

A photograph of four people, two men and two women, standing in a field of tall grass and looking out over a range of hills at sunset. They are all wearing hats. The sky is filled with clouds, and the sun is low on the horizon, creating a warm, golden light. The text 'ROAD TO RECOVERY' is overlaid in large white letters, and 'PHILLIPA HARRISON' and 'MANAGING DIRECTOR, TOURISM AUSTRALIA' are overlaid in yellow letters below it.

# ROAD TO RECOVERY

**PHILLIPA HARRISON**

**MANAGING DIRECTOR, TOURISM AUSTRALIA**

# A REMINDER: OUR FOCUS

## OUR VISION

For Australia to be the most desirable and memorable destination on Earth.

## OUR PURPOSE

To grow demand to enable a sustainable and competitive tourism industry



\*Pre-COVID figures



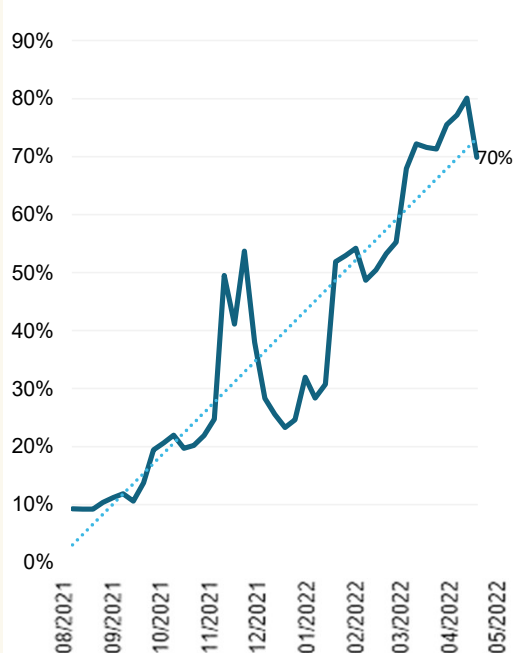
# AUSTRALIA INSIGHTS

**CURRENT STATE OF PLAY**



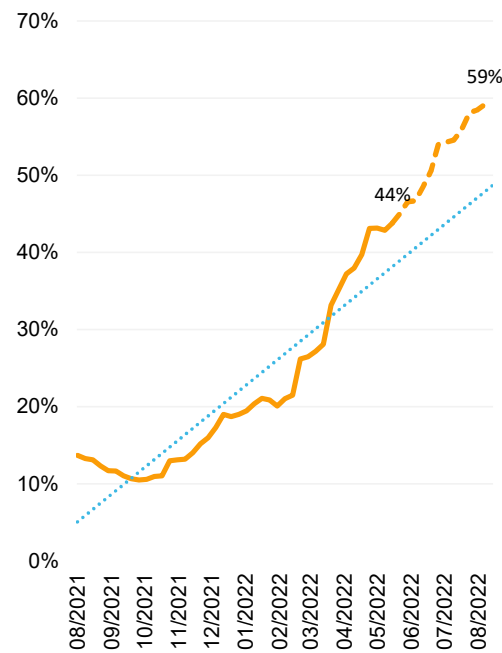
# DEMAND IS RECOVERING DOWN THE SALES FUNNEL

**SEARCHES: SKYSCANNER SEARCHES TO AUSTRALIA - % OF 2019 VOLUMES**  
Aug 21 - May 22 (vs 2019)



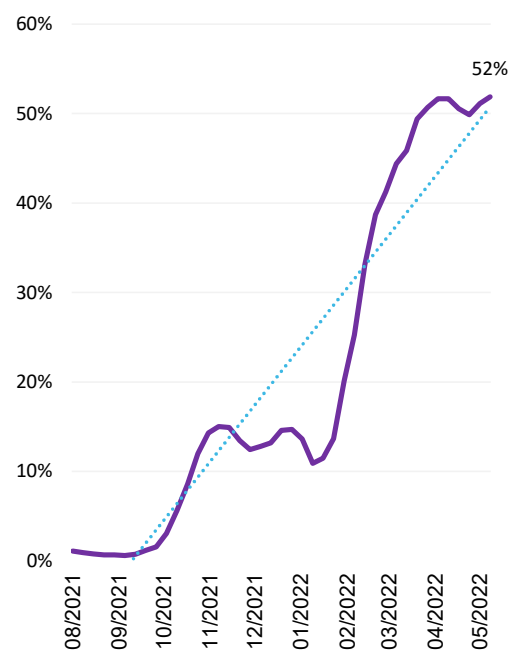
Source: Skyscanner, Flight Searches, Search Date between Aug 21 - May 22 (31-May-2022 latest available)

**CAPACITY: AVIATION CAPACITY TO AUSTRALIA - % OF 2019 VOLUMES**  
Aug 21 - Aug 22 (vs 2019)



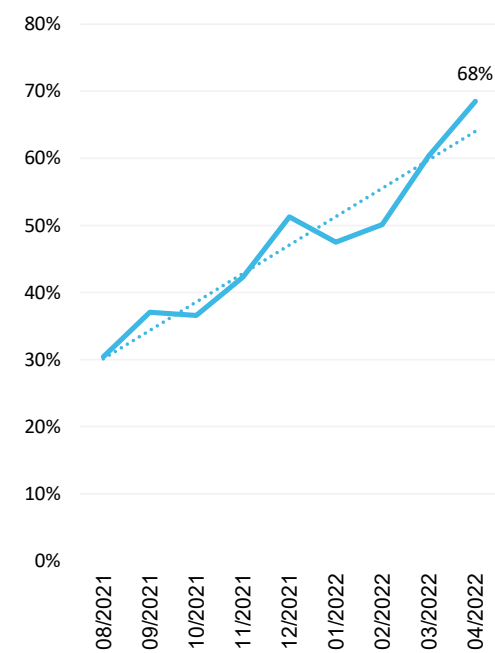
Source: Cirium - SRS Analyser, Aviation Capacity between Aug 21 - May 22 (31-May-2022 latest available)

**BOOKINGS: FORWARD BOOKINGS TO AUSTRALIA - % OF 2019 VOLUMES**  
Aug 21 - May 22 (vs 2019)



Source: ForwardKeys, Flight Bookings, Ticket Issued Dates between Aug 21 - May 22 (22-May-2022 latest week available)

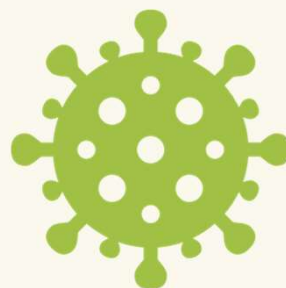
**OCCUPANCY: HOTEL OCCUPANCY RATES ACROSS CAPITAL CITIES**  
Aug 21 - April 22



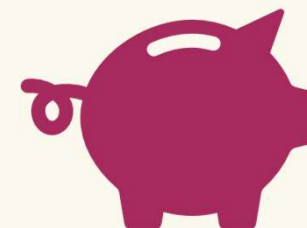
Source: STR - Capital City + Cairns Hotel Performance, Occupancy Rates between Aug 21 - April 22



**HOWEVER,  
GLOBAL  
PRIORITIES ARE  
SHIFTING  
FASTER THAN  
EXPECTED**



**HEALTH  
CONCERNS**

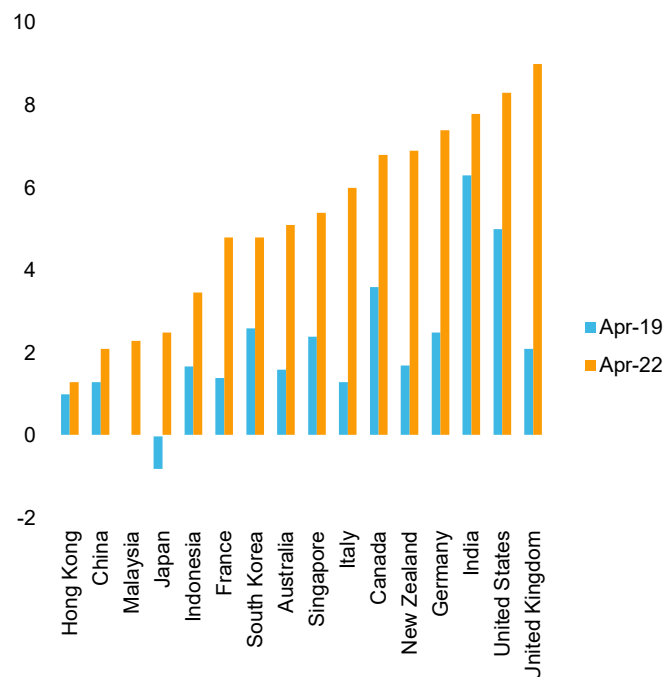


**WEALTH  
CONCERNS**

# MACRO ECONOMIC HEADWINDS ARE WORSENING

## INFLATION RATES

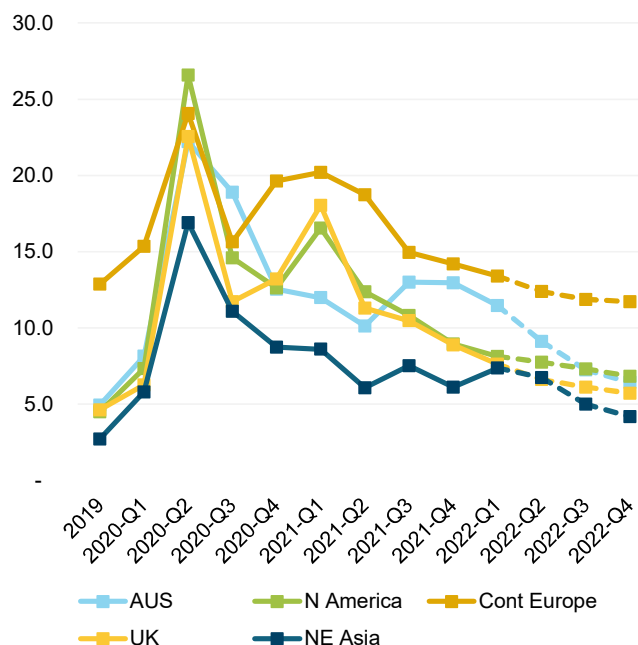
Inflation rates for April 2019 vs April 2022



Source: Various Government Agencies via Trading Economics, 2022

## HOUSEHOLD SAVINGS

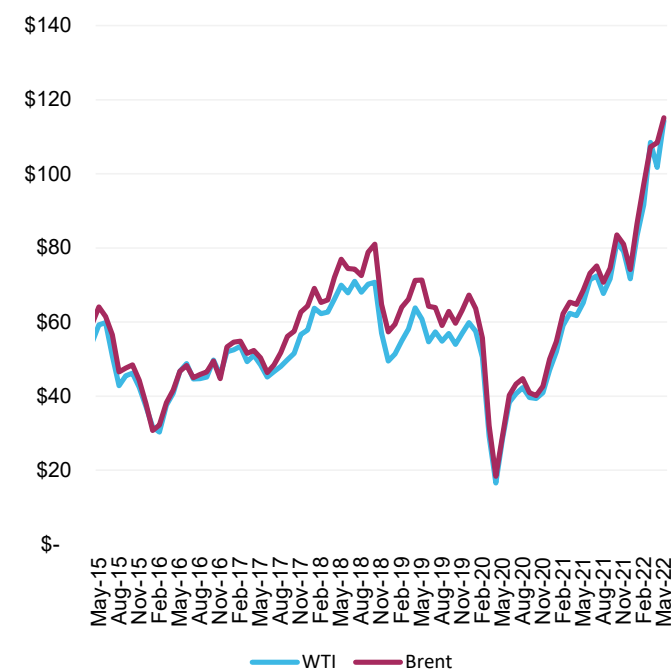
Savings as a % of household disposable income  
2019 - 2022



Source: OECD, Net Savings % of Household Disposable Income, Household Savings Forecast. Quarterly 2019-2022

## CRUDE OIL SPOT PRICE

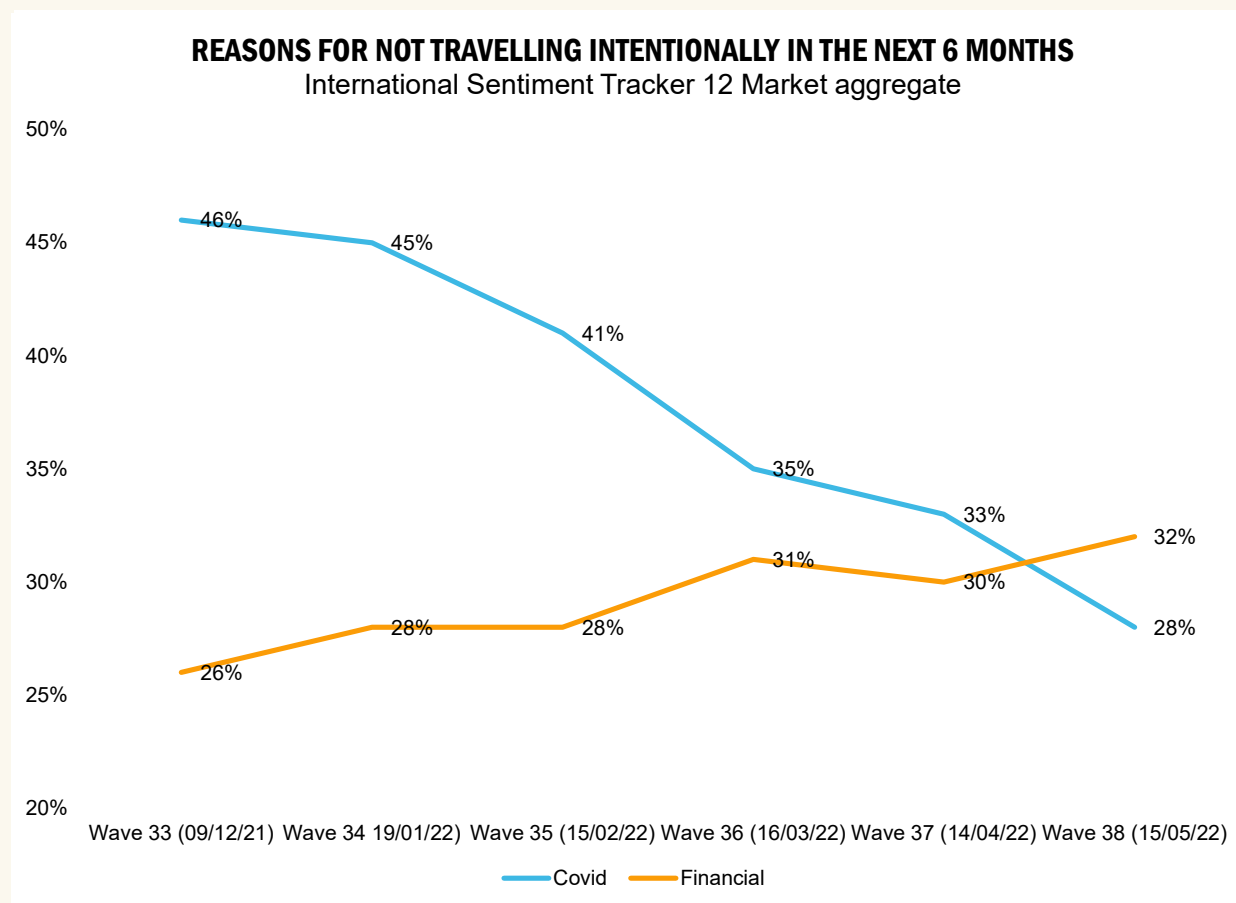
USD per barrel - Jan 15 - Apr 22



Source: Crude Oil Prices, West Texas Intermediate (WTI) and Brent Prices, Monthly Spot Prices, Jan-15 – May 22

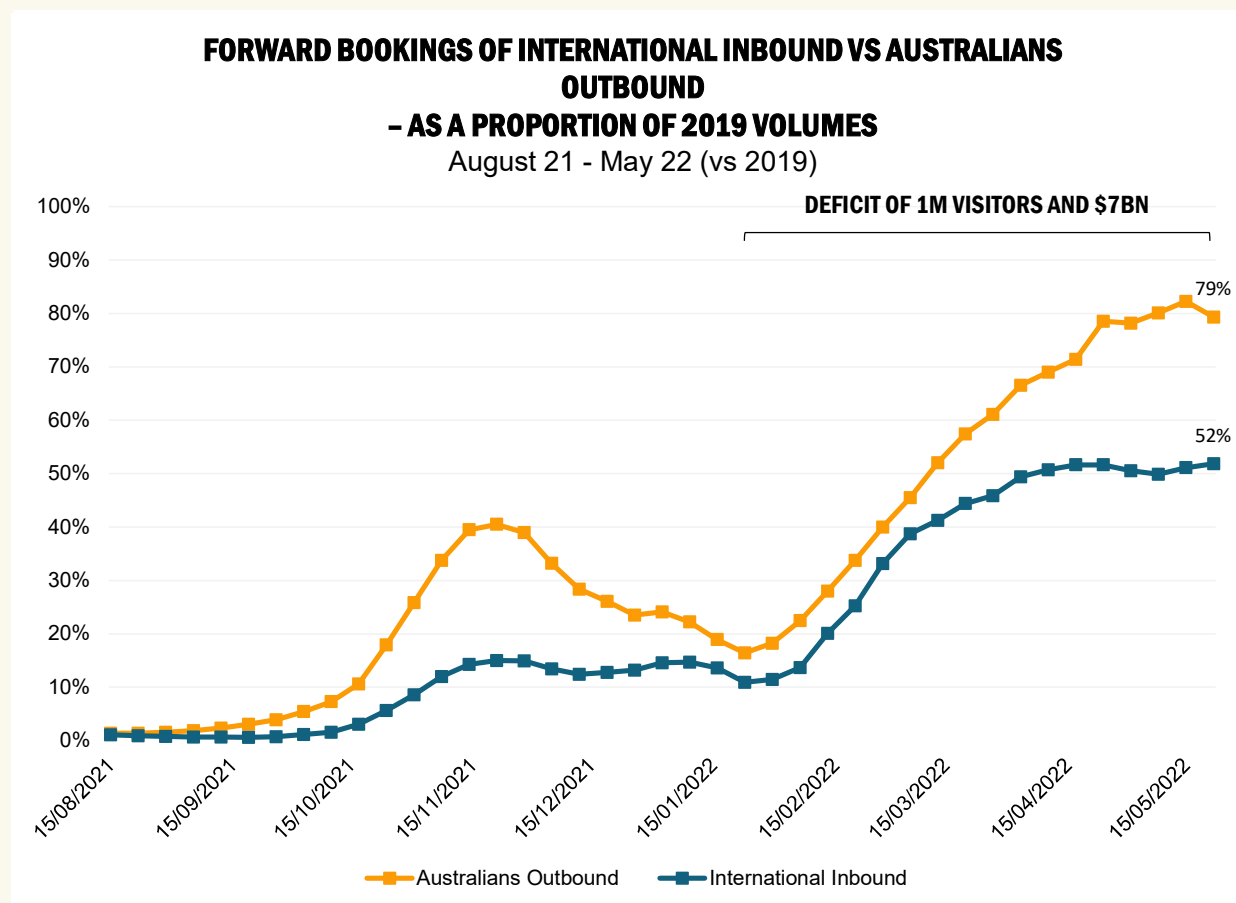


# FINANCIAL CONCERNS HAVE OVERTAKEN COVID-19 FEARS AS THE MAIN BARRIER FOR INTERNATIONAL TRAVEL



Source: Tourism Australia International Sentiment Tracker, Waves 33 - 38

# OUR INBOUND RECOVERY IS LAGGING OUTBOUND, WORSENING AUSTRALIA'S TOURISM DEFICIT

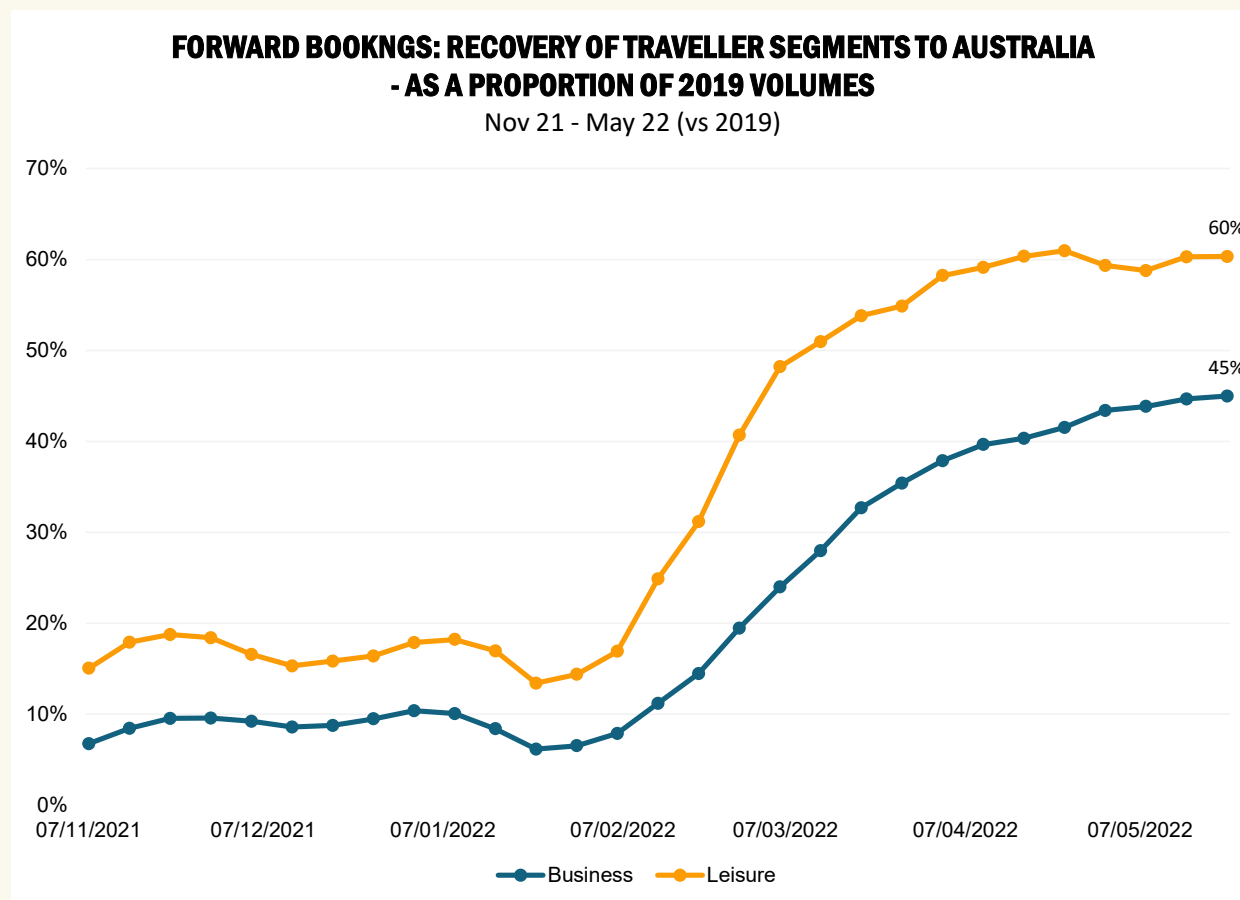


Source: ForwardKeys, Flight Bookings, Ticket Issued Dates between Aug 21 - May 22 (22-May-2022 latest week available)



**THERE ARE STILL MANY  
REASONS TO BE  
OPTIMISTIC...**

# CORPORATE TRAVEL IS RECOVERING RELATIVELY WELL

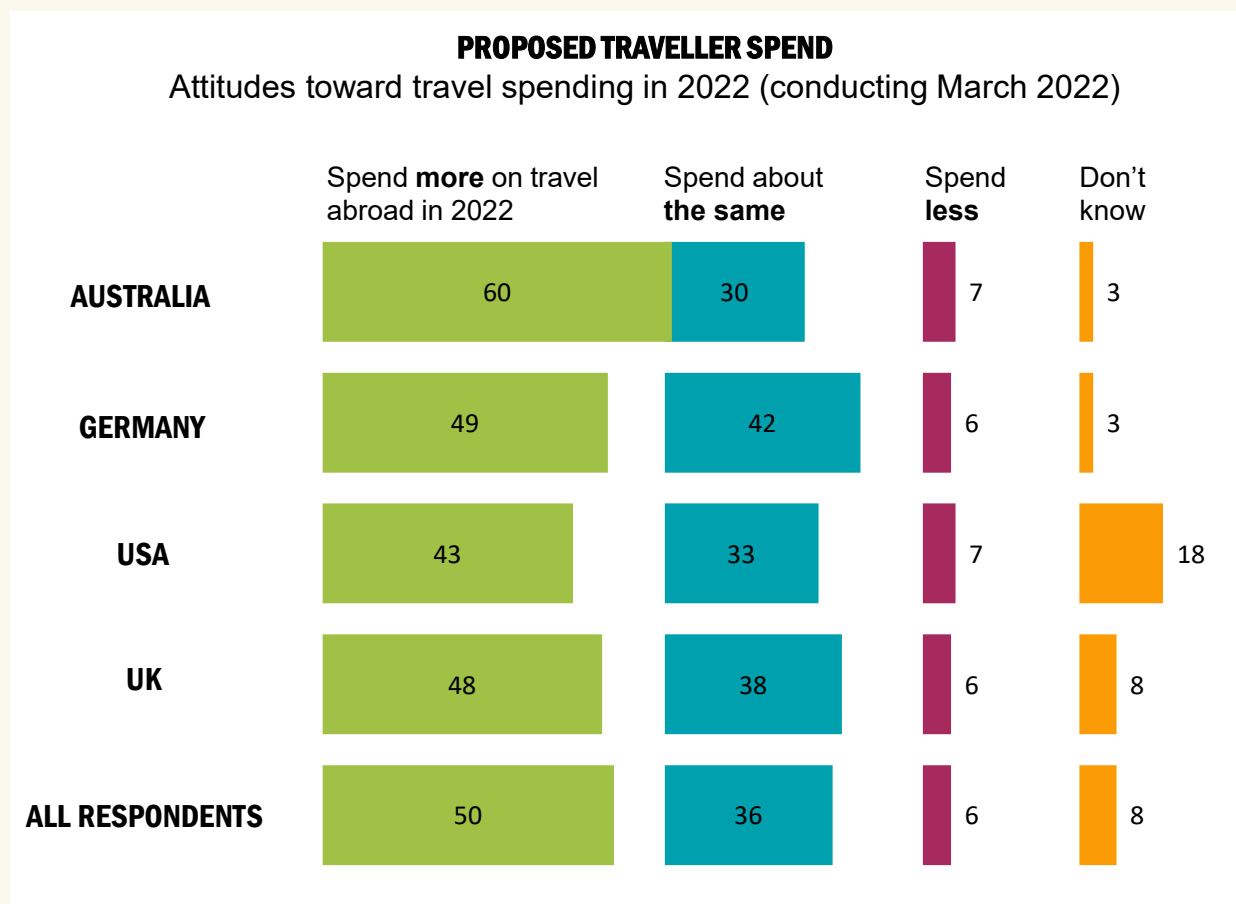


Source: ForwardKeys, Flight Bookings, Ticket Issued Dates between Nov 21 - May 22 (15-May-2022 latest week available)

Booking Assumptions: Business is categorized from bookings made by an agency qualified as a predominantly Corporate Travel Agency and type of stay is "workweek" for short-haul and up to 2 nights stay

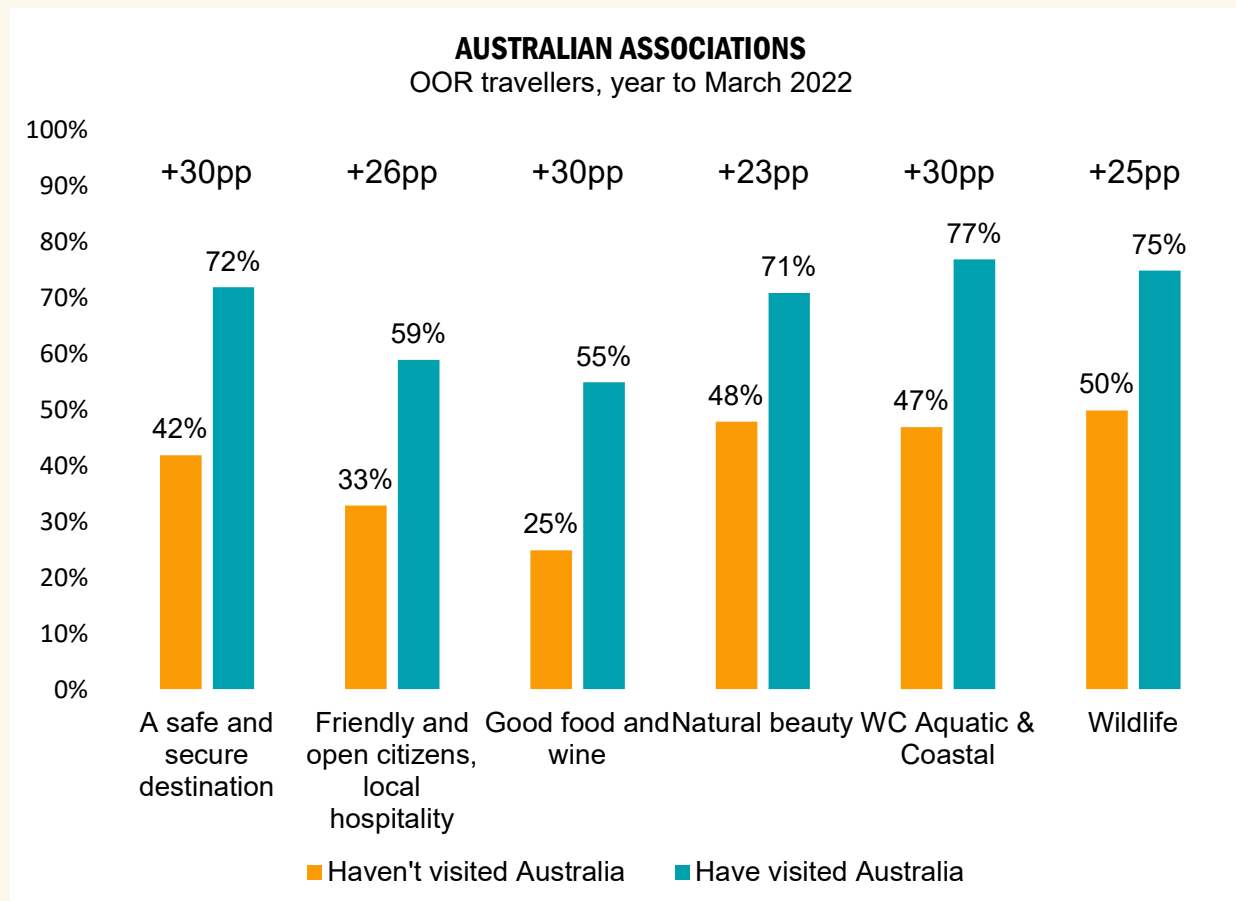


# TRAVELLERS ARE STILL INTENDING TO SPEND THIS YEAR



Source: The World Economic Forum Travel & Tourism Development Index (TTDI) , April 2022, n = 4000

**WE NEED TO KEEP  
DOING WHAT WE  
ALWAYS DO –  
OVERDELIVER WITH  
EXTRAORDINARY  
TOURISM  
EXPERIENCES**

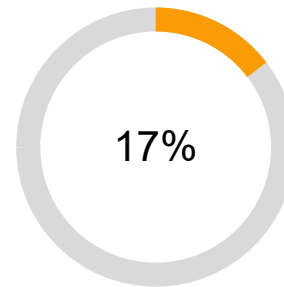


Source: Tourism Australia CDP year to March data

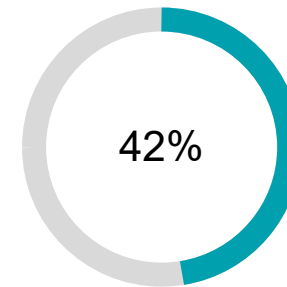
# AUSTRALIA'S BREADTH, AND QUALITY, MAKE IT FEEL LIKE GOOD VALUE

## ASSOCIATIONS OF AUSTRALIA AS BEING 'VALUE FOR MONEY'

OOB travellers, year to March 2022



**Haven't** visited Australia



**Have** visited Australia



Source: ForwardKeys, Flight Bookings, Ticket Issued Dates between at 22-May-2022 - latest week available

## TWO SIMPLE 'SO WHAT'S'

**KEEP DRIVING  
INBOUND  
DEMAND**

**&**

**KEEP  
DELIVERING  
HIGH QUALITY  
EXPERIENCES**





# OPPORTUNITIES FOR 2023

## EMERGING TRENDS AND SECTORS



# OPPORTUNITIES & SECTORS

## ADVENTURE



INCLUDES PHYSICAL  
ACTIVITY, A CULTURAL EXCHANGE &  
A CONNECTION WITH NATURE

## WELLNESS



PROMOTES HEALTH &  
WELL-BEING WITH A REGENERATIVE  
FOCUS

## YOUTH



A FOCUS ON YOUNG TRAVELLERS –  
BACKPACKERS, WORKING HOLIDAY  
MAKERS AND EDUCATION TRIPS

## AGRITOURISM



WEAVES INTO AN EXPERIENCE OR  
DESTINATION A CONNECTION TO  
FOOD, DRINK OR PRODUCE

## EVENTS



BOOSTING DESTINATION APPEAL,  
AND VISITATION, AROUND EVENTS

INDIGENOUS  
SUSTAINABILITY  
ACCESSIBILITY

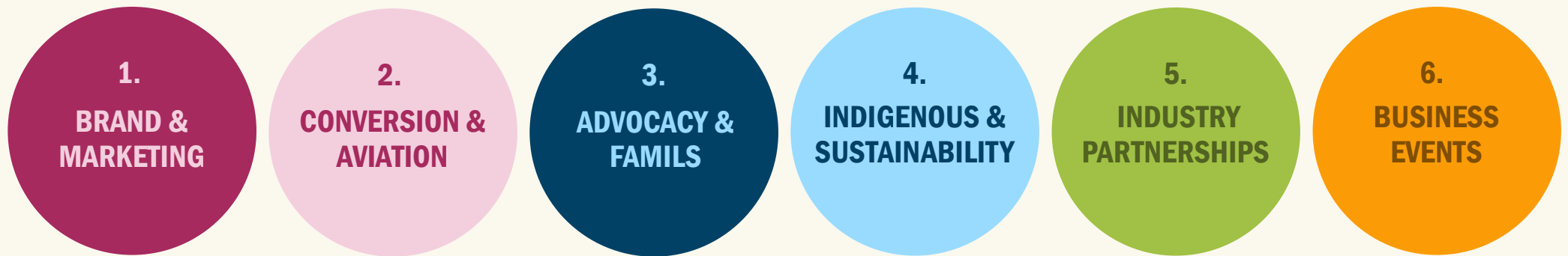




# THE ROAD TO RECOVERY

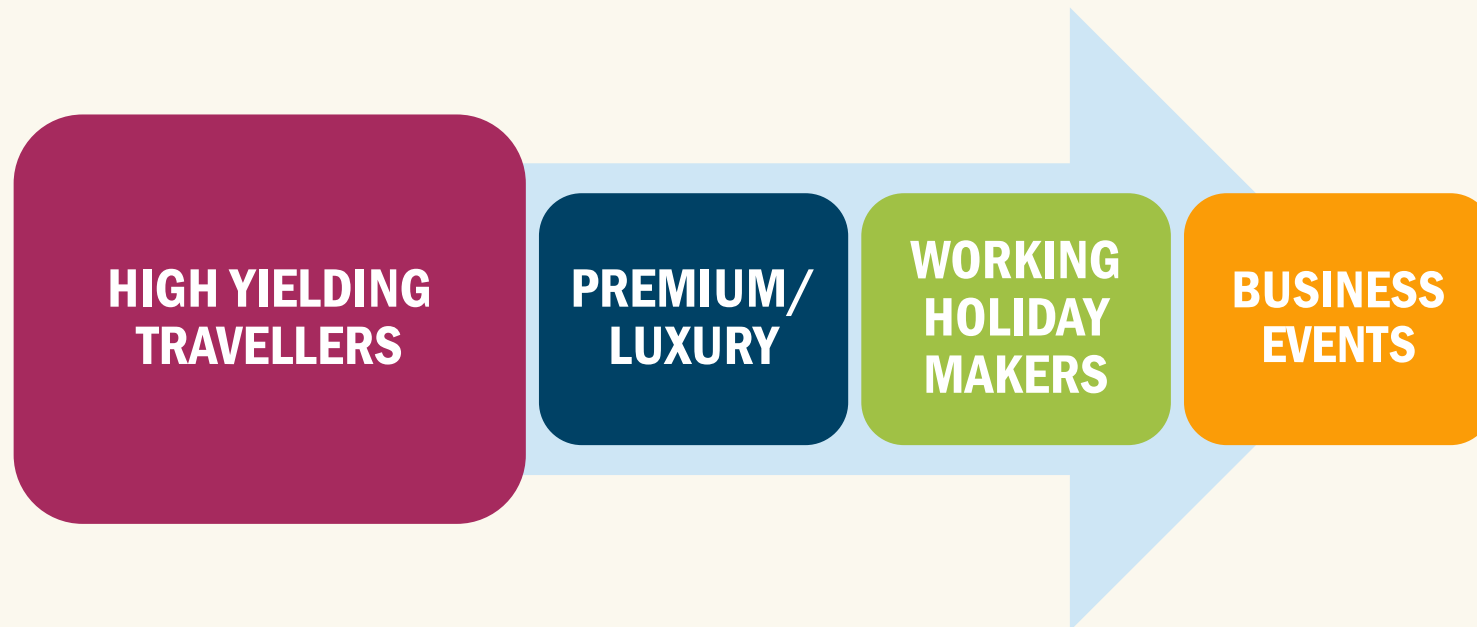
## OUR APPROACH AND KEY INITIATIVES

# AREAS OF FOCUS 2023





# TARGET SEGMENTS ACROSS 15 CORE MARKETS



## 1. GLOBAL ANNOUNCEMENT

### ANNOUNCEMENT UK & US



**DESTINATION  
AUSTRALIA**  
Reimagining the Tour of a Lifetime

## 2. CONVERSION & ADVOCACY

### DON'T GO SMALL, GO AUSTRALIA UK & US



**ATE22**  
AUSTRALIAN TOURISM EXCHANGE

Live - 16-18 May  
Online - 23-25 May

Germany, France, Italy



## 3. GLOBAL BRAND LAUNCH

### COME SAY G'DAY BRAND LAUNCH



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

### BUSINESS EVENTS International & Domestic

*Australia*  
**ON TOUR**  
North America 2022



### AUSTRALIA MARKETPLACE

Kicks off in August - USA  
Japan & South Korea, UK



PR

FAMILS

PARTNERSHIPS



A low-angle shot of a person's back and arm pointing towards a large, textured tree trunk. The tree bark is light-colored with dark, peeling patches. The background shows green foliage and a clear sky.

# INDUSTRY SUPPORT

RECENT INITIATIVES & KEY ISSUES

# NEW BUSINESS EVENTS AUSTRALIA CREATIVE STRATEGY

There are lots of expected fixtures when it comes to a great place for business events. Good accommodation, nice restaurants, new facilities and beautiful scenery.

Like others, Australia has all these things.

But it also has something more –

Australians, a people with a **unique perspective** that's been shaped by a **unique landscape** and **way of life**.

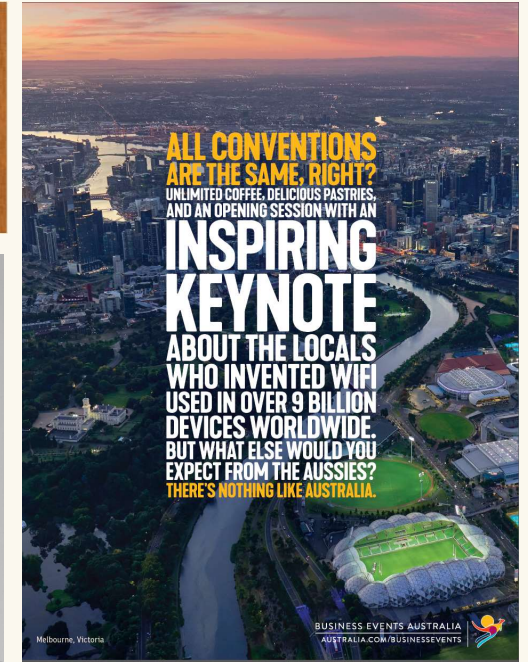
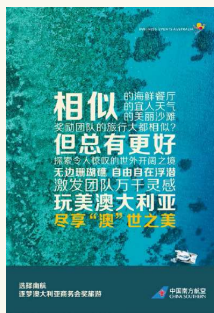
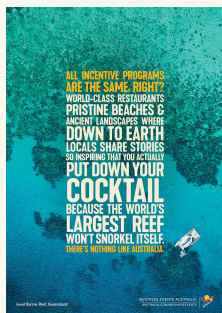


**Prove that Australia has everything you'd expect from a business event destination, plus so much more.**

## THERE'S NOTHING LIKE AUSTRALIA



# CREATIVE - PRINT & DIGITAL



Incentive

Association



# NEW BUSINESS EVENTS BRAND FILM



# KEY INDUSTRY ISSUES

- Workforce/Labour Supply challenges
- Staff accommodation shortages in-region
- Insurance
- Cancellation terms
- Aviation access to some regions such as Central Australia, Kangaroo Island
- Visa processing times
- Increasing costs of doing business; Supply chain delay
- Wildlife Park operators continue to struggle with overseas trade partner rules around animal-interactions



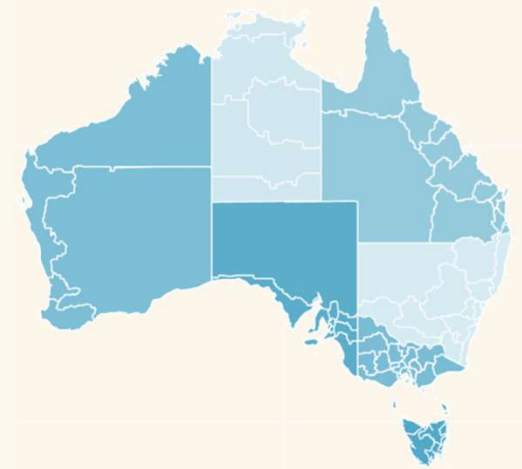
Source: ATE Industry Roundtable 2022

# THE NATIONAL EXPERIENCE CONTENT INITIATIVE

DEVELOPING NEW IMAGE  
AND VIDEO ASSETS

SPANNING 57 TOURISM REGIONS

COVERING UP TO 1,300 EXPERIENCES





# RECENT PR ACTIVITY



## CANBERRA: A FAMILY PLAYGROUND

With such a wide-ranging scope of activities suitable for the whole brood, Australia's capital city makes for a delightfully diverting family holiday.

Choosing where to take the kids for a well-deserved break doesn't have to mean a choice between stimulating activities or the pleasures of the natural environment. The metropolitan city of Canberra offers both in abundance, from world-class museums to one-of-a-kind outdoor adventures right on its doorstep. Here, travellers of any age have a veritable playground to choose from for days of family fun.

One of Australia's best zoos, the National Zoo & Aquarium, is just a 10-minute drive from Canberra's city centre and is a fantastic introduction to some of the country's famed creatures, such as dingoes, Tasmanian devils, emus and more. But what makes a trip here even more special are the pre-booked Close Encounter tours, for an even more personal wildlife experience. Hand-feed a tiger, meet the meerkats or, for the budding zoologist, you can even become a zookeeper for the day.

Adventureland, too, with its 55-plus kid-friendly activities, will keep the young ones entertained for hours.

Along with wandering the network of trails at the impressive National Arboretum Canberra, a 250-hectare site encompassing 94 forests of rare endangered and symbolic Australian and global trees, there is more scrambling and climbing to be done at the nature-themed POD



playground. Start your visit, though, at the award-winning Village Centre, where you can sit down in an architecturally designed space to enjoy a treat and a cuppa with breath-taking views across the grounds.

Canberra doesn't lack in 'edutainment' moments for curious young minds; dinosaur fans will go wild for the prehistoric wonders of the The National Dinosaur Museum, which houses life-like dinosaur models, full skeletons and robotic dinosaurs. And young science buffs will delight in the experiments, seminars and hands-on exhibits of Questacon: The National Science and Technology Centre, where you can try such things as controlling a humanoid robot or free fall on a six-metre slide.

For something a little more quaint, a mini wonderland awaits at Cockington Green Gardens, with its displays of meticulously handcrafted miniature buildings from around the world. Take in the scenic surrounds of the International Display and picnic grounds, aboard the popular Miniature Steam Train Ride.

From miniature to epic, the Mount Ainslie Lookout allows you to spot many of Canberra's national attractions from up high, with picturesque mountains framing the views, and native birds and wildlife for company too.



Not high enough for you? The adventurous family might want to rise early and get a proper birdseye view of the loveliness below on a sunrise hot air balloon ride with Balloon Arch Canberra. Canberra in the soft morning light is hard to beat.

There's much fun for the family too at the other end of the day.

Sundown is also a special time to set out onto the large and lovely Lake Burley Griffin on board a GoBoat. Self-captain your vessel and pack a picnic to enjoy on the boat's spacious centre table while watching the sun set on the day.

If it's more night action you're after, keep an eye on the Mount Stromlo Observatory website and all going well you can time your stay to coincide with one of their special free public stargazing events, where you can hear from knowledgeable astronomers, and gaze through telescopes that take you a little bit closer to the universe beyond. All enriching experiences to cherish in the family memory annals.



To find out more: <https://www.tourism.australia.com/en>

THERE'S NOTHING LIKE AUSTRALIA



Rupali Dean IN

Page 2/3



Jumped aboard an electric go boat to explore the glittering jewel in Canberra's crown aka ...

05/14/22



They serve smiles and great food down under at a 60 cover restaurant in Canberra! Tried so...

05/12/22



Love the wine you're with! P.S. When you visit Canberra, do plan a day trip to the vineyard...

05/12/22



When the chef goes out of the way (read menu) and creates breakfast the way just as how y...

05/12/22



Rupali Dean IN

Page 2/3



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05/12/22



Everything you can imagine is real! #australia #canberra #art #gallery #love #travel Must...

05/11/22



Thing indigenous, think native ingredients or think Australian produce! Ok some background...

05/11/22



Multicultural Melbourne...Beautiful Melbourne! #mustvisiteninmelbourne #travelgram #rave...

05/09/22

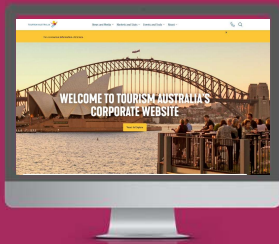


Tim Ho Wan famed and known as the cheapest michelin starred restaurant has an outpost in M...

05/09/22

# WORKING WITH TA

## CORPORATE WEBSITE



[TOURISM.AUSTRALIA.COM](http://TOURISM.AUSTRALIA.COM)

## RESEARCH & INSIGHTS



[TOURISM.AUSTRALIA.COM/STATS](http://TOURISM.AUSTRALIA.COM/STATS)

## TRADE EVENTS

**AUSTRALIA  
MARKETPLACE**  
North America 2022

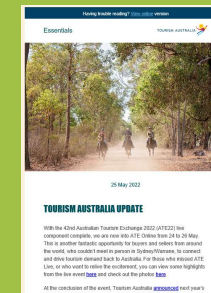
[TOURISM.AUSTRALIA.COM/EVENTS](http://TOURISM.AUSTRALIA.COM/EVENTS)

## PR, FAMILS & SOCIAL MEDIA



[TOURISM.AUSTRALIA.COM/WORKINGWITHMEDIA](http://TOURISM.AUSTRALIA.COM/WORKINGWITHMEDIA)

## NEWSLETTERS



[TOURISM.AUSTRALIA.COM/SUBSCRIBE](http://TOURISM.AUSTRALIA.COM/SUBSCRIBE)

## WORKING WITH TA GUIDE



[TOURISM.AUSTRALIA.COM/WORKINGWITHTA](http://TOURISM.AUSTRALIA.COM/WORKINGWITHTA)







THANK YOU