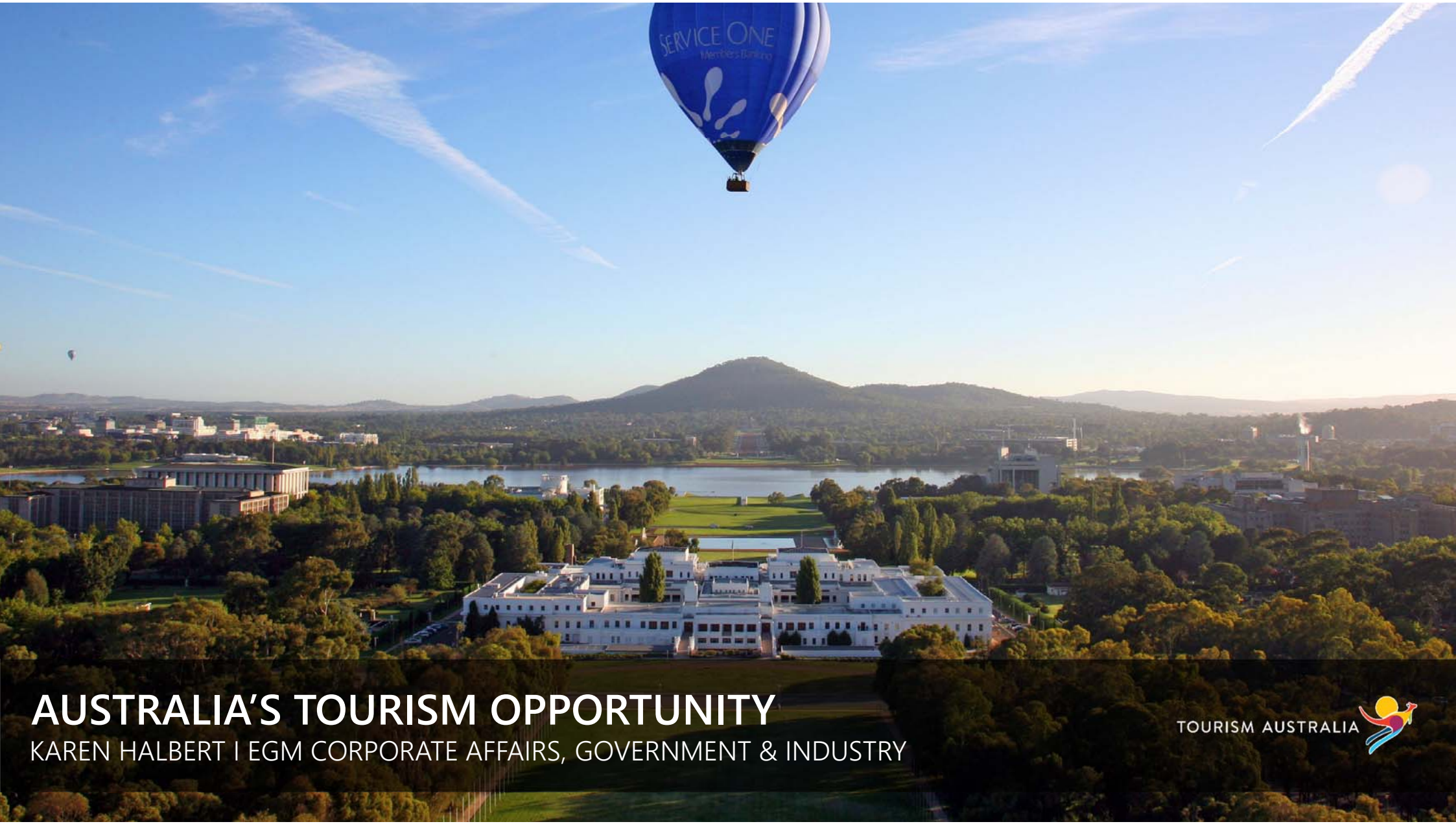


AUSTRALIA'S TOURISM OPPORTUNITY

KAREN HALBERT I EGM CORPORATE AFFAIRS, GOVERNMENT & INDUSTRY

TOURISM AUSTRALIA

OUR TOURISM 2020 STRATEGY
UNDERPINS EVERYTHING...

2009

Then

$70BN

overnight domestic and international visitor spend
JUNE 2009 YE

29%

INTERNATIONAL SHARE OF SPEND

2018

Now

$117BN

overnight domestic and international visitor spend
DEC 2018 YE

38%

INTERNATIONAL SHARE OF SPEND

2020

To

$131BN*

overnight domestic and international visitor spend
Forecast 2020

40%

INTERNATIONAL SHARE OF SPEND

2030

To

$180BN+

overnight domestic and international visitor spend
Forecast 2030

49%

INTERNATIONAL SHARE OF SPEND

TOURISM AUSTRALIA

GLOBALLY, AUSTRALIA RANKS...

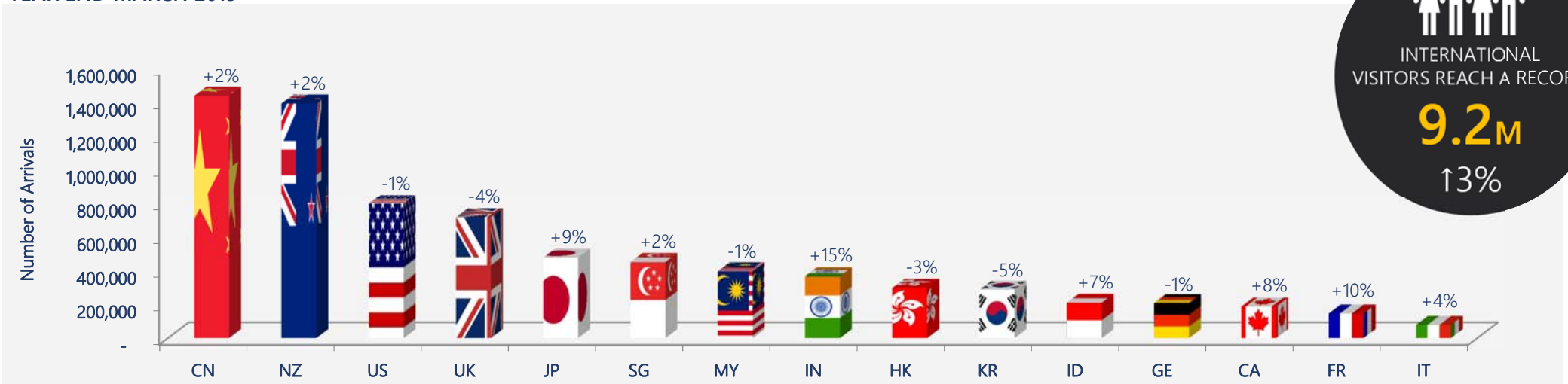
40TH
FOR
INTERNATIONAL VISITORS

7TH
FOR
TOURISM RECEIPTS

1ST
FOR
PER VISITOR SPEND

INTERNATIONAL VISITORS TO AUSTRALIA

YEAR END MARCH 2019



INTERNATIONAL VISITORS REACH A RECORD

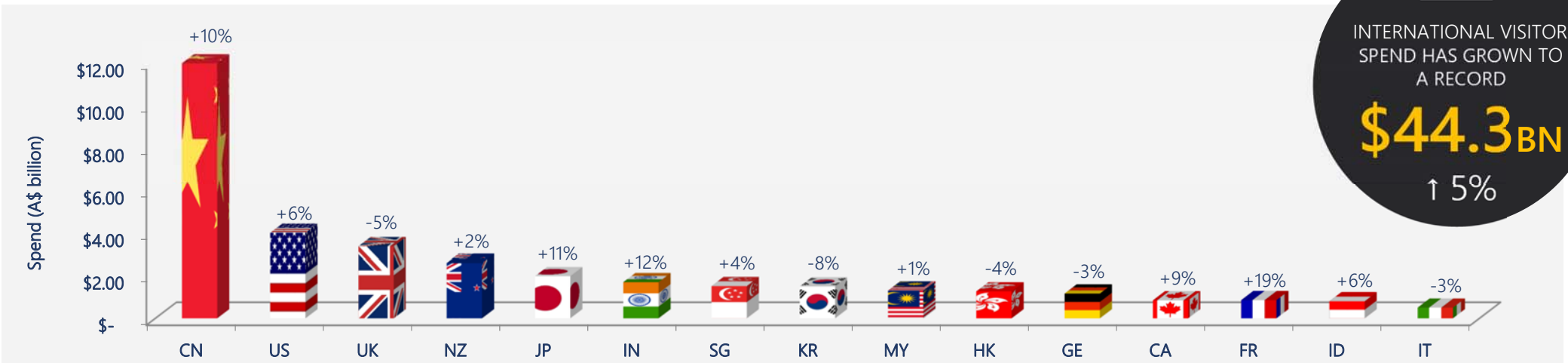
9.2M

↑3%

Source: Australian Bureau of Statistics

EXPENDITURE BY INTERNATIONAL VISITORS

YEAR END MARCH 2019



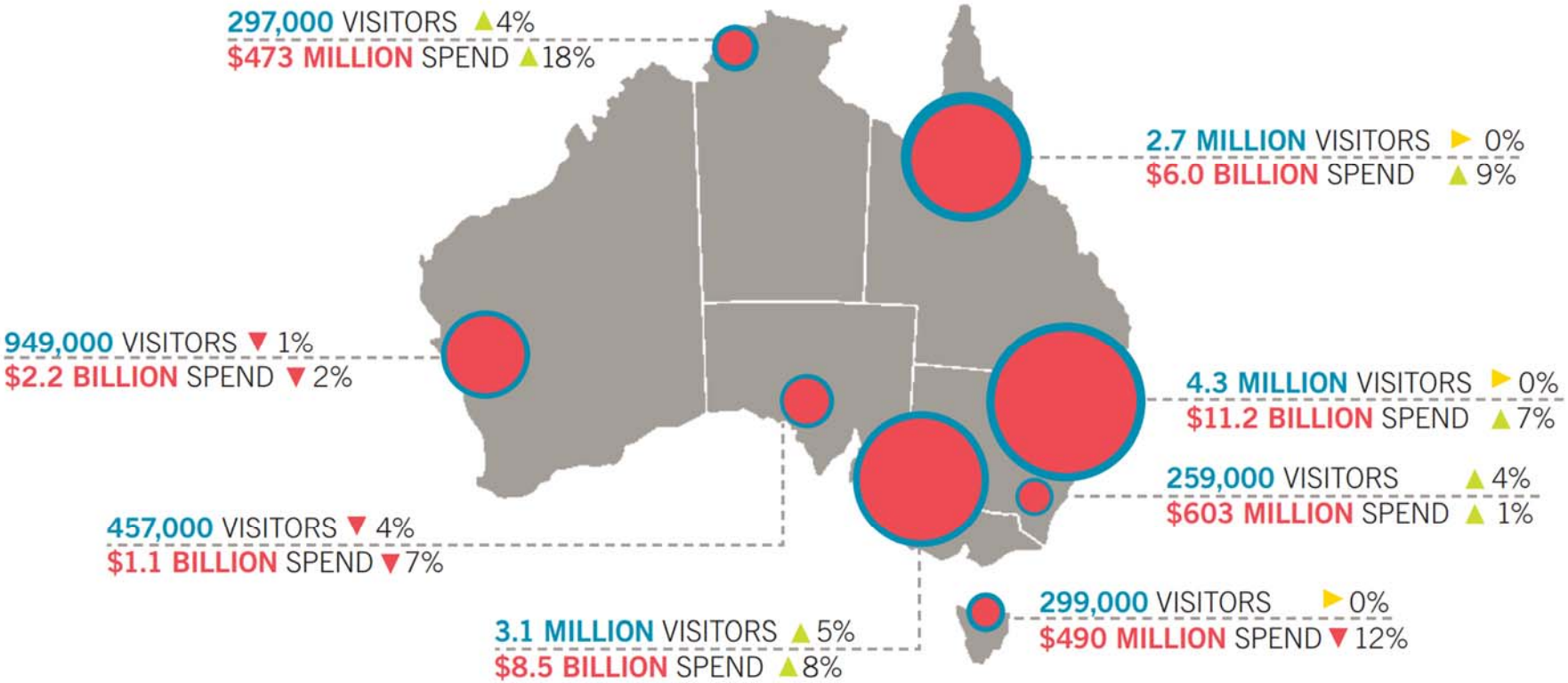
INTERNATIONAL VISITOR SPEND HAS GROWN TO A RECORD

$44.3BN

↑ 5%

Source: Tourism Research Australia

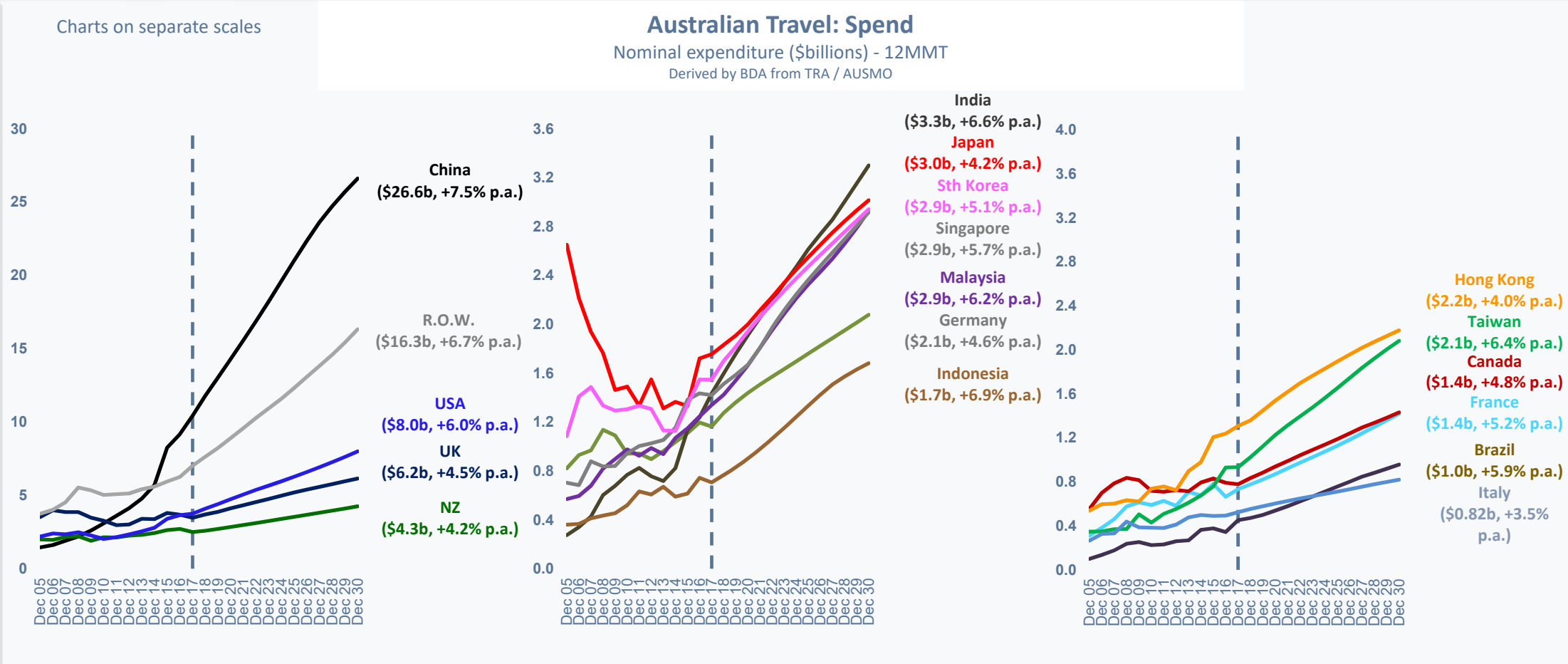
INTERNATIONAL VISITORS BY STATE



Source: TRA International Visitor Survey, March 2019.

OUTLOOK & OPPORTUNITIES

HOLD SHARE MARKET OUTLOOKS TO 2030 – INTERNATIONAL



China is projected to grow considerably and widen the gap to other markets, though growth rate is projected to slow vs recent years. USA, India, Malaysia and Indonesia the other core markets with more than 6% annual growth forecast. Also strong growth forecast for Taiwan and Brazil, at lower volume.

OUR TARGET AUDIENCE

HIGH VALUE TRAVELLERS

TOURISM AUSTRALIA

DEFINITION OF A HIGH VALUE TRAVELLER (HVT)

Travel Long Haul

Travels long haul (out of region) on a regular basis.

Preference for Australia

Consideration or intention to visit Australia.

Key Drivers for Destination Choice

Food and wine, aquatic and coastal, and nature and wildlife experiences are key drivers when choosing a holiday destination.

Represent High Value

Above average trip expenditure. Higher likelihood to stay longer. Higher likelihood to disperse further.

HIGH VALUE TRAVELLERS: THE NUMBERS

80M+

HIGH VALUE TRAVELLERS ACROSS THE GLOBE

REPRESENTING

40%

OF THE GLOBAL OUT OF REGION TRAVEL MARKET

STAYING AN AVERAGE

13 NIGHTS

WHEN VISITING A LONG HAUL DESTINATION

SPENDING

2-3x

MORE THAN THE AVERAGE TRAVELLER

TOURISM AUSTRALIA

WHAT DO THEY LOOK FOR?

93%

SEEK AUTHENTIC EXPERIENCES THROUGH LOCAL CULTURE

94%

TRAVEL TO BECOME MORE OPEN-MINDED AND KNOWLEDGEABLE ABOUT THE WORLD THEY LIVE IN

73%

LOOK FOR PURPOSEFUL TRAVEL WHERE IT ALLOWS THEM TO GIVE BACK TO THE DESTINATION THEY VISIT

81%

SEEK DESTINATIONS THAT ARE CONSIDERED FASHIONABLE AND COOL

TOURISM AUSTRALIA

CHINA – HIGH VALUE TRAVELLER

MARKET OPPORTUNITY

20.4m
High Value Travellers in China

10.8m
considering Australia in the next four years

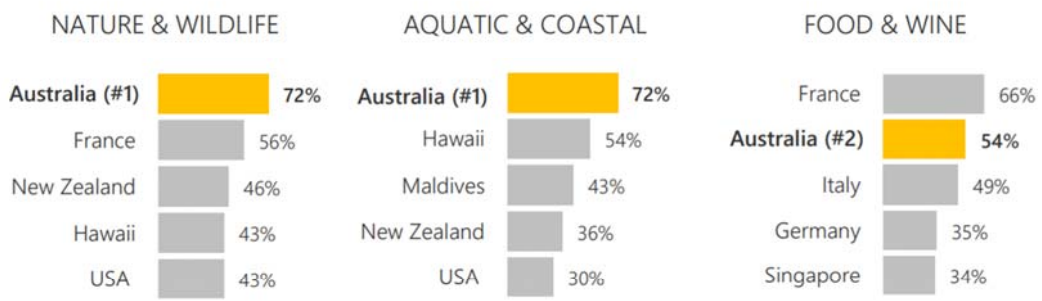
9.6m
not considering Australia in the next four years

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

- #1 Nature & wildlife
- #2 Aquatic & coastal
- #3 Food & wine
- #4 Safety & security
- #5 Romantic

AUSTRALIA'S PERFORMANCE



TRAVEL ATTRIBUTES

AUTHENTICITY

97%

seek authentic experiences through the local culture and getting a taste of everyday life.

OPEN-MINDED

97%

travel to become more openminded and knowledgeable about the world they live in.

PURPOSEFUL

94%

look for purposeful travel where it allows them to give back to the destination they visit.

FASHIONABILITY

94%

seek destinations that are fashionable and cool.

INDIA – HIGH VALUE TRAVELLER

MARKET OPPORTUNITY

2.7m
High Value Travellers in India

1.5m
considering Australia
in the next four years

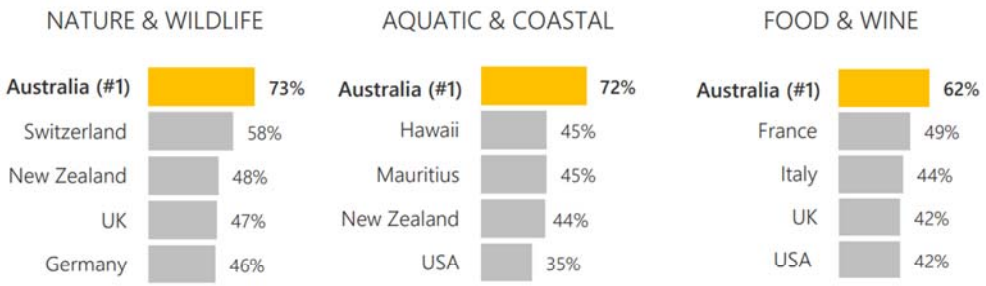
1.2m
not considering Australia
in the next four years

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

- #1 Nature & wildlife
- #2 Aquatic & coastal
- #3 Safety & security
- #4 Food & wine
- #5 Family friendly

AUSTRALIA'S PERFORMANCE



TRAVEL ATTRIBUTES

AUTHENTICITY

93%

seek authentic experiences through the local culture and getting a taste of everyday life.

OPEN-MINDED

95%

travel to become more openminded and knowledgeable about the world they live in.

PURPOSEFUL

92%

look for purposeful travel where it allows them to give back to the destination they visit.

FASHIONABILITY

91%

seek destinations that are fashionable and cool.

UK – HIGH VALUE TRAVELLER

MARKET OPPORTUNITY

7.9m
High Value Travellers in the United Kingdom

2.4m
considering Australia in the next four years

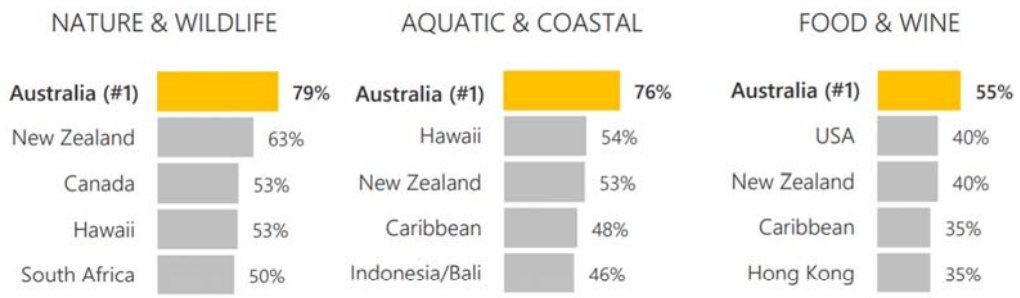
5.5m
not considering Australia in the next four years

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

- #1 Nature & wildlife
- #2 Aquatic & coastal
- #3 Safety & security
- #4 Food & wine
- #5 History & heritage

AUSTRALIA'S PERFORMANCE



TRAVEL ATTRIBUTES

AUTHENTICITY

92%

seek authentic experiences through the local culture and getting a taste of everyday life.

OPEN-MINDED

95%

travel to become more openminded and knowledgeable about the world they live in.

PURPOSEFUL

69%

look for purposeful travel where it allows them to give back to the destination they visit.

FASHIONABILITY

74%

seek destinations that are fashionable and cool.

A SHIFT IN HOW WE MARKET

FOOD & WINE

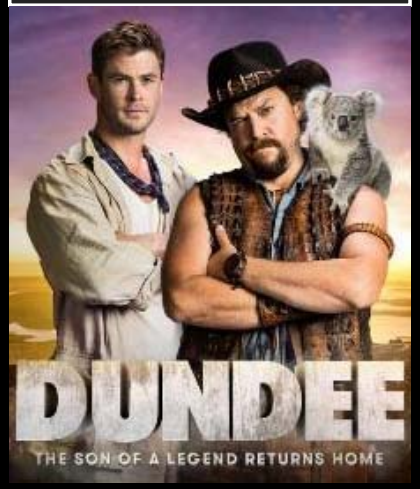
AQUATIC & COASTAL

NATURE & WILDLIFE

DIFFERENTIATED CAMPAIGNS

THERE'S NOTHING LIKE AUSTRALIA

DUNDEE



UnDiscover Australia

AUSTRALIA INC

DUNDEE
THE SON OF A LEGEND RETURNS HOME

VISIT THE SET OF
DUNDEE
DUNDEE

UnDiscover Australia

CAMPAIGN
IN KEY MARKETS
TO CHALLENGE
CONSUMER
PERCEPTIONS

CAMPAIGN RESULTS

DRIVING FASHIONABILTY & CONVERSION WITH HIGH VALUE TRAVELLERS

Australia has improved in fashionability to:

#2 in India, Indonesia and Malaysia and

#3 in Singapore

60% increase in conversion with airline partners

Hot Air Ballooning, Canberra

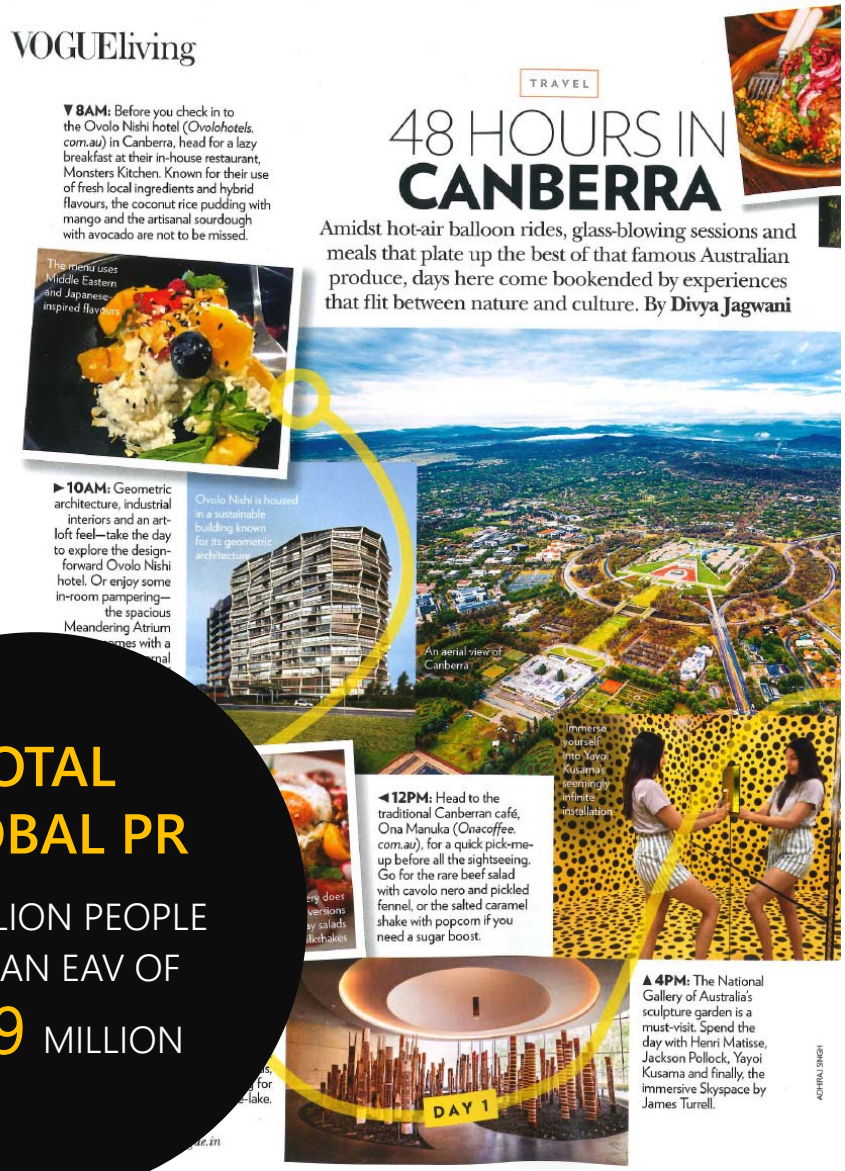
‘TOO AUSTRALIAN FOR WORDS’

CAMPAIGN CHINA

AND ROLLING OUT IN JAPAN

LAUNCHED IN
3 MARKETS
UK, GERMANY & FRANCE
IN APRIL WITH
12 PARTNERS
TO POSITION AUSTRALIA
AS THE WORLD'S
BEST WORKING HOLIDAY
DESTINATION

Bachelor of Commerce
CEO
AUSTRALIA INC.



GLOBAL PR
Including International Media & Influencer Hosting

1,000
MEDIA & INFLUENCERS HOSTED IN 2017-18 WITH A REACH OF
13 BILLION
AND AN EAV OF
$110 MILLION

TOTAL GLOBAL PR
28 BILLION PEOPLE
WITH AN EAV OF
$259 MILLION

SIGNATURE EXPERIENCES

LUXURY LODGES OF AUSTRALIA

GREAT WALKS of Australia

GREAT FISHING ADVENTURES OF AUSTRALIA

DISCOVER ABORIGINAL EXPERIENCES

Signature EXPERIENCES OF AUSTRALIA

GREAT GOLF COURSES · OF AUSTRALIA ·

ULTIMATE WINERY EXPERIENCES AUSTRALIA

Australian Wildlife Journeys

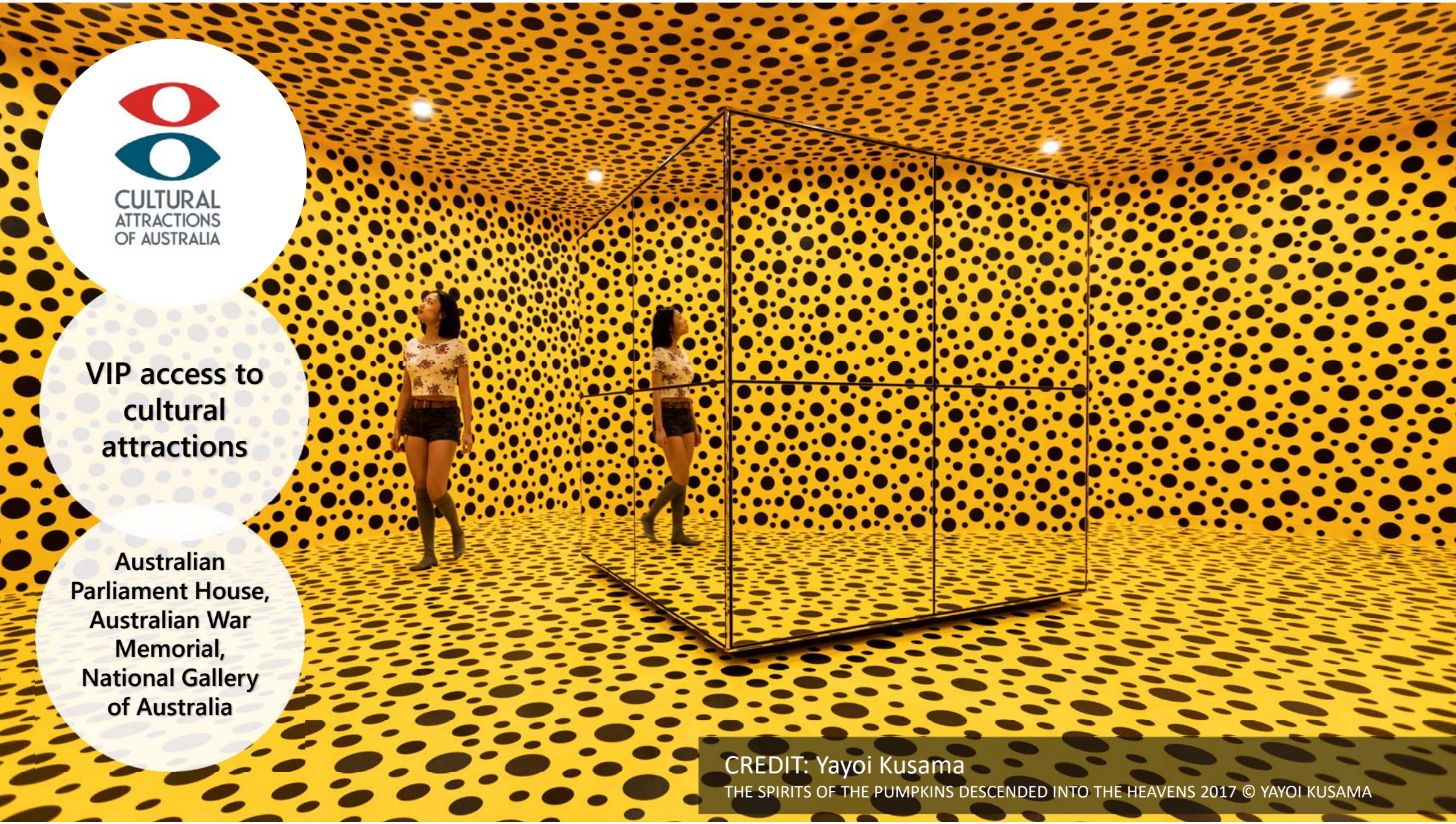
CULTURAL ATTRACTIONS OF AUSTRALIA

700

BOOKABLE EXPERIENCES

95%

IN REGIONAL AUSTRALIA



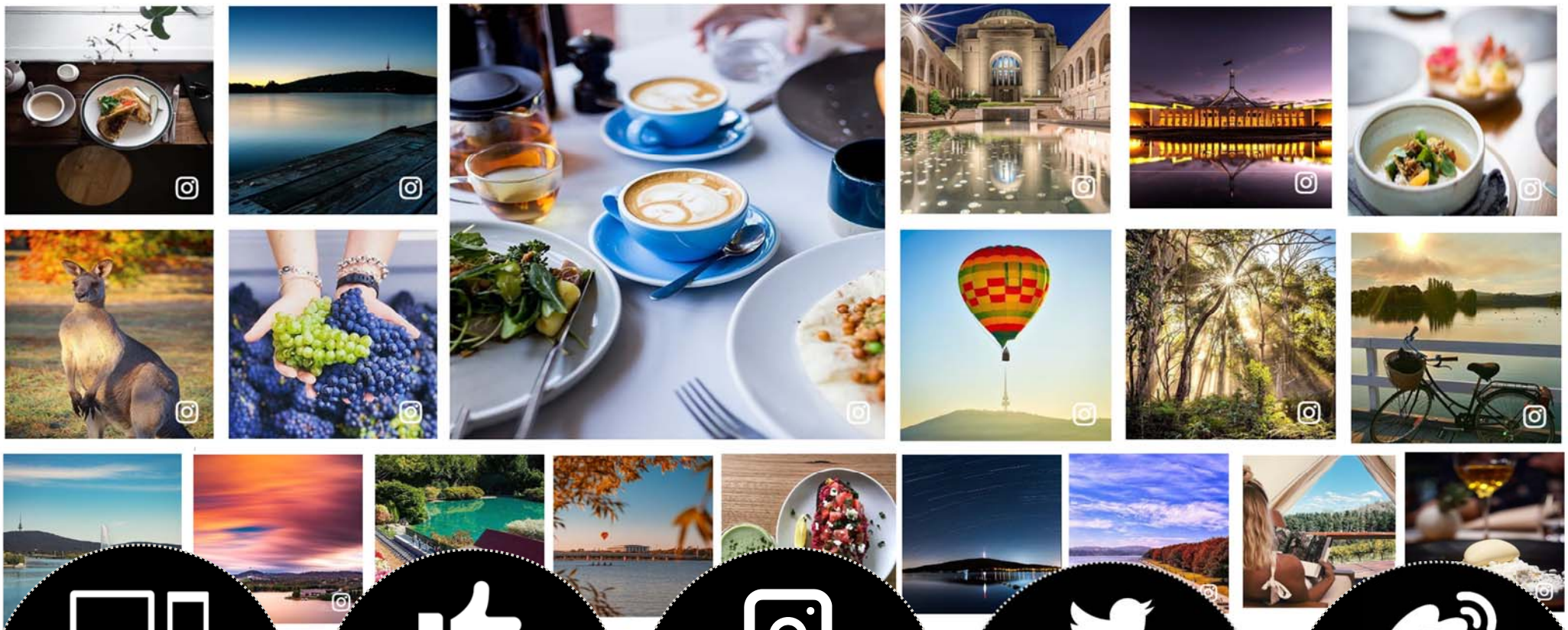
CULTURAL ATTRACTIONS OF AUSTRALIA

VIP access to cultural attractions

Australian Parliament House, Australian War Memorial, National Gallery of Australia

CREDIT: Yayoi Kusama

THE SPIRITS OF THE PUMPKINS DESCENDED INTO THE HEAVENS 2017 © YAYOI KUSAMA



20M
VISITORS TO AUSTRALIA.COM

9.2M
FANS ON FACEBOOK

3.6M
FANS ON INSTAGRAM

0.7M
TWITTER FOLLOWERS @TOURISMAU @AUSTRALIA

1.2M
WEIBO FOLLOWERS

BUSINESS EVENTS

(16% OF VISITORS)

WORTH $5BN

MARCH 2019 YE

BUSINESS EVENTS BID FUND

70 BID APPLICATIONS

WITH 19 WINS

WORTH $248M

IN ECONOMIC IMPACT

OBJECTIVE

TO INCREASE AWARENESS & DEMAND FOR AUSTRALIA AS A BUSINESS EVENTS DESTINATION

KEY MARKETS

USA/CANADA
UK/EUROPE
GREATER CHINA
NEW ZEALAND

2020 IEEE Symposium Series on Computational Intelligence (IEEE SSCI)

CANBERRA I ACT

520 DELEGATES

$3M

IN ECONOMIC IMPACT

INVESTMENT ATTRACTION

REGIONAL AUSTRALIA OFFERS SIGNIFICANT OPPORTUNITIES

FOCUS ON:

The Whitsundays (QLD)
Canberra (ACT)
Snowy Mountains (NSW)
East Coast Tasmania (TAS)
Great Ocean Road (VIC)
Kangaroo Island (SA)
Margaret River (WA)
Katherine (NT)

THANK YOU

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