

An aerial photograph of a harbor. On the left, a large number of white motorboats are anchored in the water. A curved, rocky breakwater separates the harbor from the open ocean. To the right, a large, rectangular swimming pool is visible, with waves crashing against the rocks below it. The water in the harbor is a deep blue-green, while the ocean is a darker blue.

TOURISM AUSTRALIA UPDATE

PHILLIPA HARRISON
MANAGING DIRECTOR

An aerial photograph of a coastal town and harbor. In the foreground, a white lighthouse stands on a rocky cliff overlooking the ocean. A winding road leads up to the lighthouse. Behind the cliff, a harbor is filled with numerous sailboats. The town, with its colorful buildings and streets, extends along the coast. The ocean is a deep blue, with white waves crashing against the rocks. The overall scene is bright and scenic.

PRE-COVID19 MARKETS & CRISIS RESPONSE

OUR 15 KEY MARKETS – PRE AND DURING COVID

WILL THEY REMAIN THE SAME?

Target markets and their value by 2025



9.5 MILLION VISITORS

\$45 BILLION SPEND

1 IN 13 JOBS

CRISIS RESPONSE: FOCUSING ON SHORT-TERM SURVIVAL AS WELL AS LONGER-TERM PROSPERITY



TOURISM AUSTRALIA'S RECOVERY PRIORITIES

ADDRESSING SHORT-TERM HEADWINDS

BUILDING ON LONG-TERM TAILWINDS

DRIVE OPPORTUNISTIC CONVERSION IN THE SHORT-TERM:

Drive conversion where possible. Going after domestic and international bubbles as they arise.

EXPEDITE RECOVERY FOR AVIATION AND DISTRIBUTION:

Work with distribution and aviation partners to keep them focused on Australia and ready to convert demand and return capacity fast.

BE A UNIFYING VOICE FOR OUR TOURISM INDUSTRY:

Provide direction, leadership and guidance to the Australian travel industry.

ELEVATE AND CHAMPION INDIGENOUS TOURISM:

Facilitate a greater understanding of Indigenous heritage and drive the uptake of Indigenous tourism experiences.

DRIVE AWARENESS OF, AND CAPABILITY FOR, SUSTAINABLE TRAVEL:

Advocate for Australia's sustainable tourism offering in a way that that meets increased consumer desire and increases industry readiness.

LONG-TERM DEMAND GENERATION AND GROWTH:

Ensure the Australian tourism industry remains competitive in the future by continuing to drive long-term demand today.

BOLSTER THE BUSINESS EVENTS INDUSTRY:

Drive demand to increase conversion of new events and encourage more delegates to confirmed events.

NATIONAL PLAN TO TRANSITION AUSTRALIA'S NATIONAL COVID-19 RESPONSE

KEY TRAVEL & TOURISM IMPLICATIONS

A: CURRENT PHASE	B: VACCINATION TRANSITION PHASE, 70% @ 2 DOSES	C: VACCINATION CONSOLIDATION >80% @2 DOSES	D: FINAL - POST VACCINATION PHASE
<ul style="list-style-type: none"> • Close international borders to keep COVID-19 out. • Inbound passenger caps temporarily reduced. • Establish digital vaccination authentication at international borders. • Trial and pilot the introduction of alternative quarantine options. 	<ul style="list-style-type: none"> • Allow capped entry of student and economic visa holders. (Working Holiday Makers) • Restore inbound passenger caps at previous levels. • Ease restrictions on vaccinated residents (TBD). • Introduce new reduced quarantine arrangements for vaccinated residents. 	<ul style="list-style-type: none"> • New bubble markets: (Singapore, Pacific). • Exempt vaccinated residents from all domestic restrictions. • Gradual reopening of international travel with “safe countries”. • “Proportionate quarantine” for fully vaccinated inbound travellers. 	<ul style="list-style-type: none"> • Open international borders. • Quarantine for high-risk inbound travel. • Allow uncapped inbound arrivals for all vaccinated persons, without quarantine. • Allow uncapped arrivals of non-vaccinated travellers subject to pre-flight and on arrival testing.

Source: [National Plan to transition Australia's National COVID-19 Response](#)

DOMESTIC-LED RECOVERY

VACCINES INCREASE TRAVEL CONFIDENCE

THE COVID-19 VACCINE INCREASES MY CONFIDENCE TO TRAVEL IN AUSTRALIA

% of total Aus (n=755)

Strongly disagree Somewhat disagree Somewhat agree Strongly agree



THE COVID-19 VACCINE INCREASES MY CONFIDENCE TO TRAVEL INTERNATIONALLY

% of total Aus (n=755)

Strongly disagree Somewhat disagree Somewhat agree Strongly agree



Source: Derived by BDA Marketing Planning

DOMESTIC TRAVEL IS PREFERRED FOR NEXT MAJOR TRIP

Where do you think you will take your next major holiday?

% of Aus travellers (n=799 in Aug 2021)



Source: Derived by BDA Marketing Planning from Blue North

Reasons for choosing travel overseas for your next major holiday

% of Aus travellers (n=192)



DOMESTIC STRATEGY

Encourage Australians to travel like
our overseas visitors would.

LEISURE: HOLIDAY HERE THIS YEAR

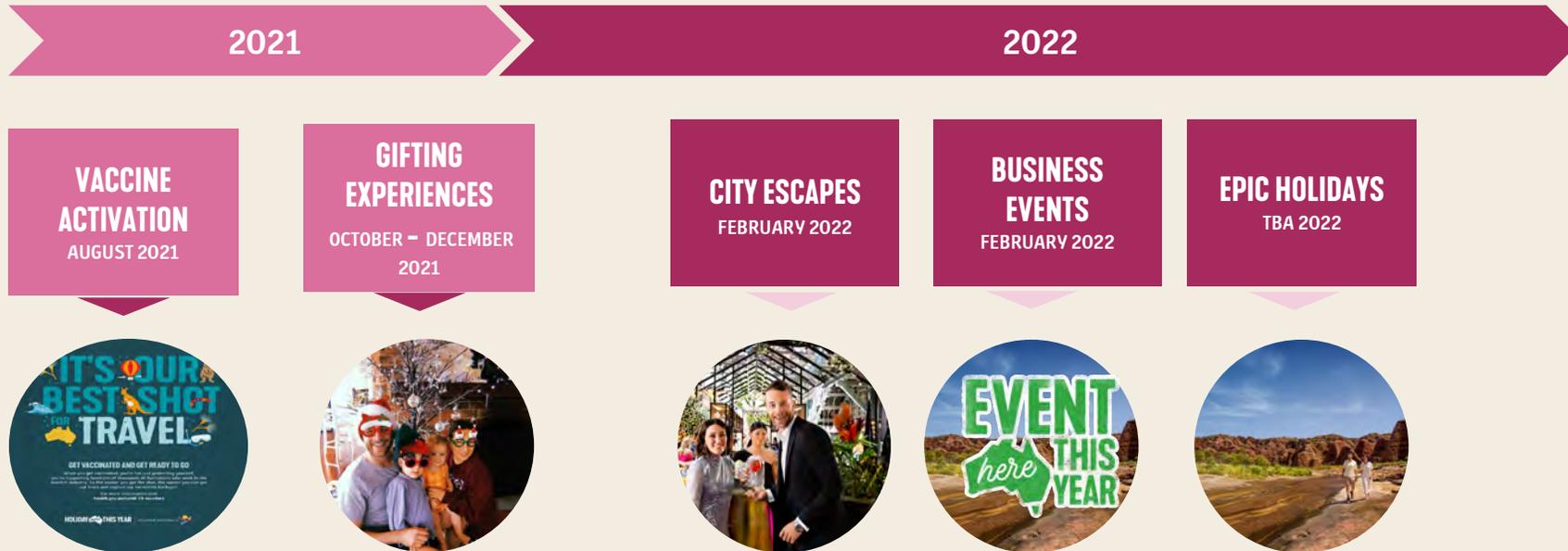
with Hamish Blake and Zoe Foster Blake



BUSINESS EVENTS: EVENT HERE THIS YEAR



WHAT'S NEXT IN DOMESTIC (2021-22 WORK IN PROGRESS PLAN)



THE WIGGLES PARTNERSHIP

IDEA

HOLIDAY THE WIGGLY WAY

TACTIC

CONTENT PARTNERSHIP

DIGITAL

LIVE SHOW ACTIVATIONS

VIDEO CONTENT SERIES

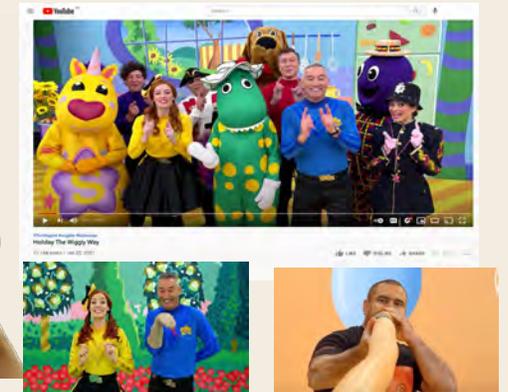
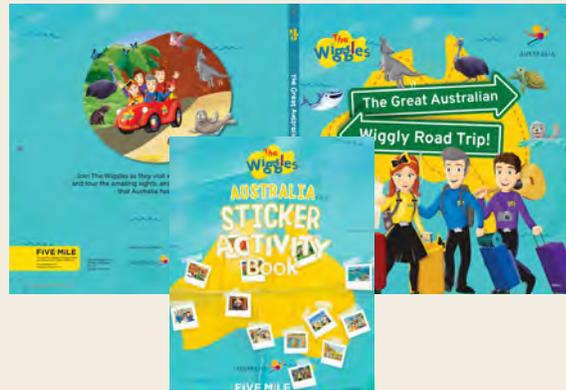
KEY ASSET

THE BOOKS + THE SONG + NEW FOA

FAMILY HUB + DYNAMIC STORY GENERATOR

SPONSORSHIP OF NATIONAL TOUR

10 PART DIGITAL VIDEO SERIES



SEPTEMBER 2021

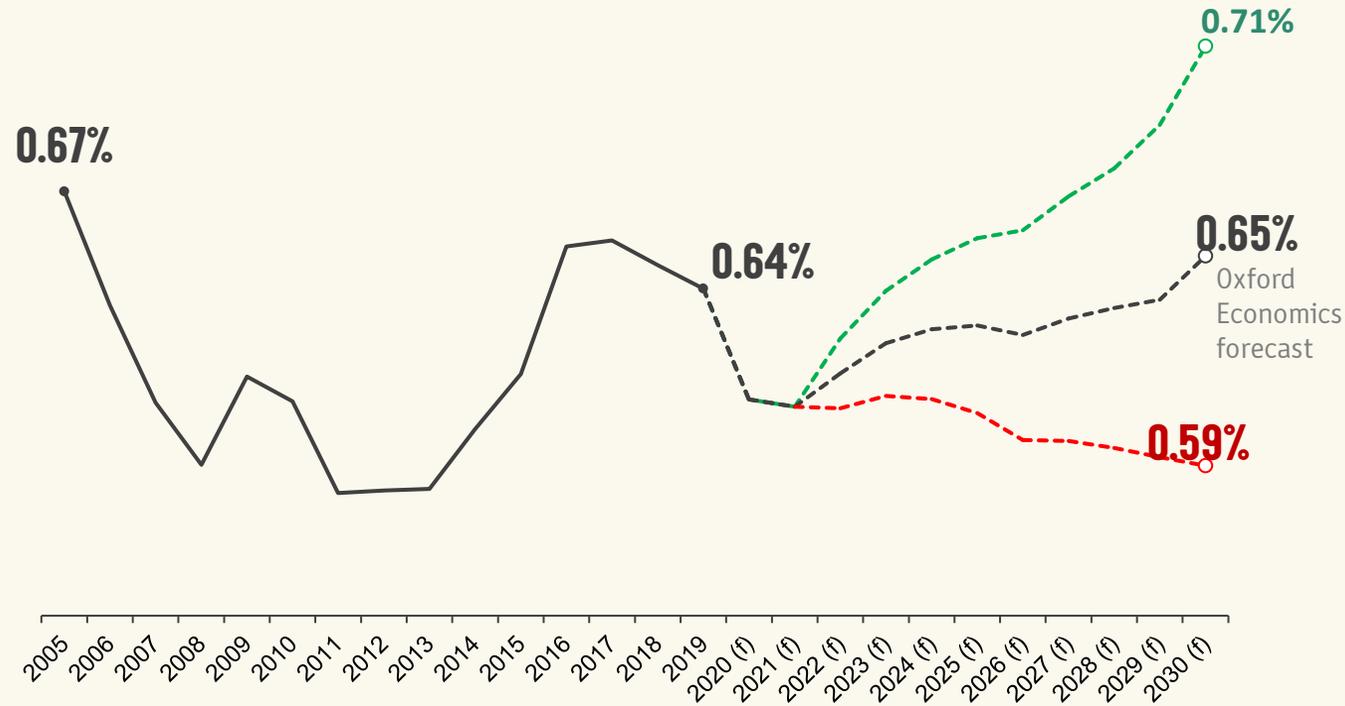


FEBRUARY 2022

INTERNATIONAL

TOURISM HAS ALWAYS BEEN HIGHLY COMPETITIVE

AUSTRALIA'S SHARE OF INTERNATIONAL VISITATION FORECAST TO 2030



2030 EXPENDITURE

WIN SHARE:
\$78.1B

+\$6.5BN

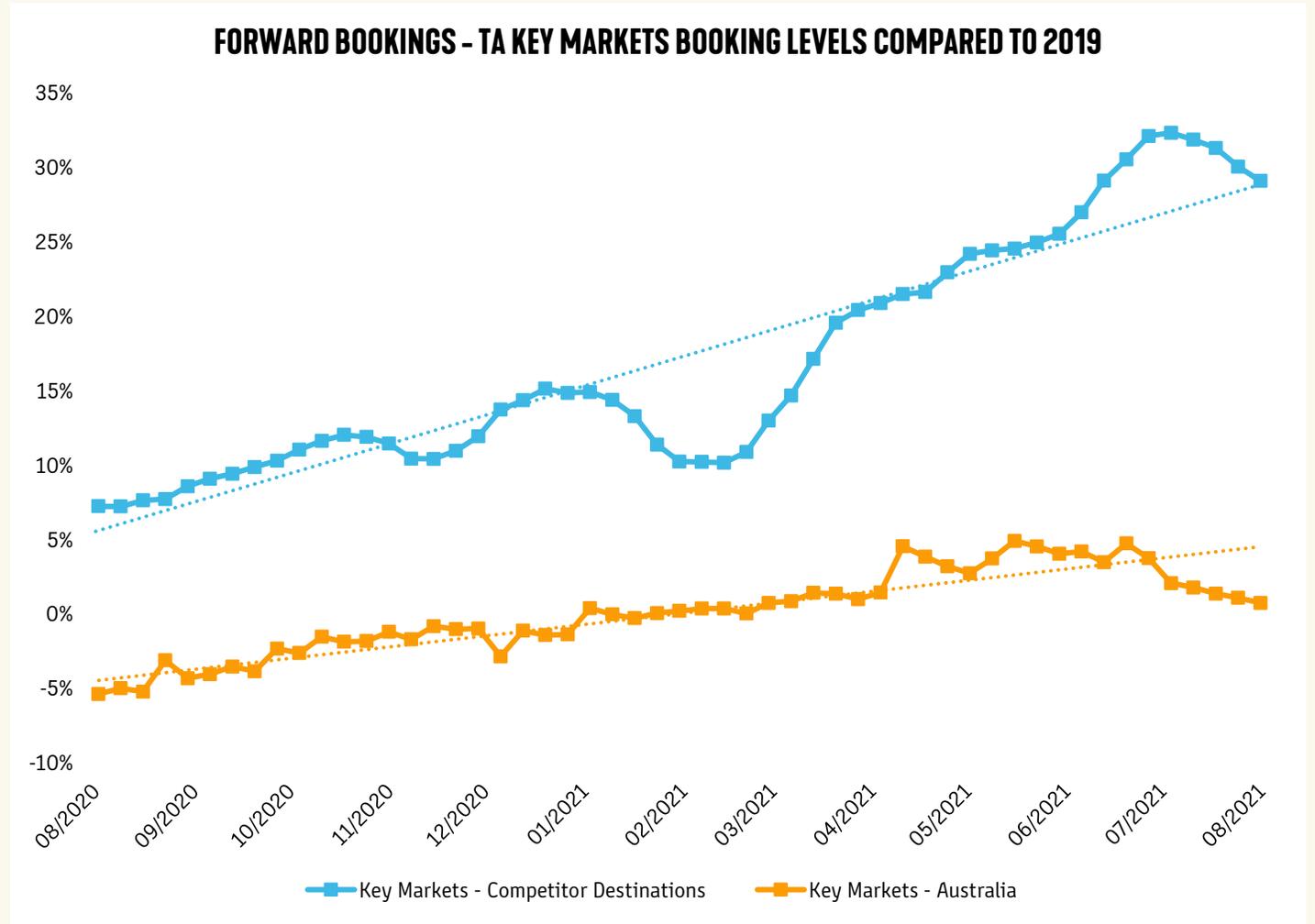
HOLD SHARE:
\$71.6B

-\$6.6BN

LOSE SHARE:
\$65.0B

NB: figures here are for illustrative purposes only

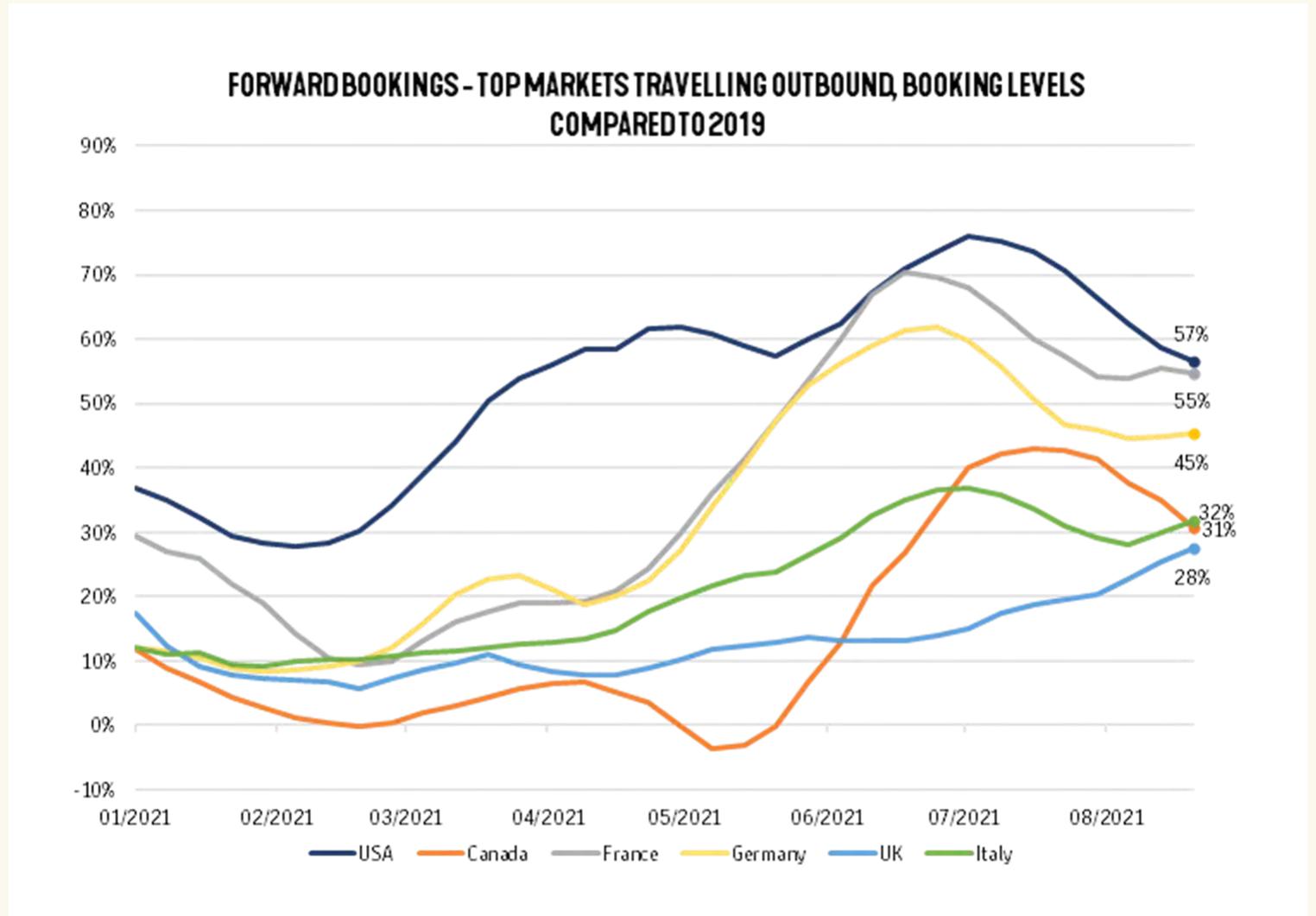
DEMAND IS RETURNING AROUND THE WORLD – IT'S OUT THERE!



Source: ForwardKeys, August 2021

TOP 6 KEY MARKETS TRAVELLING OUTBOUND INTERNATIONALLY

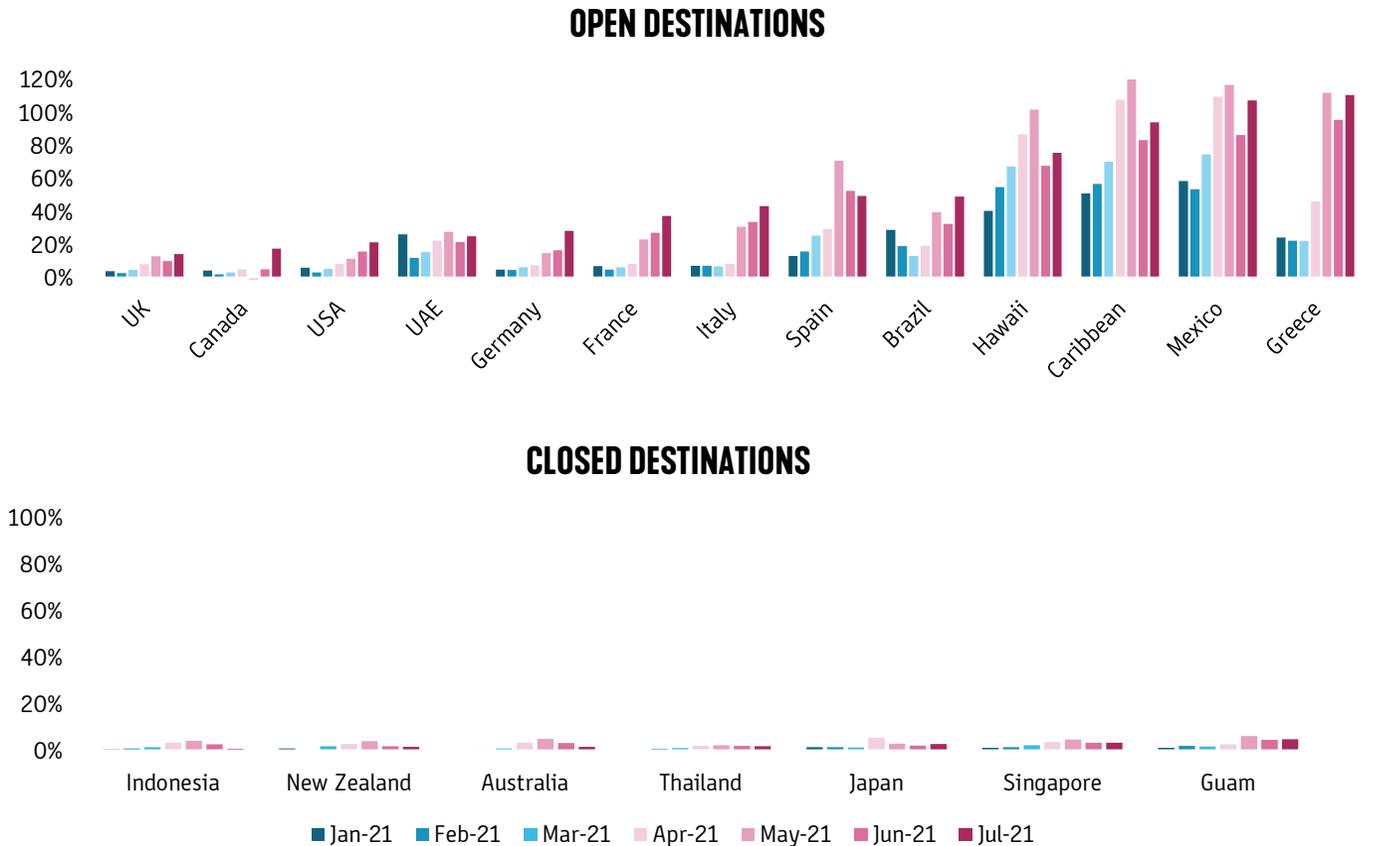
Outbound travel from USA, Canada, France, Germany, UK and Italy has recovered to 48% of 2019 volumes



Source: ForwardKeys, Ticketing Dates, August 2021

OPEN DESTINATIONS ARE EXPERIENCING STRONG AND EVEN POSITIVE YOY GROWTH

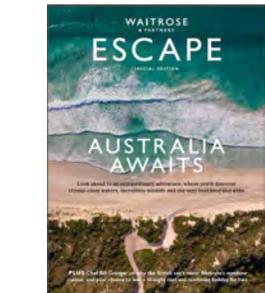
TA KEY MARKETS TO COMPETITOR DESTINATIONS, BOOKING LEVELS COMPARED TO 2019 VOLUMES



Source: ForwardKeys, July 2021

WHAT'S NEXT FOR OUR INTERNATIONAL 'DREAMING' WORK

CONTINUE CONTENT PARTNERSHIPS (EG WAITROSE)



ONGOING CONTENT AMPLIFICATION



ALWAYS ON PRESS OFFICE LONELY PLANET AWARDS



LOCALISED EVENTS



HYBRID ATE EVENTS GLOBALLY



OUR PATH TO RE-OPENING INTERNATIONALLY

INTERNATIONAL BORDERS CLOSED



BUBBLE MARKETS OPEN



CRITICAL MASS OF MARKETS OPEN



DOMESTIC

FY22: MAKE UP FOR THE LOSS OF INTERNATIONAL

Get Australians to do domestic travel like international travel: stay longer, go further, and spend more



INTERNATIONAL

H1: MAINTAIN INTERNATIONAL DEMAND

Keep Australia on international travellers' consideration lists as competitors borders likely reopen

ASAP: DRIVE IMMEDIATE CONVERSION

Overinvest on conversion, driving urgency in the first markets to reopen to Australia

OPEN BORDERS: WELCOME THE WORLD

Relaunch Australia to the world with a critical mass of open borders

An aerial photograph of a city, likely Canberra, Australia, featuring a large lake (Lake Burley Griffin) and a prominent building (Parliament House) in the center. The foreground is dominated by dense green trees, and the background shows rolling hills and mountains under a blue sky with scattered white clouds. The text 'INDUSTRY SUPPORT' is overlaid in large, bold, white capital letters across the middle of the image.

INDUSTRY SUPPORT

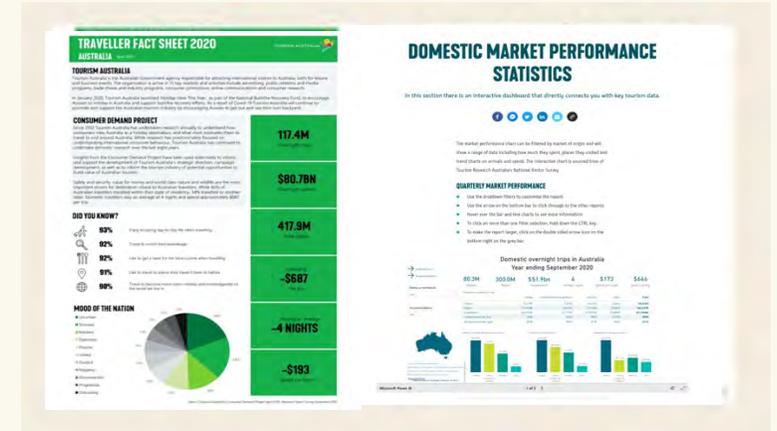
SUPPORTING YOU

INDUSTRY RESOURCES HUB



tourism.australia.com

GLOBAL MARKET INSIGHTS



tourism.australia.com

HEAR MORE ABOUT OUR NEXT DOMESTIC CAMPAIGN PLANS ON OUR NEXT INDUSTRY WEBINAR: 11AM ADST FRIDAY 8 OCTOBER

CAMPAIGN TOOLKITS



tourism.australia.com/holidayherethisyear

AUSSIE SPECIALIST PROGRAM

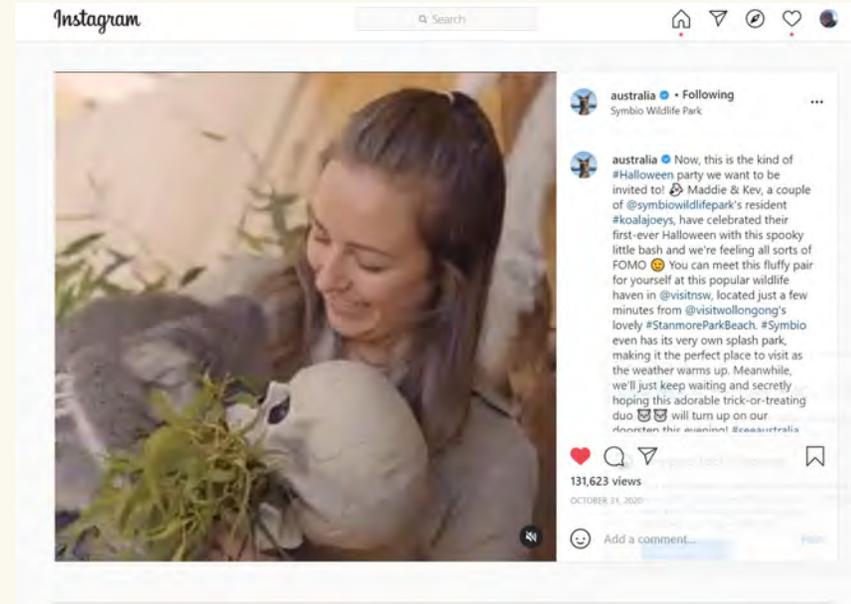


aussiespecialist.com

SOCIAL MEDIA FEATURED POSTS

BE SURE TO SHARE YOUR SOCIAL CONTENT WITH US

#SeeAustralia @Australia
SocialMedia@Tourism.Australia.com



NATURE & WILDLIFE

CULTURE

UNUSUAL MOMENTS

TIMELY MOMENTS

NATURAL & PLANNED EVENTS

A photograph of a kangaroo standing in a grassy field. The kangaroo is facing forward, looking slightly to the left. The background is a blurred landscape with green hills and trees. The lighting is warm, suggesting late afternoon or early morning. The text "THANK YOU" is overlaid in large, white, bold, sans-serif capital letters across the middle of the image.

THANK YOU