

AUSTRALIA'S INTERNATIONAL TOURISM RECOVERY

G'DAY

**1.
INTERNATIONAL VISITOR
RECOVERY**

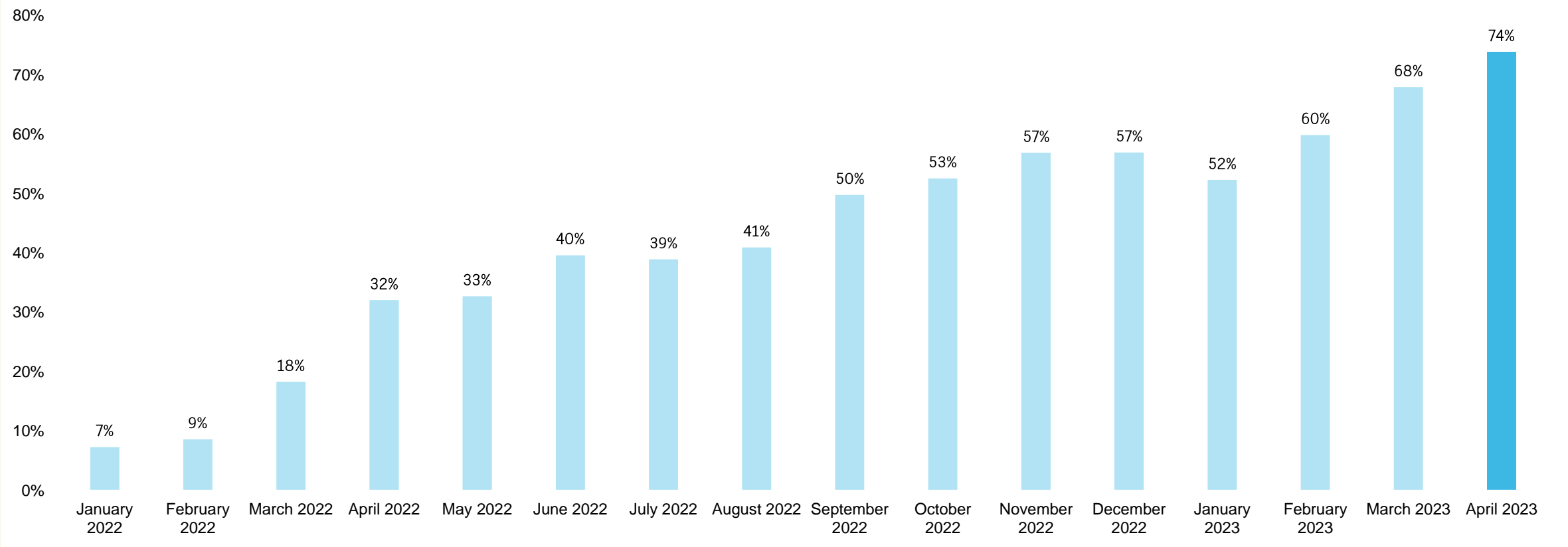
**2.
HOW TOURISM AUSTRALIA IS
RESPONDING**

**3.
MAKING THE MOST OF THE
RECOVERY**

INTERNATIONAL VISITOR RECOVERY

AUSTRALIA’S RECOVERY CONTINUES TO PICK UP PACE

ABS ARRIVALS BY MONTH RECOVERY VERSES SAME MONTH IN 2019

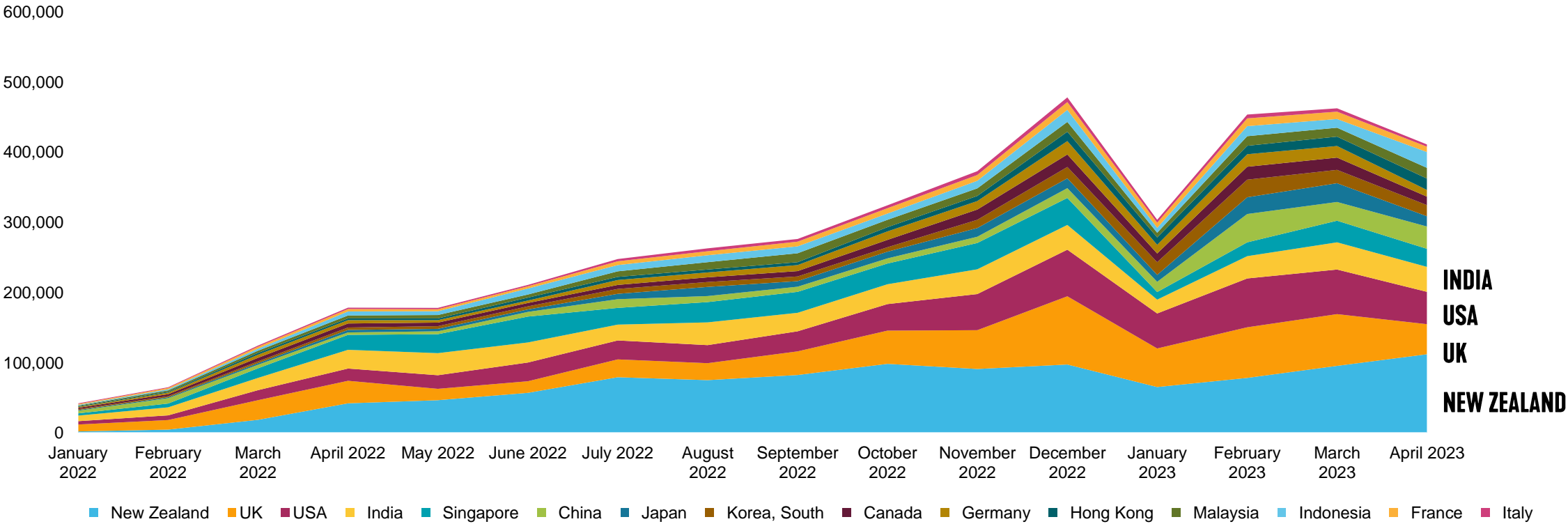


Source: ABS Overseas Arrivals and Departures (Short Term Visitor Arrivals), to the Month of April 2023

DRIVEN BY THE REBOUND OF FOUR CORE MARKETS

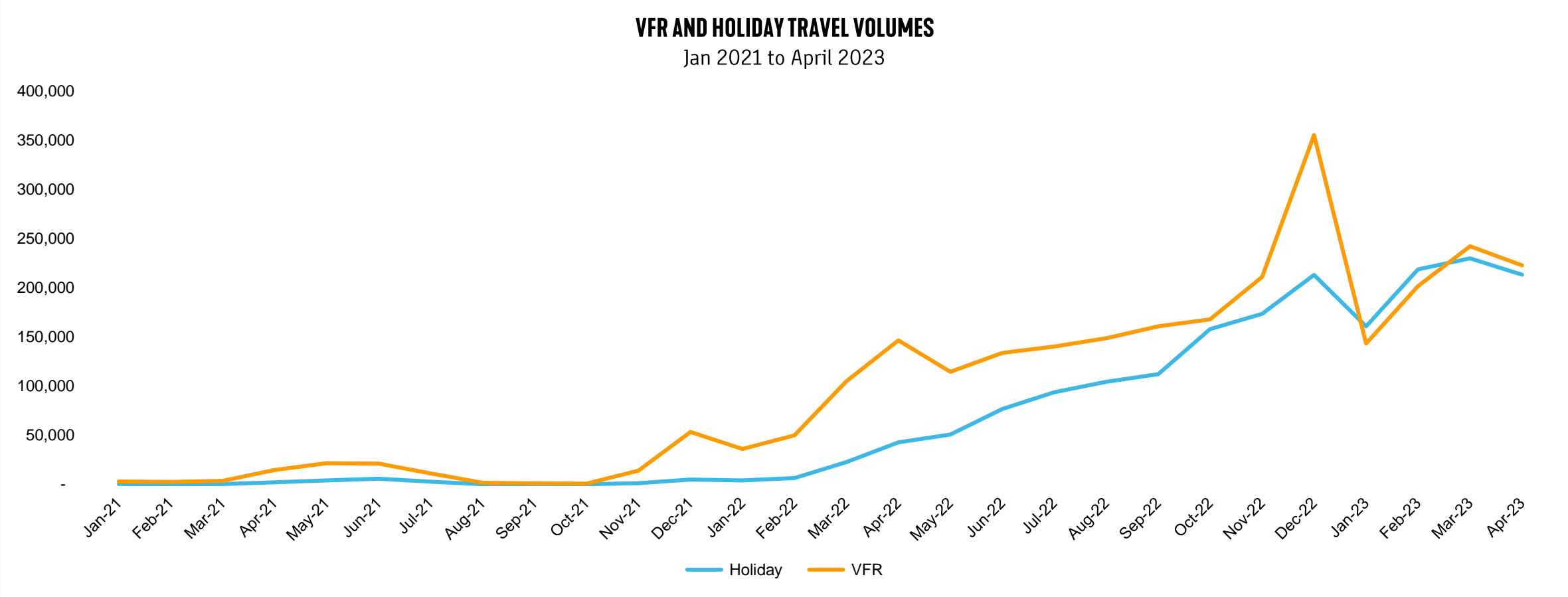
TOURISM AUSTRALIA'S 15 MARKETS ABS ARRIVALS

January 2019 to April 2023



Source: ABS Overseas Arrivals and Departures (Short Term Visitor Arrivals), to the Month of April 2023

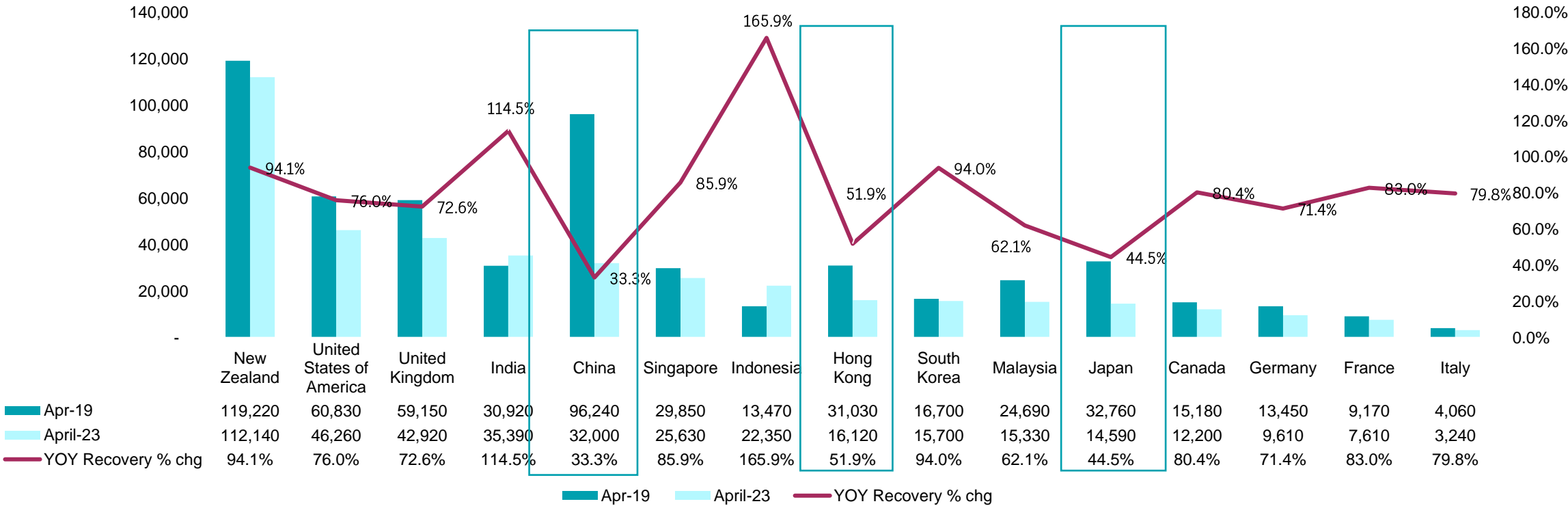
RETURNING OF LEISURE TRAVELLERS



Source: ABS Overseas Arrivals and Departures (Short Term Visitor Arrivals), to the Month of April 2023

NORTH ASIA UPSIDE YET TO COME

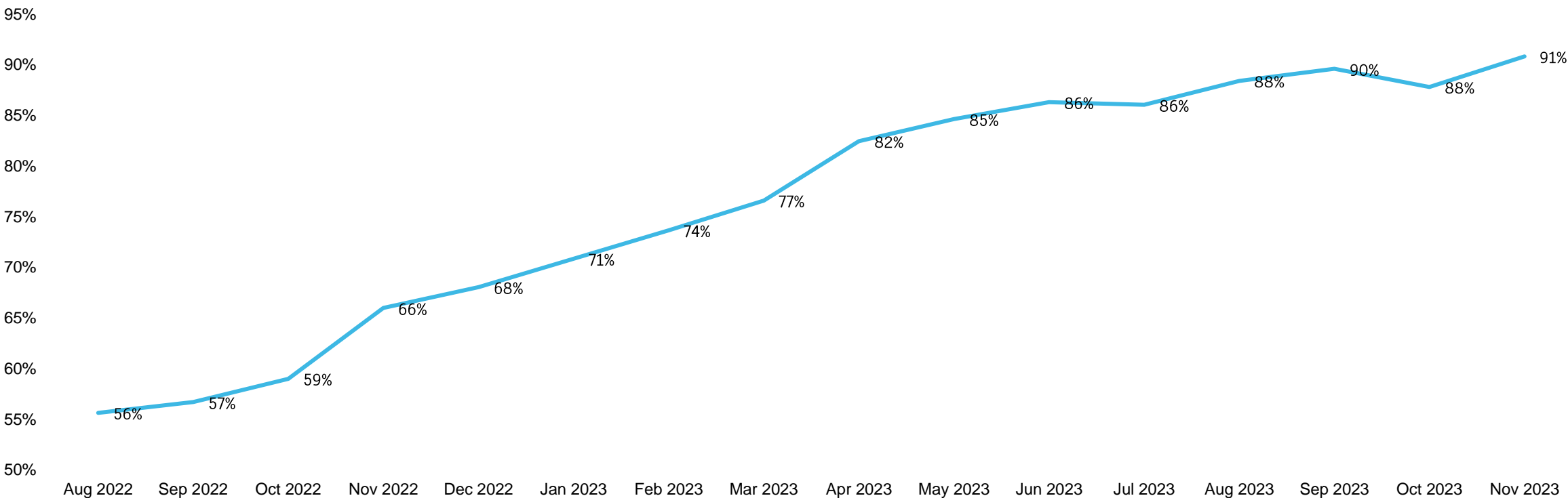
Visitor Arrivals from our Top 15 Markets
Month of April 2023



Source: ABS Overseas Arrivals and Departures (Short Term Visitor Arrivals), to the Month of April 2023

AVIATION SEAT RECOVERY: ABOVE 90% BY YEARS END

AVIATION SEATS RECOVERY % TO 2019
ALL MARKETS TO AUSTRALIA

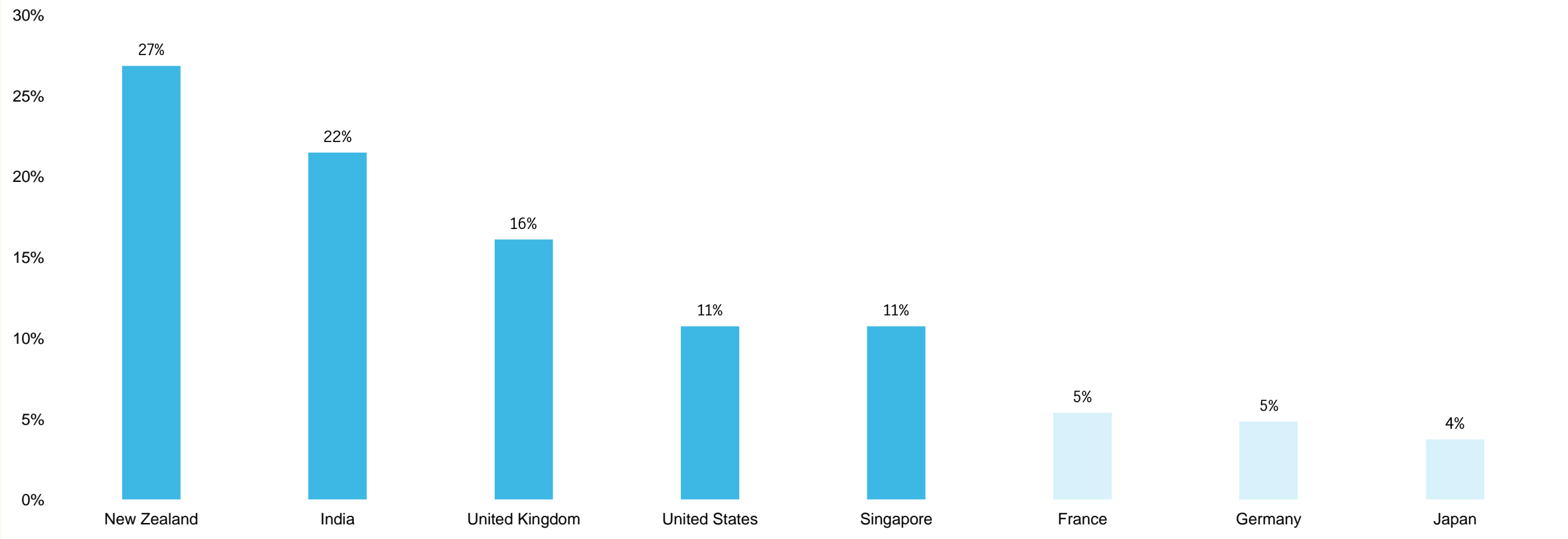


Source: SRS Cirium Analyser, May 2023

A.C.T. & CANBERRA CONTEXT

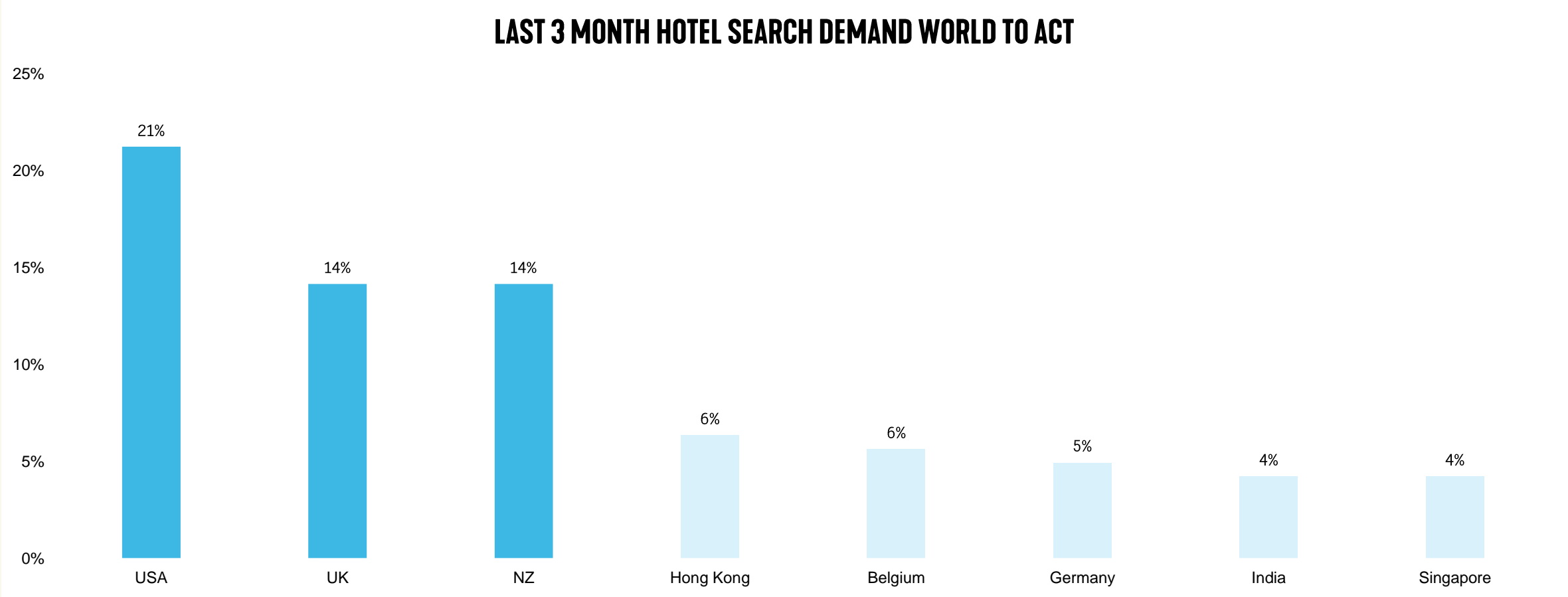
FLIGHTS: MARKETS CURRENTLY LOOKING AT THE ACT

LAST 3 MONTHS: FLIGHTS WORLD TO CANBERRA



Source: Search Provider, World to Canberra, March 2023

HOTELS: MARKETS CURRENTLY LOOKING AT CANBERRA



Source: Search Provider, World to Canberra, March 2023

QUESTIONS FOR YOU

GAUGE CHECK FOR YOUR BUSINESS. WHAT'S INTERNATIONAL CAPACITY FEELING LIKE TODAY COMPARED TO 2019?

TRACKING ABOVE OR BELOW NATIONAL RECOVERY?

ARE YOU WAITING ON THE NORTHERN ASIAN RECOVERY? ARE YOU READY FOR IT?

HOW IS TOURISM AUSTRALIA RESPONDING?

THE WORK IS WORKING

+12PP

**IN CONSIDERATION
FOR AUSTRALIA**

+13PP

IN INTENTION TO TRAVEL

+10%

**IN OUR OTA SHARE OF
SEARCH**

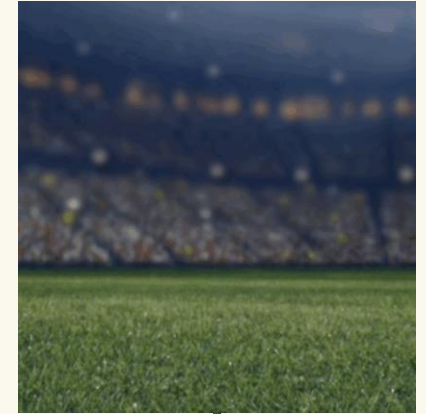
WHAT'S TA DOING? MORE OF THE SAME



CHINA LAUNCH



PARTNERS



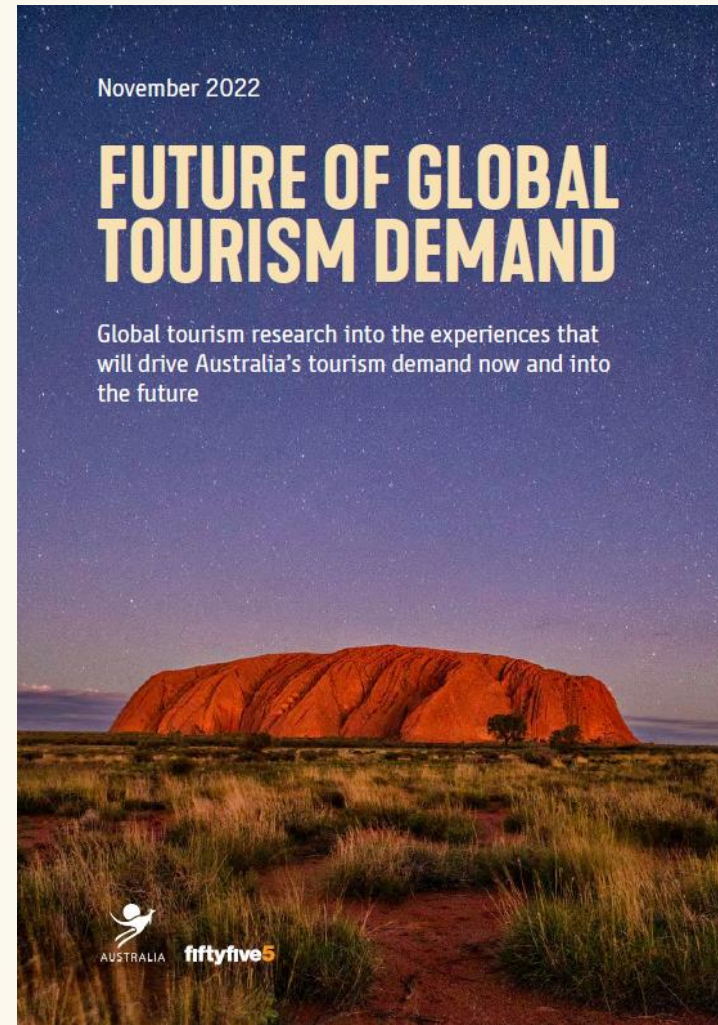
CULTURAL SPIKES

WORKING HOLIDAY











MAKE THE MOST OF THE RECOVERY

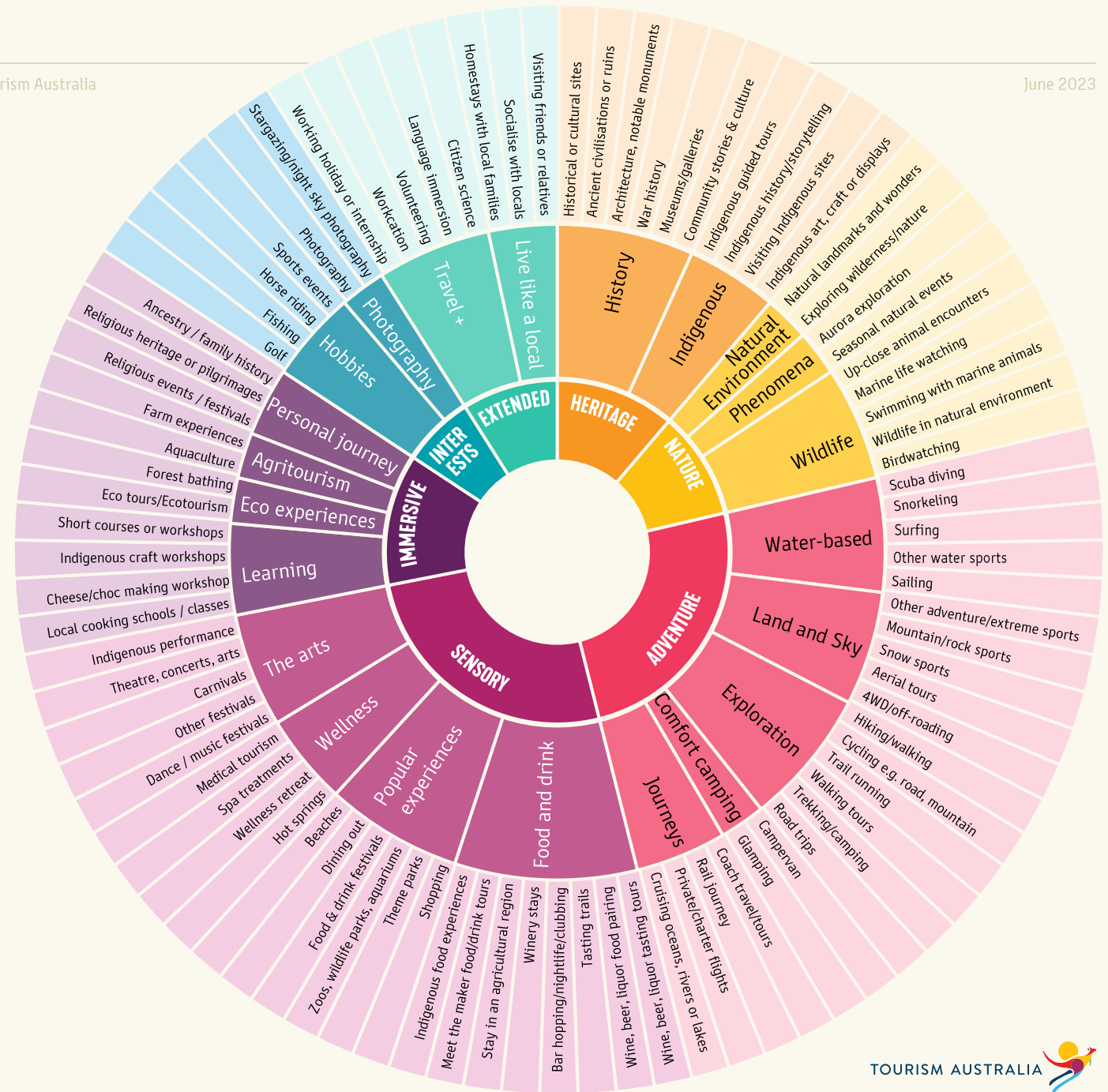
6 MONTHS AGO TOURISM AUSTRALIA LAUNCHED “FUTURE OF DEMAND” RESEARCH REPORT



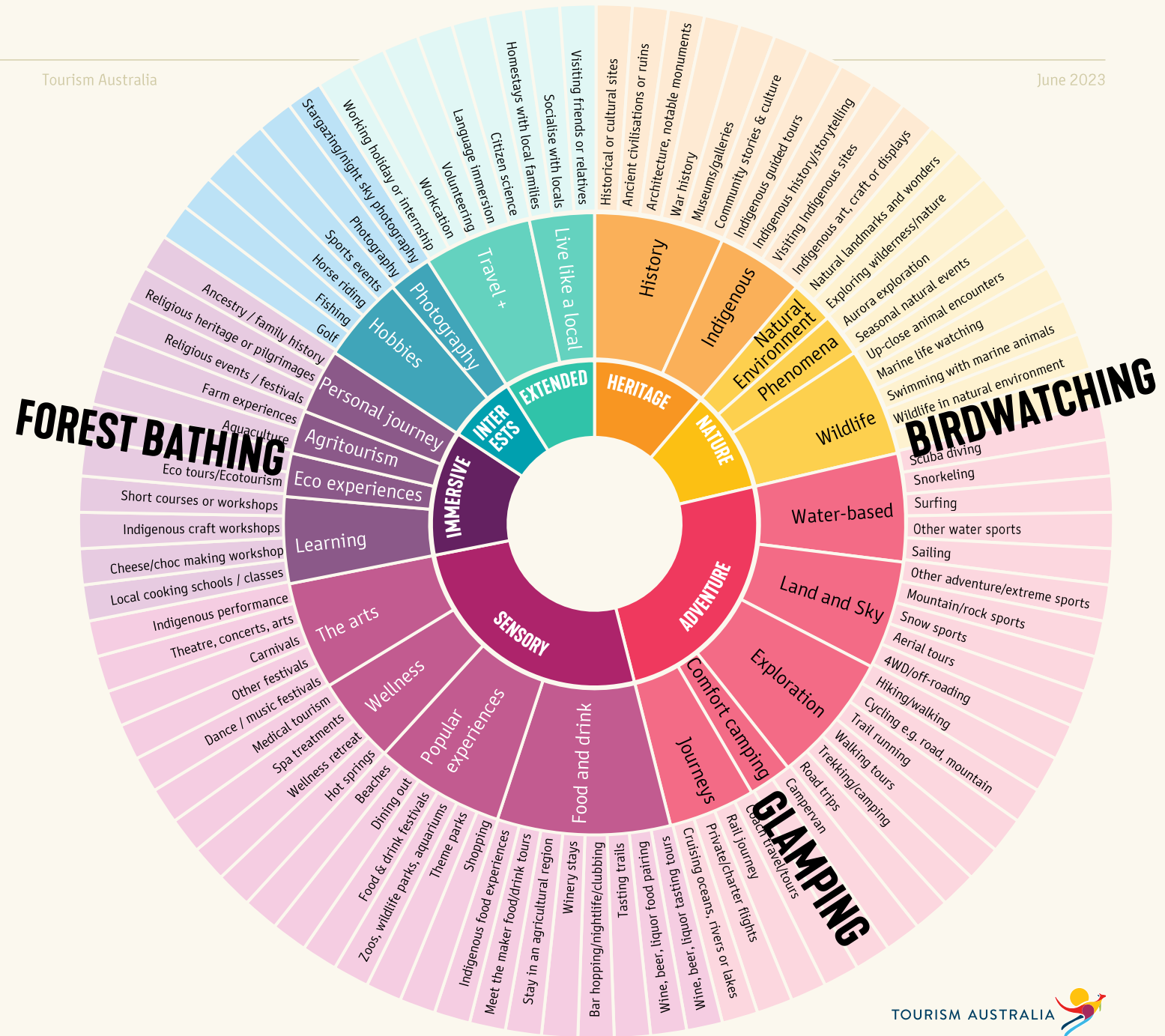
AUSTRALIA AGONISTIC, MULTI-MARKET, WORLD-TO-WORLD

TOURISM AUSTRALIA'S 15 MARKETS		+ ADDITIONAL MARKET COVERAGE	
		EMERGING	DOMESTIC
 USA	 Indonesia	 Taiwan	 Australia
 UK	 New Zealand	 Vietnam	
 Germany	 France	 Thailand	
 Japan	 Italy	 Philippines	
 Singapore	 China		
 Malaysia	 Hong Kong		
 India			
 South Korea			
 Canada			

ASKING GLOBAL CONSUMERS HOW THEY DEFINED TOURISM EXPERIENCES



INDIVIDUALISED RESEARCH ON 89 TOTAL EXPERIENCES WITH AN ADDITIONAL 54 SUB-EXPERIENCES.



THE MOST COMPREHENSIVE VIEW ON GLOBAL DEMAND THAT TOURISM AUSTRALIA HAS EVER COMPILED

UNDERSTANDING MARKET DEMAND: AERIAL TOURS



INTEREST IN EXPERIENCE ACROSS THE GLOBE

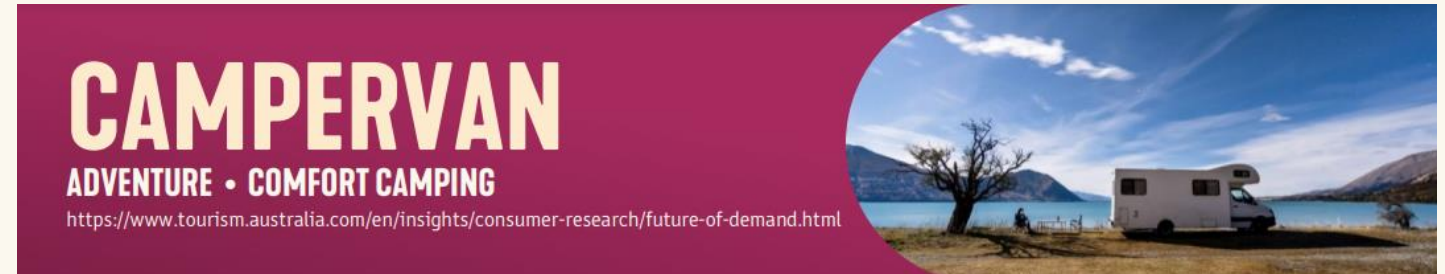
MARKET	INTEREST %	RANK OUT OF 89 EXPERIENCES	SIZING ('000)
GLOBAL	33%	26	36,770
Malaysia	45%	9	753
Taiwan	45%	18	1,216
Singapore	36%	18	554
China	32%	19	9,071
Vietnam	41%	20	888
Indonesia	40%	22	544
South Korea	35%	23	3,394
Philippines	44%	24	1,226
Hong Kong	34%	24	430
Thailand	35%	30	731
Japan	25%	33	1,967
Italy	30%	35	943
Germany	26%	36	1,480
New Zealand	31%	37	232
France	24%	40	1,746
UK	26%	45	2,479
India	32%	46	1,157
USA	25%	47	6,514
Canada	23%	50	1,446
AUSTRALIANS	29%	39	2,554

Malaysians expressed the greatest interest in aerial tours

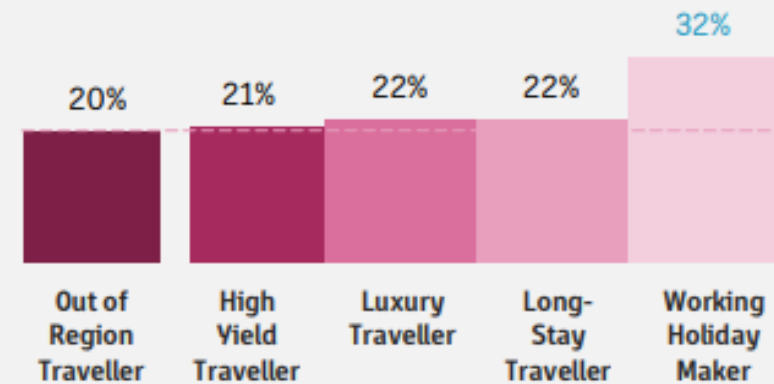
Chinese, South Koreans and **Americans** have the greatest volume of persons interested in aerial tours.

Source: Tourism Australia's Future of Demand, 2022

TRIP TYPES



INTEREST IN THE EXPERIENCE BY SEGMENT



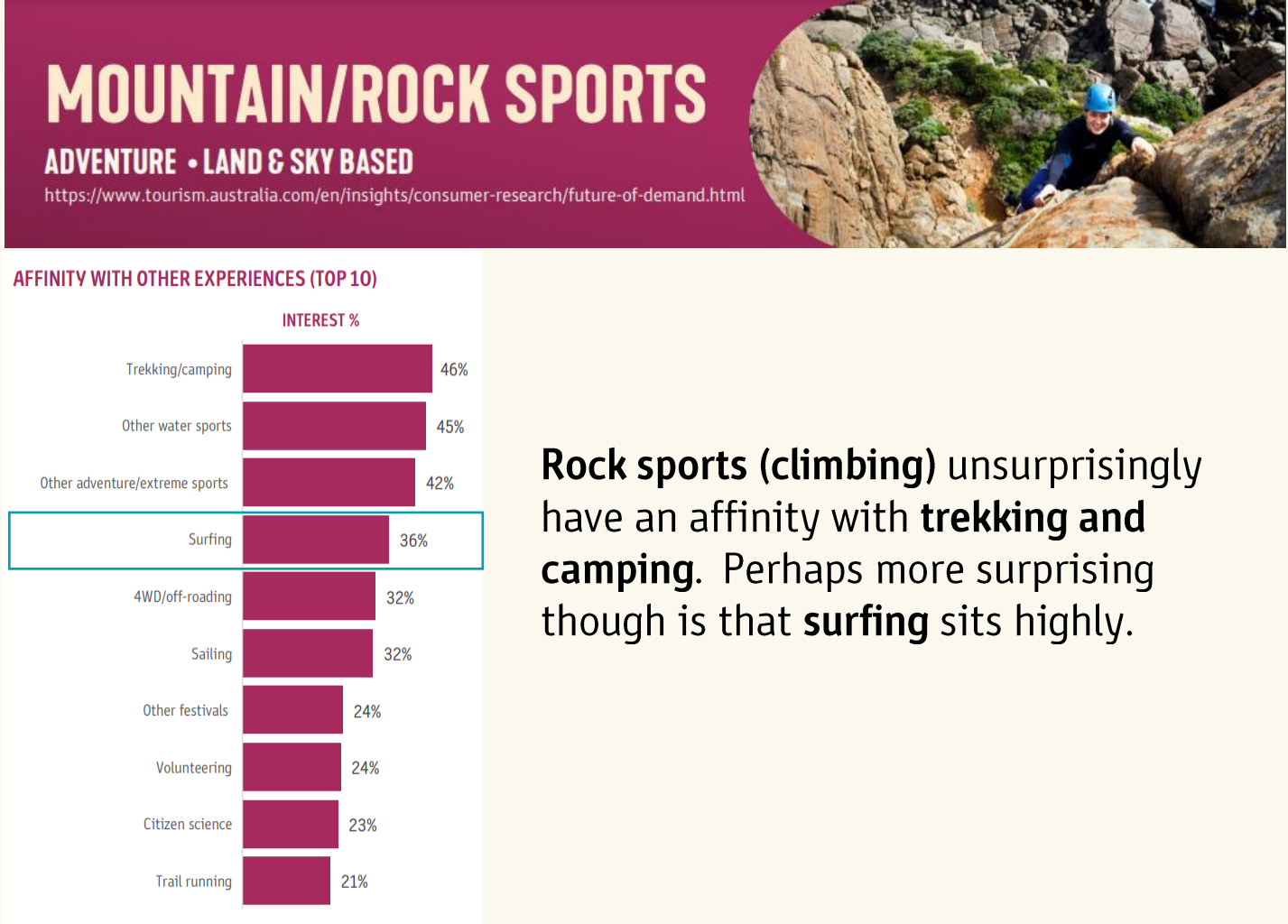
1 in 5 Out of Region Travellers are interested in campervan experiences when they travel, with **Working Holiday Makers** more interested with **1 in 3** expressing interest.

DEMOGRAPHICS



Exploring wilderness & nature. With a global perspective it is an experience that leans slightly older and wealthier interest group.

AFFINITY EXPERIENCES: WHAT EXPERIENCES COMPLIMENT EACH OTHER



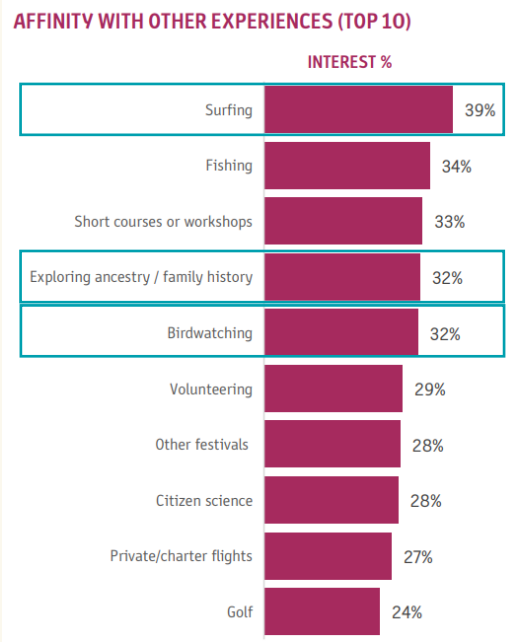
Rock sports (climbing) unsurprisingly have an affinity with **trekking and camping**. Perhaps more surprising though is that **surfing** sits highly.

SOME (NOT SO) SURPRISING AFFINITIES

TRAIL RUNNING

ADVENTURE • EXPLORATION

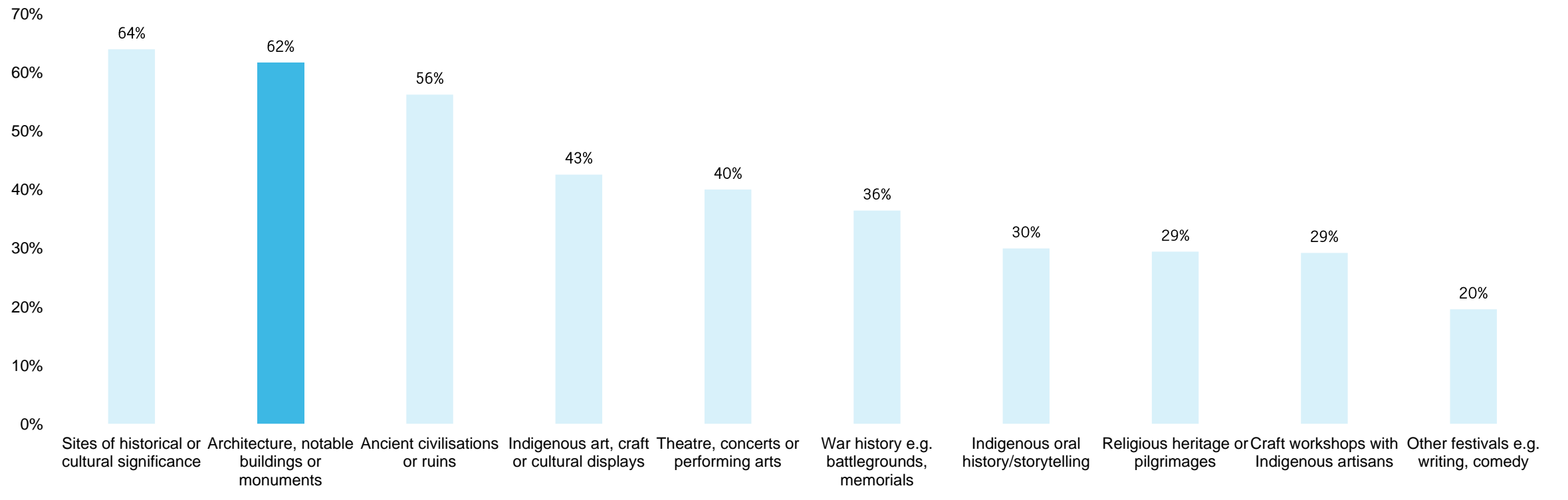
<https://www.tourism.australia.com/en/insights/consumer-research/future-of-demand.html>



Trail runner tourists are also rather interested in exploring their **ancestry/family history** and **bird watching**.

MUSEUMS

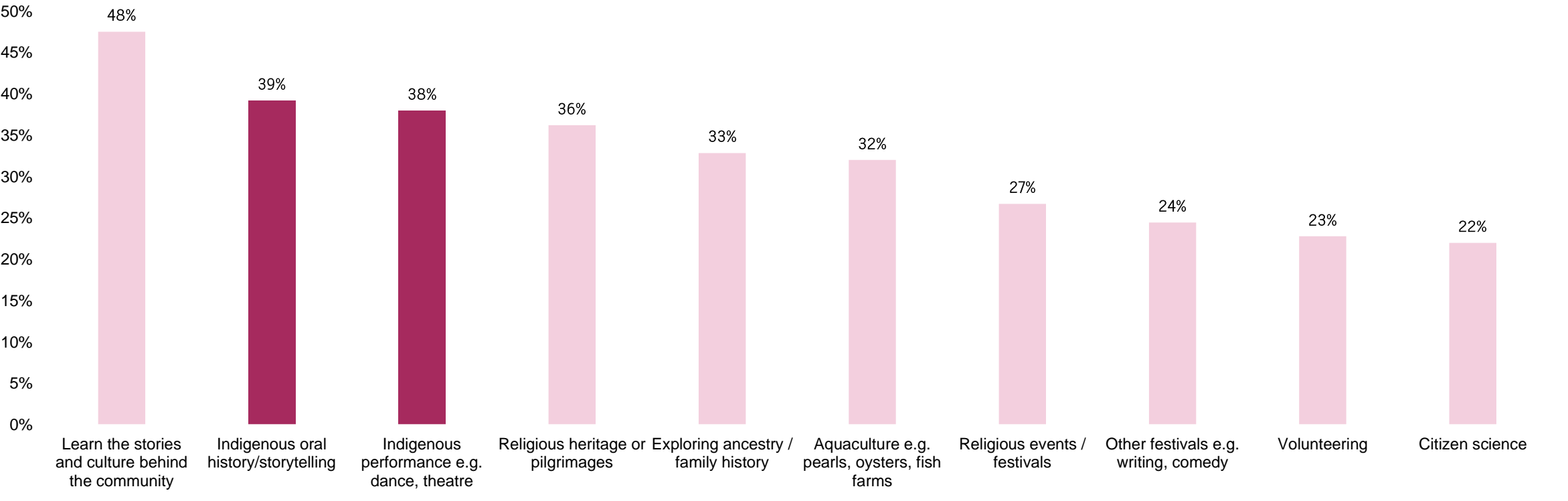
**WHICH OF THESE EXPERIENCES WOULD YOU BE INTERESTED IN DOING ON A FUTURE INTERNATIONAL VACATION?
BY MUSEUMS/GALLERIES**



Source: Tourism Australia's Future of Demand, 2022

WAR HISTORY

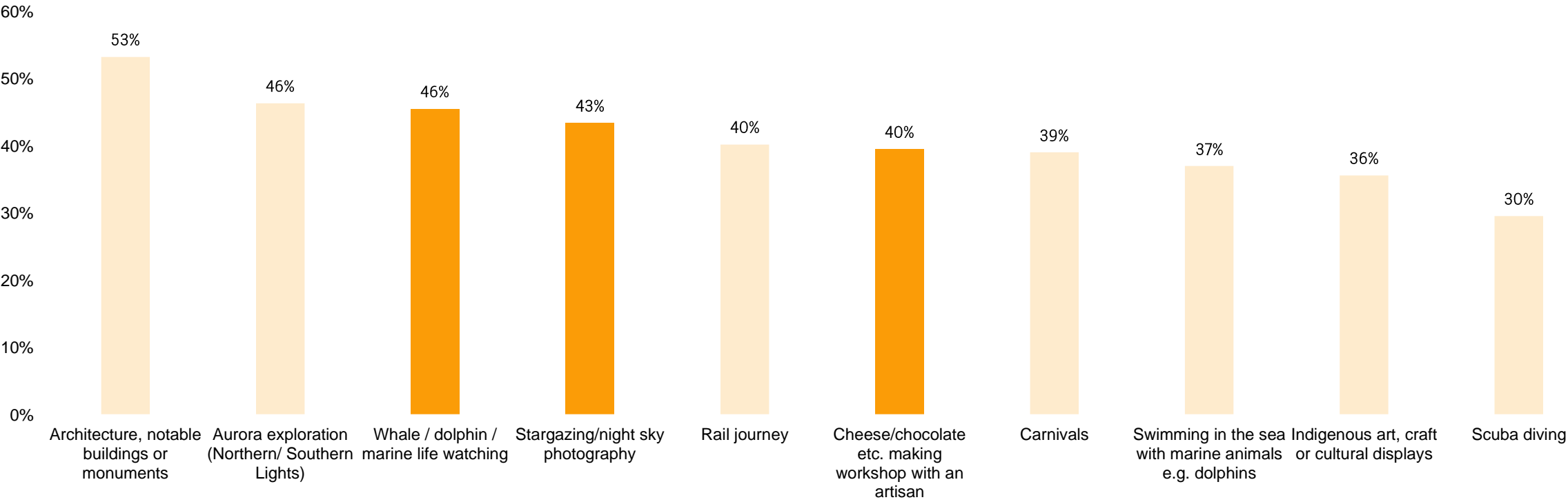
WHICH OF THESE EXPERIENCES WOULD YOU BE INTERESTED IN DOING ON A FUTURE INTERNATIONAL VACATION? BY WAR HISTORY E.G. BATTLEFIELDS, MEMORIALS



Source: Tourism Australia's Future of Demand, 2022

HOT AIR BALLOONING

WHICH OF THESE EXPERIENCES WOULD YOU BE INTERESTED IN DOING ON A FUTURE INTERNATIONAL VACATION? BY HOT AIR BALLOON



Source: Tourism Australia's Future of Demand, 2022

QUESTIONS FOR YOU

**IS THERE GROWTH OPPORTUNITIES IN NEW MARKETS?
(DOES YOUR EXPERIENCE VISITOR PROFILE MATCH FOD PROFILES?)**

ARE YOU CROSS PROMOTING THE RIGHT EXPERIENCES?

IS THERE ANY “CROSS BUSINESS” COLLABORATIONS TO DRIVE A BETTER OUTCOMES?

BRING IT ALL TOGETHER

AUSTRALIAN INTERNATIONAL VISITOR RECOVERY ON TRACK

NORTH ASIAN RETURN YET TO BE FULLY FELT

CURRENT KEY INTERNATIONAL MARKETS FOR ACT: NZ, USA, UK, INDIA

FUTURE OF DEMAND: ARE YOU MAXIMISING OPPORTUNITY PRESENTED BY INTERNATIONAL VISITORS?

THANKS

