



OUTBOUND CHINA AND ASIA TRAVEL AND TOURISM GROWTH OUTLOOK

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A group of seven people are gathered around a wooden dining table on a grassy hill. The table is set with a white tablecloth, plates of food, and glasses. The group consists of four women and three men, all dressed in casual to semi-formal attire. They are smiling and engaged in conversation. In the background, a beautiful coastal scene unfolds with a white sandy beach, a calm blue ocean, and a small rocky island in the distance. The sky is a mix of soft clouds and clear blue. In the foreground, the grass is tall and golden. To the right, a few sheep are grazing on the hillside.

OUR VISION

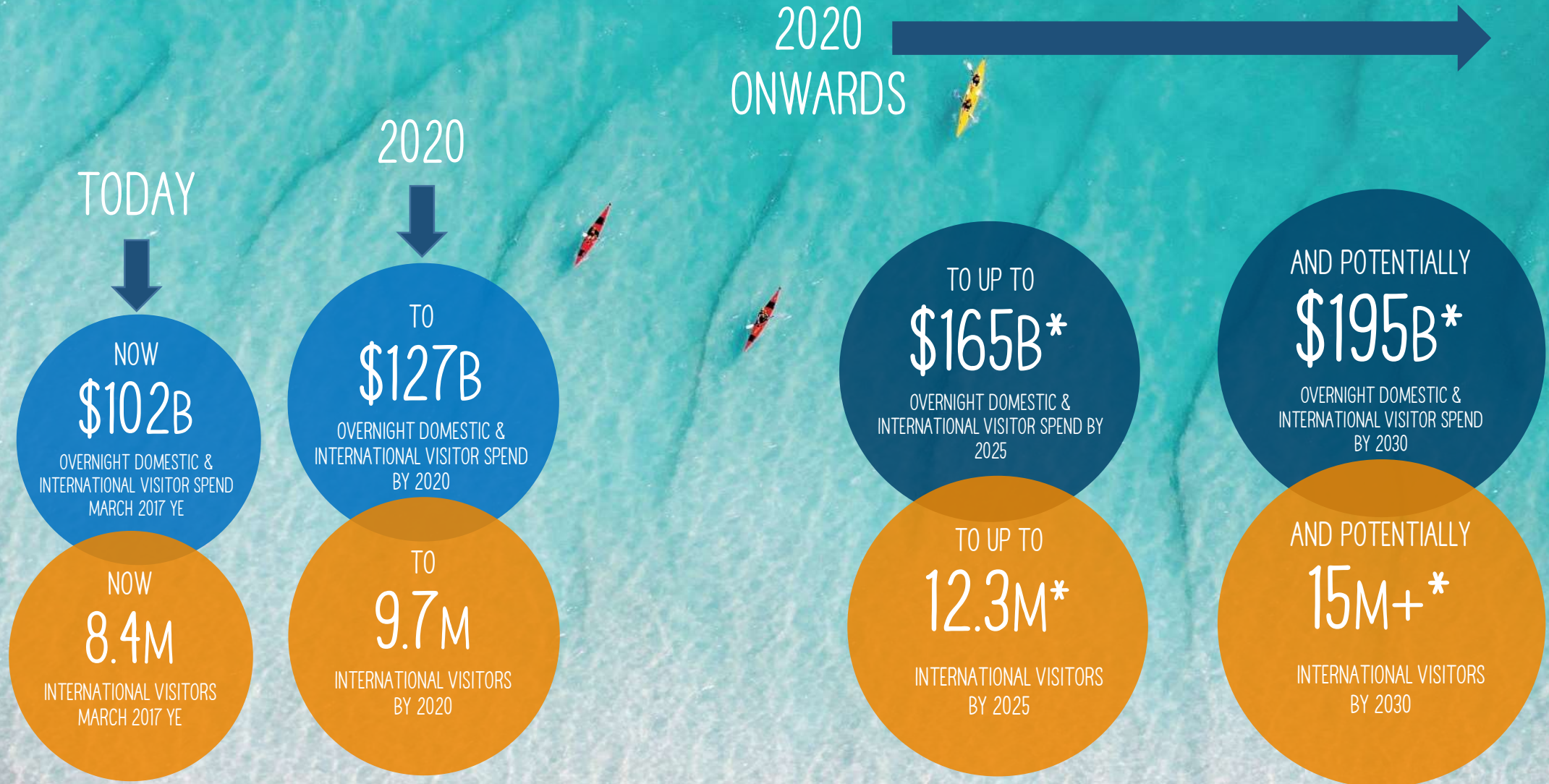
TO MAKE AUSTRALIA
THE MOST **DESIRABLE** AND
MEMORABLE DESTINATION
ON EARTH

ALIGNED TO

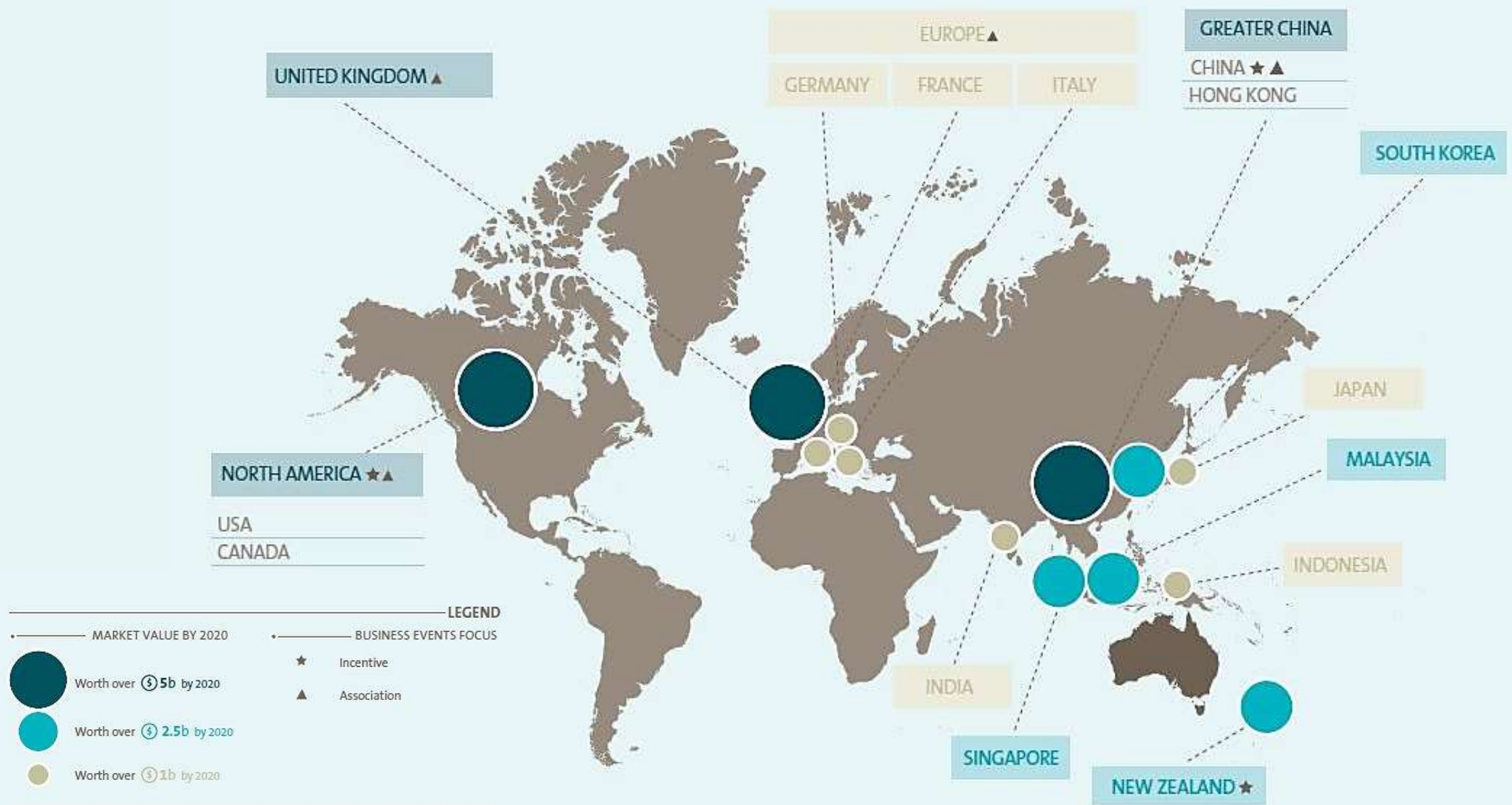
OUR CORE VALUES:

POSITIVE, GENUINE,
INNOVATIVE, COMMERCIAL
& UNITED

BETWEEN NOW AND 2030 THERE IS A \$90 BILLION OPPORTUNITY



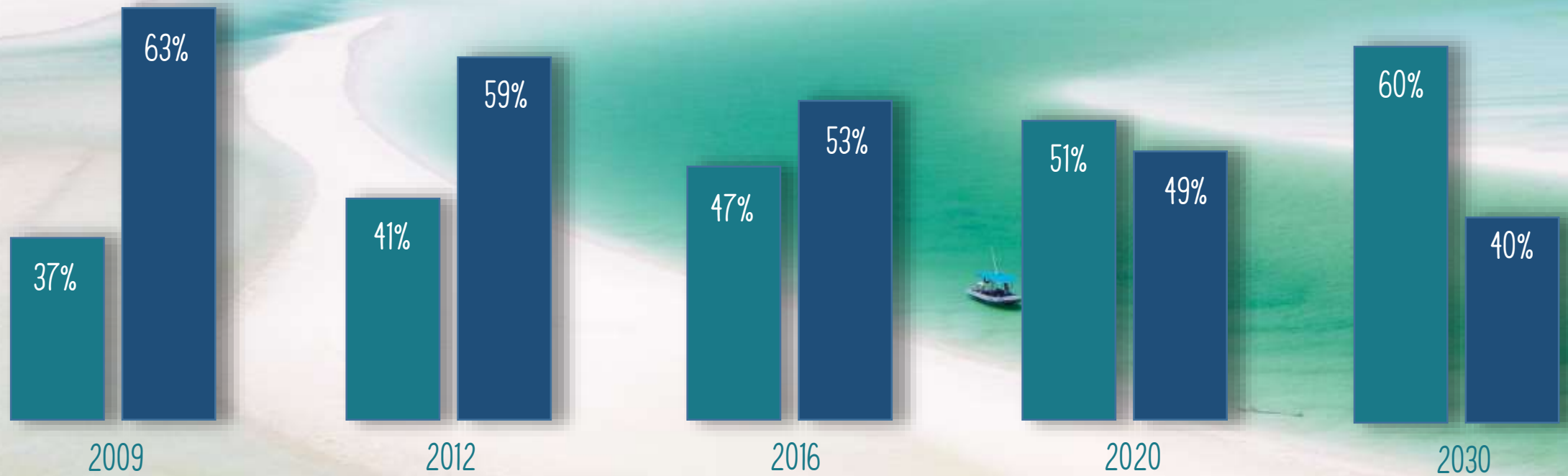
OUTLOOK: WHERE THE GROWTH WILL COME FROM



GROWING IMPORTANCE OF ASIAN INBOUND

SHARE OF INTERNATIONAL VISITORS

■ EAST ■ WEST



CHINA'S IMPORTANCE

- RECORD 1.2 MILLION PLUS VISITORS, +12%
- 50.1 MILLION VISITOR NIGHTS, +23%
- INCREASINGLY FREE AND INDEPENDENT TRAVEL (FIT), NOW AT 45%
- AVERAGE TRIP SPEND OF \$8K PLUS

FROM
A\$3B
IN O/NIGHT SPEND
IN 2009

NOW
A\$9.7B
IN O/NIGHT SPEND
MARCH 2017 YE

TO AS MUCH AS
\$13B
IN O/NIGHT SPEND
BY 2020

EXPERIENCES

WORLD CLASS NATURE, FOOD & WINE,
AQUATIC & COASTAL

TWO-THIRDS

OF TRAVELLERS ARE <35 YEARS OLD

84%

SHARE TRAVEL ON SOCIAL

80%

USE INTERNET TO RESEARCH TRAVEL

42%

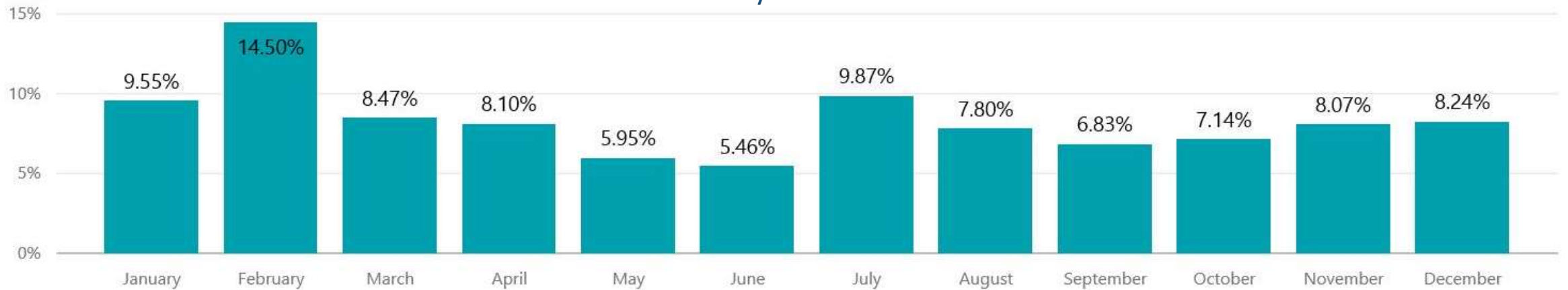
OF LUXURY ONLINE REVIEWS POSTED BY
CHINESE TRAVELLERS

CHINA – INSIGHTS



CHINA SEASONALITY

Arrivals Seasonality from China in 2016



TOURISM AUSTRALIA'S STRATEGY IS LED BY:

- GEOGRAPHICAL PRESENCE IN
MAJOR CENTRES
- AVIATION PARTNERSHIPS
- CHINA DIGITAL STRATEGY
- TAILORED MARKETING
EXPERIENCES
- KEY DISTRIBUTION PARTNERS





BUT CHINA IS NOT OUR ONLY ASIAN MARKET...



ASIAN CONSUMER WILL CONTINUE TO CHANGE

2009



- MORE ADVENTUROUS
- SHARING STORIES
- DIGITALLY CONNECTED
- NEW MARKETS

NOW



- SEARCHING FOR UNIQUE EXPERIENCES
- INCREASED DISPERSAL
- INCREASINGLY DEMANDING

NEXT



JAPAN

NOW
A\$1.7B

IN O/NIGHT SPEND
MARCH 2017 YE

TO AS MUCH AS
\$2.7B

IN O/NIGHT SPEND
BY 2020

EXPERIENCES

FOOD & WINE, RICH
HISTORY & HERITAGE,
WORLD CLASS NATURE,
AQUATIC & COASTAL

- 424K PLUS VISITORS, +18%
- SPEND GROWTH ALSO UP 18%
- MAJORITY ARE HOLIDAY VISITORS (67%)
- 54% OF LEISURE VISITORS AGED 30 PLUS
- SYDNEY – GOLD COAST – REEF



INDIA

NOW
A\$1.3B

IN O/NIGHT SPEND
MARCH 2017 YE

TO AS MUCH AS
\$1.9B

IN O/NIGHT SPEND
BY 2020

EXPERIENCES

FOOD & WINE,
VALUE FOR MONEY,
FAMILY FRIENDLY,
AQUATIC & COASTAL

- 268K PLUS VISITORS, +15%
- SPEND GROWTH UP 18%
- MAJORITY ARE LEISURE VISITORS (68%)
- 69% OF LEISURE VISITORS AGED 45 PLUS
- SYDNEY – MELBOURNE – GOLD COAST

INDONESIA

NOW
A\$0.7B

IN O/NIGHT SPEND
MARCH 2017 YE

TO
\$1B+

IN O/NIGHT SPEND
BY 2020

EXPERIENCES

WORLD CLASS NATURE, AQUATIC
& COASTAL, CLEAN CITIES &
INFRASTRUCTURE, AND
FRIENDLY PEOPLE

- 179K PLUS VISITORS, +18%
- SPEND GROWTH UP 10%
- MAJORITY ARE HOLIDAY VISITORS (67%)
- 76% OF LEISURE VISITORS AGED 30 PLUS
- SYDNEY – MELBOURNE – PERTH

A group of seven people, including men and women of various ages, are standing on the deck of a white sailboat. They are all looking down towards the water. Below the waterline, a large sea turtle is swimming. The water is clear and blue, and a small island with green trees is visible in the background under a blue sky with a few birds.

THANK YOU

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