Tourism Australi

Wednesday 24th July 2024

LEARNINGSFROM THE LATES TOURISE DATA

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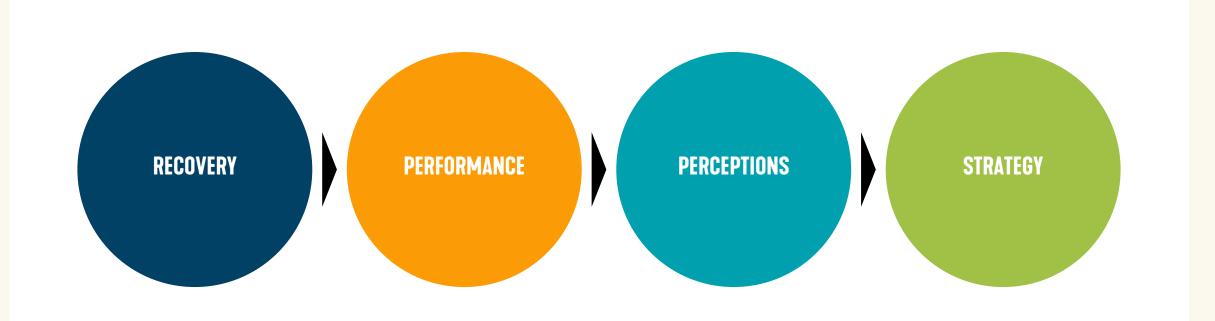
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THE NEXT 25 MINUTES...





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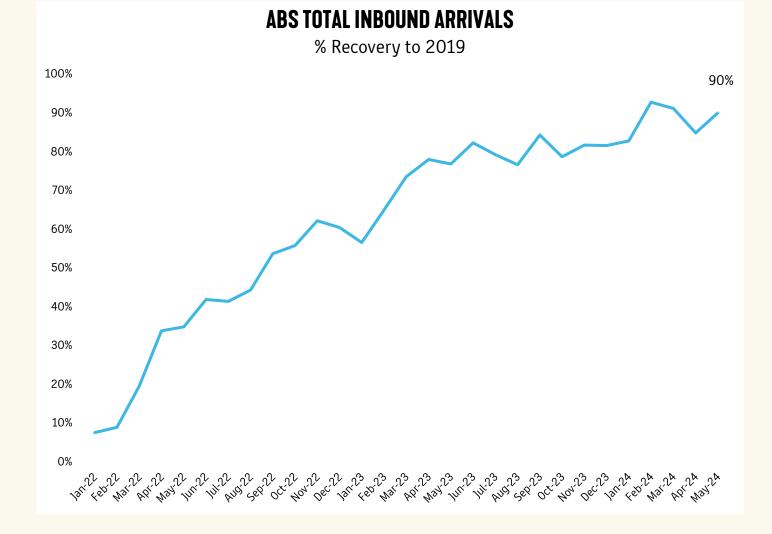
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RECOVERY



OUR RECOVERY IN INBOUND VISITATION MARCHES ONWARDS...





Source: ABS Short-Term Arrivals

THAT RECOVERY IS Comparable to our Direct competitors

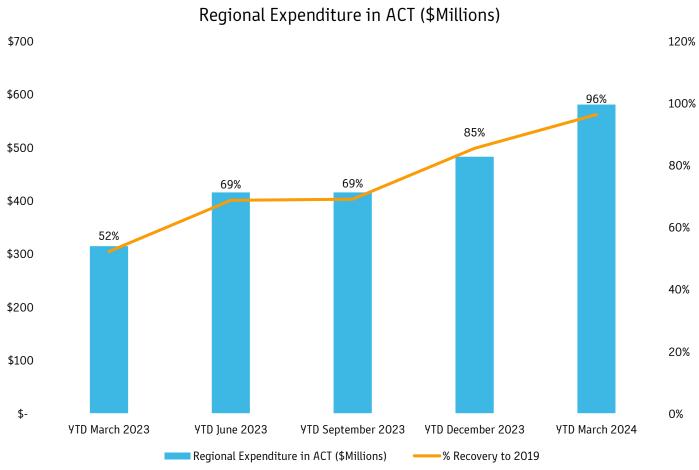


RECOVERY BY MARKET: YTD 2023 VS 2019



Source: WTTC Global Tourism Barometer, March 2024

EXPENDITURE FOR THE ACT WELL ON THE WAY TO RECOVERY



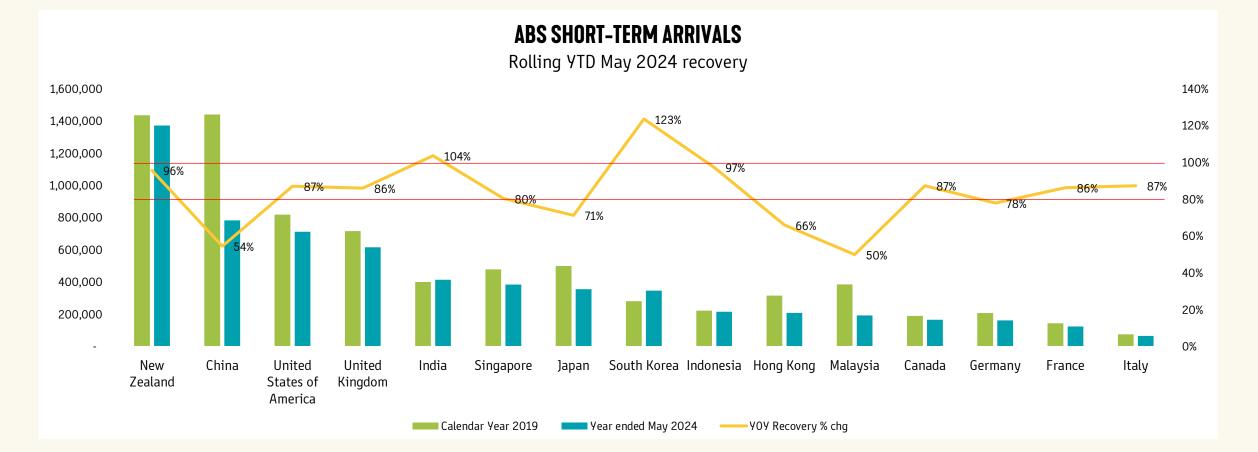
ACT SPECIFIC EXPENDITURE



PERFORMANCE



RECOVERY IN VISITATION VARIES ACROSS MARKETS

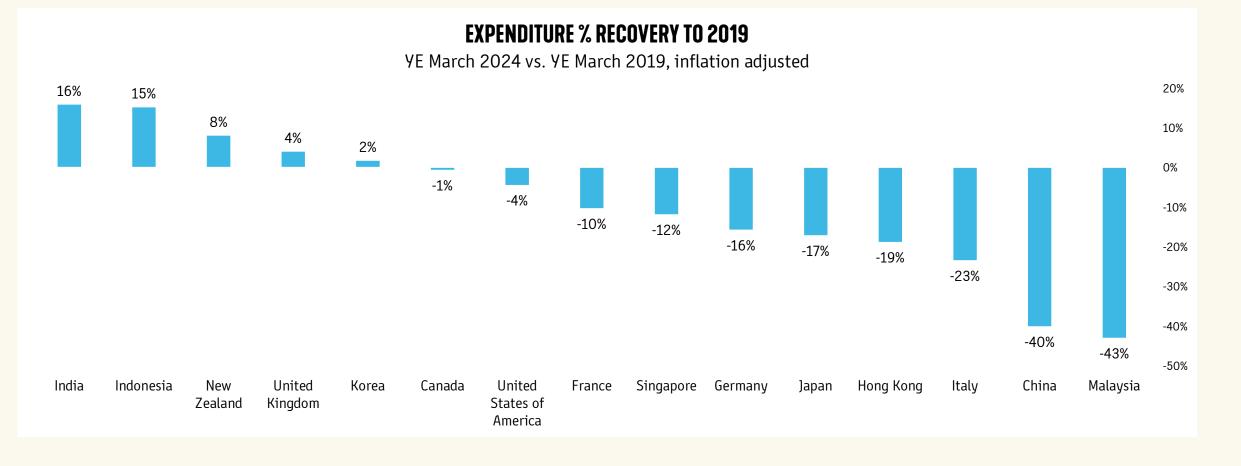


Source: ABS Short-Term Arrivals *Recovery to CY 2019



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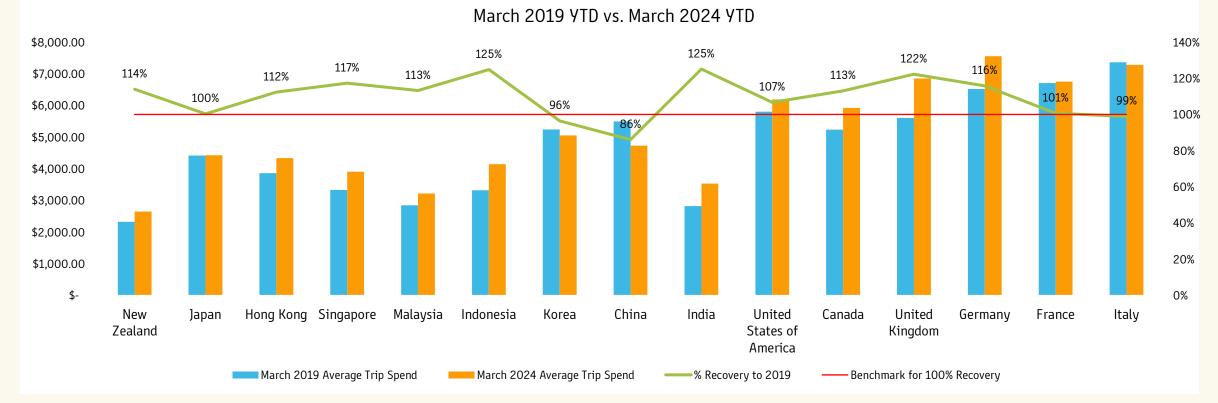
EXPENDITURE IS UP, BUT INFLATION IS A FACTOR





AVERAGE TRIP SPEND IS LARGELY UP!

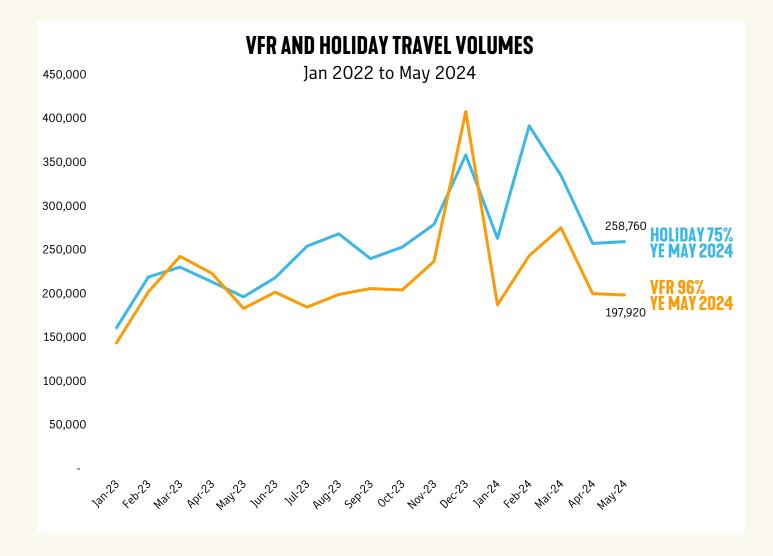
RECOVERY IN AVERAGE (TOTAL) TRIP SPEND ADJUSTED FOR INFLATION





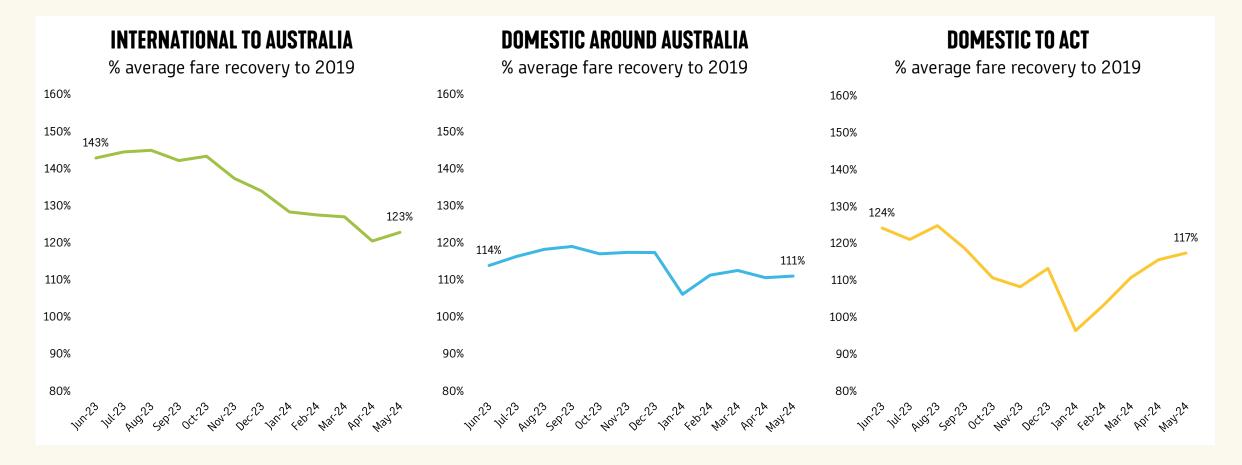
THERE'S A BIG DIFERENCE BETWEEN HOLIDAY AND VFR, HOWEVER.

Holiday spend is around 40% higher than VFR spend levels which has big implications for yield.





AVIATION COSTS ARE UP BUT IT'S HARD TO COMPARE TO 2019





Source: IATA Airports IS

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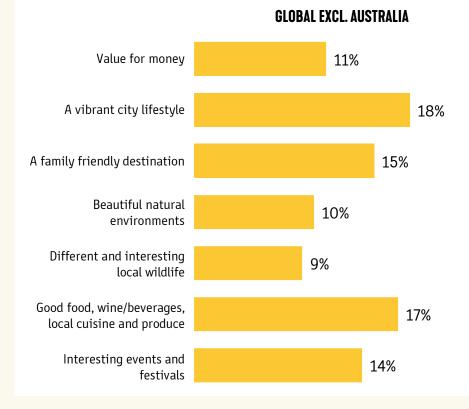
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PERCEPTIONS



CANBERRA'S CURRENT ASSOCIATIONS

CANBERRA DESTINATION ASSOCIATIONS



Source: Tourism Australia Consumer Demand Project B7. Which of these Australian destinations do you associate with the following attributes? Base: Oct-Dec 23 Global excl. Australia (n=12,616) , North America n=1,504, UK & Europe n=3,006, North Asia n=3,600, South/Southeast Asia n=3,605,



PROXIMITY PLAYS A BIG PART IN DEPTH OF UNDERSTANDING

CANBERRA DESTINATION ASSOCIATIONS BY SOURCE MARKET REGIONS

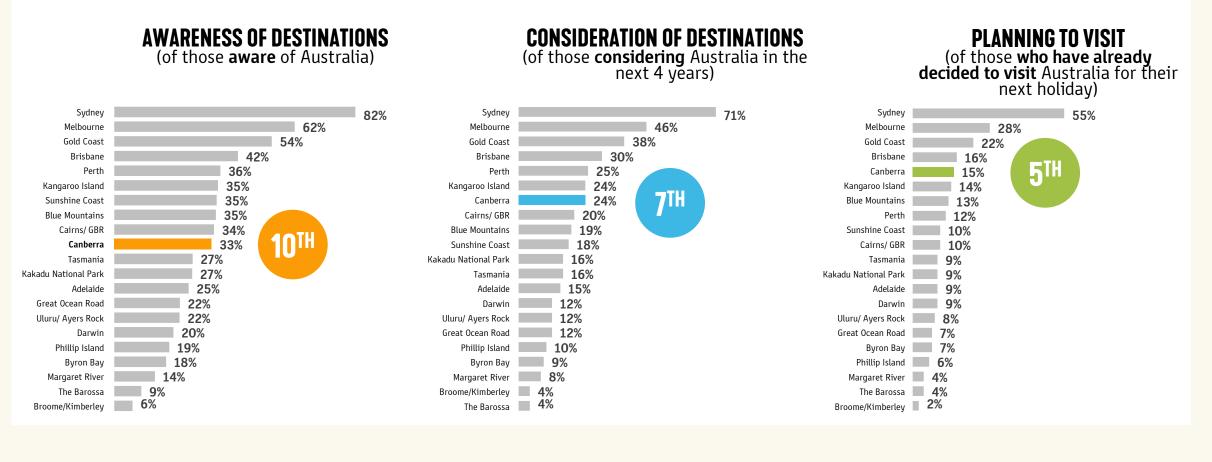
	GLOBAL EXCL. AUSTRALIA	NORTH AMERICA	UK & EUROPE	NORTH ASIA	SOUTH/SOUTHEAST ASIA
Value for money	11%	9%	10%	11%	16%
A vibrant city lifestyle	18%	10%	20%	18%	21%
A family friendly destination	15%	12%	16%	15%	17%
Beautiful natural environments	10%	9%	9%	9%	13%
Different and interesting local wildlife	9%	9%	8%	8%	11%
Good food, wine/beverages, local cuisine and produce	17%	12%	17%	17%	19%
Interesting events and festivals	14%	11%	14%	13%	18%

Source: Tourism Australia Consumer Demand Project

B7. Which of these Australian destinations do you associate with the following attributes? Base: Oct-Dec 23 Global excl. Australia (n=12,616), North America n=1,504, UK & Europe n=3,006, North Asia n=3,600, South/Southeast Asia n=3,605,

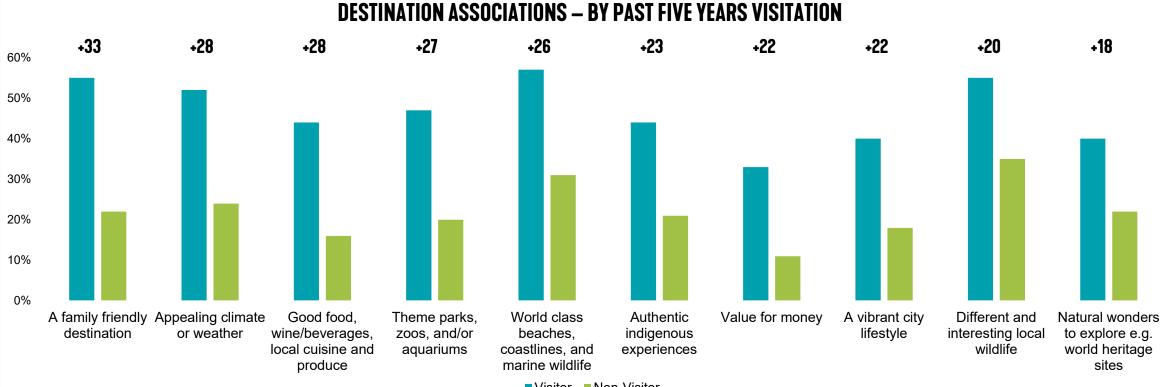


IN GOOD NEWS...CANBERRA SELLS!





AND IN GENERAL, AUSTRALIA STILL OVER DELIVERS



Visitor Non-Visitor

Source: Tourism Australia Consumer Demand Project Base: Oct-Dec 23 Global excl. Australia (n=12,616)

Question: You said [factor] is important to you. Which of these destinations do you associate with [factor]? (Those who ever visited Aus vs those who have not)



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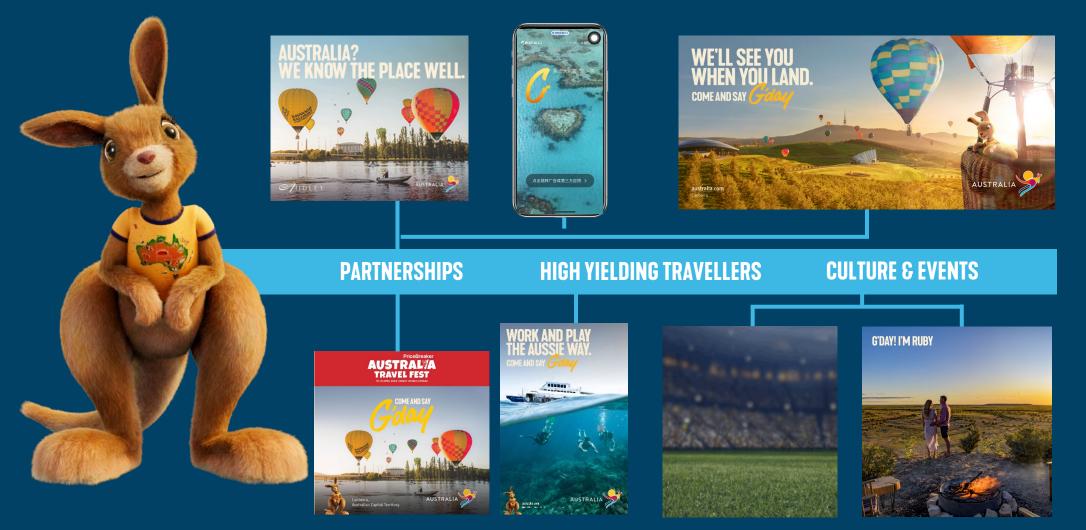
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STRATEGY

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THE BRAND CAMPAIGN CONTINUES TO SPEARHEAD OUR WORK



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SUPPORTED BY A BREADTH OF ACTIVITIES



CONTENT CAMPAIGNS







BROADCAST & IMHP





WORKING HOLIDAY MAKER





SOCIAL MEDIA



GLOBAL PR







CONTENT PARTNERSHIPS





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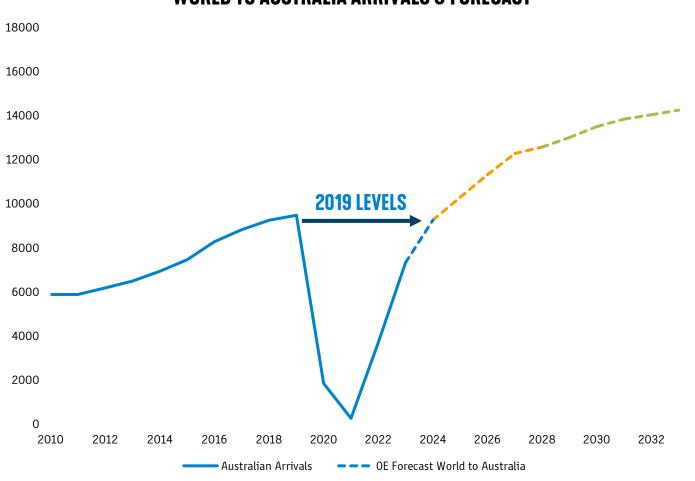
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FILL SEATS VIA AIRLINE PARTNERSHIPS

中国南方航空 CHINA SOUTHERN CHINA EASTERN	CATHAY PACIFIC	malaysia 37	Air Asia	KORFAN AIR
CHINA	HONG KONG & SOUTH KOREA	MALAYSIA	MALAYSIA	SOUTH KOREA
の 川航空 SICHUAN AIRLINES	호주, 우리가 제일 잘 아는 곳이죠! 19월 58월 0월 4년, > CAURNINGER	GREAT AUSTRALIAN DEALS. maiayaa D	<complex-block></complex-block>	브리즈번과 나누는 반가운 인사 진짜 호주를 만날 시간, 아이아 이야하는 아이아 이야하는 아이아이아 이야하는 아이아이아이아 이야하는 아이아이아이아 이야하는 아이아이아이아 이야하는 아이아이아이아이아이아 이야하는 아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이아이
australia	QANTAS		UNITED	🛞 AIR CANADA
JAPAN	8 X MARKETS	7 X MARKETS	USA	CANADA
	Come and Say Grday with Cantas Tourism Australia (stbA)	Flüge nach Australien ab £ 9999 : Metzt buchen auf singaporeair.com/australien ¹⁶ s geters Bediganger	SAVE ON FLIGHTS TO BRISBANE, MELBOURNE OR SUDNEY TODAY.	SOLDE POUR L'AUSTRALIE Reserver die lie 24 mai 2021 Lie conditions süppliquent



SHIFTING OUR FOCUS TO THE NEXT CHAPTER OF SUSTAINABLE GROWTH



WORLD TO AUSTRALIA ARRIVALS & FORECAST

Sources: Oxford Economics (OE) Forecasts, December 2023.



GROWING AUSTRALIAN TOURISM IN THE LONGER TERM

DRIVE DEMAND ENABLING A COMPETITIVE AND SUSTAINABLE TOURISM INDUSTRY						
RECOVER	DRIVE	DIVERSIFY				
GET BACK TO 2019 LEVELS	MAINTAIN A HIGH GROWTH RATE	DRIVE NEW, SUSTAINABLE GROWTH				
'REACTIVE OPPORTUNITIES'	'INVEST IN CURRENT COMPETITIVE ADVANTAGES'	'BROADEN APPEAL FOR FUTURE ADVANTAGES'				



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THANK YOU