

# REBUILDING TOURISM TO AUSTRALIA

**PHILLIPA HARRISON**

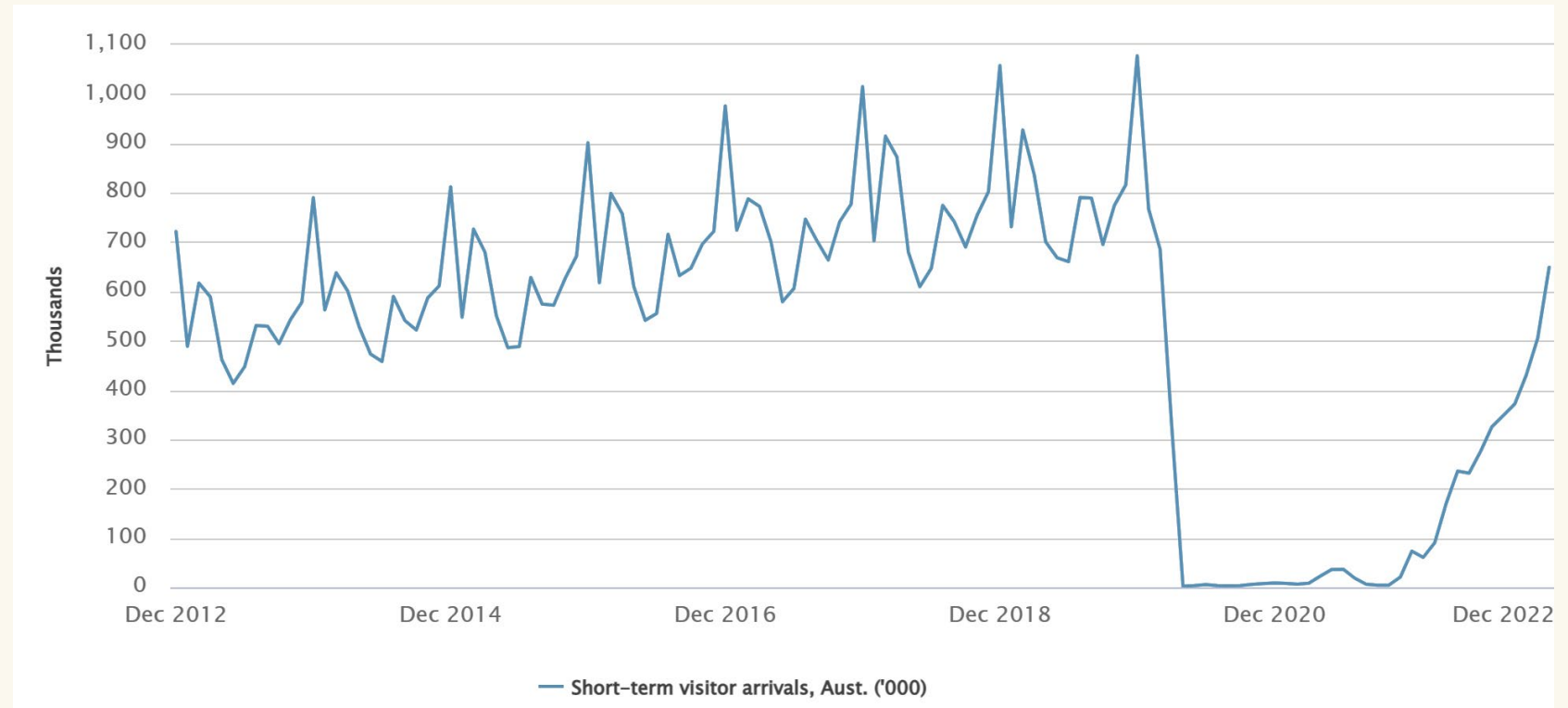
**MANAGING DIRECTOR**

**TOURISM AUSTRALIA**



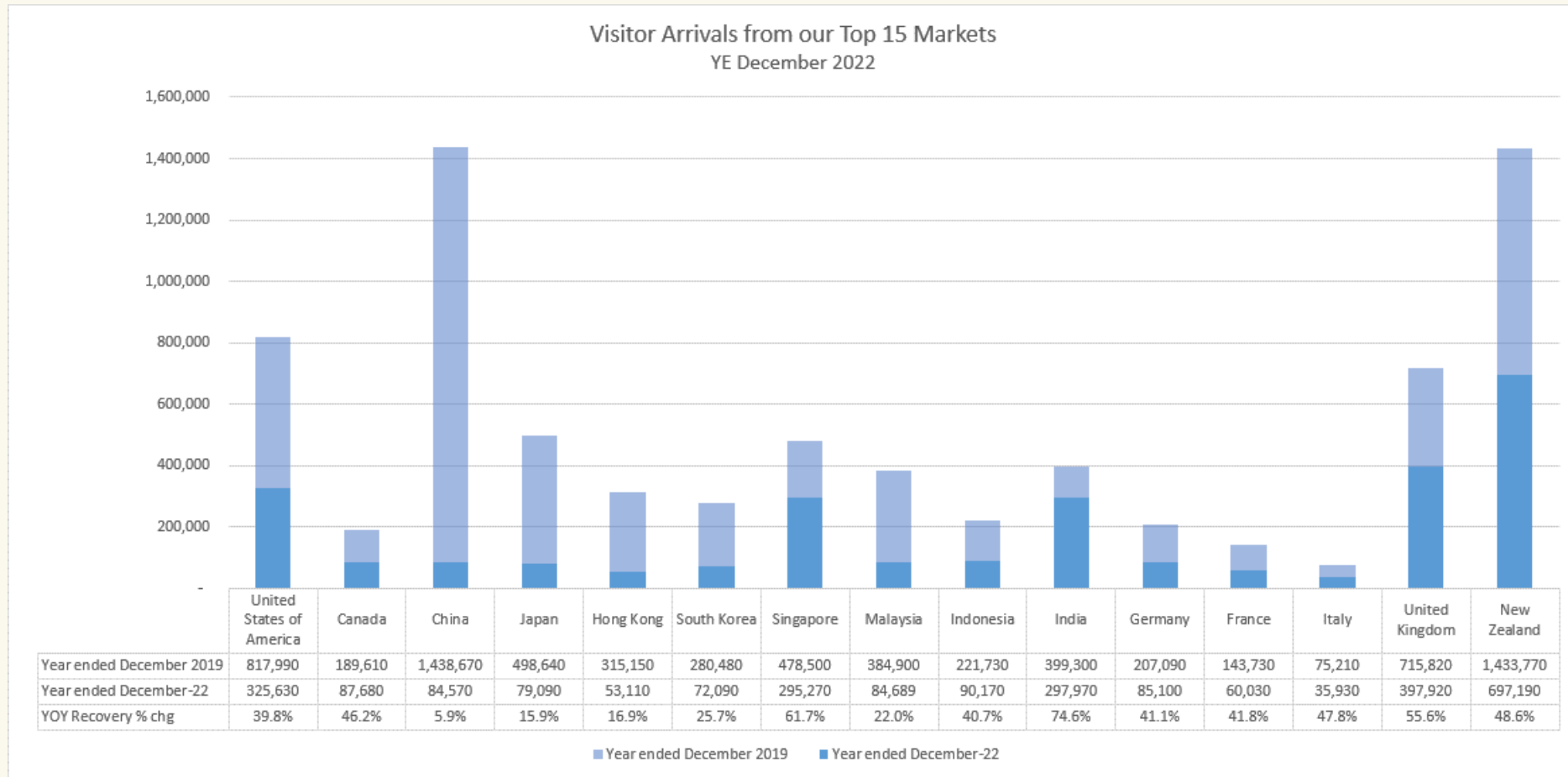
**IT'S BEEN A CHALLENGING FEW YEARS... BUT WE ARE STEADILY POWERING OUR WAY BACK TO PRE COVID-19 LEVELS**

**SHORT TERM VISITOR ARRIVALS**

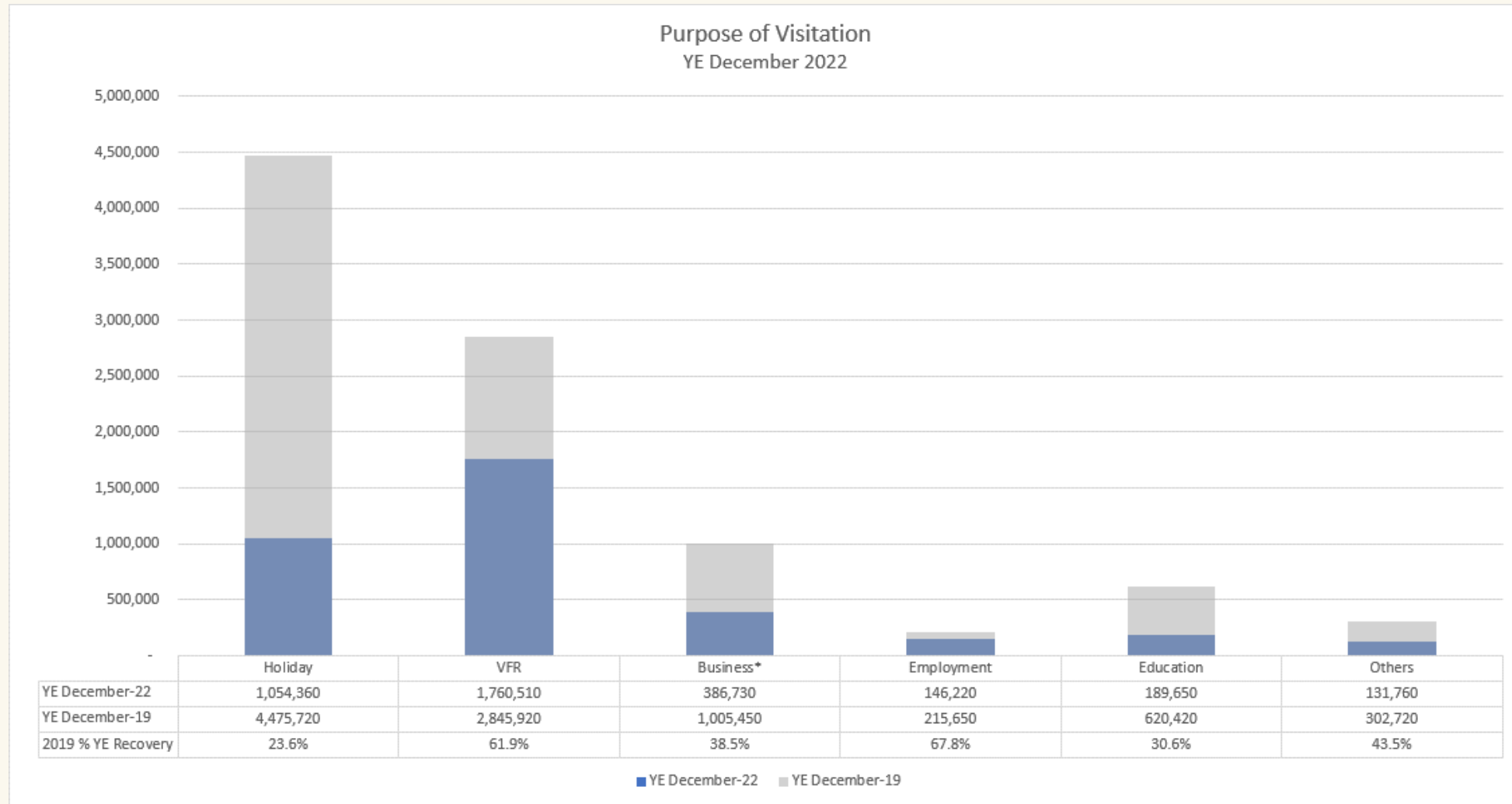


Source: Australian Bureau of Statistics, Overseas Arrivals and Departures, Australia, December 2022

# HOW OUR 15 KEY MARKETS ARE REBUILDING



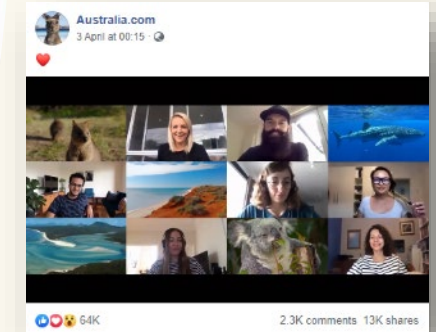
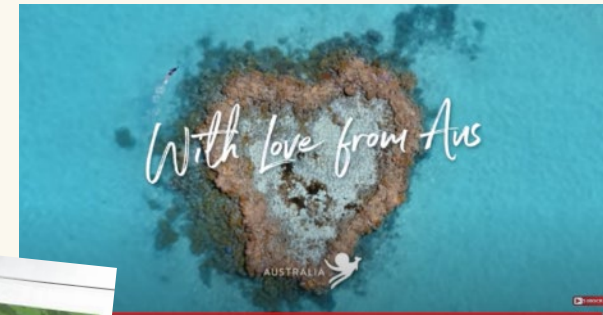
# HOW OUR VISITOR ECONOMY IS REBUILDING



# WE KEPT THE LIGHTS ON INTERNATIONALLY...



Koalas gehören zu meinem Leben, seit ich gerade einmal fünf Wochen alt, als meine Mutter Ali mich zum ersten Mal mit in ihre Tierklinik auf Magnetic Island vor der Nordküste von Queensland nahm. Sie ist dort als Ärztin tätig, mein Vater Tim heisst bei der Arbeit zugewandert, sobald ich dann groß genug war, um helfen zu können, habe ich mich angepackt. Zumeist haben meine Eltern sich um kranke und verletzte Koalas gekümmert. Besonders pflegebedürftige Bärchen haben sie auch mit nach Hause gebracht. Wegen des Klimawandels werden immer öfter verwaisete Koalababys in der Tierklinik von Magnetic Island abgegeben. Ihre Mütter finden nicht mehr genug Nahrung, weil Blätter und Blätter vertrocknen. Das tut mir im Herzen weh...



PUBLIC RELATIONS

CONTENT

LIVE WEBINAR

## Virtual Fam Trip Down Under

Win a case of Premium Australian Wine!

**THURSDAY, MAY 7 AT 11AM PACIFIC / 2PM EASTERN**

Join three of your fellow travel advisors on a virtual fam trip to Australia.

- Last year, three advisors became Aussie Specialist Ambassadors and traveled on an action packed fam trip to Australia where their incredible experiences were filmed.
- Deftly led by travel advisors for travel advisors this webinar aims to give you some top tips on the amazing Australian experiences on offer for when the world starts to travel again.
- Hear how one of them even met Chris Hemsworth in his hometown of Byron Bay!

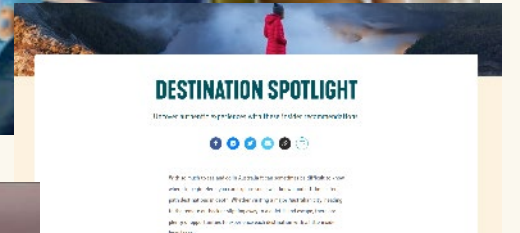
Three live attendees will win a case of premium Australian whisky!

**REGISTER NOW**



AUSSIE SPECIALIST PROGRAM

# AND WE MOVED OUR FOCUS TO DOMESTIC...



# WE ALSO SUPPORTED INDUSTRY OPERATORS WITH THE NATIONAL EXPERIENCE CONTENT INITIATIVE

**DEVELOPING NEW IMAGE AND VIDEO ASSETS**

**SPANNING 57 TOURISM REGIONS**

**COVERING UP TO 1,400 EXPERIENCES**







# FUTURE DEMAND FOR AUSTRALIA

THE  
NBERRA  
DISTILLERY

THE  
CANBERRA  
DISTILLERY

THE  
CANBERRA  
DISTILLERY

Px  
Heavy char  
THE  
CANBERRA  
DISTILLERY

THE  
ERRA  
LERY

THE  
CANBERRA  
DISTILLERY

THE  
CANBERRA  
DISTILLERY

#2  
J.L. Rodriguez  
Master  
Spain  
PX  
Heavy Char  
THE  
CANBERRA  
DISTILLERY

# THIS IS A MOMENT OF EXTREME COMPETITION



## FEWER TRAVELLERS

Airline **capacity** to Australia is still rebuilding

Travellers are more worried about their **finances**

People are still staying closer to **home**



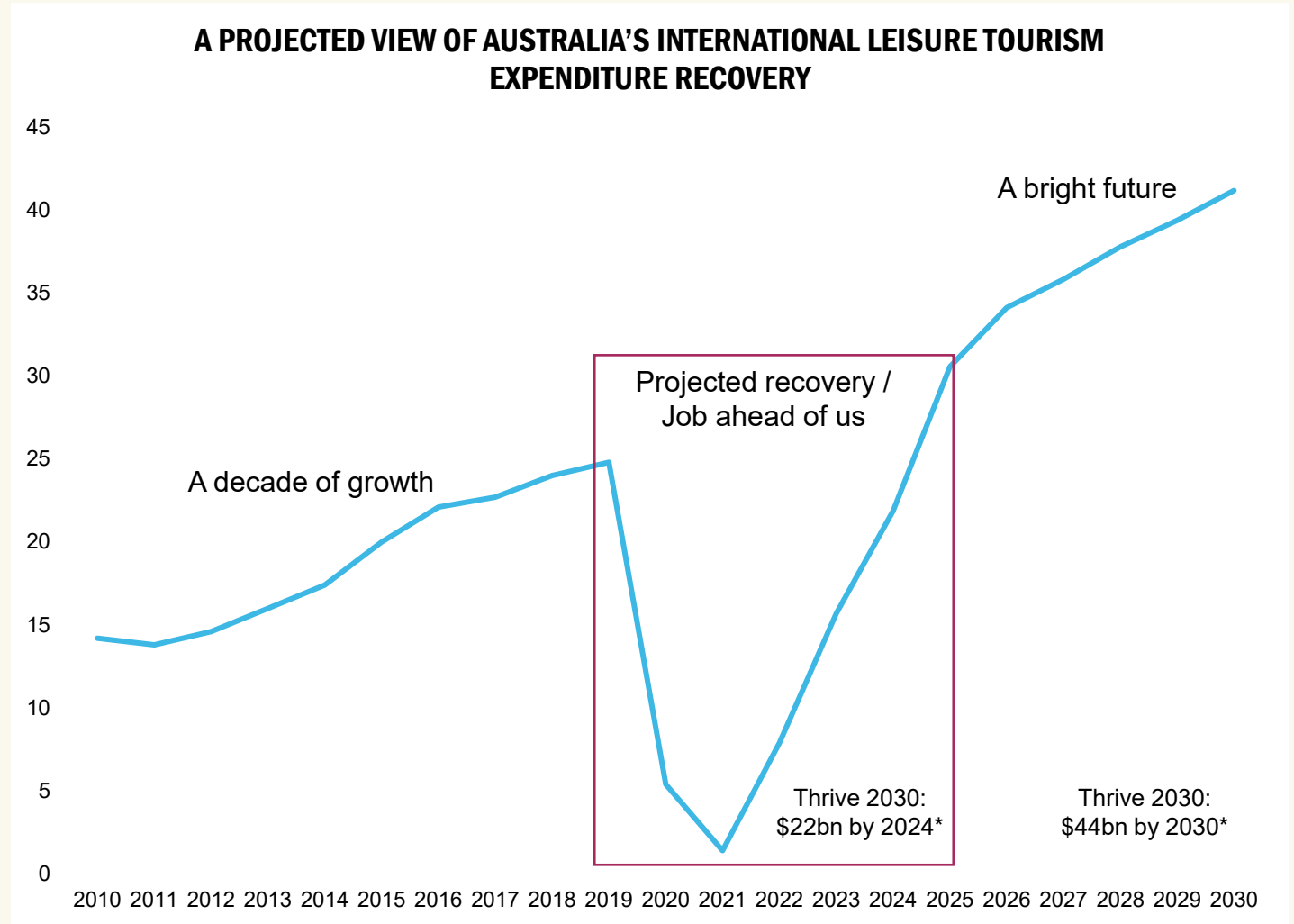
## MORE COMPETITION

All countries **rebuilding** their visitor economies

**Media costs** & inflation continue to rise

Global **creative** work is better than ever

# THE FUTURE FOR TOURISM IS BRIGHT, BUT WILL BE HARD FOUGHT

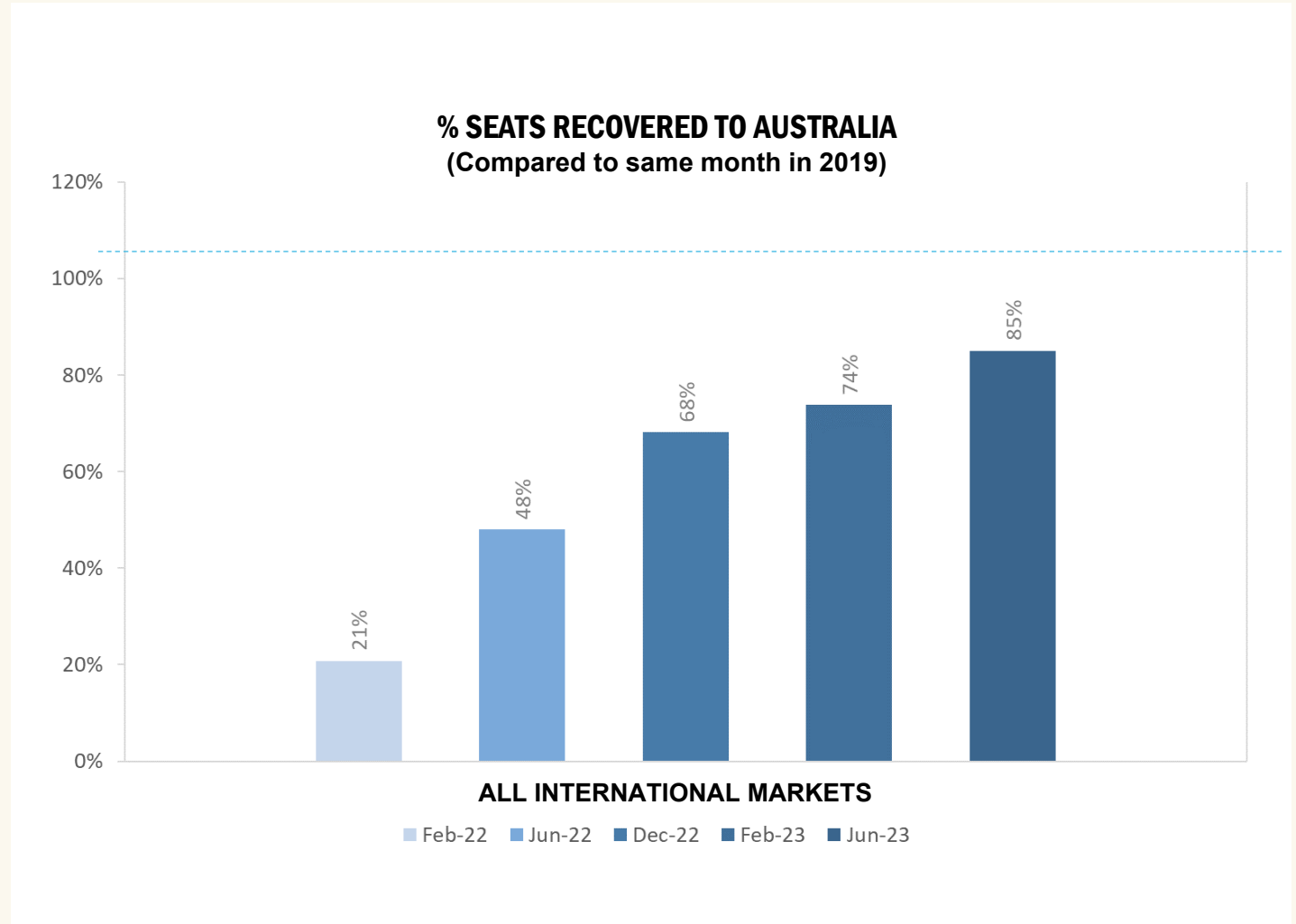


Source: Tourism Research Australia, International Visitor Survey YE December 2010- 2021; Thrive 2030 A Reimagined Visitor Economy YE December 2024 & 2030; Oxford Economics Forecast Arrivals, Australia Expenditure. \*Total Visitor Expenditure, YE December, excluding expenditure of long-term international students.

# INTERNATIONAL RECOVERY - AVIATION SEAT CAPACITY

## February 2023 levels:

<b>India:</b>	271% of seats scheduled
<b>South Korea:</b>	111% of seats scheduled
<b>Indonesia:</b>	102% of seats scheduled
<b>Canada:</b>	85% of seats scheduled
<b>Singapore:</b>	84% of seats scheduled
<b>NZ:</b>	76% of seats scheduled
<b>USA:</b>	76% of seats scheduled
<b>Malaysia:</b>	73% of seats scheduled
<b>Japan:</b>	65% of seats scheduled
<b>China:</b>	23% of seats scheduled
<b>Qatar:</b>	128% of seats scheduled
<b>Singapore A'lines:</b>	84% of seats scheduled
<b>Qantas:</b>	78% of seats scheduled
<b>Cathay Pacific:</b>	59% of seats scheduled
<b>Emirates:</b>	50% of seats scheduled
<b>Etihad:</b>	42% of seats scheduled

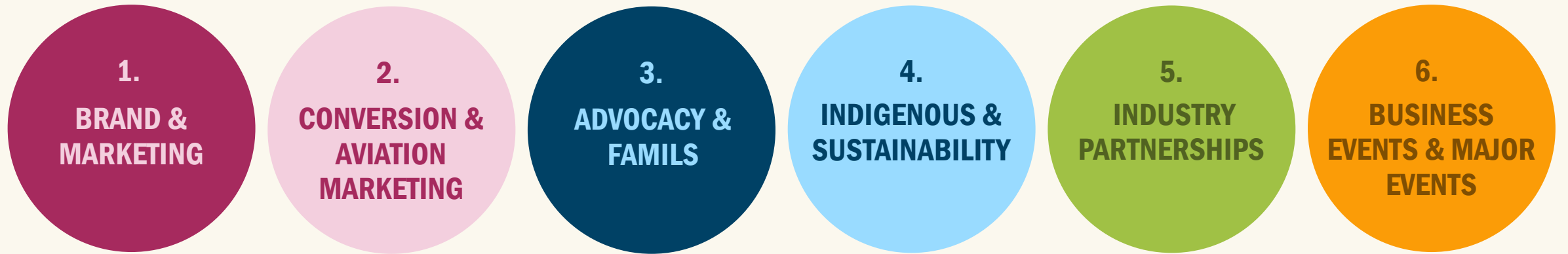


Source: Cirium SRS Analyser air schedules data as at 30 Jan-23

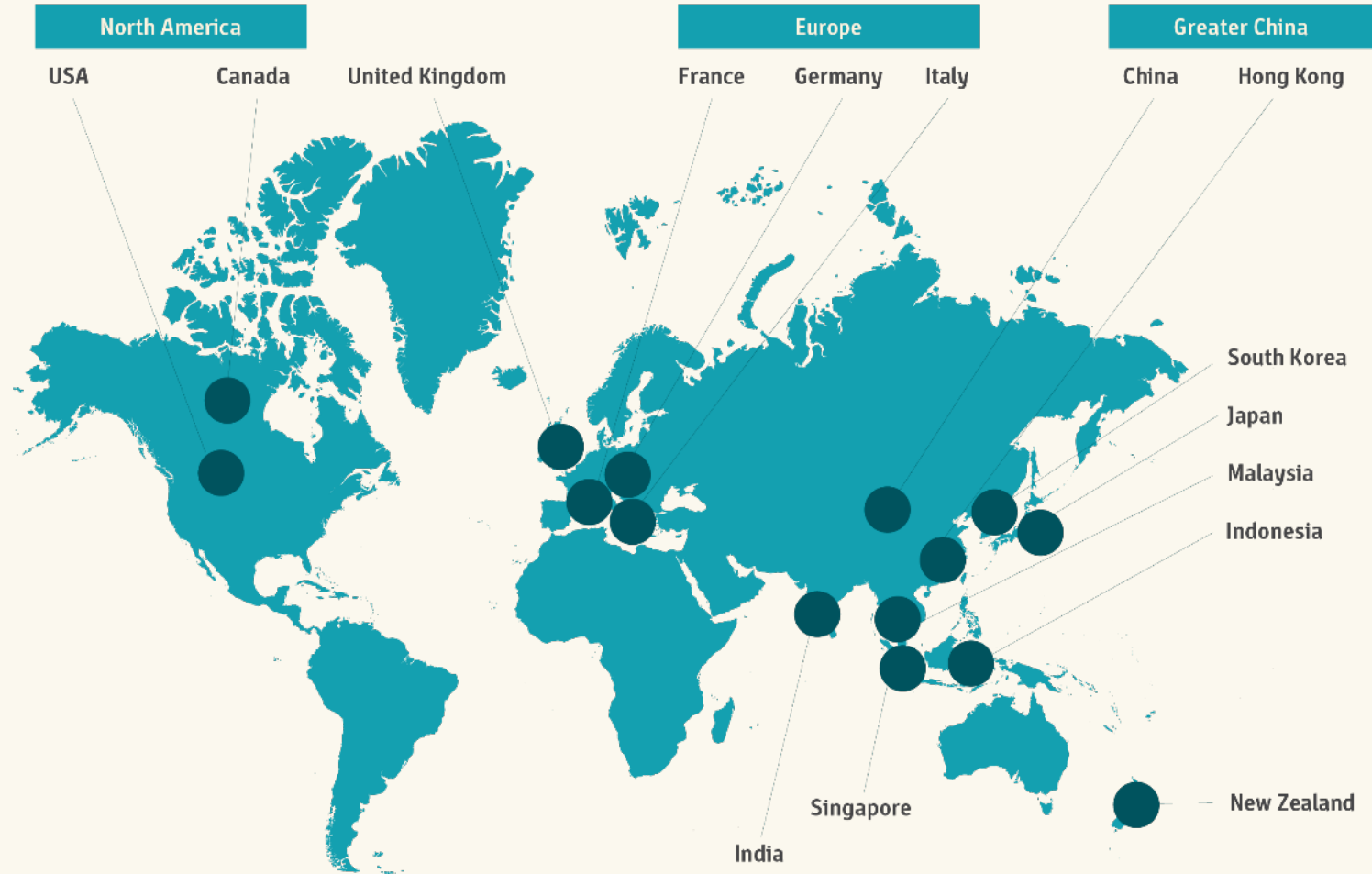
A scenic landscape photograph showing four people from behind, standing on a grassy hillside and looking out over a valley towards a range of hills under a dramatic, cloudy sky at sunset. The people are wearing hats and casual clothing. The text 'TOURISM AUSTRALIA'S RESPONSE' is overlaid in large white letters across the center of the image.

# TOURISM AUSTRALIA'S RESPONSE

# AREAS OF FOCUS 2023



# OUR FOCUS IS ACROSS 15 MARKETS



# 21 FEBRUARY 2022 - BORDERS OPENED 'COME AND SAY G'DAY'!



# MARKETING FOUNDATIONS OF ‘COME AND SAY G’DAY’

## GLOBAL IN NATURE

Invitation to  
the world

Developed  
collaboratively with  
teams in 15  
markets

## BACKED BY RESEARCH

Brand Codes  
Destination Drivers  
Proposition  
Creative Territories  
Concept &  
Execution

## BRAND FOCUS

Healthy brand  
investment across  
9 priority ‘grow  
markets’ plus  
partnership budget

## PRINCIPLES OF EFFECTIVE ADVERTISING

Emotion  
Story Arc  
Music  
Fluent Devices  
Characters  
Talent

# WE LEVERAGED AUSTRALIAN ICONS TO REMIND THE WORLD WHAT THEY KNOW AND LOVE ABOUT AUSTRALIA



**TALENT**

+



**CHARACTERS**

+



**AUSSIE LOCATIONS, PEOPLE  
& EXPERIENCES**

+



**MUSIC**

# GLOBAL LAUNCH EVENT HIGHLIGHTS



**UK**



**USA**



**JAPAN**



**SINGAPORE**



**ITALY**

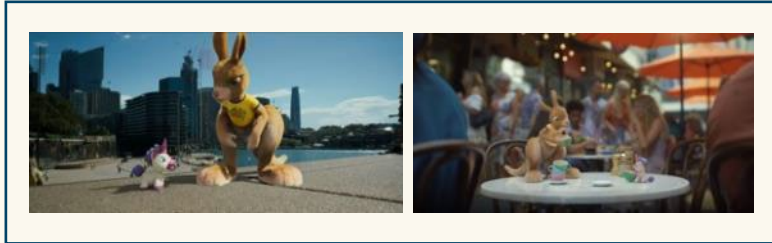


**GERMANY**



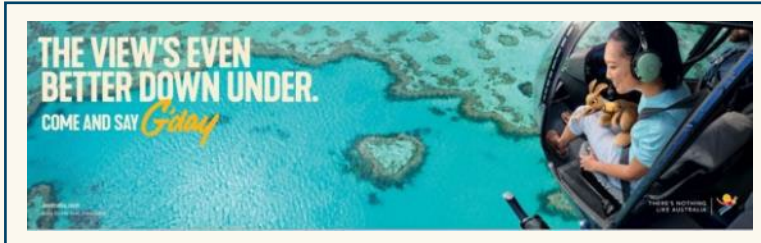
**FRANCE**

# COME & SAY G'DAY CAMPAIGN APPROACH



## SHORT FILM

Drive **fame and impact** for launch.  
Platform for PR amplification.  
Establish story of Ruby, our new “brand ambassador”.



## ADVERTISING & MID-FUNNEL CONTENT

Hardworking advertising and content partnerships to **showcase our destinations, experiences** and welcoming Australians.

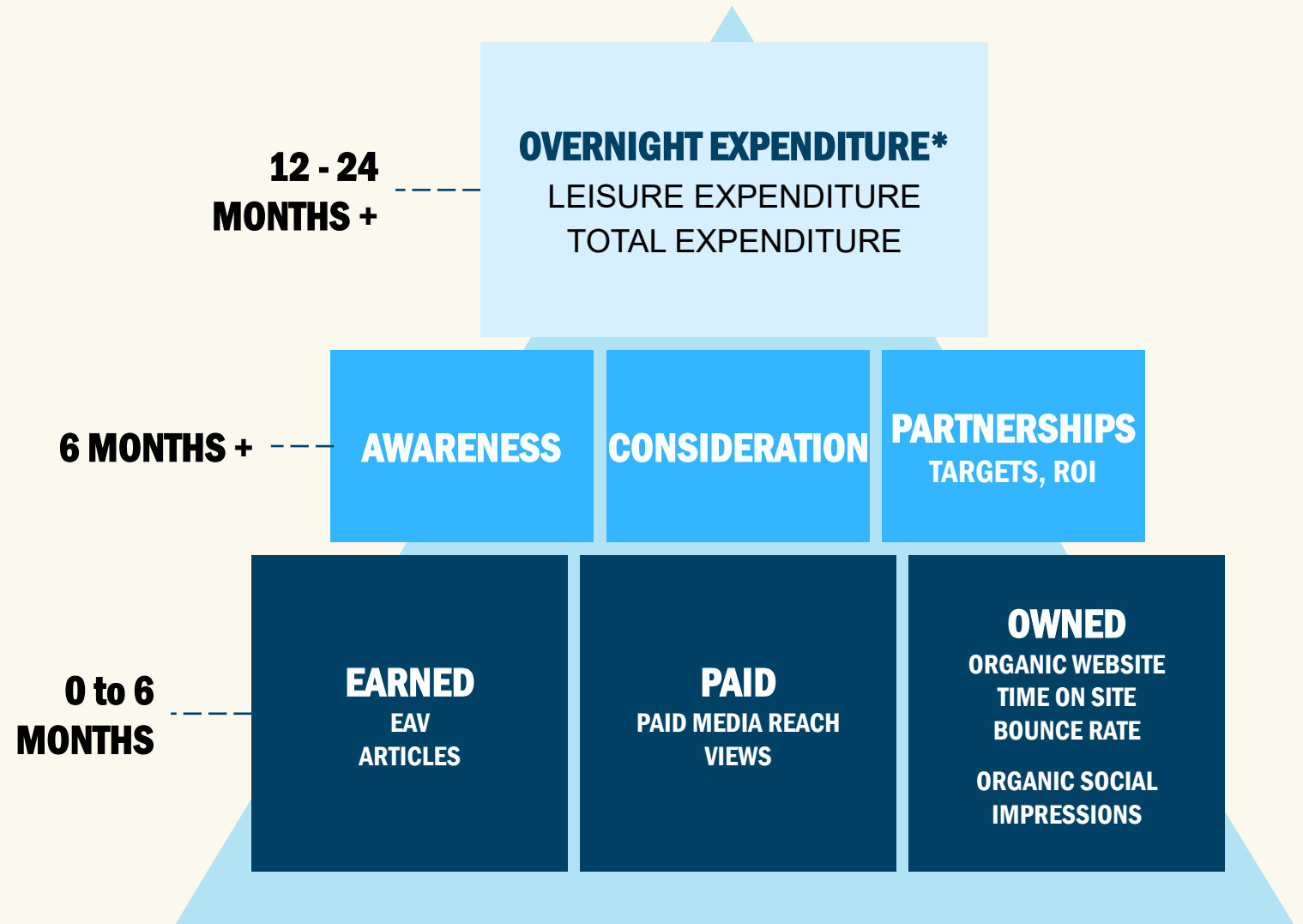


## PARTNERSHIPS

**Capture demand** from high yield travellers through strategic partnerships with airlines and key distribution partners.



# TA'S MEASUREMENT FRAMEWORK



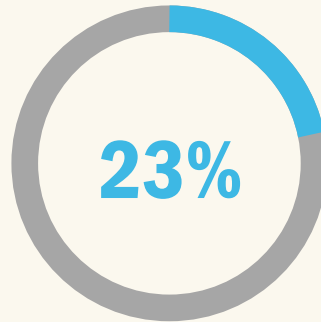
Dark blue (bottom row) section results based on 19/10-31/12/2022, EAV 11/10-31/12/2022 to capture Japan launch event

A group of four people (three men and one woman) are sitting around a dark table in a dimly lit room with wood-paneled walls. They are all smiling and looking towards each other, engaged in conversation. On the table in front of them are several glasses of drinks, some with citrus slices, resting on light-colored wooden coasters. The text 'WHAT'S NEXT... NEW OPPORTUNITIES' is overlaid in large, white, bold, sans-serif font across the center of the image.

**WHAT'S NEXT...  
NEW OPPORTUNITIES**

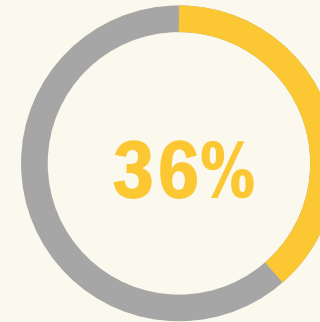
# AVIATION IN CHINA IS LOOKING VERY PROMISING

- Air China will commence 3fpw Beijing-SYD and Beijing-MEL in Feb-23 using A330s.
- China Eastern's Shanghai-SYD service increases from 3-7fpw (B777s) and Shanghai-MEL increases from 3-4fpw (787-9s) in Feb-23.
- China Southern's Guangzhou-SYD service increases 4-7fpw (A350s) and CZ recommence Guangzhou-MEL with 7fpw in Feb-23 using A350-9s. SYD/MEL frequencies are then set to increase from 7-10fpw on 26 Mar-23.
- Xiamen Air will increase Xiamen-SYD at 2-4fpw (B787-9s), commence Xiamen-MEL to 3fpw (787-9s), and operate Fuzhou-SYD at 2fpw and Fuzhou-MEL at 2fpw (all B787-9s).
- Sichuan Airlines recommences Chengdu-MEL with 2fpw in Feb-23 using A330s.
- Beijing Capital's resumption of Australia with 2fpw Qingdao-MEL starting 14 Feb-23 increasing to 3fpw in Mar-23.



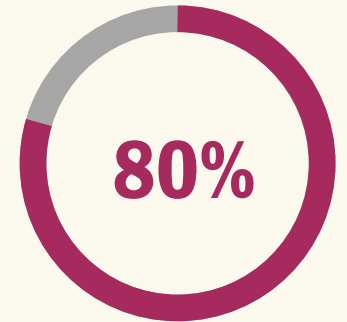
Scheduled seat capacity  
**February 2023**

Source: Cirium



Scheduled seat capacity  
**June 2023**

Source: Cirium



Predicted  
**December 2023**

Source: Civil Aviation  
Administration of China (CAAC)  
capacity

# CHINA MARKET REOPENING ACTIVITY OVERVIEW

## PHASE 1: AWARENESS

(26 Dec 2022 to Feb 2023)



LEVERAGE THE RETURN OF TWO-WAY QUARANTINE FREE TRAVEL WITH PR AND SOCIAL ACTIVITY

## PHASE 2: CONSIDERATION & CONVERSION

(March to June 2023)



PAID MEDIA AND CTRIP

## PHASE 3: COME AND SAY G'DAY



LAUNCH OF IN-MARKET CAMPAIGN

# B2C AND B2B EVENTS ARE RETURNING



**SYDNEY WORLD PRIDE**



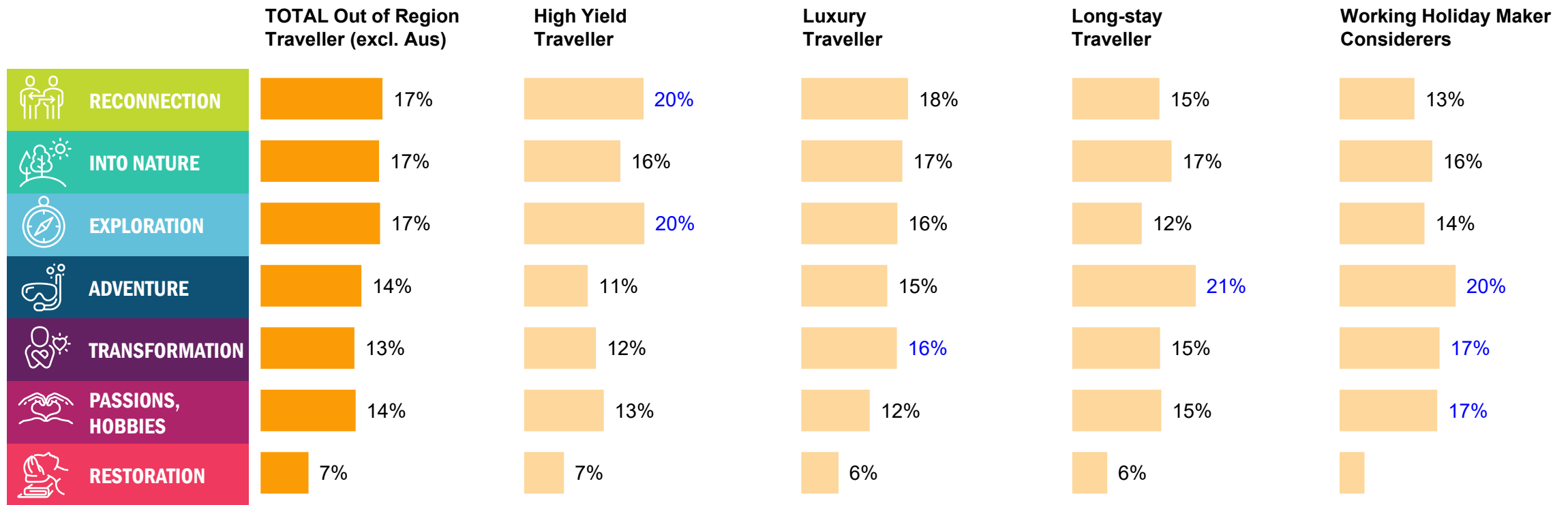
**FIFA WOMEN'S WORLD CUP**



**BUSINESS EVENTS**

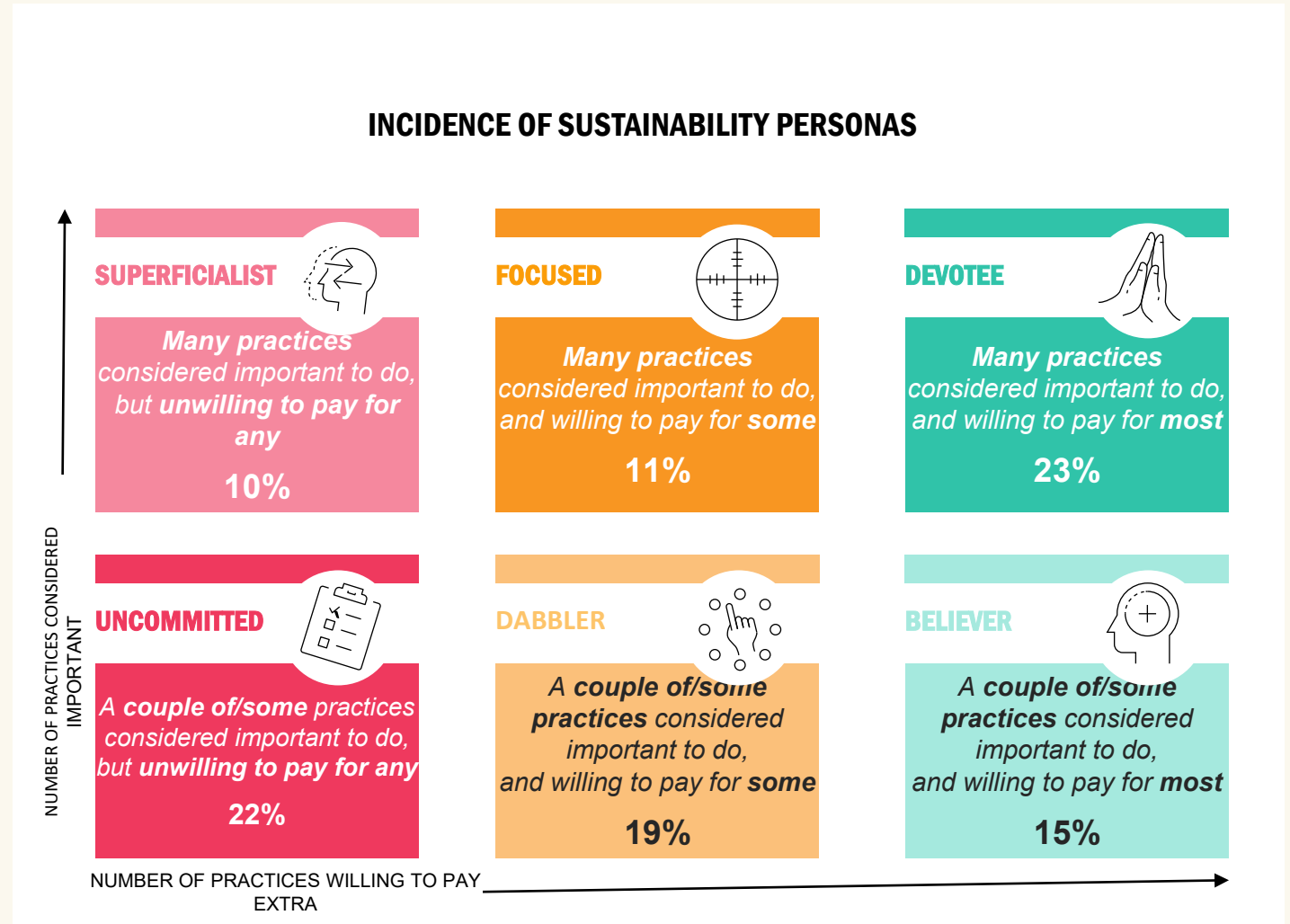
# HIGH YIELD TRAVELLERS SEEK RECONNECTION AND EXPLORATION

## TRAVELLER TYPOLOGY PROFILE X DEMAND SEGMENTS



Future of Global Tourism Demand Research, Quantitative validation phase, April-May 2022  
 A4. When you travel, which of the following are you most often looking for?  
 Base: Global excl. Australia (n=22,190), High Yield Traveller excl. Australia (n=6,070), Luxury Traveller excl. Australia (n=1,050), Long Stay excl. Australia (n=956), Working Holiday Maker excl. Australia (n=1,960)

# SUSTAINABILITY: MORE THAN 75% OF TRAVELLERS ARE COMMITTED TO SUSTAINABILITY IN SOME WAY & 1 IN 3 ARE SUSTAINABILITY DEVOTEES OR BELIEVERS



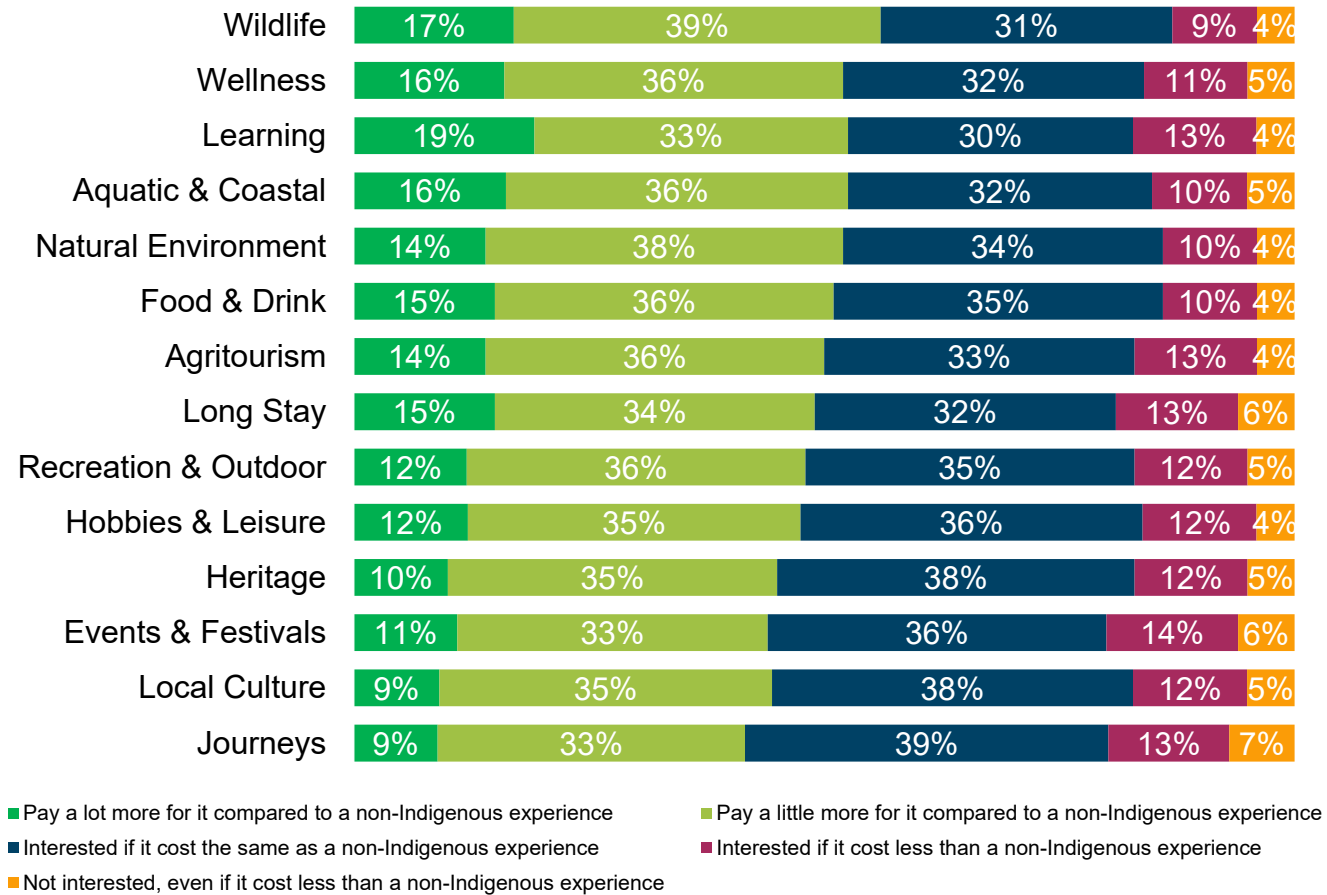
Future of Global Tourism Demand Research, Quantitative validation phase, April-May 2022

Segmentation based on two questions: E1. How important are each of the following to you when travelling? E2. Imagine you have identified two experiences that offer everything you are looking for on your next vacation. If one experience offered the following, and the other did not, which statement best applies to you?

Base: Global excl. Australia (n = 22,190)

# INDIGENOUS: AN ABORIGINAL LENS CAN ENRICH THE OTHER EXPERIENCES TRAVELLERS SEEK

## WILLINGNESS TO PAY MORE FOR INDIGENOUS EXPERIENCES

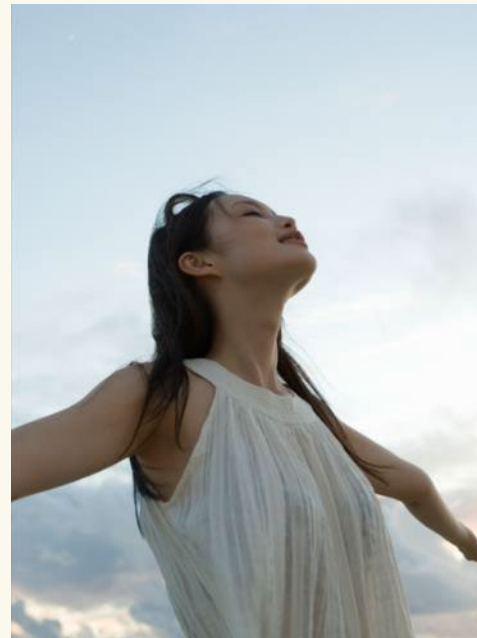


Future of Global Tourism Demand Research, Quantitative validation phase, April-May 2022  
 E5. If you had the opportunity to do the following types of experiences in an Indigenous setting or with Indigenous people, which of the following is true?  
 Base: Global excl. Australia (n = 1,536 to 8,251)

# EVOLUTION OF AI – EMPOWERING TRAVELLERS TO CREATE PERSONALISED EXPERIENCES



Source: Bloomberg



Source: Accor.

Conversational AI to enable the tourism industry to provide a deeper more personalised customer experience.

It can assist guests with pre travel planning, helping to tailor their travel and experiences to a highly personalised level.

Whether its transactions such as trip planning and booking, check-in, online activity during their stay, check-out or any of the digital touch points in the customer journey.

**EVOLVING AI TO IMPROVE CUSTOMER EXPERIENCE**



**THANK YOU**