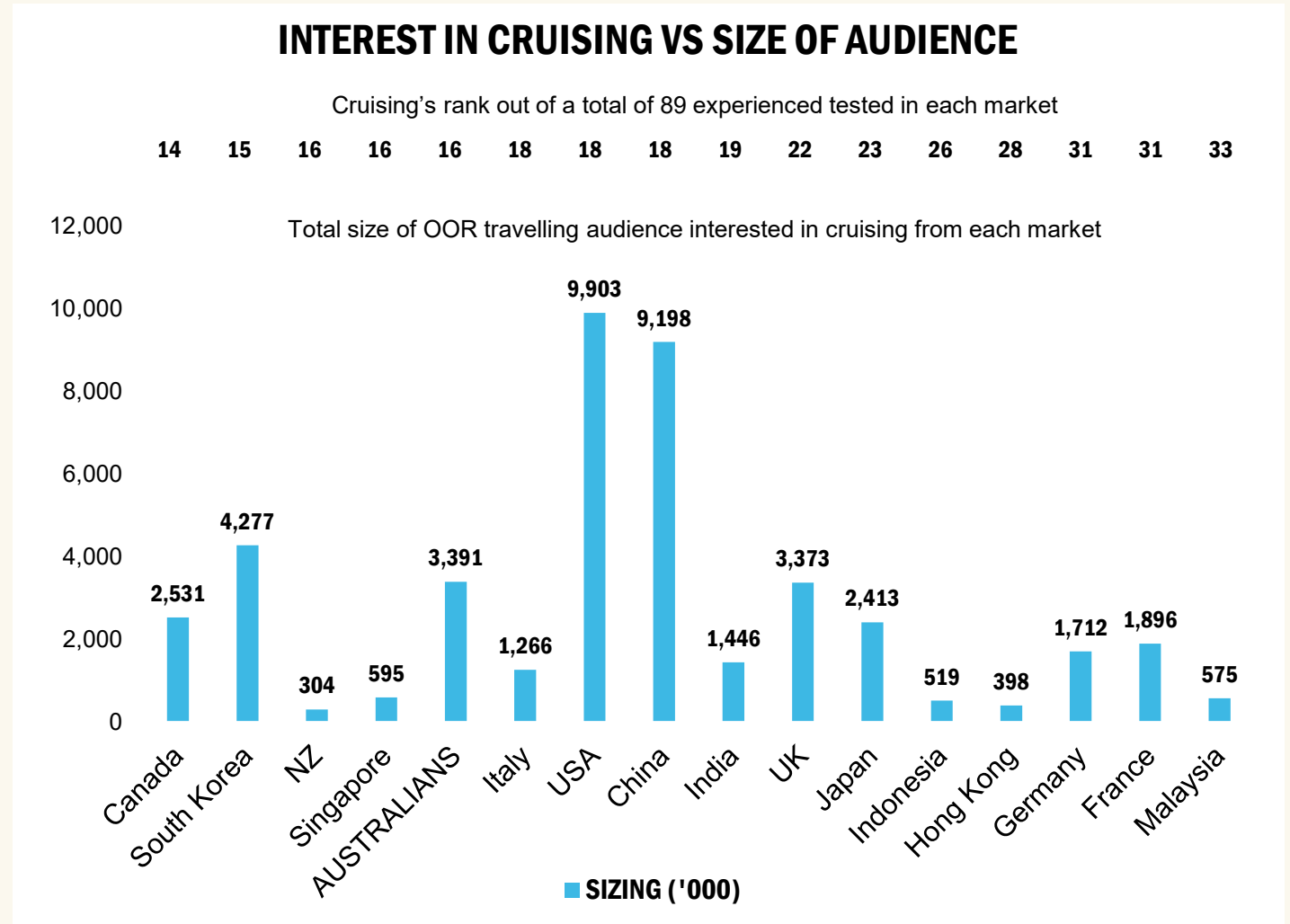


“

Swimming, casinos, making new friends and shopping makes this cruise even more exciting. Enjoying every bit of it. Me and my husband watching the sea while holding hands day and night is my favourite pastime

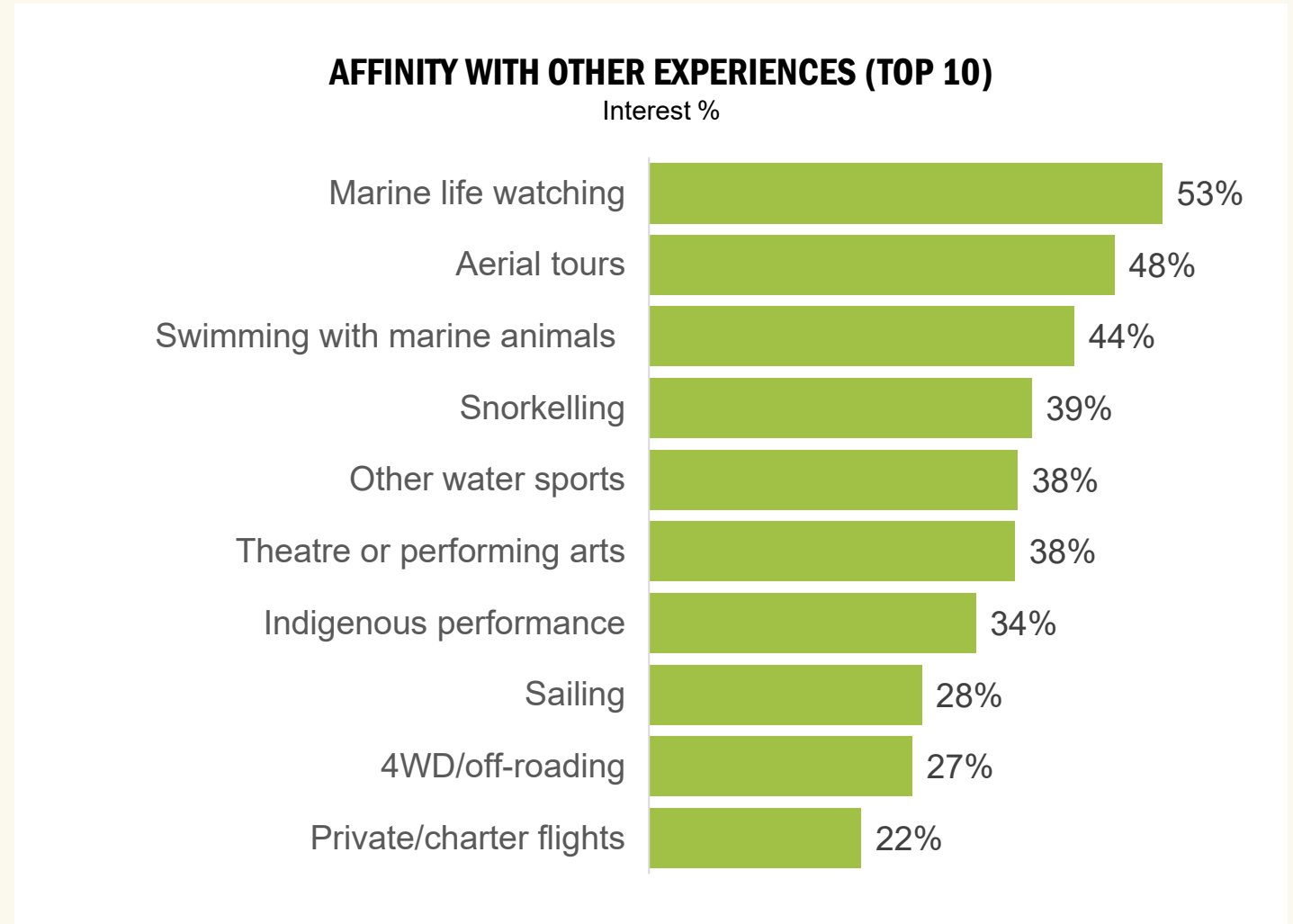
HYT INDIA

WHILE MANY MARKETS RANK CRUISING IN THEIR TOP 20 INTERESTS, THERE ARE SOME MAJOR VOLUME OPPORTUNITIES, ESPECIALLY CHINA AND THE USA



Source: Tourism Australia's 'Future of Demand' research w FiftyFive5. Qual n=240. Quant n = 2,3990 Out of Region travellers

THOSE INTERESTED IN CRUISING ARE ALSO INTERESTED IN...



Source: Tourism Australia's 'Future of Demand' research w FiftyFive5. Qual n=240. Quant n = 2,390 Out of Region travellers

SIZE MATTERS: THERE ARE CONSIDERABLE DIFFERENCES BETWEEN THE INTERESTS ON THOSE TRAVELLING ON BIG VS SMALL SHIPS

SMALL VESSEL

- Mountain/rock sports
- Sailing
- Fishing
- Birdwatching
- Indigenous oral history/storytelling
- Scuba diving
- Craft workshops with Indigenous artisans
- Visiting Indigenous sites or communities
- Exploring wilderness/nature
- Eco tours/Ecotourism

LARGE VESSEL

- Coach travel/tours
- Spa treatments
- Private/charter flights
- Tasting trails
- Wine, beer or liquor pairings with food
- Aurora exploration
- Shopping
- Carnivals
- Food & drink festivals
- Theme parks

TOURISM AUSTRALIA: OUR SUPPORT FOR CRUISING FY23

MARKETING & PR

Using TA platforms to tell the story of some of Australia's iconic cruise itineraries.

INDUSTRY PARTNERSHIPS

Includes destination support at key global cruise-related industry events and partnership with CLIA & ACA to make Australia the premier cruising destination for high yield travellers.

RESEARCH & INSIGHTS

Includes supporting research into the economic impact of the sector such as pre/post visitation.

DISTRIBUTION

Includes specialised cruise-focused-content as part of the Aussie Specialist Program.



TOURISM
AUSTRALIA



THANK YOU