



ACCI Tourism Update

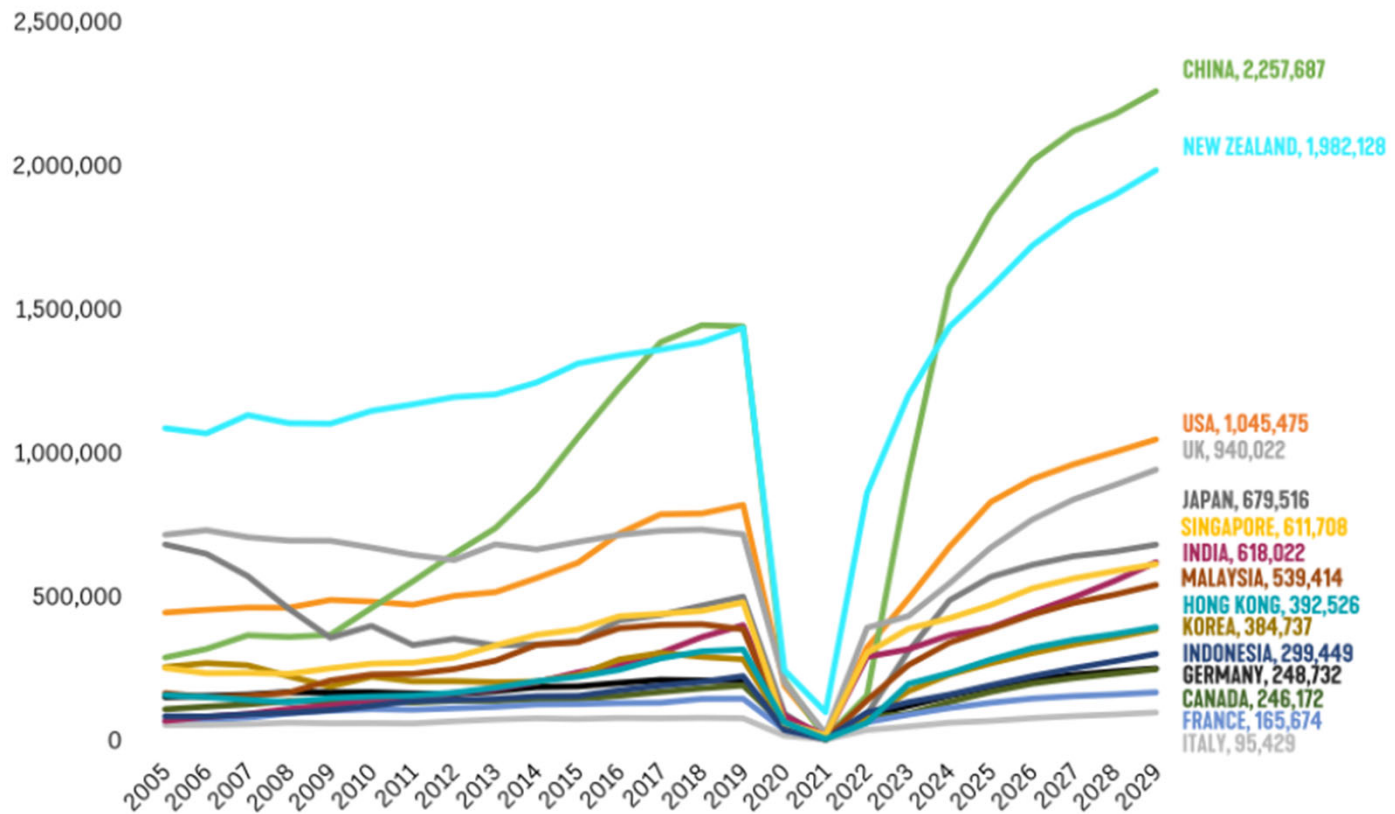
May 2023

John Hart, Executive Chair
Australian Chamber – Tourism

Demand Recovery

PAST & PREDICTED OOR VISITATION ARRIVALS TO AUSTRALIA FROM TOP 15 MARKETS

CY 2005 - CY 2029

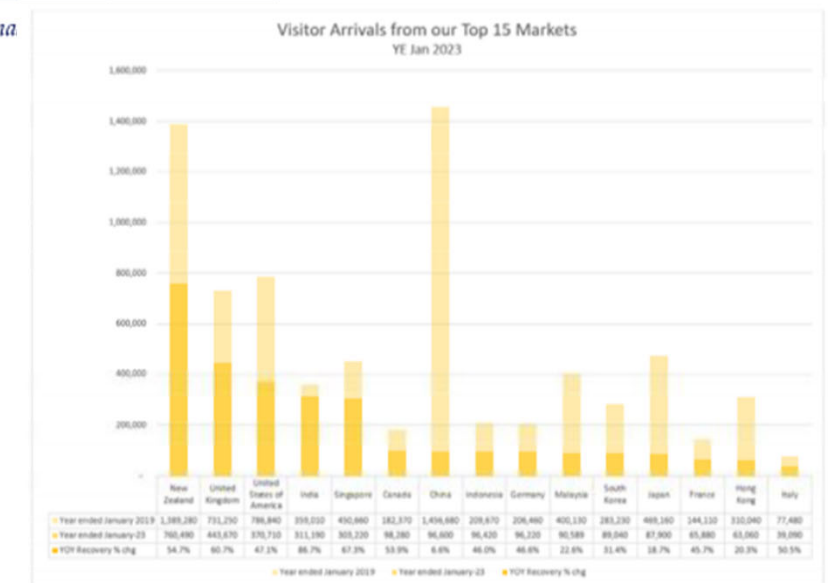


Current Performance



VISITOR SPEND IN STATES AND TERRITORIES, AT DECEMBER 2019 V DECEMBER 2022							
State/Territory		International Total Trip Spend (\$B)		Domestic Overnight Trip Spend (\$B)		Total	
		Dec-22	YoY (2019) Change %	Dec-22	YoY (2019) Change %	Spend (\$B)	YoY (2019) Change %
New South Wales	NSW	10.4	-58%	31.8	20%	42.1	-18%
Victoria	VIC	6.5	-65%	22.1	18%	28.7	-23%
Queensland	QLD	5.4	-65%	30.3	42%	35.7	-3%
South Australia	SA	1.5	-58%	7.5	14%	9.0	-11%
Western Australia	WA	2.4	-54%	10.5	17%	12.9	-9%
Northern Territory	NT	0.7	-69%	3.7	37%	4.5	-13%
Tasmania	TAS	0.6	-73%	3.8	20%	4.4	-17%

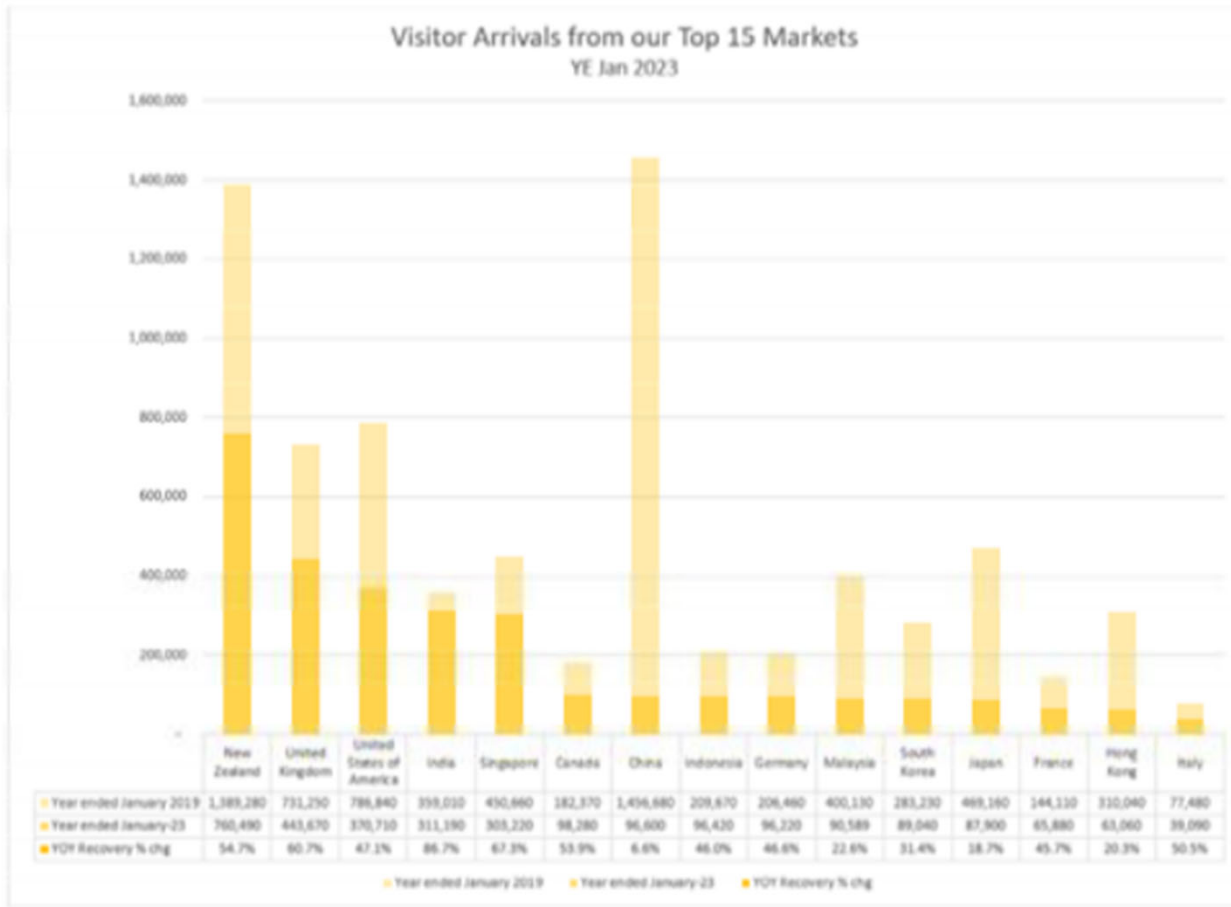
Tourism Research Australia, International Visitor Survey and National



Australian Bureau of Statistics, Overseas Arrivals and Departures, January, 2023

Working for business. Working for Australia

Current Performance



Australian Bureau of Statistics, *Overseas Arrivals and Departures, January, 2023*

Current Performance



Current Performance

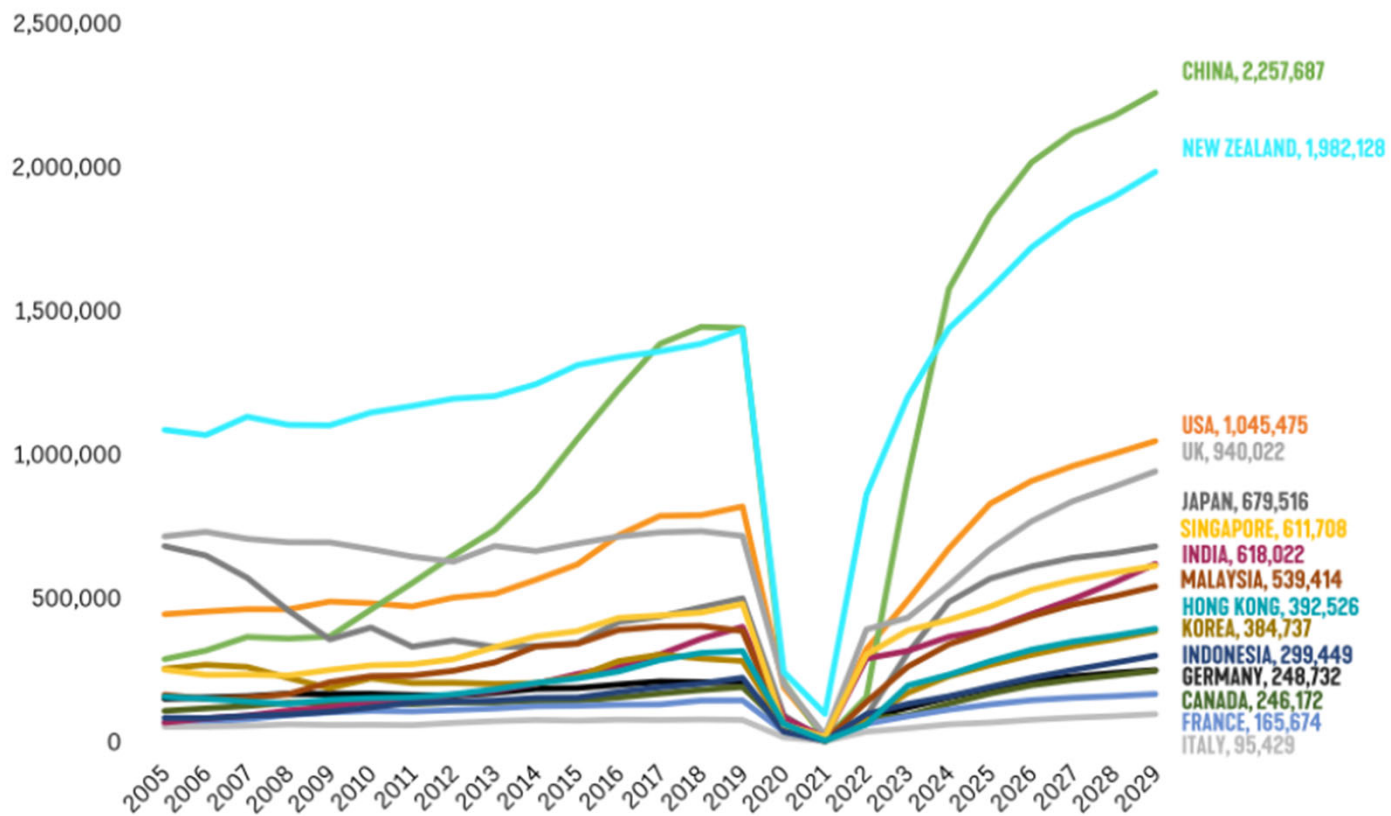


Current Performance



PAST & PREDICTED OOR VISITATION ARRIVALS TO AUSTRALIA FROM TOP 15 MARKETS

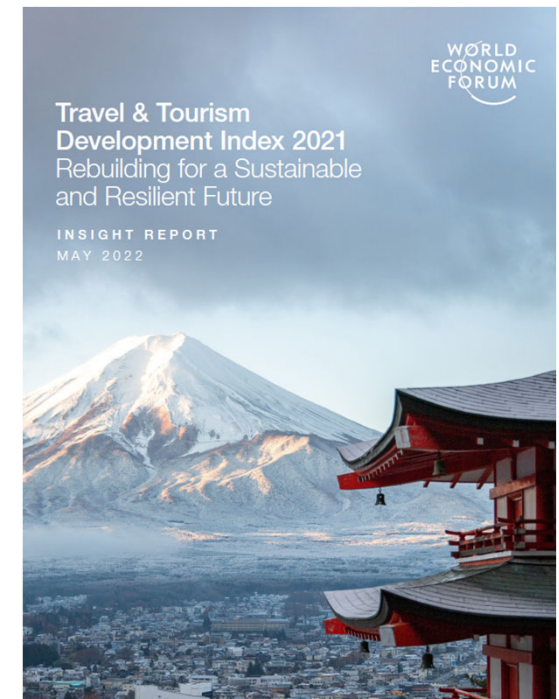
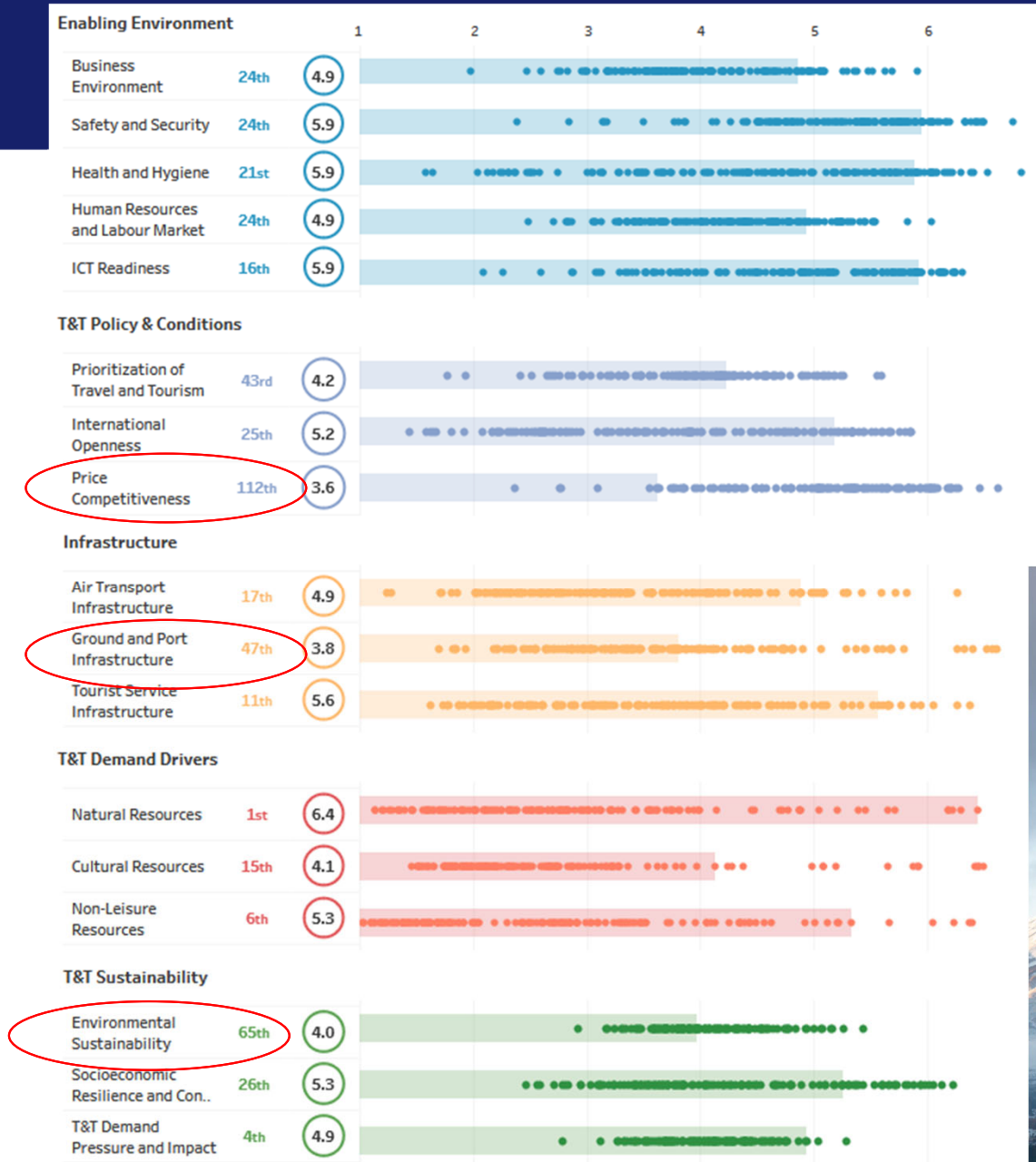
CY 2005 - CY 2029





7th

7th



Priorities



Ongoing Advocacy in Priority Areas



Future Traveller Working Group

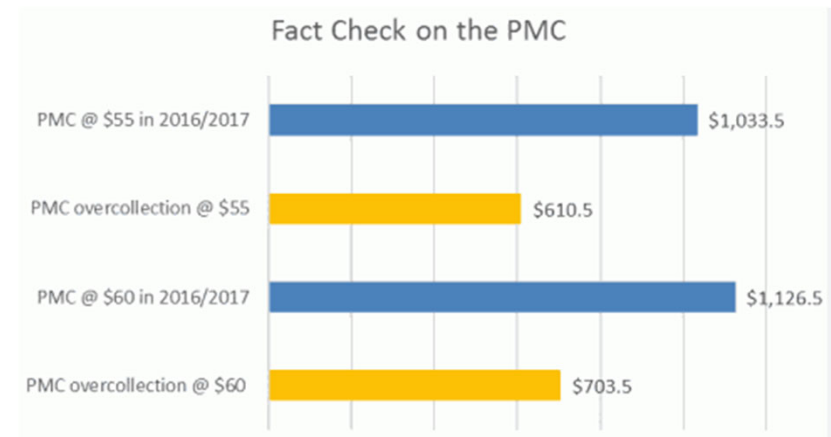


Sustainable Tourism Advisory Committee

Advocacy Priorities



- Tourism – Passenger Processing Funding (PMC and OS revenue recognition).
- Skills & Labour Issues - 397,000 vacancies in 2023 – Student Working Hours, WHM Policy, Skilled Migration, Skills Policy.
- Visa Settings.
- Tourism Australia Funding.
- Industry Engagement and Representation.
- Insurance.



The STAC will provide advice and guidance on the following areas:

- Strategies for improving the sustainability of the tourism sector (including all aspects of the visitor economy, including travel, accommodation, hospitality, transport and events);
- Developing and promoting sustainable tourism initiatives;
- Identifying and addressing barriers to sustainability;
- Enhancing the environmental, economic, and social impacts of tourism;
- Facilitating collaboration between stakeholders, and
- Setting, monitoring and evaluating progress towards sustainability goals



Sustainable Tourism Advisory Council



The member of the STAC are:



Ms Nicole Walker, CEO Arinex

Mr Andrew Parker, CSO, QANTAS (TBC)

Dr Claire Ellis, Chair, Ecotourism Australia

Joel Katz, Chief Executive Officer, Cruise Lines International Association

Melanie Anderson, General Manager, Strategy & Advocacy, QTIC

Luke Chippindale, General Manager, Caravan Industry Association of Australia Ltd

Carlita Warren, General Manager, Business Development & Corporate Responsibility, NRMA

Penny Rafferty, Sustainability Lead, Tourism Australia (observer)

Teressa Lloyd, Chief Strategy and External Affairs Officer, Carnival Australia

Rashveen Maini, Group Sustainability Manager, Kelsian Group (Sealink)

Mark Olsen, CEO, Tourism Tropical North Queensland



Future Traveler Working Group



The scope of the FTWG will include, but is not limited to, assessing current trends in the travel industry, identifying emerging technologies and innovations, and exploring potential implications for travellers and the travel industry.

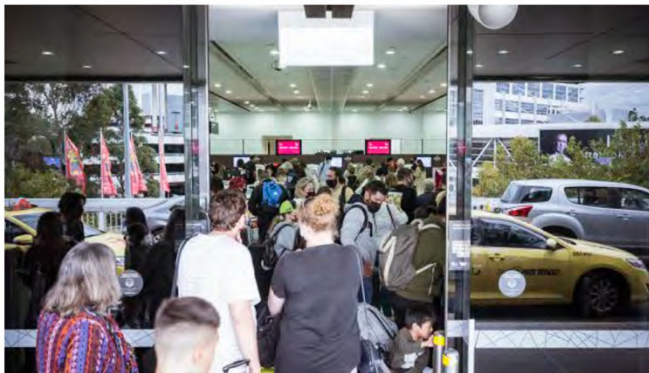


Figure (i) Queues at Melbourne Airport

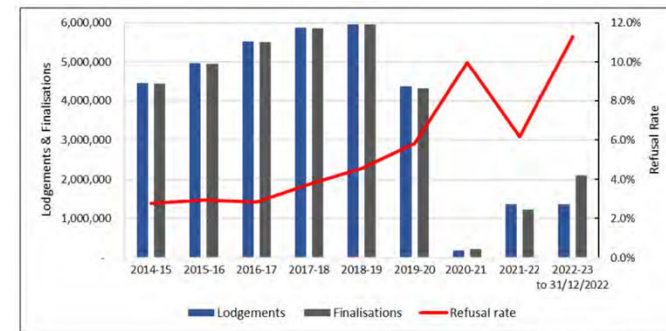


Figure (iii) - Vision-Box biometric self-boarding solution at Los Angeles Airport

