Tourism Australia Update

Glen Davis - Industry Relations Manager

TOURISM AUSTRALIA

1. International update
2. Campaign activity
3. Working with TA
4. The India Opportunity

OUR ROLE

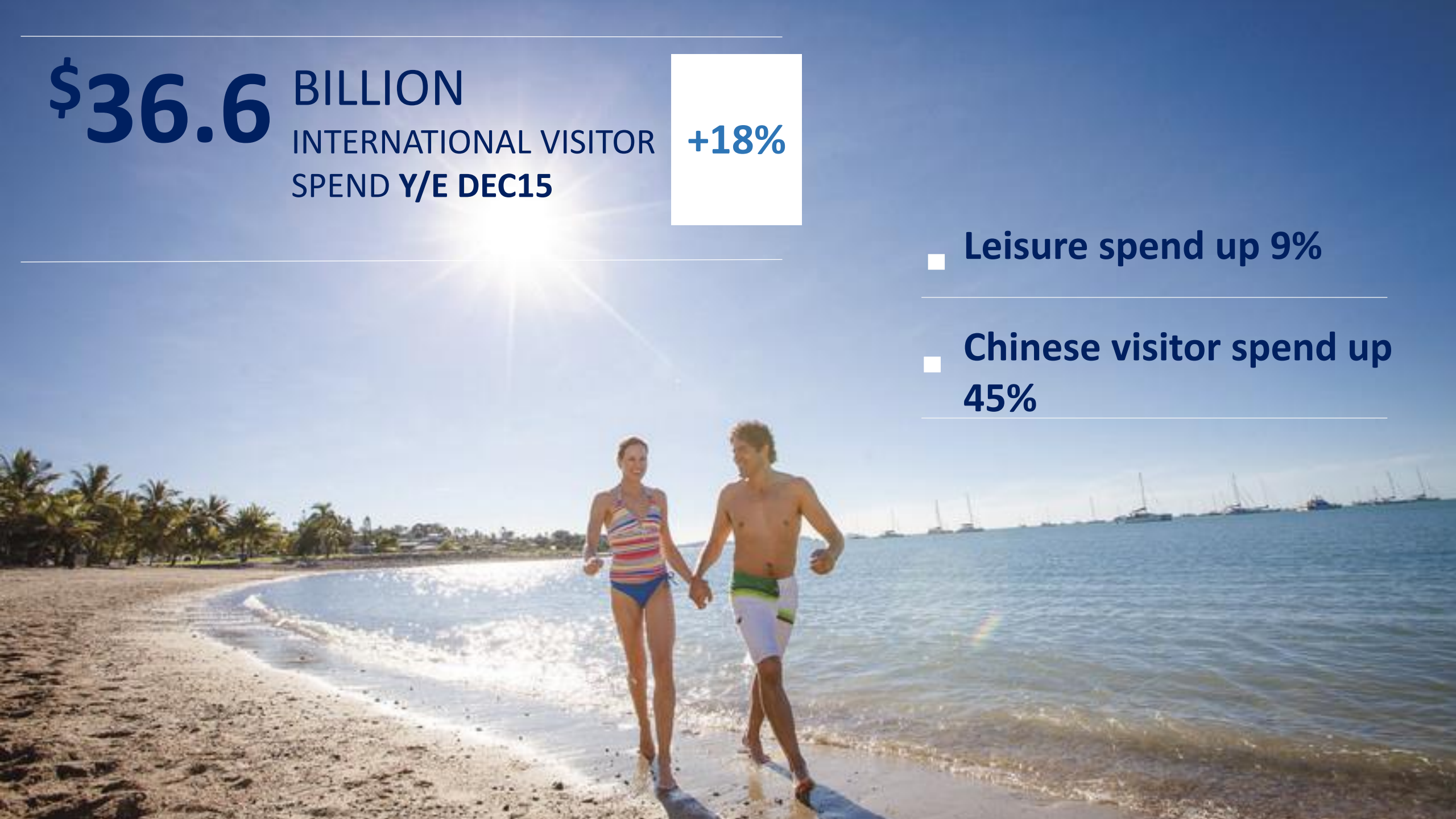
Grow demand
and foster a competitive and sustainable Australian tourism industry **through partnership marketing** targeted **to global consumers in key markets**

TOURISM 2020

From
$70bn
in 2009

Now
$93.4bn

To more than
$115bn
in overnight spend
by 2020



$36.6 BILLION

INTERNATIONAL VISITOR SPEND **Y/E DEC15**

+18%

- **Leisure spend up 9%**
- **Chinese visitor spend up 45%**

Our Market Focus

OUR CUSTOMERS

Young Adults

- Germany*
- UK*
- Italy
- France
- Singapore

**Denotes a secondary target audience for this market.*

Affluent Adults

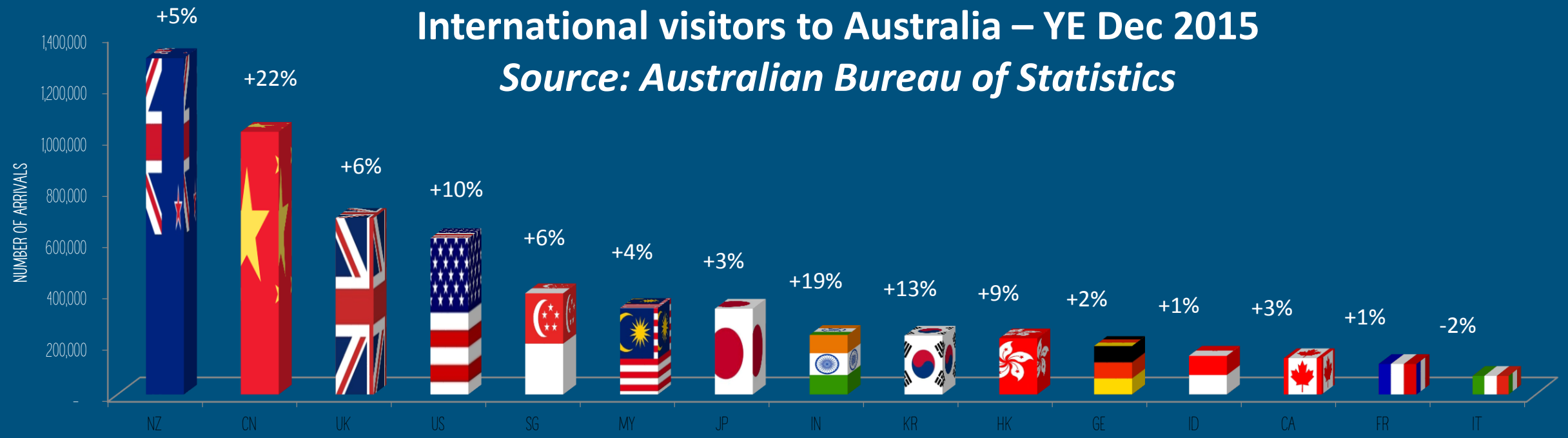
- China
- India
- South Korea
- Japan
- Hong Kong
- Indonesia
- Malaysia
- Brazil

Older Affluent Adults

- UK
- USA
- Germany

International visitors to Australia – YE Dec 2015

Source: Australian Bureau of Statistics



Expenditure by visitors – YE Dec 2015

Source: International Visitor Survey, Tourism Research Australia

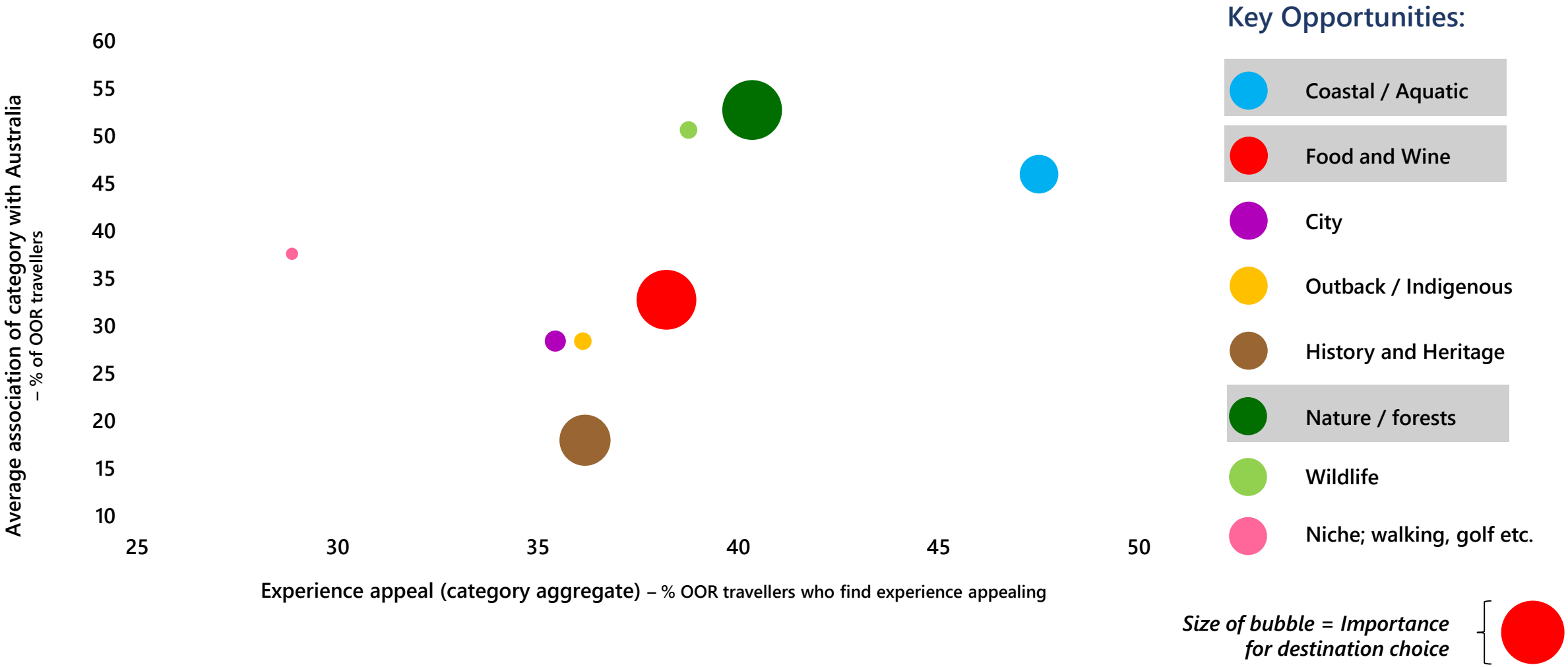
OUR GLOBAL CAMPAIGN MESSAGE

Launched in 2010
constantly evolving
to reach our global audience

OUR MARKETING - THERE'S NOTHING LIKE AUSTRALIA

COMPETITIVE DIFFERENTIATION, POSITIONING, CAMPAIGN FOCUS

RESEARCH WAS CONDUCTED ACROSS 11 KEY INTERNATIONAL MARKETS, WHERE 12 AUSTRALIAN REGIONS AND OVER 140 INDIVIDUAL EXPERIENCES WERE TESTED



Source: Consumer Demand Project, Tourism Australia, 2012 – 2014

AUSTRALIA, IT’S A PLACE YOU FEEL

You don’t just visit Australia, you live it. Because it’s not just a place you see, it’s a place you feel. Australia welcomes you with open arms and invites you to experience it with all your senses.

IMMERSIVE MEDIA ASSETS NEEDED TO ENSURE POTENTIAL INTERNATIONAL TRAVELLERS UNDERSTAND WHAT IT FEELS LIKE TO VISIT AUSTRALIA

FEEL AUSTRALIA THROUGH AN IMMERSIVE VIRTUAL REALITY EXPERIENCE

LINCOLN AND A WHITEHAVEN BEACH SCENE

GETTING
INVOLVED

facebook.com/seeaustralia

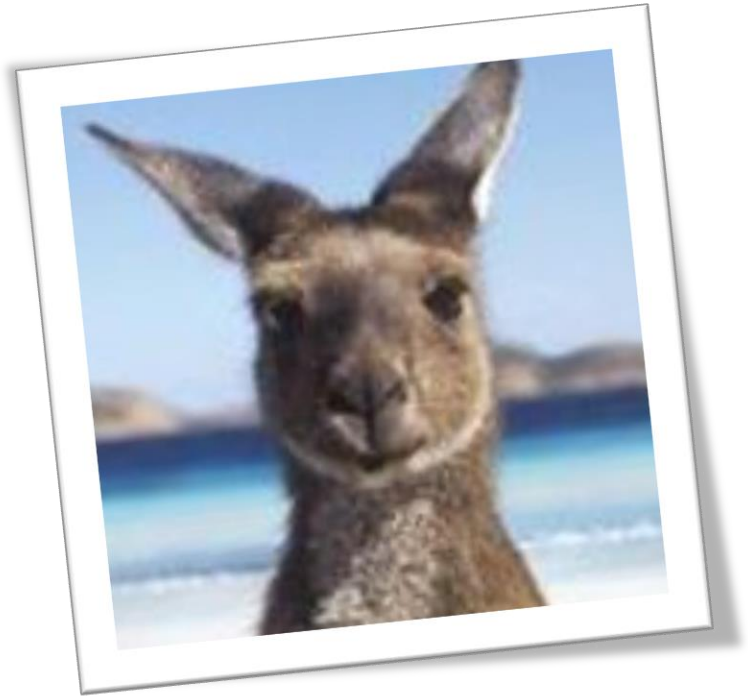
#seeaustralia
#restaurantaustralia
@Australia

#newsouthwales

@Australia

SOCIAL MEDIA

THERE'S NOTHING LIKE AUSTRALIA



1. Upload photos directly to the Tourism Australia Facebook page

2. Caption should include location and be short, laid back and conversational

3. If we re-posted to the main page: get involved in the conversation

SOCIAL MEDIA

australia

46.9k likes 11h

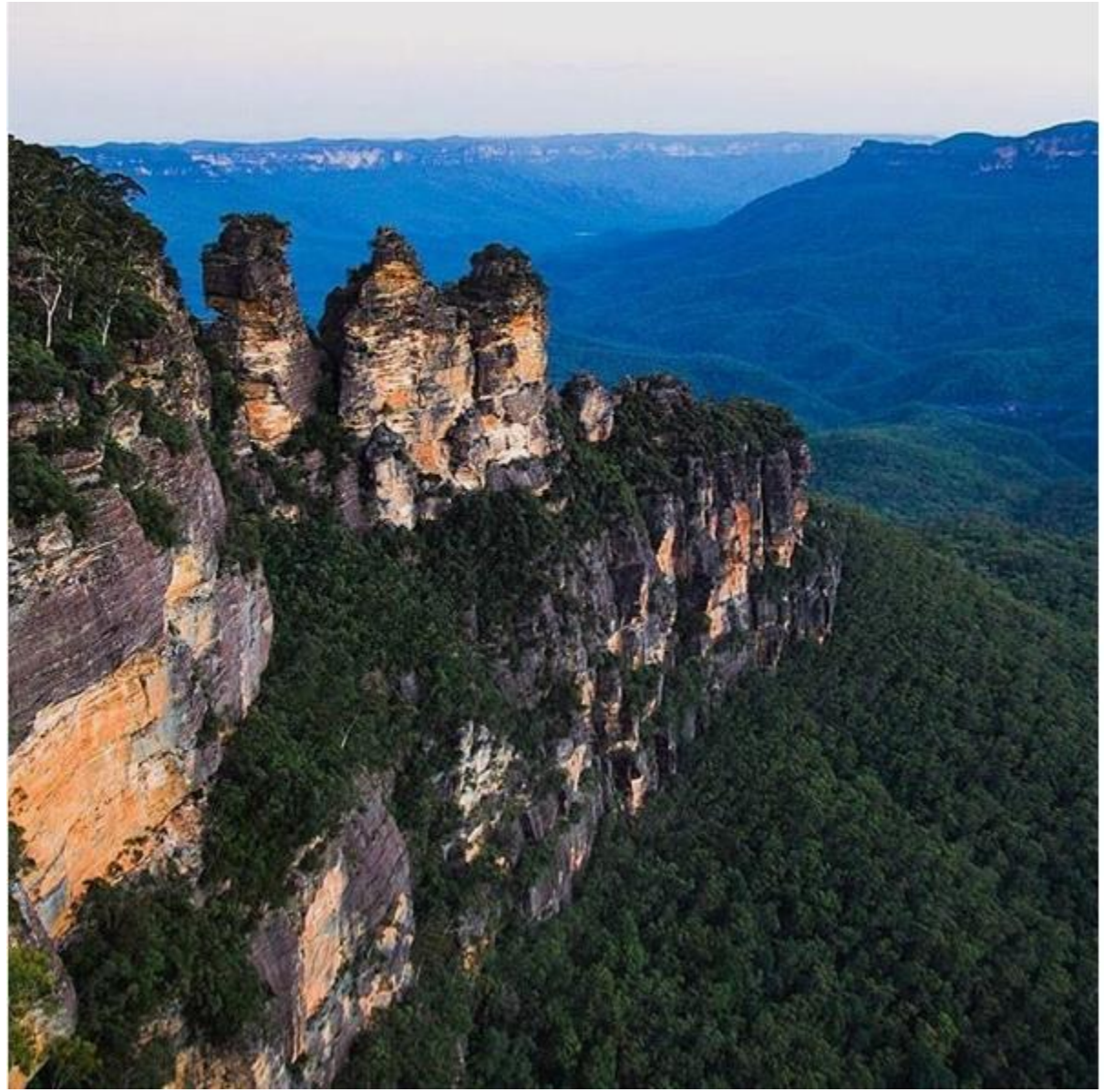
australia Looking for fresh air, adventure and incredible scenery? Walls Lookout in the @bluemountainsaustralia is where it's at! This stunning spot is right on the edge of the Blue Mountains Grand Canyon in @visitnsw, with panoramic views over the valley below. To get here, you'll need to drive along a gravel road to a picnic area, then it's just a one hour return walk to the lookout. And, in case you didn't know, the #BlueMountains are located just a 90 minute drive from the @sydney CBD - too easy! Photo: @wanderer_rachel

view all 515 comments

wanderer_rachel @lifecatchme thank you so much 😯

caroline_2303 @netflixhasnochill it's even more impressive than in the picture 😊

Add a comment...



australia

57.1k likes 8w

australia In Australia, our rocks come in all sorts of weird and wonderful shapes - behold, the Three Sisters in @visitnsw's #BlueMountains National Park! There's an excellent 1km boardwalk with handrails here, so you can get right up close to these fascinating formations. The park's waterfalls are usually pretty impressive after the summer rain - try the Furber Steps-Scenic Railway walking track for awesome views of Katoomba Falls. Photo: @mikegquinn

view all 737 comments

clymerhead @clymergirl awesome

kstewart 😲 @inesirm

jtar15 @aimee__e

joey.sedg @racheldobb you soon!!! 💜

lozzz_green @elishaprice this is literally my backyard haha

Add a comment...

australia

51.3k likes 4w

australia There's nothing like a crisp morning in the @bluemountainsaustralia 😍 This is the extraordinary vista from #GovettsLeap, which is one of the most famous lookouts in @visitnsw. The nearby historic town of #Blackheath is one of the highest towns above sea level in the area, plus it's built on an escarpment so there's mind-boggling scenery on both sides of the township. A getaway here means fresh mountain air, brisk walks, great food and cosy accommodation - sounds bearable! Photo: @wanderer_rachel

view all 354 comments

lmartini101 @shanobee165 just come back and we can see it again!! And yes we're having a blast

daortegaa 😂😂😂

cassandraperera @ramykozman

Add a comment...

australia
Featherdale Wildlife Park

39.5k likes 7w

australia Looks like Atlas the koala's eyes might be bigger than his belly! He's thoroughly enjoying this enormous gumleaf at @featherdalewildlifepark, which is less than an hour's drive from the @sydney CBD, en route to the famous Blue Mountains. This unique wildlife park is known for its up-close animal encounters - you can cuddle up to a koala, hand-feed a poteroo or pademelon, or even watch the resident Tassie Devils having lunch.

view all 2,724 comments

_k.a.t.h.i._ @_anli_15_ der koala erinnert mich an uns, nur am futtern und dabei cute aussehen😂😂🙄😎❤

_anli_15_ @_k.a.t.h.i._ Mah der ist aber echt niedlich 🙄🙄

claire.cunningham_ @alexakantor !!!!!

Add a comment...

New tool for industry with hints/tips on content

Australia
Draft · 3 min read

Tips and Tricks from Tourism Australia's Social & Content team

Have a question? Ask it here by highlight any part of the text and leaving us a comment or use #AskTA on Twitter. Bookmark this page, as we'll be updating it weekly.

TA's consumer profiles

www.australia.com—this is our main channel and our call to action on our campaign

@Australia (Instagram)—TA's @Australia account recently won a Skifties Award making it the best account in travel globally. The team feature 4 photos per day

Australia.com (Facebook)—TA's Facebook profile features the best fan photos daily. Regular features include the 'Friday Fan Photos', '7 Instagram Photos that made us happy' and 'What Australia Ate This Weekend'

Examples of great 'Aquatic & Coastal' social posts

Taking off to check out some of the amazing scenery that @thekimberleyaustralia is packed with...

"Taking off to check out some of the amazing scenery that @thekimberleyaustralia is packed with! From the ancient...

instagram.com

A helicopter flight over paradise, AKA @qualiaresort, with @terryyoong ☞ Located on the secluded...

"A helicopter flight over paradise, AKA @qualiaresort, with @terryyoong ☞ Located on the secluded northern tip of...

instagram.com

Well... we know exactly where we would like to be this weekend! The infinity pool at @lakearyle has...

"Well... we know exactly where we would like to be this weekend! The infinity pool at @lakearyle has to be one of the...

instagram.com

We just had to share this shot with you because seriously, who on earth could resist a little

Tourism operators who we think are doing great work in social

Lady Elliot Island Eco Resort (@ladyelliotislandecoresort) * Instagram photos and videos

Official account for Lady Elliot Island Eco Resort. #ladyelliotisland or @ladyelliotislandecoresort to give permission...

instagram.com

Hamilton Island

Hamilton Island, Whitsundays, QLD. 68,336 likes · 7,750 talking about this · 232,100 were here. Situated on the edge of...

www.facebook.com

Ocean Rafting (@oceanrafting) * Instagram photos and videos

Australian Tourism Award Winner featuring snorkeling, Whitehaven Beach and Hill Inlet. Welcome to the wildest ride in...

instagram.com

Heron Island (@heronisland) * Instagram photos and videos

Heron Island Resort's official account. Use #heronisland or @heronisland to give us permission to repost. www.facebook...

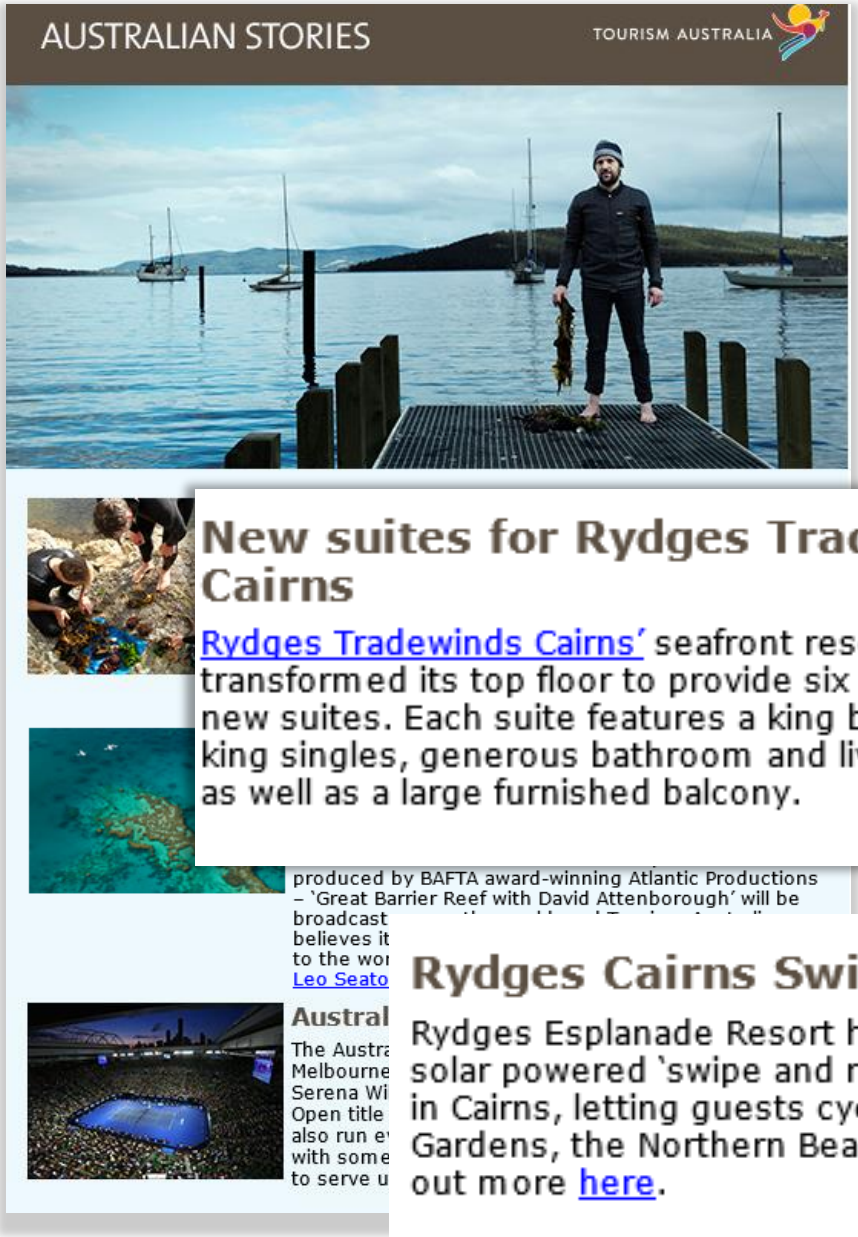
instagram.com

Heron Island
GREAT BARRIER REEF

GoPro

We're big fans of the new GoPro4 Session camera. It's small, lightweight and very easy to carry with you. Unlike the previous model it doesn't have an LCD screen in the back, but it connect through your smartphone app for easy viewing, editing and publishing to social media.

Live now!
Go to tourism.australia.com/socialmedia



- 'New news' – product and events
- Sent to 4,000 subscribers
- Assists journalists with content ideas

Send your press releases to:
internationalmedia@tourism.australia.com

Bareboating in The Whitsundays

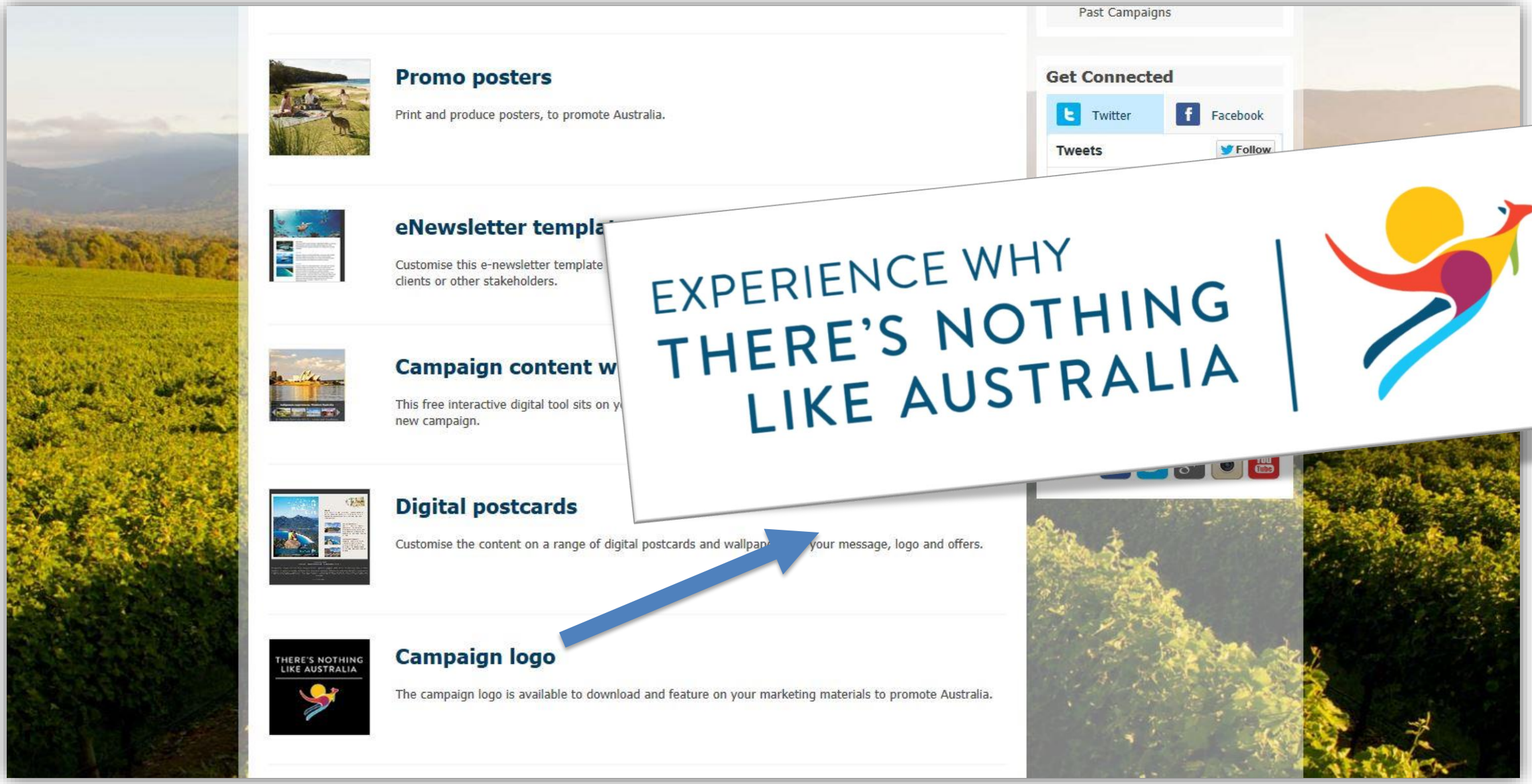
Hire your own boat and create your own journey through the Whitsunday Islands and Great Barrier Reef, Queensland. With your own floating hotel, you can partake in dozens of marine activities at your leisure. Find out more here.

Hartley's Crocodile Adventures

Hartley's Crocodile Adventures in Far North Queensland has been named in Trip Advisor's Hall of Fame. Hartley's won entry in to the Hall of Fame after winning Trip Advisor's Certificate of Excellence for five consecutive years.

'AUSTRALIAN STORIES' NEWSLETTER

THERE'S NOTHING LIKE AUSTRALIA

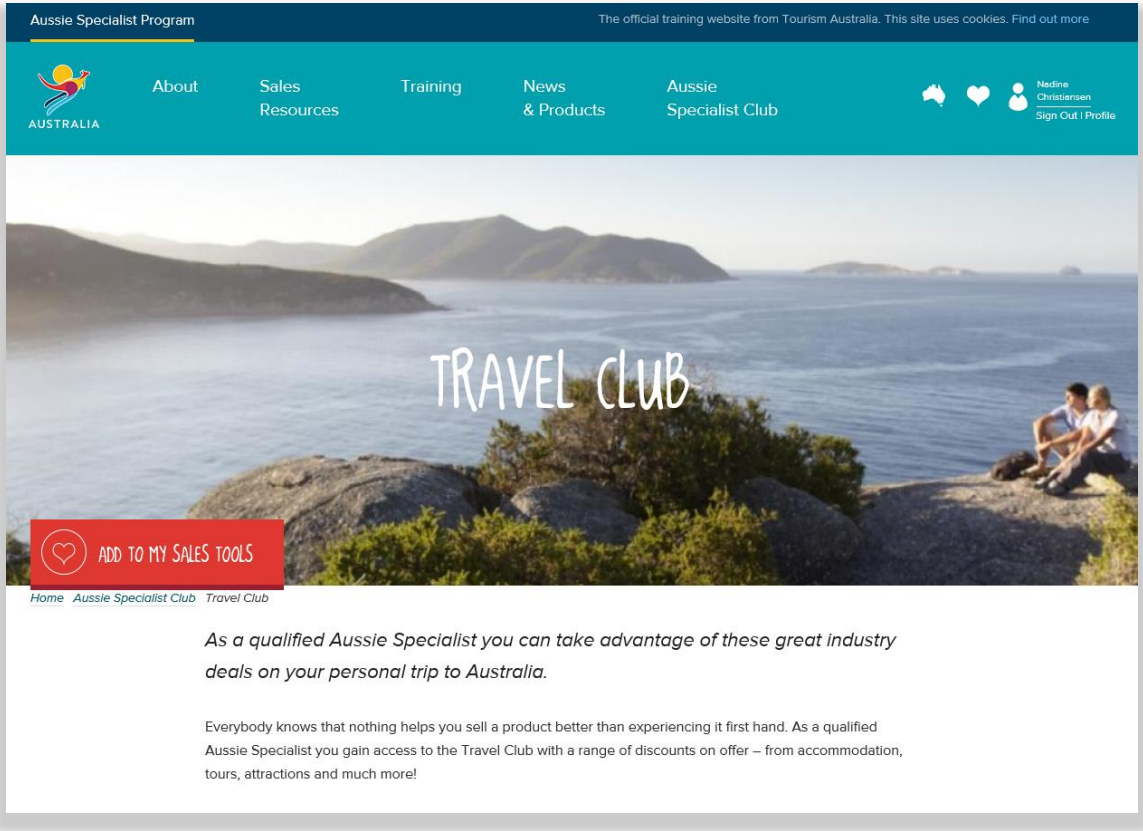


CAMPAIGN ASSETS

THERE'S NOTHING
LIKE AUSTRALIA

AUSSIE SPECIALIST PROGRAM

THERE'S NOTHING LIKE AUSTRALIA



PARADISE ON THE BEACH

Boutique resort in the beautiful beachside village of Palm Cove village only 25 minutes' drive north of Cairns.
View more information

Expires: Jun 25, 2016

TJAPUKAI. WHERE AUSTRALIA BEGINS

Tjapukai showcases Australia's ancient Indigenous culture with theatrical performances and interactive activities.
View more information

Expires: Mar 31, 2016

SKYRAIL RAINFOREST CABLEWAY

The world's most beautiful rainforest experience.
View more information

Expires: May 06, 2016

BILLY TEA SAFARIS

Experience a day tour of the magical Daintree/Cape Tribulation World Heritage-listed rainforest in a custom-built 4WD vehicle.
View more information

Expires: Mar 31, 2017

SUNLOVER REEF CRUISES

Full day outer Great Barrier Reef cruise.
View more information

Expires: Mar 31, 2016

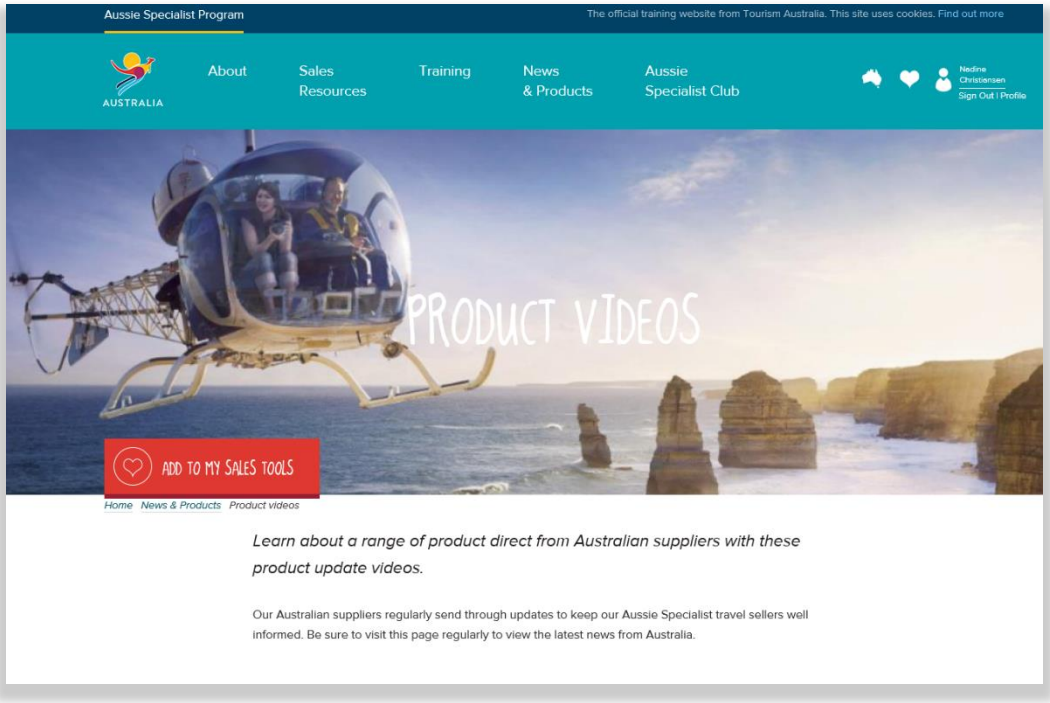
KURANDA SCENIC RAILWAY

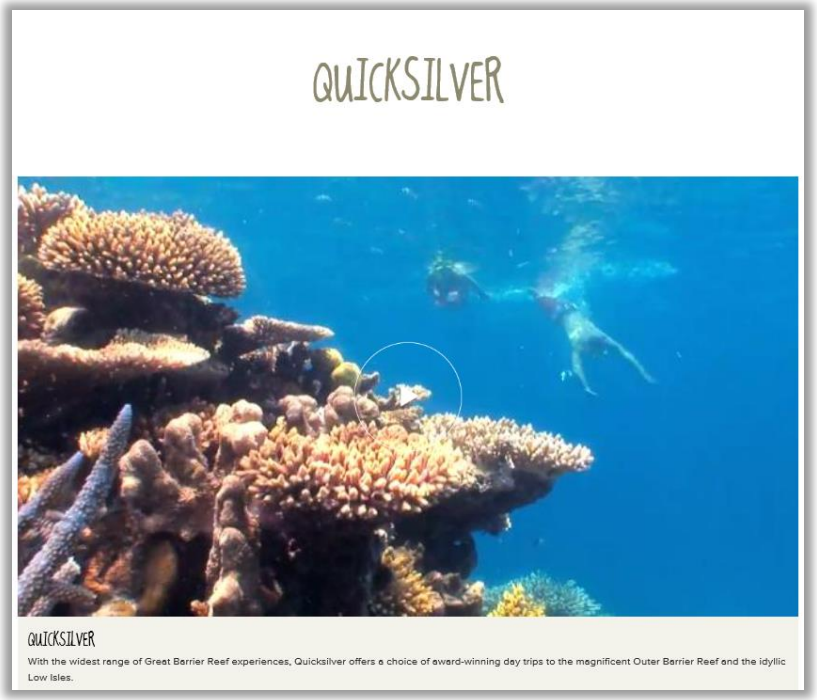
Experience one of the most unique rail journeys in Australia.
View more information

Expires: Mar 31, 2016

TRAVEL CLUB

THERE'S NOTHING LIKE AUSTRALIA





PRODUCT UPDATE VIDEOS

THERE'S NOTHING LIKE AUSTRALIA

Holiday in Australia | Plan a business event | Media & Industry

Search Media & Industry

TOURISM AUSTRALIA CORPORATE WEBSITE

Help | Contact Us | Subscribe to news

NEWS & MEDIA — Latest news, media tools
EVENTS — Calendar
INDUSTRY ADVICE — Opportunities, accreditation
MARKETS — Regions, sectors
CAMPAIGNS — Current, past
PROGRAMS — Industry programs
RESEARCH — Statistics, figures
ABOUT US — Tourism Australia

Aquatic and Coastal Strategy

AQUATIC AND COASTAL STRATEGY
From early 2016, Tourism Australia's 'There's nothing like Australia' campaign will put the spotlight on one of Australia's key competitive advantages – our aquatic and coastal offering.

Find out more

Aboriginal Tourism News – December 2015
Holiday in Australia
Aquatic and coastal strategy
Essentials
Australian Stories

Latest News

Chris Hemsworth announced as Tourism Australia's new global ambassador

15 Jan 2016

Australian actor Chris Hemsworth has been announced as the global ambassador for Tourism Australia's new campaign, which will focus on the country's world-class aquatic and coastal experiences.

Read more

Australia welcomes record one million visitors from China

13 Jan 2016

Australia's tourism industry is continuing its record breaking trend with annual Chinese visitor arrivals hitting one million for the first time.

Read more

Other Headlines

- New Year projections for Sydney looking good 23 Dec 2015
- Australia named 'Destination of the Year' by Condé Nast Traveler 16 Dec 2015
- Indigenous tourism campaign launches in Germany 16 Dec 2015
- Major media promotion launches in the USA 16 Dec 2015

Twitter

Tweets — Follow

Joanna Savill @joannasavill 22 Jan
Redzepi is in the house tourism.australia.com/campaigns/news ... @ReneRedzepiNoma @TourismAus #NomaAustralia. Words by yours truly. pic.twitter.com/JnQPPs0Hwt
Retweeted by Tourism Australia
Show Photo

Tourism Australia @TourismAus 22 Jan

tourism.australia.com

THERE'S NOTHING LIKE AUSTRALIA

International Market Update

Tourism Australia's International Market Update (formerly the Quarterly Market Update) provides an update to industry on the current state of international tourism for Australia. At the time of publishing, the report contains the latest Australian Bureau of Statistics data, International Visitor Survey data up to September 2015, and references various other secondary data sources.

December 2015

TOURISM AUSTRALIA

STRONG GROWTH CONTINUES IN 2015

- The Australian Bureau of Statistics (ABS) showed that there were 7.2 million short-term visitor arrivals into Australia in the 12 months ending September 2015, a rise of seven per cent compared to the previous year.
- The latest International Visitor Survey (IVS) results showed that international expenditure for the 12 months ending September 2015 grew 13 per cent, reaching a total of $34.8 billion.

Strong momentum in international arrivals and expenditure

International arrivals to Australia increased seven per cent in the 12 months to September 2015. A strong performing leisure segment has aided the growth with Holiday arrivals up four per cent and Visiting Friends & Relatives (VFR) arrivals up eight per cent over the 12 month period. Key markets saw particularly strong growth in Holiday purpose arrivals, with an increase of 21 per cent from China and India, and a seven per cent rise from the USA.

Total international expenditure grew at an even greater rate than arrivals, up 13 per cent in the year ending September 2015. China continues to be one of the fastest growing markets, with spend up 43 per cent reaching $7.7 billion. Similarly, Indian visitor expenditure was up 34 per cent. Growth in total visitor expenditure was also recorded for New Zealand, the USA, Singapore, Malaysia, Hong Kong, Germany, Canada and France. Leisure spend recorded growth of nine per cent, made up of seven per cent growth in holiday spend and a 14 per cent rise in VFR spend.

Global consumer confidence

The latest Nielsen Consumer Confidence Index report shows that although consumers globally still have a recessionary mindset, confidence increased three index points to a score of 99 in Q3 2015, which is the highest recorded growth since 2006. The report also showed that confidence in eight of the 14 countries within the Asia-Pacific region was slightly supressed due to the rising recessionary sentiment in countries like Hong Kong, Malaysia and South Korea. There was however a surge in consumer confidence in USA and increases in the UK and Italy attributed to the improving job market. Click here for full report.

New research publications available

Tourism Research Australia (TRA) recently published the *Tourism Forecast 2015 Report*. The forecasts show inbound visitor arrivals are likely to grow at an annual average rate of four per cent to reach 10.6 million by 2024/25. This growth will be driven by key markets such as China, India, South Korea, Indonesia and Malaysia. China is likely to be the main driving force behind the growth and it is projected that China will contribute almost a third of all inbound arrivals by the financial year of 2024/25 and will surpass New Zealand as the largest inbound arrivals market in 2019/20. Other factors such as the depreciating Australian dollar and decreasing fuel prices will also aid both international and domestic tourism. Click here for full report.

The *State of the Industry Report* released in November 2015 by TRA reviews the performance of the tourism industry in 2014/15 and includes key supply-side metrics. The report showed that there has been record growth in overnight visitor expenditure during the last 12 months. Room supply decreased slightly over the same period, however there is a robust pipeline of 16,000 rooms under construction and supply is expected to average three per cent annual growth to 2020. Click here for full report.

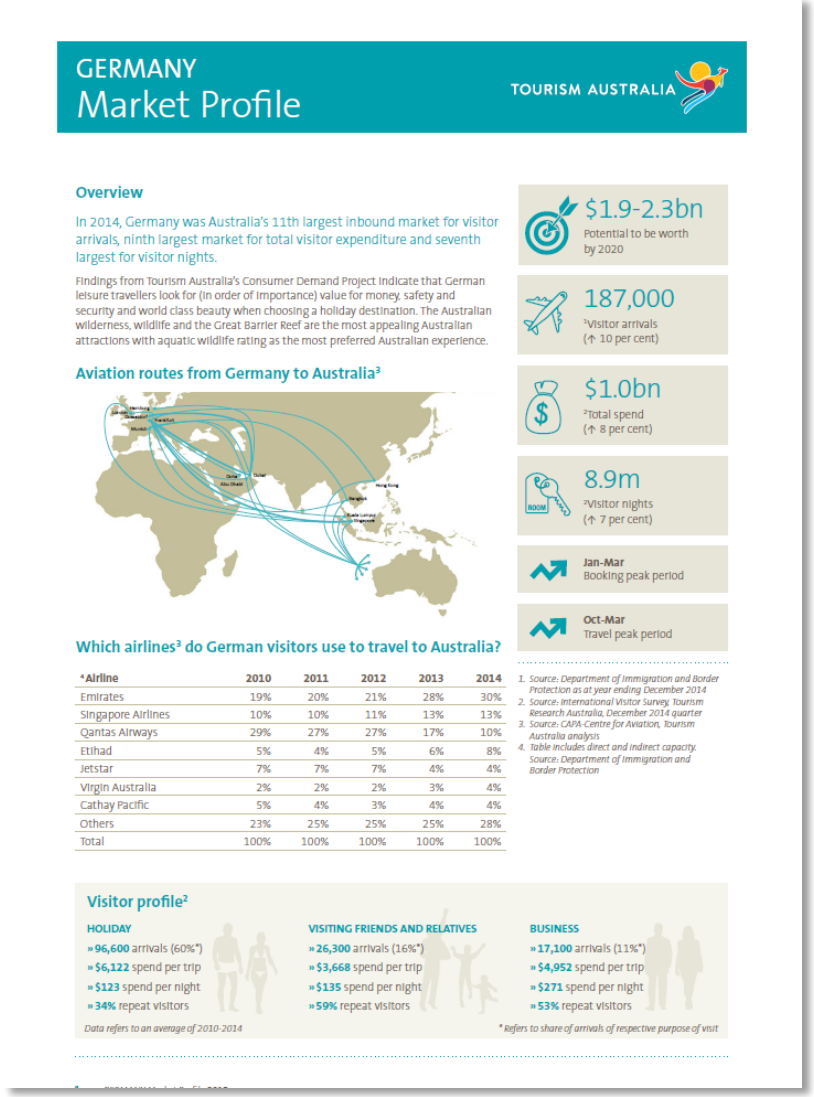
There's Nothing Like Australia Aquatic & Coastal campaign

As part of the ongoing campaign *There's Nothing Like Australia*, Tourism Australia is looking to highlight one of Australia's key competitive advantages – our world-class aquatic and coastal experiences. To ensure that the travel industry in Australia maximises this in-market campaign activity, we encourage operators to develop special offers and itineraries with products (new and existing) that align to the campaign. Activity will be rolling out in international markets in early 2016. Each market campaign will feature a strong conversion focus aligning key distribution partners to the campaign. For more information click here.

Tourism Australia's social media and content team have created a blog with top tips and tricks for Australian tourism businesses when using social media which should be particularly useful for getting involved in the latest There's Nothing Like Australia Aquatic & Coastal Campaign. Tourism Australia is also implementing ongoing improvements to Australia.com, most recently incorporating display of user generated content from the @australia instagram handle on the home page.

Aussie Specialist Program continues global roll out

Frontline travel sellers in the UK, US, Canada, India, Singapore and Malaysia are now benefitting from Tourism Australia's revamped Aussie Specialist Program, which includes a new digital platform with a progressive rollout in 11 languages across Australia's key international inbound markets. The relaunch started in September 2015 and concludes in March 2016, following an extensive review of the global online training program. In addition to the new website, a team of 23 Aussie Specialist Trainers and Coordinators have been recruited to provided face-to-face training and drive online engagement, to help frontline travel sellers promote and sell Australia more effectively.



GERMANY Market Profile

TOURISM AUSTRALIA

Overview

In 2014, Germany was Australia's 11th largest inbound market for visitor arrivals, ninth largest market for total visitor expenditure and seventh largest for visitor nights.

Findings from Tourism Australia's Consumer Demand Project indicate that German leisure travellers look for (in order of importance) value for money, safety and security and world class beauty when choosing a holiday destination. The Australian wilderness, wildlife and the Great Barrier Reef are the most appealing Australian attractions with aquatic wildlife rating as the most preferred Australian experience.

$1.9-2.3bn
Potential to be worth by 2020

187,000
[1]Visitor arrivals
(↑ 10 per cent)

$1.0bn
[2]Total spend
(↑ 8 per cent)

8.9m
[2]Visitor nights
(↑ 7 per cent)

Jan-Mar
Booking peak period

Oct-Mar
Travel peak period

Aviation routes from Germany to Australia[3]

Which airlines[3] do German visitors use to travel to Australia?

*Airline	2010	2011	2012	2013	2014
Emirates	19%	20%	21%	28%	30%
Singapore Airlines	10%	10%	11%	13%	13%
Qantas Airways	29%	27%	27%	17%	10%
Etihad	5%	4%	5%	6%	8%
Jetstar	7%	7%	7%	4%	4%
Virgin Australia	2%	2%	2%	3%	4%
Cathay Pacific	5%	4%	3%	4%	4%
Others	23%	25%	25%	25%	28%
Total	100%	100%	100%	100%	100%

1. Source: Department of Immigration and Border Protection as at year ending December 2014
2. Source: International Visitor Survey, Tourism Research Australia, December 2014 quarter
3. Source: CAPA-Centre for Aviation, Tourism Australia analysis
4. Table includes direct and indirect capacity. Source: Department of Immigration and Border Protection

Visitor profile[2]

HOLIDAY
- » **96,600** arrivals (60%*)
- » **$6,122** spend per trip
- » **$123** spend per night
- » **34%** repeat visitors

VISITING FRIENDS AND RELATIVES
- » **26,300** arrivals (16%*)
- » **$3,668** spend per trip
- » **$135** spend per night
- » **59%** repeat visitors

BUSINESS
- » **17,100** arrivals (11%*)
- » **$4,952** spend per trip
- » **$271** spend per night
- » **53%** repeat visitors

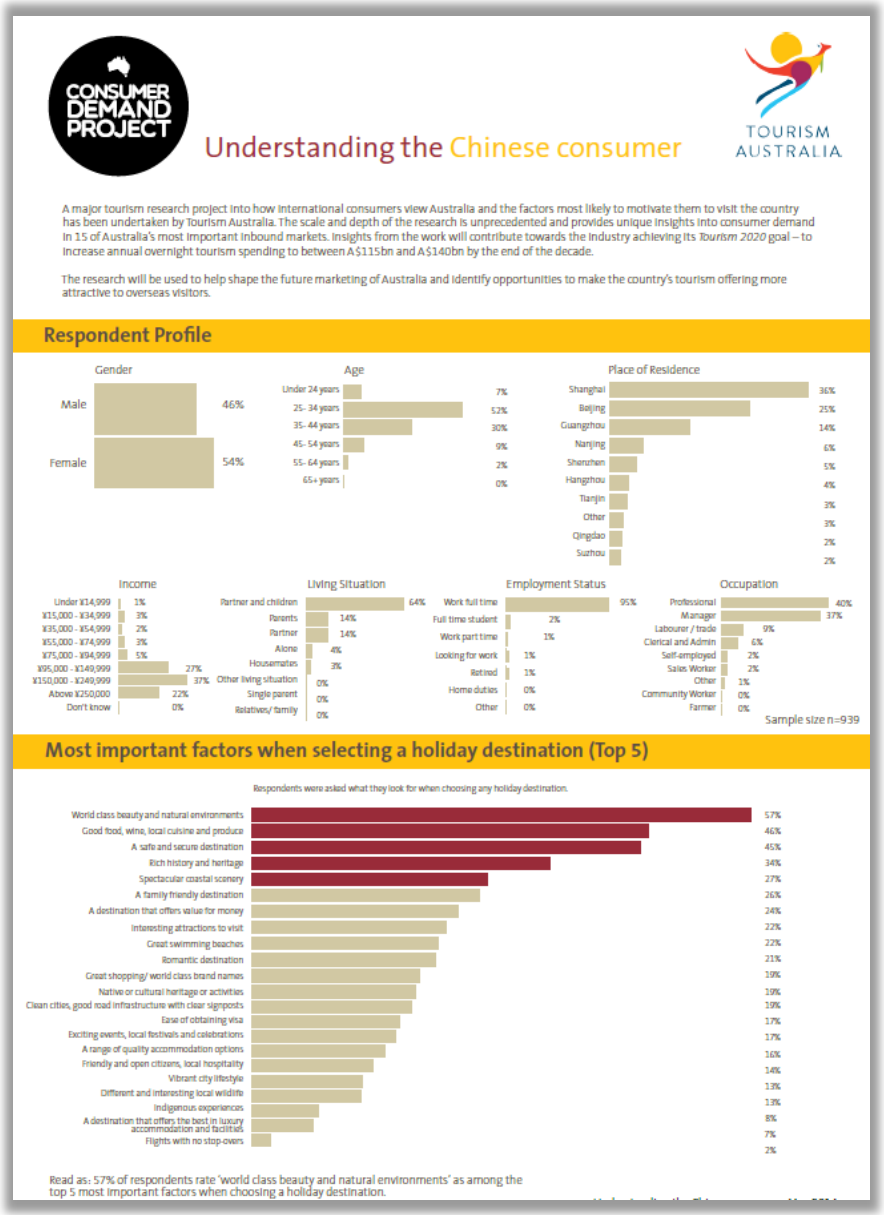
Data refers to an average of 2010-2014

** Refers to share of arrivals of respective purpose of visit*

- Market performance
- Aviation news
- Distribution news
- Consumer behaviours
- Planning seasons
- Booking seasons
- Key holiday periods
- Tips for sales calls
- Key trade events

MARKET UPDATES AND PROFILES

THERE'S NOTHING LIKE AUSTRALIA



CONSUMER DEMAND PROJECT

Understanding the Chinese consumer

TOURISM AUSTRALIA

A major tourism research project into how international consumers view Australia and the factors most likely to motivate them to visit the country has been undertaken by Tourism Australia. The scale and depth of the research is unprecedented and provides unique insights into consumer demand in 15 of Australia's most important inbound markets. Insights from the work will contribute towards the industry achieving its *Tourism 2020* goal – to increase annual overnight tourism spending to between A$115bn and A$140bn by the end of the decade.

The research will be used to help shape the future marketing of Australia and identify opportunities to make the country's tourism offering more attractive to overseas visitors.

Respondent Profile

Gender

Male 46%

Female 54%

Age

Under 24 years 7%
25- 34 years 52%
35- 44 years 30%
45- 54 years 9%
55- 64 years 2%
65+ years 0%

Place of Residence

Shanghai 36%
Beijing 25%
Guangzhou 14%
Nanjing 6%
Shenzhen 5%
Hangzhou 4%
Tianjin 3%
Other 3%
Qingdao 2%
Suzhou 2%

Income

Under ¥14,999 1%
¥15,000 - ¥34,999 3%
¥35,000 - ¥54,999 2%
¥55,000 - ¥74,999 3%
¥75,000 - ¥94,999 5%
¥95,000 - ¥149,999 27%
¥150,000 - ¥249,999 37%
Above ¥250,000 22%
Don't know 0%

Living Situation

Partner and children 64%
Parents 14%
Partner 14%
Alone 4%
Housemates 3%
Other living situation 0%
Single parent 0%
Relatives/ family 0%

Employment Status

Work full time 95%
Full time student 2%
Work part time 1%
Looking for work 1%
Retired 1%
Home duties 0%
Other 0%

Occupation

Professional 40%
Manager 37%
Labourer / trade 9%
Clerical and Admin 6%
Self-employed 2%
Sales Worker 2%
Other 1%
Community Worker 0%
Farmer 0%

Sample size n=939

Most important factors when selecting a holiday destination (Top 5)

Respondents were asked what they look for when choosing any holiday destination.

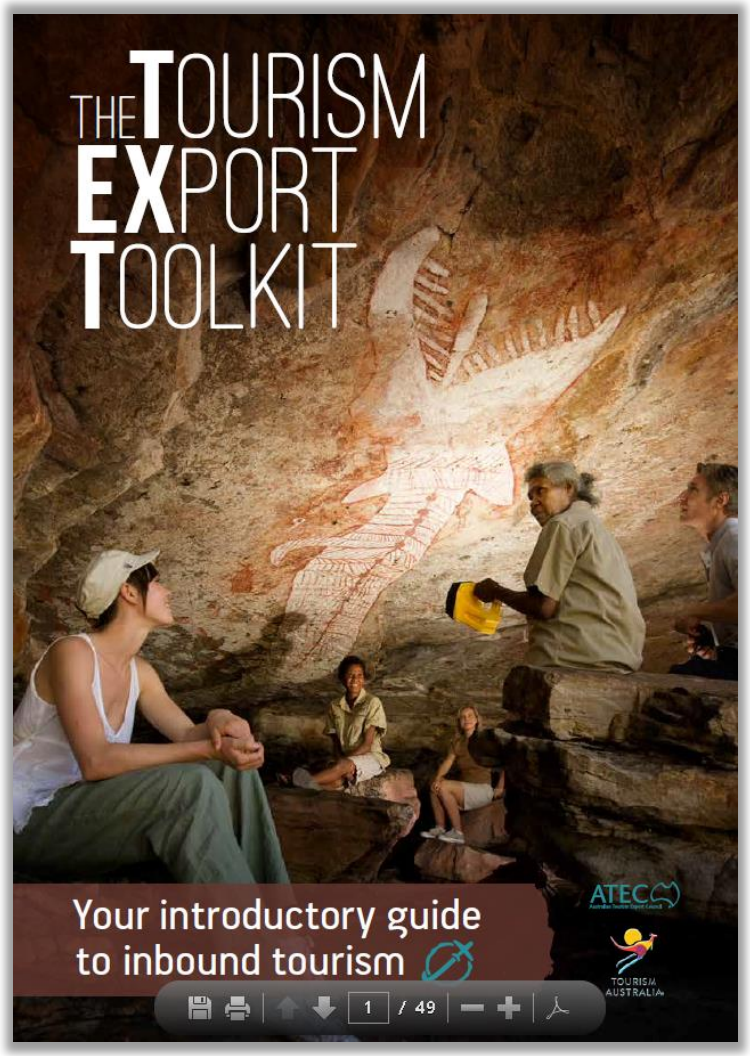
World class beauty and natural environments 57%
Good food, wine, local cuisine and produce 46%
A safe and secure destination 45%
Rich history and heritage 34%
Spectacular coastal scenery 27%
A family friendly destination 26%
A destination that offers value for money 24%
Interesting attractions to visit 22%
Great swimming beaches 22%
Romantic destination 21%
Great shopping/ world class brand names 19%
Native or cultural heritage or activities 19%
Clean cities, good road infrastructure with clear signposts 19%
Ease of obtaining visa 17%
Exciting events, local festivals and celebrations 17%
A range of quality accommodation options 16%
Friendly and open citizens, local hospitality 14%
Vibrant city lifestyle 13%
Different and interesting local wildlife 13%
Indigenous experiences 8%
A destination that offers the best in luxury accommodation and facilities 7%
Flights with no stop-overs 2%

Read as: 57% of respondents rate 'world class beauty and natural environments' as among the top 5 most important factors when choosing a holiday destination.

- Results of the Consumer Demand Project
- Identify motivators for travel
- How consumers plan & book their travel
- What is important to them & what they want to do while here

UNDERSTANDING THE CONSUMER

THERE'S NOTHING LIKE AUSTRALIA



- Advice on becoming ‘export-ready’
- Rate structures for inbound
- Inbound tourism trends
- Distribution network
- Working with ITOs, OTAs, inbound wholesalers
- Dealing with local, regional, state and national tourism organisations

Tourism Export Toolkit

Subscribe to our newsletters
tourism.australia.com/subscribe

Follow us on Twitter:
@TourismAus

Follow us on LinkedIn

KEEP IN TOUCH

THERE'S NOTHING LIKE AUSTRALIA

Glen Davis
Industry Relations Manager

gdavis@tourism.australia.com
0408 358 222

THANK YOU

THERE'S NOTHING LIKE AUSTRALIA

THE INDIA OPPORTUNITY

MAY 2016

SAMAR CHOKSHI

AGENDA

1. The India story – facts & figures
2. Update on arrivals and spends
3. The Indian traveler & opportunities
4. Getting India ready
5. Summary

TOURISM AUSTRALIA

INDIA

“Anything you say about India is true. But so is the opposite.”

Shashi Tharoor

Co-existence of the rich & the poor, urban and the rural, literate and the not so educated, modern versus cultural, makes this market truly diverse, extremely fragmented, unique and exciting!

“India needs Patience, Persistence, Perseverance” *Libby Swan, PRDXN*

“India punishes impatience”

Peter Varghese - Former Secretary, Department of Foreign Affairs and Trade

“Australia needs to adjust to India.
India will not adjust to Australia”

Patrick Suckling - Former Australian High Commissioner to India

ADVANTAGE INDIA

- India is burning brightest amongst the large economies
- India's GDP expected to grow between 7 to 8% over the next few years
- Aspirational middle class of over 300 Mn that will drive India's economy
- Over 1.2 bn domestic trips taken during 2015
- Over 20 Mn people traveled overseas (10-year CAGR: 12%) in 2015

GLOWING IN THE WIND

INDIA - FACT FILE

29 states
7 union territories

Population
1.2 billion

Languages spoken
29
Recognized Dialects
1,652

Population under 25 years of age
50%

GDP at PPP
US$ 6.7 trillion

GDP Growth Rate (2015-16)
7.6%

Other interesting facts:

- Credit card penetration less than 2% of the population & average credit limit is approx. A$ 1,000
- Just 2.8% of the population pays income tax
- India adds population equivalent to Australia's population every year
- India's middle class of 300 Mn is 13x the size of Australia's population

Source: *Statistical Outline of India, U.S. Department of Commerce, Economics and Statistics Administration, Bureau of the Census, IMA Asia, Various websites.*

AGENDA

1. The India story – facts & figures
2. Update on arrivals and spends
3. Our activities
4. The Indian traveler & opportunities
5. Getting India ready
6. Summary

TOURISM 2020 - India
Achieving our ambition

FROM:

233,000 arrivals &
A$ 1.1 BN

in total spend in 2015

TO:

300,000 arrivals (CAGR 5%) &
A$ 1.9 BN (CAGR 12%)

in total spend by 2020

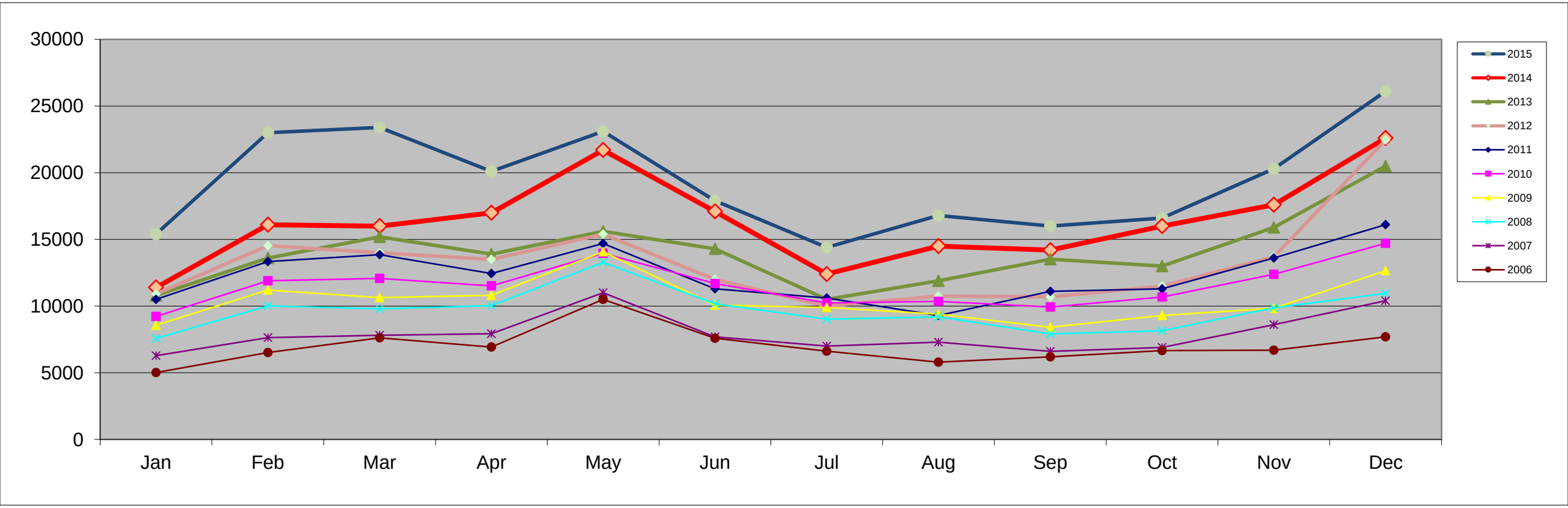
TOURISM FACTSHEET - 2015

TOURISM AUSTRALIA

1. 233,100 visitors from India during 2015, an increase of 19% over 2014
   - Two years of sustained double-digit growth (2014: +17%)
   - Holiday: Up 27%; VFR: 17.3%; Business: 4.9%
2. Spend during 2015 increased by 38% to A$ 1.1 Bn
   - Spend in 2014 increased by 15% to A$ 823 Mn
3. India is now ranked # 8th inbound market in to Australia for arrivals and is ranked #10 for spend
4. Leisure visitation now contributes to 68% of arrivals and 38% of spend

Sources: International Visitor Survey, Dec 2015, Tourism Research Australia. Overseas Arrivals and Departures, ABS Dec 2015

10-YEAR TREND AND SEASONALITY



Sources: International Visitor Survey, Tourism Research Australia.
Overseas Arrivals and Departures, ABS

TOURISM AUSTRALIA

ARRIVALS BY STATE

State/territory	Visitors in 2015 (000s)	% Growth
New South Wales	115	24%
Victoria	104	24%
Queensland	59	35%
South Australia	15	17%
Western Australia	20	15%

Sources: International Visitor Survey, Dec 2015

ARRIVALS & SPEND BY INDIAN STATES

TOURISM AUSTRALIA

Visitors	2014	2015	% Gth
Maharashtra	32319	43179	34%
Delhi	22909	28609	25%
Karnataka	22390	26498	18%
Kerala	12687	18244	44%
Tamil Nadu	18134	17527	-3%
Andhra Pradesh	12645	15285	21%
Gujarat	9122	12336	35%
Punjab	11487	15297	33%
West Bengal	8274	5525	-33%
Total	177599	213119	20%

Total trip Spend 000	2014	2015	% Gth
Maharashtra	126023	197689	57%
Delhi	94376	173969	84%
Karnataka	84376	136193	61%
Tamil Nadu	73639	79110	7%
Kerala	54043	93374	73%
Andhra Pradesh	90345	88752	-2%
Punjab	66231	71088	7%
Gujarat	45753	47952	5%
West Bengal	37987	31328	-18%
Total	799459	1071275	34%

AIRLINE MARKET SHARE

	Year ending				
Market share (last leg used by visitors)	**11**	**12**	**13**	**14**	**15**
Singapore Airlines	29%	33%	31%	29%	29%
Malaysia Airlines	22%	20%	27%	26%	24%
Air India	0%	0%	2%	11%	12%
Qantas Airways	16%	16%	8%	12%	9%
Thai Airways International	15%	15%	16%	6%	9%
Air Asia X	2%	1%	1%	3%	3%
Cathay Pacific Airways (HK)	5%	4%	5%	4%	3%
Emirates	3%	4%	3%	2%	2%
Others	7%	7%	9%	7%	8%

AGENDA

1. The India story – facts & figures
2. Update on arrivals and spends
3. Our activities
4. The Indian traveler & opportunities
5. Getting India ready
6. Summary

MAJOR CAMPAIGN OVERVIEW - 2016

TOURISM AUSTRALIA

- Jan 2016: 4-week campaign on television, 6 week campaign on print and 4-month campaign on digital
- Jan 15-Feb 14: Partnership with Air India. Mediums: Print, digital and OOH
- Feb 15-Mar 31: Partnership with Singapore Airlines and STOs - Television, print and digital
- Jan to Apr: Coop with 9 KDPs on Print and Digital
- Mar 2016: Inviting the world to 'NOMA'
- Apr 1-30: Partnership with Malaysia Airlines - Digital

12 KEY DISTRIBUTION PARTNERS

TOURISM AUSTRALIA

CHARIOT WORLD TOURS LIMITED
Great Holidays! Honest Prices™

COX & KINGS
OVER 200 YEARS OF DISCOVERY
ESTD 1758

DPauls.com
it's all about holidays

FLIGHT SHOP
Unbeatable

KESARI

kulinkumarholidays
family group tours

SOTC
For Holidays.

make MY trip
Dil toh roaming hai

Balmer Lawrie
Vacations Exotica
A world of difference

Thomas Cook
Travel Smooth
thomascook.in

yatra.com
creating happy travellers

MERCURY TRAVELS

50

TOURISM AUSTRALIA

DISTRIBUTION - AUSSIE SPECIALISTS

Distribution is fragmented in nature – 80:20 rule doesn't apply in fact it's exactly the inverse – hence the importance of the Aussie Specialist Program

- Aussie Specialist Team run Face to face trainings and Online webinars
- Aussie Specialists: Certified – 2615; Trainees – 2623; Total: 5238

DISTRIBUTION

- ATE 2015: May 15-19, Gold Coast
  24 Buyers attending

- India Travel Mission 2016:
  location TBC, Aug 18-21
  Seller applications open May

- Sep 5-9: Corroboree Asia – Perth
  Seller applications open April 6

AGENDA

1. The India story – facts & figures
2. Update on arrivals and spends
3. Our activities
4. The Indian traveler & opportunities
5. Getting India ready
6. Summary

THE INDIAN TRAVELLER - TARGET CUSTOMER

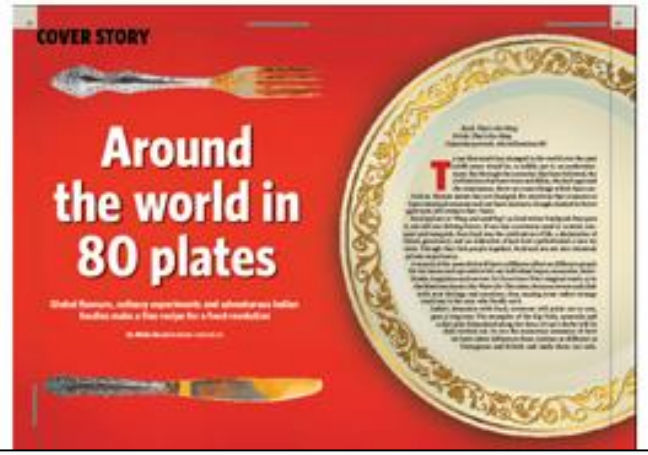
TOURISM AUSTRALIA

- Affluent – amongst the wealthy
- 35 – 54 married, married with a kid/s,
- Honeymooners
- Annual household income of USD 45,000
- Work as Entrepreneurs or Self-employed, Highly qualified professionals, senior executives
- Own at least two vehicles, drivers, domestic help for cooking, cleaning, kids.

EXPERIMENTING WITH TASTES; ASPIRING FOR MORE

Getting adventurous with food

Around the world in 80 plates



Global flavours, culinary experiments and adventurous Indian foodies make a fine recipe for a food revolution

By Nikita Doval/Mumbai and Delhi

Food: That's the thing
Drink: That's the thing
Sumerian proverb, 4th millennium BC

Fancy food getting accessible

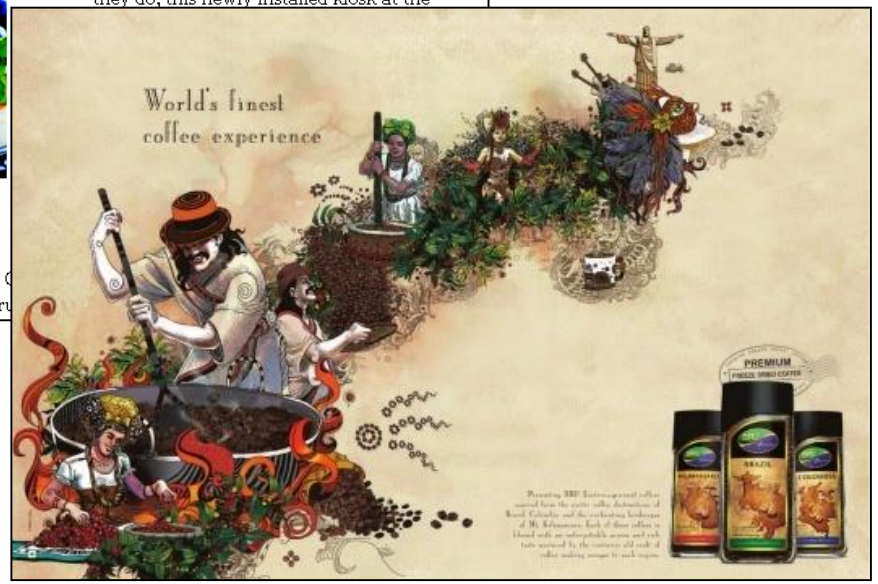
Sushi for a steal

Joeanna Rebello Fernandes | March 5, 2011

Like 1 Tweet A- A+

We only have Chinese at the moment, " was the sheepish return to the routine inquiry: 'What's on the menu?' Sheepish, because the said establishment was called Taste of Tokyo. There was no cultural cross-wiring we were assured;it was only a stopgap until their containers holding Japanese kitchen munitions came through customs. When they do, this newly installed kiosk at the

the word of a trader at Mumbai's
cuitwala is a taciturn man who gru



TOURISM AUSTRALIA

But they all have their
QUIRKS

FRUGALITY=BACCHHAT

Defined by a sense of restraint

A savers nation

We love Bargaining

Extravagant (weddings) and miserly (everything else) at the same time

Rooted in a memory of scarcity

TOURISM AUSTRALIA

COEXISTENCE=MASALA

‘Andness’

Modern and traditional at the same time

The thali/ rice plate

Indian Burger, Paan Ice Cream, ‘Sitar Guitar’

INFORMATION & PURCHASE DECISIONS

- *54%* of travellers going *online* to *search* for travel components

- Many are searching online *but still reserving* through *call centers* or *visiting storefronts* to make payments. Indian travellers use the best of both worlds to shop and book their travels.

- As holiday travellers go down the funnel, they start moving back to offline channels. While price is most important, other factors such as trust, convenience, content and validation from peers or professionals are also big influencers.

THE OPPORTUNITY

- Young country
- Consumption and spending habits – have money, will spend. Bragability; YOLO
- Honeymooners – have time and budget
- Niche, luxury traveller – older, wiser, mature – extensively travelled
- Experiential travel – not just a tourist. Stories to tell back home
- Thrill seekers – Adventure junkies, life is incomplete without the adrenalin rush.

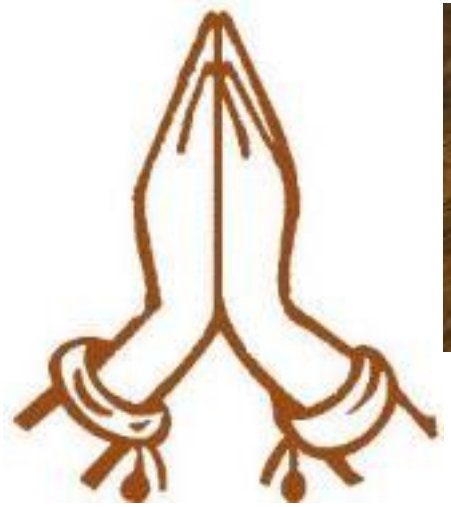
60

AGENDA

1. The India story – facts & figures
2. Update on arrivals and spends
3. Our activities
4. The Indian traveler & opportunities
5. Getting India ready
6. Summary

WHAT YOU CAN DO

- Comfortable
- Vegetarian



WHAT YOU CAN DO

- Pamper
- Early rate contracts
- Value deals

HOT DEALS

HOW TO WIN THIS MARKET

- Patience
- Perseverance
- Engage
- Visibility + Awareness

HOW TO WIN THIS MARKET

- Xperiential travel
- Events & festivals
- Product development
- Customise

GAINING COMPETITIVE EDGE IN INDIA

1. Make selling easy
2. Provide rates at least 4 to 5 months prior to date of travel
   - Travel starting Oct (Rates to be made available in Jun)
   - Travel starting Apr (Rates to be made available in Nov)
3. Deal seekers: Extremely value conscious, but not cheap
   - Exclusive deals: Stay 10, Pay 8. Kids stay & eat free. Breakfast & WIFI included
4. Coopetition
5. New products, destinations, experiences to drive length of stay & yield
6. Support during IMHPs and content integration projects

AGENDA

1. The India story – facts & figures
2. Update on arrivals and spends
3. Our activities
4. The Indian traveler & opportunities
5. Getting India ready
6. Summary

STARS ARE ALIGNED FOR INDIA

TOURISM AUSTRALIA

- Strong foundation set since the launch of the India 2020 Plan
- Solid growth in arrivals & spend over the past two years
- High aspiration, awareness and intention to visit
- Visa: e600 rollout gives us a competitive edge

- Regular engagement with trade – including distribution events
- Localize / customize offerings to suit customer needs
- Offer Deals whenever possible
- Cater for dietary requirements

THANK YOU
schokshi@tourism.australia.com