## TOURISM AUSTRALIA UPDATE





#### OUR TOURISM 2020 STRATEGY UNDERPINS EVERYTHING...



## OUR KEY MARKETS



## **INTERNATIONAL PERFORMANCE – 2018 HIGHLIGHTS**

## NOW A \$ 4 4 BN IVS DEC 2018

**GROWTH IN SPEND** 

CHINA CHINA FOR INTERNATIONAL VISITOR SPEND

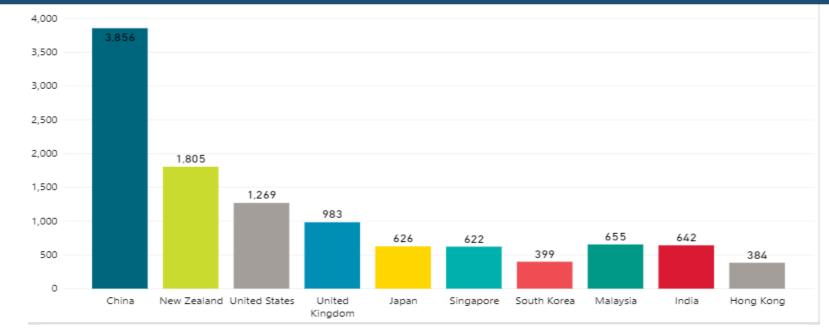
21% INCREASE IN SPEND BY INDIAN VISITORS

TRENDS SHORTER STAYS WEST TO EAST AVIATION CONSTRAINTS REGIONAL DISPERSAL

top 5 markets deliver **OVER 50%** of visitors & spend



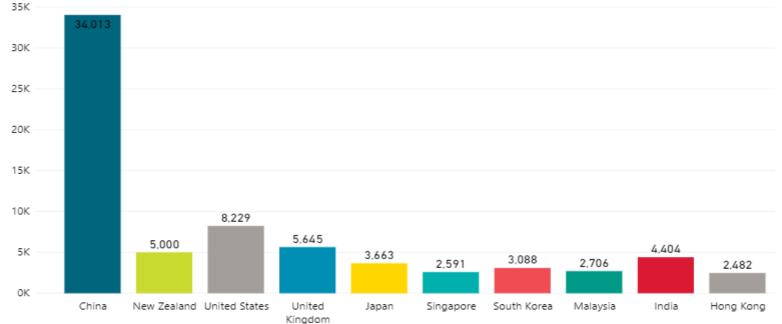
## FORECASTS 2026/27 – TOURISM RESEARCH AUSTRALIA



#### 30к \_\_\_\_\_ 25к \_\_\_\_ SPEND 20к \_\_\_\_ (\$AUD BILLIONS) 15к \_\_\_\_

**VISITORS** 

(MILLIONS)



# CURRENT OPPORTUNITIES & CHALLENGES

## **OUR CHALLENGES**





## **CONSUMER CHALLENGES**

WHILE AUSTRALIA HAS STRONG APPEAL WITH CONSUMERS THESE CHALLENGES PRESENT THE GREATEST BARRIERS TO VISITATION.

#### FASHIONABILITY

Limited knowledge of Australia's offering outside of iconic experiences leads to feeling we've seen and heard it all before.

#### LOW URGENCY

Australia is perceived as a once-in-a-lifetime destination which can be put off for another day because of rational factors such as time, distance and cost.

#### COMPLEXITY

A cluttered marketing environment and low familiarity of Australia's geography and experience offering leads to feeling overwhelmed. Travellers are visiting up to 20 sites before booking.

## CHINESE TRAVELLERS BECOMING MORE DISCERNING

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#### MORE INDEPENDENT TRAVEL

- Self-booking flights, hotels, etc
- Self-defined travel plan/schedule
- Will research on destinations before choosing destination and travelling

#### MORE EXPERIENCED TRAVELLERS

- Have travelled to many countries
- High expectations on local service
  and facilities
- Look for new and unique experience in each trip

#### MORE IMMERSIVE EXPERIENCES

- Understand the significance, not just look at the surface
- Want to feel immersed in the culture and have authentic experiences
- Experience local life (F&B, night life, taking local public transportation, etc.)

Chinese travellers have become more mature in their travel careers, becoming more discerning, and more demanding when it comes to what they want from their travel experiences

#### **OUR INDUSTRY NEEDS TO ADAPT**

## MARKETING CHALLENGES

#### Harder to cut-through in a sea of sameness



## **OUR RESPONSE**

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#### OUR STRATEGY IS FIRMLY FOCUSED ON TARGETING HIGH VALUE TRAVELLERS

TOURISM AUSTRALIA

### FOR BOTH LEISURE & BUSINESS EVENTS...

## **DEFINITION OF A HIGH VALUE TRAVELLER**





#### **TRAVEL LONG HAUL**

Travels long haul (out of region) on a regular basis.

#### PREFERENCE FOR AUSTRALIA

Consideration or intention to visit Australia.



#### KEY DRIVERS FOR DESTINATION CHOICE

Food and wine, aquatic and coastal, and nature and wildlife experiences are key drivers when choosing a holiday destination.



#### REPRESENT HIGH VALUE

Above average trip expenditure. Higher likelihood to stay longer. Higher likelihood to disperse further.

## IT'S ABOUT CUT-THROUGH...

INCREASED FOCUS ON THE CUSTOMERS & MARKETS WITH THE GREATEST OPPORTUNITY TO DELIVER DOING FEWER THINGS BUT WITH MORE DOLLARS IN THE RIGHT CHANNELS WITH THE RIGHT MESSAGE + DISTRIBUTION PARTNERS

TO CREATE A BIGGER IMPACT



# **UnDiscover** Australia



68% of Indonesians who think

the amazing beaches

Australia is all about

Australia.com Sponsored (demo) - Q

To the 81% Indians who think Australia is all about cities... 👇



To the 73% of Singaporeans who think Australia is not a foodie destination Innk again Unit again Un

CAMPAIGN ROLLING OUT IN KEY MARKETS TO CHALLENGE CONSUMER PERCEPTIONS

AUSTRALIA.COM Cairns

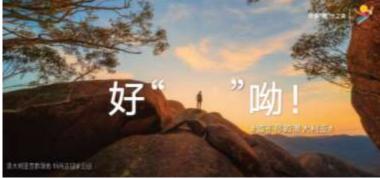
Queensland

Discover

Australia

Learn More

## 'TOO AUSTRALIAN FOR WORDS' CAMPAIGN CHINA

















## AUSTRALIA WITH JULIA BRADBURY

NEW ITV SERIES SUPPORTED BY TOURISM AUSTRALIA

# WHAT'S NEXT?

## WORKING HOLIDAY MAKERS

#### SHARPEN FOCUS ON UK, GERMANY & FRANCE FOR NEXT PHASE IN APRIL 2019

RESEARCH FINDINGS & INDUSTRY FEEDBACK TO UNDERPIN THE CAMPAIGN & WITH A MORE TACTICAL FOCUS

#### ADDRESSES KEY CHALLENGES LOW UNDERSTANDING OF WORKING HOLIDAYS PLUS ECONOMIC

UNCERTAINTY ARE FACTORS

### A SHIFT IN HOW WE MARKET OUR EXPERIENCES





BRINGING ALL THE HEROES TOGETHER WITH OUR PEOPLE & INDUSTRY AT THE FRONTLINE TO DELIVER THE EXPERIENCE

♦Y USi

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#### ATE 2019



#### A\$9M DIRECT EXPENDITURE

A\$5.5BN – A\$9.5BN POTENTIAL BUSINESS FOR AUSTRALIA

#### 1,800 DELEGATES

600 BUYERS | 505 COMPANIES | 30 COUNTRIES | 20% FROM CHINA

**1,200** AUSTRALIAN SELLERS | 546 COMPANIES

66 INTERNATIONAL AND AUSTRALIAN MEDIA

45,000 BUSINESS APPOINTMENTS

98% DELEGATE SATISFACTION WITH THE LAST ATE



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## THANK YOU

