

**CORPORATE PLAN**  
2024–2028

### **Acknowledgement of Country**

Tourism Australia acknowledges the Traditional Aboriginal and Torres Strait Islander Custodians of the land, sea and waters of the Australian continent, and recognises their custodianship of culture and Country for over 60,000 years.

We are proud of the work we do to ensure the cultures and stories, as well as the warmth, humour and generosity of Aboriginal and Torres Strait Islander peoples and communities, are central to the Australian tourism story.

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Tourism Australia is a Commonwealth government agency responsible for the international marketing of Australia as a destination for leisure tourism and business events. It is an Australian Government Commonwealth corporate entity formed under the *Tourism Australia Act 2004* (TA Act) and governed by a Board of Directors that is appointed by the Minister responsible for tourism under the TA Act and the *Public Governance, Performance and Accountability Act 2013* (PGPA Act). Tourism Australia and its predecessor, the Australian Tourist Commission, has delivered tourism marketing campaigns on behalf of Australia's tourism industry since 1967.

This plan outlines Tourism Australia's strategic direction, objectives and goals for the period 2024 to 2028. It has been prepared in accordance with the TA Act and PGPA Act.

# 1. INTRODUCTION

I, as the accountable authority of Tourism Australia, present the Tourism Australia Corporate Plan 2024–2028, which covers the periods 2024/25 to 2027/28, as required under paragraph 35 (1)(b) of the PGPA Act and the TA Act.

**Michael Issenberg, Chairman**



**Phillipa Harrison**  
Managing Director

In the face of significant headwinds over the past twelve months, the tourism industry has again demonstrated its resilience and proven its worth to the Australian economy.

Inbound tourism expenditure doubled over the last twelve months and that high growth rate, after an extreme low during the pandemic, is expected to remain high into the mid-term. Given the rate of inflation and especially the significant increases in the cost of aviation, along with extremely high investments from our competitors like Saudi Arabia and the Middle East, this level of demand is very encouraging.

To ensure that Australia remained on travellers' consideration lists (on average only three destinations are considered by travellers within the next four years), Tourism Australia has continued to invest in our highly effective *Come And Say G'Day* campaign, worked with over 190 partners to convert that demand, and trained a record number of agents around the world to sell our world class experiences.

So far, the advertising campaign has amassed \$928 million globally in advertising value since its launch in October 2022, with the film element reaching 172 million views across all channels, and campaign advertising now at 1.7 billion views. Tourism Australia's latest brand health metrics also show awareness and consideration have increased across all markets where the campaign was running.

Excluding another shock, Australia will reach the same level of international visitation as we enjoyed in 2019, in 2024/25. It is an important milestone

on our journey towards genuine and sustainable future growth.

The opportunity for tourism in Australia is still huge. It's clear from our recovery data that Australia has what the world wants right now. Even considering the significant frictions around restarting the industry, Australia's net promoter score is higher than it was pre-pandemic. Clearly our stunning beaches, blue skies and clean air, our friendly and genuinely welcoming people, our world class tourism experiences, and our adorable creatures are delivering on the world's high expectations of us.

### **“The opportunity for tourism in Australia is still huge”**

It's not enough to simply possess these things, however. While Australia is a truly extraordinary place, our competitors like Japan, Hawaii, Canada, and New Zealand all offer highly competitive experiences to global holidaymakers.

This year, Tourism Australia will double down on our competitive advantages; the things that we're excellent at. Some of which we're already famous for, like our beaches and animals. And the ones that we're less renowned for; our incredible food and wine, our breathtaking interior, and our Indigenous stories and storytellers.

Brand campaigns are the spearhead of our demand creating activity, but we do a lot more than just the one campaign. In 2025 we will continue our investment in the critical Working Holiday Maker audience with a new campaign launch. We will continue to invest in Major Events in the leadup to the Olympics in 2032. We will sweat our marketing

assets and launch broadcast programs utilizing existing footage and imagery. We are reworking our highly effective International Media Hosting Program, focusing on fewer but much higher impact journalists.

To convert that demand, Tourism Australia will work hard with our 190 partners to deliver value to our High Yielding Traveller audience, convincing them to get on planes as soon as they can. We'll look to further develop airline relationships and specific routes critical to Australia's future growth. We'll launch our Distribution 2035 strategy to aid our industry in making the most of the increasingly complicated and competitive distribution landscape.

And finally, we'll keep championing industry with the addition of an Agritourism collective to our Signature Experiences program. We'll keep leading the industry in developing our Indigenous, Sustainable, and Accessible tourism offerings. And we'll get even better at informing the industry with an enhanced Consumer Demand Project.

In the longer term, Tourism Australia will search for ways to be even more competitive in the global tourism space. Striving for forms of future growth that generate the yield that our industry and economy require, while safeguarding our rich tourism resources for future generations of Australians, and their welcome guests.

On behalf of the Board, and the Tourism Australia team, we look forward to working with our industry partners around the world as we embark on this exciting new phase.

# 3. ABOUT US

## PURPOSE

To grow demand to enable a competitive and sustainable Australian tourism industry.

## GOAL

Increase total overnight tourism expenditure to \$169.6b by 30 June 2025.

## VALUES

Our values support our ambition. They are the essence of our identity and guide our behaviour and the relationships we have with our customers and partners.

The values that will guide us are as follows:

- We think big and without borders.
- We make each other better.
- We do the right thing.
- We only do work that makes a difference.
- We're obsessed with telling the Australian story.

## ANNUAL GOALS

We have set goals in four areas:

- Grow visitor expenditure.
- Improve brand metrics.
- Drive industry recovery.
- Grow the business events pipeline.

Key performance indicators and targets for each of these goals are provided in Section 7.

## TARGET AUDIENCES AND MARKETS

Our target audiences and markets are listed in Table 1. Activity between 2024 and 2028 will continue to focus on targeting high yield travellers in markets that present the best potential for growth (following a review of our target markets, we found that these markets still offer the best opportunity for Australia's tourism industry). Further detail is provided in Section 5.

2024/25 TARGET AUDIENCES AND MARKETS			
Leisure			
Audience	Definition	Markets	
High Yield Travellers (HYT)	Purpose of trip: Holiday and visiting friends and relatives (VFR) Spend per night: >\$200 Total trip spend: >\$1,500	Stars	UK, USA, China, Germany, Singapore, Japan, India, South Korea
		Solid Deliverers	NZ, France, Indonesia, Italy, Malaysia, Canada
HYT – Luxury <sup>1</sup>	Purpose of trip: Holiday and VFR Spend per person per night: >\$1,000	China, UK, USA	
HYT – Working Holiday Makers	Purpose of trip: Employment <sup>2</sup> Length of stay: >31 days Age group: <35 years	UK	
Rest of world	All other markets, with a focus on emerging markets	Emerging markets such as Thailand, Philippines, Vietnam	
Business Events			
Audience	Definition	Markets	
Incentive <sup>3</sup>	Incentive trip planners/ decision-makers	NZ, China, North America, UK, South/Southeast Asia	
Association	Association trip planners/ decision-makers	UK/Europe, North America	

Table 1: Target audiences and markets 2024/25

<sup>1</sup> Excludes those who have travelled for business and who have stayed for less than 14 days.

<sup>2</sup> Working holiday makers are visitors who live, work and travel in Australia under the Australian Government Working Holiday Visa (subclasses 417 and 462) and are aged 18 to 35 years.

<sup>3</sup> An incentive is a planned trip that is used to encourage people to achieve a specific business goal.



Sydney, New South Wales

## STRATEGIC PRIORITIES AND ENABLING FACTORS

We will focus our effort through three strategic priorities to drive the sustainable growth of Australian tourism. These priorities are aligned with our legislative objects and functions. Further detail is provided in Section 5:

- Create demand: Make Australia the most memorable and desirable destination on Earth.
- Convert demand: Work with industry and partners to convert demand into visitation.
- Champion industry: Help industry to drive Australia’s next competitive advantage.

The following enabling factors will be important to delivery of our strategic priorities. Further detail is provided in Section 5:

- Engaged and supportive stakeholders
- Timely and accessible data and insights
- Motivated staff
- Strategic financial management and performance reporting
- Robust governance.

The development of this corporate plan and our strategic priorities are aligned with *Thrive 2030: The re-imagined visitor economy* (Thrive 2030). Thrive 2030 is the Australian Government’s long-term strategy for Australia’s visitor economy recovery and return to sustainable growth.

## LEGISLATIVE OBJECTS AND FUNCTIONS

Under the TA Act our objects are to:

- Influence people to travel to Australia, including for events
- Influence people travelling to Australia to also travel throughout Australia
- Influence Australians to travel throughout Australia, including for events
- Help foster a sustainable tourism industry in Australia
- Help increase the economic benefits to Australia from tourism.

Under the TA Act, our functions are to:

- Increase potential travellers’ awareness of Australia as a destination
- Increase potential domestic travellers’ awareness of Australia as a place to travel
- Increase both international and domestic potential travellers’ knowledge of Australia
- Increase both international and domestic potential travellers’ desire to travel to and throughout Australia
- Conduct research analysis of international and domestic travel
- Communicate effectively with the Australian tourism industry on matters that may affect it
- Increase awareness among Australians of the contribution tourism makes to Australia’s economy, society and environment
- Report on trends in international and domestic travel.

## AUSTRALIAN GOVERNMENT OUTCOME AND PROGRAMS

Each year, Australian Government agencies are required to identify their planned programs and how these programs deliver on outcomes set by the government.

Tourism Australia has one government outcome:

**‘To grow demand and foster a competitive and sustainable Australian tourism industry through partnership marketing to targeted global consumers in key markets.’**

This outcome is delivered through two programs:

- Grow demand.
- Industry development.



# 4. OPERATING CONTEXT

## OPERATING ENVIRONMENT AND TOURISM OUTLOOK

Trends impacting Tourism Australia's operating model are outlined below. These areas have been taken into consideration when planning our marketing activities and operations as well as in determining budgeting and resourcing.

Overall, Australia's tourism sector continues to recover well. Domestic activity remains solid, while the return of international visitors to Australia is growing, although inbound travel remains impacted by constraints in aviation capacity. Economic factors also continue to influence the outlook, along with a volatile geopolitical environment. Intention to spend on travel remains strong, despite cost of living concerns in Australia and among our key international source markets.<sup>4</sup>

In Tourism Research Australia's (TRA) visitor economy outlook for the period 2023-2028<sup>5</sup>, both international and domestic travel are predicted to continue to grow. TRA expects:

- International visitor numbers to Australia will exceed pre-pandemic levels in 2025
- International visitor spend in Australia will exceed pre-pandemic levels in 2024
- Domestic tourism spend, which already exceeds pre-pandemic levels, will continue to rise
- Domestic tourism nights in all states and territories will recover to pre-pandemic levels.

The number of international arrivals in Australia is forecast to increase to 9.3 million in 2024 (98 per cent of the pre-pandemic level). This is expected to rise to 10.2 million in 2025, then to 12.1 million in 2028. This strong growth profile reflects the reopening of China to outbound travel in 2023 and a positive outlook for the return of Chinese visitors to Australia<sup>6</sup>, sustained high growth in international arrivals to Australia in 2023, and continued re-opening and growth in new flight routes.

### Global economy

Global economic growth is projected to remain at 3.1 per cent in 2024, then to rise to 3.2 per cent in 2025.<sup>8</sup> Factors contributing to this outlook are the resilience of the USA and several large emerging and developing economies, along with fiscal support in

**“A thriving tourism industry is crucial to our economic prosperity, with every dollar spent in the visitor economy generating a further 81 cents for other parts of the economy.”<sup>7</sup>**

**Senator the Hon Don Farrell,  
Special Minister of State;  
and Minister for Trade  
and Tourism**

China.<sup>9</sup> Notably, many countries that were previously expected to experience recession are now likely to avoid it, although economic growth will remain slow.<sup>10</sup>

Overall, global economic recovery from the COVID-19 pandemic, Russia's invasion of Ukraine and the cost-of-living pressures are proving comparatively robust. Inflation is falling faster than expected from its 2022 peak, with a smaller toll on employment and activity than initially forecast, although inflation remains a challenge in many economies. High interest rates aimed at fighting inflation, coupled with a withdrawal of fiscal support by central banks amid high debt in a number of major economies, are expected to weigh on growth in 2024.<sup>11</sup>

The geopolitical outlook remains uncertain, with ongoing ramifications for the global economy. Continuing hostilities

from Russia's invasion of Ukraine, the Hamas-Israel conflict, China's property sector downturn and the effects of sharp monetary tightening all pose risks. Persistent inflation, high interest rates, volatile oil prices and disruptions to trade are also likely to impact transport and accommodation costs in 2024.<sup>12</sup>

Australia's economy will likely be impacted by the challenges that are being experienced internationally. Australia's real GDP is forecast to grow by 1.8 per cent in 2023. Economic growth is then expected to pick up in 2024/25 as inflation subsides, and real annual wages growth returns. This will support household consumption and drive economic growth to a forecast 2.25 per cent in 2024/25.<sup>13</sup>

While tourism demand rebounded strongly in 2022/23 in Australia, supply-side factors such as workforce recovered more slowly. While the severity of these shortages eased in 2023, skills shortages remained elevated compared with the pre-pandemic period for some roles in education and training; accommodation, air, water and other transport; travel agency and information centre services and cultural services.<sup>14</sup>

Further increases in the number of working holiday makers in Australia are expected. This will support an increase in the available workforce for segments of our visitor economy that have typically relied on these sources of labour. Key government and industry initiatives will also influence the future of the visitor economy workforce. These include the Employment White Paper and the Migration Strategy released in late 2023.

We will continue to monitor the economic environment and its impact on consumer confidence to inform the development and delivery of our marketing initiatives.

<sup>4</sup> Skift, 2024, Skift Research 2024 Travel Outlook

<sup>5</sup> Tourism Research Australia, Tourism forecasts for Australia, November 2023

<sup>6</sup> Prior to the COVID-19 pandemic, China was a major contributor to Australian tourism, as our largest inbound market for visitor arrivals and spend

<sup>7</sup> Australian tourism continues to recover | Minister for Trade and Tourism (trademinister.gov.au)

<sup>8</sup> IMF, World Economic Outlook update, January 2024

<sup>9</sup> IMF, World Economic Outlook update, January 2024

<sup>10</sup> Oxford Economics, 2024 Key Themes, December 2023

<sup>11</sup> IMF, World Economic Outlook update, January 2024

<sup>12</sup> UNWTO World Tourism Barometer, January 2024

<sup>13</sup> The Commonwealth of Australia, Budget 2023-24 Mid-Year Economic and Fiscal Outlook 2023-24, December 2023

<sup>14</sup> Tourism Research Australia, October 2023, Tourism Workforce Report



## Consumer confidence

Analysis of consumer confidence<sup>15</sup> provides an indication of future developments or changes in household consumption and saving. As confidence improves, there is often a correlation with increased spending on discretionary purchases<sup>16</sup> such as holidays and tourism. The past year has seen fluctuations in consumer confidence across the globe. While confidence climbed as borders re-opened to trade and travel in 2022 and 2023, elevated inflation and monetary tightening efforts by central banks (including increases in interest rates) subsequently impacted consumer confidence. A similar outlook is anticipated for 2024, with modest economic growth impacting business and consumer confidence.<sup>17</sup>

Continuing inflationary pressures are predicted to impact the cost of travel, particularly the cost of airfares, although appetite for domestic holidays is expected to remain strong. In summary, while there are concerns regarding the cost of living in Australia and among our key international source markets, intention to spend on travel remains strong, with weak sentiment not extending to the travel industry as consumers continue to prioritise travel spending.<sup>18</sup>

Consumers across all ages and regions report travel remains a top priority, with travel budgets being defended even in the face of inflation.<sup>19</sup> The importance of travel and tourism is also a reflection of the value many people now place on the opportunity to reconnect with family, friends and communities. As a result, we are seeing an increased sense of purposeful travel, driven by a desire to connect with communities and cultures, with a lighter footprint as the importance of travelling sustainably continues to grow.

## Destination appeal

Australia's attractiveness as a tourism destination remains strong and Australia continues to be an aspirational holiday and business events destination for many people around the world. At a global level, Australia is consistently one of the top three most desirable holiday destinations in the world across our priority source markets,<sup>20</sup> but the margin between Australia and our competitors has been narrowing over the past few years as competitor destinations have ramped up their marketing activities to rebuild their tourism industries and make the most of post-pandemic demand for travel.

Analysis of research at the total out-of-region traveller level shows that Australia performs strongly and is highly associated with having world class beaches/coastlines, beautiful natural environments and an appealing climate; while our target audience, high yield travellers, associate Australia more strongly than other destinations with being family friendly, having beautiful natural environments and catering well to foreign-language tourists.<sup>21</sup>

On average, consumers only consider three destinations when they are undertaking international travel planning. This is a very short list given the investment in time and money involved in travelling internationally and shows the importance of being high on the consideration list. We compete for a limited pool of prospective out of region travellers and aim to capture as much of this global demand for travel to Australia as possible. The challenge is that our competitors have the same goal.<sup>22</sup>

When consumers are deciding where to travel, some factors dominate. At a global level these are safety and security, value for money and beautiful natural environments – factors for which Australia rates very highly with



our target audiences. In recent research undertaken through our Consumer Demand Project<sup>23</sup>, we found that Australia is in the top two destinations being considered for a holiday by consumers from New Zealand, North Asia and South/Southeast Asia, with Australia's proximity to these regions an advantage. Sentiment tracking has stabilised for consideration to visit Australia, with small increases in equity across all priority markets, with the largest consideration gains from prospective travellers in the UK and China.<sup>24</sup>

As Tourism Australia continues to promote sustainability, accessibility and Indigenous tourism in our marketing activities, the country is also in a solid position to tap into rising consumer desire to travel well and with purpose.

<sup>15</sup> The Consumer Confidence Index (CCI) measures how optimistic or pessimistic consumers are regarding their expected financial situation. An indicator above 100 signals positive consumer confidence towards the future economic environment. A consumer confidence index below 100 indicates a pessimistic outlook, resulting in a tendency to save more and consume less.

<sup>16</sup> OECD, January 2024, Consumer Confidence Index (CCI)

<sup>17</sup> Economic outlook: A mild slowdown in 2024 and slightly improved growth in 2025 - OECD

<sup>18</sup> Oxford Economics, 2024 Key Themes, December 2023

<sup>19</sup> Skift, 2024, Skift Research 2024 Travel Outlook

<sup>20</sup> Tourism Australia, Consumer Demand Project, December 2023

<sup>21</sup> Tourism Australia, Consumer Demand Project, December 2023

<sup>22</sup> Australia is often competing with high profile destinations such as Japan, New Zealand, South Africa, Canada, France and Hawaii.

<sup>23</sup> Tourism Australia's long-running Consumer Demand Project (CDP) was established in 2012 to understand how global consumers view Australia and what most motivates them to visit. Over the last decade, Tourism Australia has spoken to hundreds of thousands of long-haul travellers via online consumer research panels. Insights from the CDP have been used extensively to inform and support development of Tourism Australia's strategic direction, campaign development, and to inform the tourism industry of potential opportunities to build the value of Australian tourism.

<sup>24</sup> Tourism Australia, Consumer Demand Project, December 2023

## Tourism and aviation

Global travel recovery will continue in 2024, despite economic uncertainty. International tourism ended 2023 at 88 per cent of pre-pandemic levels, with an estimated 1.3 billion international arrivals. The unleashing of remaining pent-up demand, increased air connectivity, and strong recovery in Asian markets and destinations are expected to underpin a full recovery by the end of 2024.<sup>25</sup>

Higher costs stemming from inflation, staff shortages and fuel prices have translated to higher travel prices for consumers, as post-pandemic balance sheets have reduced the ability for airlines and hotels to absorb costs. This environment, combined with a weaker economic backdrop could impact travel demand, especially in advanced economies. However, to date, consumers have demonstrated tolerance towards higher prices.<sup>26</sup>

Over 2023, there was a steady increase in inbound travel to Australia. This was supported by the reopening of existing flight routes and the introduction of new ones, including direct flights from India. It was also bolstered by the return of Chinese visitors following the reopening of China's borders to international travel

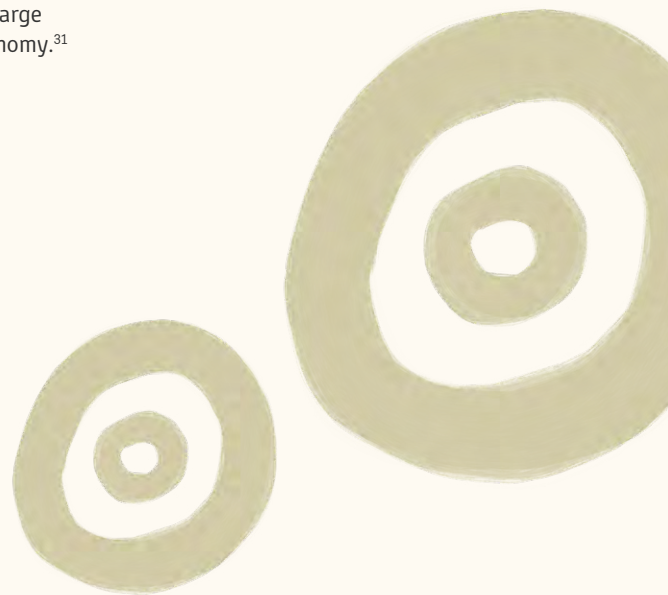
in early 2023.<sup>27</sup> In the year ending January 2024, Australia welcomed 7.4 million visitors (78 per cent of 2019 volumes for the same period). Visitor arrivals for all purposes are predicted to grow. Travel for a holiday gathered pace in 2023, overtaking the 'Visiting friends and relatives' category. Holiday arrivals are forecast to exceed their pre-pandemic levels in 2025, before increasing to 5.8 million in 2028.<sup>28</sup> At January 2024, this has been led by holiday arrivals from New Zealand, the USA and the UK.<sup>29</sup>

The return of international visitors to Australia is expected to be faster than initially predicted, but it is still likely to be uneven across markets and travel purposes. Overall, visitor arrivals are forecast to be higher than pre-pandemic levels by 2025 and to total 12.1 million in 2028. International spending is predicted to recover at a slightly faster rate than arrivals, with spending expected to surpass pre-pandemic levels in 2024 and reach \$50.7 billion by 2028. While the pace of recovery varies across source markets, a return to pre-pandemic levels is predicted for Tourism Australia's priority markets by 2025.<sup>30</sup>

Domestic tourism accounts for a large majority of Australia's visitor economy.<sup>31</sup>

Growth in domestic travel is expected to moderate in 2023 compared with its strong recovery in 2022, reflecting impacts on discretionary spending for Australians. After a period of adjustment in the near term, domestic tourism is predicted to strengthen. Domestic overnight trip spend in Australia is forecast to reach \$109.1 billion in 2023 (up 35 per cent on pre-pandemic levels), to reach \$132 billion in 2028. Visitor nights are expected to exceed 2019 levels in 2024.<sup>32</sup> The potential drop-off in domestic tourism and return to higher levels of outbound travelling Australians heighten the importance of driving inbound tourism and expenditure for Australia's tourism industry.

Throughout 2023, inbound aviation capacity to Australia continued to improve. At December 2023, 94 per cent of seats had returned, compared with the same period in 2019. While supply constraints remained, airlines increased capacity to meet the strong demand for travel. Over 2024, seat capacity is forecast to exceed pre-COVID-19 levels, with 101 per cent of seats scheduled to return by May 2024 compared with May 2019.<sup>33</sup>



<sup>25</sup> UNWTO World Tourism Barometer, January 2024

<sup>26</sup> Oxford Economics, 2024 Key Themes, December 2023

<sup>27</sup> Prior to the COVID-19 pandemic, China was a major contributor to Australian tourism, as our largest inbound market for visitor arrivals and spend.

<sup>28</sup> Tourism Research Australia (December 2023), Tourism Forecasts 2023-2028, p 16

<sup>29</sup> Australian Bureau of Statistics (January 2024), Overseas arrivals and departures

<sup>30</sup> Tourism Research Australia (December 2023), Tourism Forecasts 2023-2028, p 8

<sup>31</sup> Domestic visitor spend accounted for 77% of total visitor spend in Australia in 2019, Tourism Research Australia, Tourism Forecasts 2023-2028, p 22

<sup>32</sup> Tourism Research Australia (December 2023), Tourism Forecasts for Australia 2023 to 2028, p27

<sup>33</sup> Cirium, January 2024, SRS Analyser International Aviation Capacity.



Mount Wellington, Hobart

## Marketing and communications channels

The outlook remains unsettled, with an unpredictable geopolitical environment and a challenging economic outlook putting pressure on marketing budgets across all categories. Creativity and efficiency will need to take the lead.<sup>34</sup> From a consumer perspective, cost of living pressures are predicted to impact consumers across the globe, with consequences for travel and media consumption behaviours.

From a channel perspective, we will see increasing fragmentation. While there will be ongoing use of traditional channels such as TV, the shift from broadcast towards streaming and Connected TV will gain pace.<sup>35</sup> Users are continually migrating across a number of platforms, which means consumers' use of particular channels is in a constant state of flux. Social channels are not the only ones that will be affected. The convergence of streaming and traditional TV is predicted to see the emergence of new advertising opportunities that cater to evolving media consumption habits, and increasingly personalised content.<sup>36</sup>

Other key trends influencing marketing activities include:

- The growing influence of artificial intelligence (AI), with marketers exploring opportunities to create efficiencies in the development and personalisation of creative and ways to innovate at scale.<sup>37</sup> Human skills and emotions will remain critical in making the most of this technological evolution.<sup>38</sup>
- User-generated content (UGC) is predicted to accelerate even further in 2024, with UGC becoming the preferred, and trusted, style of content, particularly for younger consumers. Similarly, influencer marketing will continue to grow.
- Short-form video marketing will remain a powerful channel.
- Diversity, equity and inclusion will be taken even more seriously, with visible efforts to represent diversity of cultures, languages and social norms expected to increase across marketing activities.
- Media usage will reflect the societal trend towards diversity, giving rise to a Generation P whose media

consumption is personalised to reflect their diverse, unique lives.<sup>39</sup>

- Attention will remain a hot topic for marketers, as the number of platforms for marketers to choose from increases, the importance of choosing channels that attract the attention by the target customer also heightens. Research shows a strong correlation between the media channels that consumers claim capture their attention and those in which they prefer seeing advertising.<sup>40</sup>
- Continued impact of inflation on advertising and media costs, which will likely result in increased costs being passed on to advertisers.

We will continue to work with our media agency UM to monitor emerging trends and ensure marketing activities maximise the opportunities presented by consumer and technology trends. Data-driven insights will guide our efforts, and flexibility will continue to be integral to success and to our effective response to consumer needs.

<sup>34</sup> Creativity means campaigns get noticed, shared, engaged with; while efficiency means all gains are captured and put to work: TLC, 2023, 19 Marketing Trends for 2024

<sup>35</sup> TLC, 2023, 19 Marketing Trends for 2024

<sup>36</sup> TLC, 2023, 19 Marketing Trends for 2024

<sup>37</sup> Kantar, 2023, Marketing Trends 2024

<sup>38</sup> TLC, 2023, 19 Marketing Trends for 2024

<sup>39</sup> Dentsu, The pace of progress, 2024 Media Trends

<sup>40</sup> Kantar, Media Reactions 2023

## CAPABILITY

We are continuing to align the capability of our organisation with the needs of our industry and the potential of our people. As our industry grows and evolves, so too must our organisation and people. In driving efficiencies through the adoption of new processes and approaches we are enabling our people to be engaged, motivated, and fully equipped to achieve our purpose.

We will continue to partner with organisations and stakeholders to deliver on our remit. This includes working with government organisations and commercial and industry partners to drive demand for Australian tourism.

We will continue to collaborate with tourism businesses and government agencies across federal, state and local government to champion Australian tourism. This includes involvement in tourism marketing, policy, research, distribution, international marketing and business events. From a government perspective, our ongoing collaboration with agency partners to deliver a whole-of-portfolio program will be undertaken across trade, investment and tourism. Providing input into tourism policy issues such as visas and aviation will remain a key focus.

We will continue to support the Australian Government's economic and public diplomacy agendas. This includes working with Austrade and the Department of Foreign Affairs and Trade, the Department of Home Affairs, and the Department of Infrastructure, Regional Development, Communications and the Arts.

### Our people

As of 31 December 2023, Tourism Australia employed 207 people in 12 countries, with 42 per cent residing

outside Australia. An additional 20 Aussie Specialist trainers and two 'One Voice' staff members are employed through a cooperative arrangement with state and territory tourism organisations (STOs).

We offer our staff flexible work practices and benefits to create engagement and align with our culture. We have staff working from offices and remotely in permanent and part-time roles. Our health and wellbeing programs continue to expand to support our teams.

Our values have always promoted behaviours that support respect, diversity and inclusivity – efforts that are redoubling due to legislative changes to how workplaces are managed. Creating diversity and ensuring people are respected and are safe at work are key. Our female to male ratio is currently 67 per cent to 33 per cent. In our Global Leadership team, the female to male ratio is 58 per cent to 42 per cent.

While working for Tourism Australia, our people are expected to understand and contribute to our Reconciliation Action Plan. To support this, staff participate in a program of events and strategies that promote reconciliation and meet the increasing demand for Indigenous tourism experiences. We aim to create opportunities for Indigenous Australians as we work towards achieving a higher percentage of Aboriginal or Torres Strait Islander heritage within our business than the government target of 3 per cent.

Our interest in creating accessible tourism experiences for people with disabilities connects to our internal focus on ensuring our workplace is supportive, accessible and attractive for people with disabilities, and of all ages and backgrounds.

### Workforce planning

Our goal is to attract, develop and retain quality people to build a professional, responsive and impactful team. We use the P3 performance management platform to drive growth and development of our people and teams through meaningful conversations. A new Human Resource Information System (HRIS) will further streamline and improve efficiencies across our HR functions.

### People leaders

The passion and commitment of our leaders and managers defines our organisation, by helping our culture and people grow and develop. To support these leaders, we offer a range of innovative leadership and coaching programs, tailored to group learning as well as individual needs.

### Learning and development

Our programs focus on the current and future needs of our industry. To respond to this, Industry, professional and specialist skills are key, as are individual developmental opportunities. We want all our people to be passionate about Australia and to be able to promote Australia as a preferred tourist destination. We also focus on learning opportunities that create great leaders, inspire our people and are relevant to our culture whilst demonstrating our commitment to their career development. We partner with leading training organisations and bespoke local suppliers to deliver these quality development programs.





Ragged Range, East Kimberley

## Information Technology (IT)

The IT team supports Tourism Australia's activities by enhancing agility, driving digital innovation and optimising business processes. Relevant Australian Government policies and guidelines ensure Tourism Australia staff continue to innovate while being aware and protected from potential threats.

Enhancements to our IT capability in 2024/25 will focus on five main areas – customer/stakeholder relationship management; business process optimisation; financial forecasting capability; cybersecurity and our artificial intelligence strategy.

**Customer/stakeholder relationship management (CRM):** The CRM platform will be refined, based on user feedback, enabling us to optimise user experience and reporting capabilities. Additional analytics capability will generate insights that aid stakeholder management and improve user experience. This will involve integrating the CRM with marketing automation tools and our

event management platform to streamline email communications and stakeholder interactions.

**Business process optimisation with Monday.com:** Increased use of the Monday.com platform across the organisation will foster greater departmental integration and collaboration. This will include developing Monday.com boards to address specific departmental needs and automating repetitive tasks to improve efficiency, productivity and improvements to visibility and control across project activities.

**Enhanced financial forecasting:** New cloud-based financial forecasting tools will use analytics to improve departmental financial forecasting. This will involve integrating the new platform with operational data and key performance indicators, to provide a more holistic view of activity and improved insights to inform financial decision-making.

**Continued focus on cybersecurity:** Our multi-layered zero-trust approach to cybersecurity will involve the continuous monitoring of web assets and endpoints through the managed Security Operations Centre. We will continue staff training on cybersecurity awareness and phishing, helping to build Tourism Australia's robust cybersecurity posture and mitigate potential threats.

**Artificial intelligence (AI) strategy and roadmap:** A strategy and clear roadmap for responsible AI adoption will be developed. This will include defining the vision and goals for AI within the organisation aligned with business objectives; identifying key focus areas and potential use cases across departments (marketing, customer service, operations, research); and developing a roadmap for AI implementation, including pilot projects and long-term initiatives.

## RISK OVERSIGHT AND MANAGEMENT

Each year we undertake strategic risk assessment and use the insights from this process to inform the development of our corporate plan, operational planning and internal audit planning. Our strategic risk assessment uses our risk appetite, which spans eight perspectives that are significant to Tourism Australia's operations. Our risk appetite is provided in the Appendix on page 33. Our key strategic risks and planned mitigation activities are outlined in Table 2.

TOURISM AUSTRALIA STRATEGIC RISKS AND MITIGATION STRATEGIES 2024/25	
<b>HIGH RISKS</b>	Mitigation
<b>1. Geopolitical tension</b>   Rising geopolitical tension and continual political uncertainty hampering growth.	Robust crisis management framework in place
<b>2. Economic growth</b>   Global economic challenges continue to hinder Australian tourism's recovery in the medium to long term, with impacts on business operations and the economy hampering return to growth.	<b>Preventative:</b> Ongoing consultation with industry and government stakeholders; ability to reallocate funding if necessary; delivering marketing that will result in consumers travelling despite the economic barriers; tourism recognised as an investment priority by the Australian government <b>Detective:</b> Regular review of arrivals figures and consumer confidence in source markets; participation in committees with Austrade and DFAT Governance: Crisis management framework in place; quarterly meetings with STO CEOs, regular ASCOT meetings; regular reporting and review of performance
<b>3. Inbound tourism from China</b>   Slower growth in tourism recovery from China (key market) due to airline capacity and prices and slow economic recovery	Continuing to target independent travellers and BE travellers; ongoing consultation with industry and government stakeholders; shifting and reallocating funding if necessary; maintaining strong relationships with key carriers, distribution partners, media
<b>4. Airline capacity and pricing</b>   Slow growth in aviation capacity and high cost of flights impedes tourism recovery and Australia's overall attractiveness	Aviation industry consultation, including discussions to assist supply; delivering effective marketing that will result in consumers travelling despite capacity limitations and high prices; Destination Australia presence at key aviation events and conferences
<b>5. Funding to maintain share of market and drive growth</b>   TA does not receive sufficient funding (both short and long term) to maintain market share or support the level of growth required for the industry	Robust budget planning and monitoring process; reporting on performance to government; relationship with government and stakeholders; building and communicating a strong case for support including highlighting competitor activity
<b>MEDIUM RISKS</b>	Mitigation
<b>6. Marketing and partnership activities</b>   Inability to effectively deliver on key campaigns and projects, i.e., to maximise their commercial potential and marketing effectiveness.	Regular reporting to ELT, Board and Minister on major projects; half-yearly business evaluations; 'always-on' social strategy to drive demand; Reviewing campaign KPIs to demonstrate return on investment; identifying implications of Middle East and Ukraine conflicts and implementing recommendations; monitoring sentiment across TA social media platforms; investing in analytics to inform and assess campaigns; using specialist agencies; following partnership guidelines to select commercial partners
<b>7. Talent</b>   Inability to attract and retain a high performing workforce due to wage pressures and employee expectations (including flexible work), as well as broader issues with labour supply in the tourism industry.	Regular reporting to ELT, Board and Minister on major projects; half-yearly business evaluations; 'always-on' social strategy to drive demand; Reviewing campaign KPIs to demonstrate return on investment; identifying implications of Middle East and Ukraine conflicts and implementing recommendations; monitoring sentiment across TA social media platforms; investing in analytics to inform and assess campaigns; using specialist agencies; following partnership guidelines to select commercial partners
<b>8. Sustainability</b>   Inability to meet the growing demand for sustainable travel. Loss of social licence for Australia as a tourism destination due to environmental issues or not being perceived as a thought leader or advocate on sustainability issues.	Education and communication on the value of industry's sustainable products and experiences; consultation with industry and other stakeholders; highlighting successful sustainable experiences and stories that advocate, educate and promote sustainable tourism practices

<p><b>9. Cyber Security</b>   TA's consumer / trade / corporate platforms could be compromised by third party sophisticated hackers or sensitive information could be unknowingly exposed to the public, for example via a software issue or human error. These could result in a data breach or leak, loss of access, web assets being defaced, or loss of sensitive information, causing reputational harm.</p>	<p>Cyber security framework and protocols established; managing cyber controls based on risk; adhering to Level 2 of the ACSC Essential 8 Cyber Security Controls; ongoing monitoring of TA sites and social media accounts; external audit of controls; regular Audit Committee reporting; use of third-party experts for daily penetration testing, ongoing monitoring, advisory and staff education; business continuity plan reviewed; virtual chief information security officer (VCISO) engaged ; Digital and data steering committee established; testing of social media hacking to test protocols and guidelines; new data privacy laws including unidentifiable data<sup>41</sup></p>
<p><b>10. Workplace Health and Safety</b>   Failure to maintain a safe working environment for staff, contractors, visiting media, delegates and event volunteers that are not in line with expected behaviours and conduct. Increased focus on physical and mental wellbeing of staff and psychosocial factors following the pandemic and the introduction of new labour legislation.</p>	<p>Implementation of central repository for health and welfare information, policies and tools; WHS policies and framework enacted; WHS contract clauses built into corporate agreements; embedding risk management into event planning; ongoing consultation on health and safety issues through the WHS Committee; learning modules and contractor registration; monitoring of 350 high-risk operators via our health and safety platform; annual TA WHS week; management and measurement of risk through Donesafe incident reporting system; employee assistance program and wellbeing policies; flexible work policy; executive health checks; specialised training for industry events and IMHP Teams in risk management and first aid</p>
<p><b>11. Bushfires, floods and natural disasters</b>   The impact of a bushfire, flood or natural disaster on the Australian community and tourism industry resulting in significant reduction in tourism visitors and spend in Australia, limiting the return on tourism campaigns, and subsequently impacting Australia's reputation as a destination.</p>	<p>Campaign funding and objectives focused on tourism to bolster visitor numbers, particularly to bushfire affected regions; communication plan and templates developed that can be activated in an event of a bushfire or other natural disaster</p>
<p><b>12. Governance and legislative compliance</b>   Current strong governance levels and legislative compliance are not maintained.</p>	<p>Policy levers that address this risk fall outside Tourism Australia's remit. We work across government to encourage action to address capacity constraints and use our relationships with industry to focus its attention on the needs of international visitors</p>
<p><b>LOW RISKS</b></p>	
<p><b>13. New product supply</b>   Existing products and limited supply of new products don't meet consumer expectations</p>	<p>Regular reporting to ELT, Board and Minister on major projects; half-yearly business evaluations; 'always-on' social strategy to drive demand; Reviewing campaign KPIs to demonstrate return on investment; identifying implications of Middle East and Ukraine conflicts and implementing recommendations; monitoring sentiment across TA social media platforms; investing in analytics to inform and assess campaigns; using specialist agencies; following partnership guidelines to select commercial partners</p>
<p><b>14. Government interdependencies</b>   Inability to independently influence policy settings and processes not conducive to increasing demand for travel to Australia e.g. Holiday visas, bilateral agreements, international working visas.</p>	<p>Ongoing consultation with industry and government stakeholders; involvement in industry working groups; quarterly STO and CEO Forums and ASCOT meetings; ongoing ministerial briefings; working with STOs to create a uniform voice for tourism</p>

Table 2: Strategic risks and mitigation strategies

<sup>41</sup> Unidentifiable data refers to data that has not been labelled with individual identifiers or from which identifiers have been permanently removed.

# Strategic Risks Heat Map

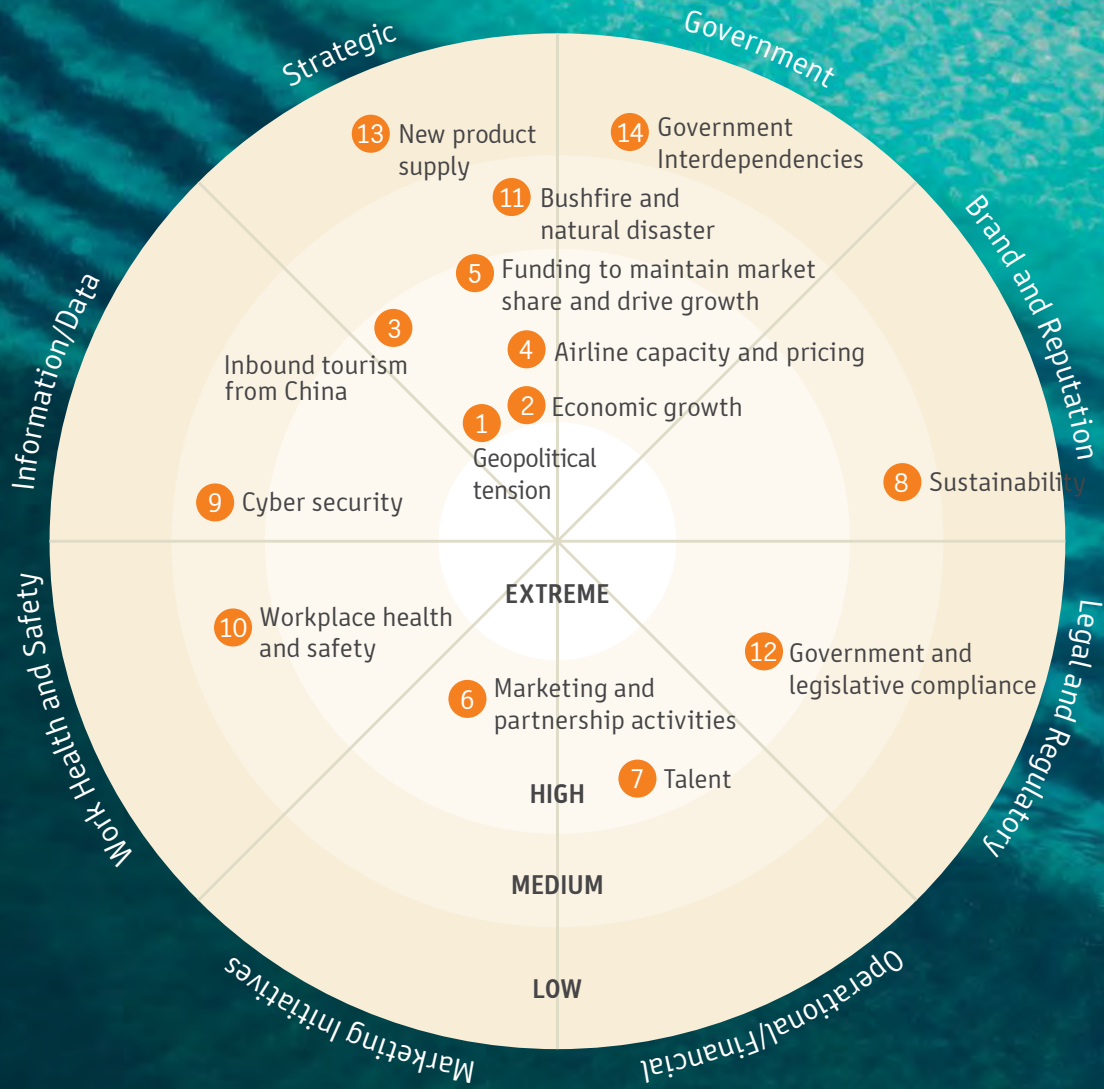


Figure 1: Strategic risks heat map 2024/25



# 5. STRATEGIC PRIORITIES AND PLANNED PERFORMANCE

## OUR STRATEGIC DIRECTION

During the pandemic our strategic outlook narrowed to concentrate on just the next financial year. This allowed us to be opportunistic and highly reactive during what was a very chaotic period. It meant that we could target our activities to stimulate demand wherever it was to be found, domestically, in early opening markets, among specific audiences and so on.

Austrade has since launched the *Thrive 2030* strategy, which covers the entire visitor economy and outlines targets for growth that include both inbound and domestic tourism, as well as a range of specific trip types. Our areas of focus - inbound leisure tourism and business events form a part of this strategy - with our work complementing *Thrive 2030* and providing specific initiatives to drive the Australian tourism industry's return to growth.

As the world returns to normal, we have extended our strategic horizon out to 2033 with three distinct phases of recovery:

### 1. RECOVER [Pre 2025]

Stage one focuses on recovery to 2019 levels of inbound visitation. Tourism Research Australia forecasts that this will occur at the start of calendar year 2025 but we are slightly more optimistic, expecting a return by the end of calendar year 2024. Either way, it is very likely that inbound visitation will be back to pre-pandemic levels within the next 12 months.

While this moment has been long awaited, it hides the fact that Australia (and the global tourism industry as a whole) has lost four years of incremental tourism growth.

### 2. DRIVE [2025 – 2028]

As Australia moves past the 'recover' phase, growth will be high as we effectively restart from a very low base

(due to the impact of the pandemic). We aim to maintain these high growth rates by focusing on Australia's current competitive advantages - those that Australia is already known for, such as our beaches, friendly people, and cute animals; as well as less well-known areas of excellence and distinction, including food, wine, and interior regions like the Outback.

Our 2024-2028 plan is part of the 'Drive' phase, with further detail in the next section.

### 3. DIVERSIFY [2028 – 2035]

In the longer term, we will work with industry to identify new forms of sustainable growth. This growth needs to be beneficial to our industry and economy, while reflecting the growing need to safeguard our country and culture for future generations of Australians and visitors alike. Balancing the triple bottom line is critical to both long-term profitability and sustainable growth – one of our objectives under the TA Act.

Strategy Summary 2020-2035			
	Recover 2020-2024	Drive 2020-2024	Diversify 2028-2035
Goal	Recover to 2019 spend levels	Maintain high grow rates	Broaden appeal for future advantages
Strategy	Reactive opportunities	Invest in current competitive advantages	Generate a new wave of sustainable growth
Targeting	14 core markets HYT, WHM, Luxury, Business Events	14 core markets HYT, WHM, Luxury, Business Events	In development
Actions	Domestic, Come and Say G'day Industry/NECI Advocacy Busines Events	Create demand Convert demand Champion Industry	In development

Figure 2: Strategy summary 2020-2035

## 2024/25 STRATEGY

The diagram below outlines our areas of focus for 2024/25, with the following sections detailing Tourism Australia’s plan to deliver on these priorities.

<b>PURPOSE:</b>	<b>GROW DEMAND TO ENABLE A COMPETITIVE AND SUSTAINABLE TOURISM INDUSTRY</b>			
<b>GOAL:</b>	<b>INCREASE TOTAL OVERNIGHT VISITOR EXPENDITURE TO \$169.6B BY 30 JUNE 2025</b>			
<b>ANNUAL GOALS:</b>	<b>GROW VISITOR EXPENDITURE</b>	<b>IMPROVE BRAND METRICS</b>	<b>DRIVE INDUSTRY RECOVERY</b>	<b>GROW THE BUSINESS EVENTS PIPELINE</b>
	International + domestic tourism expenditure: \$169.6B International tourism expenditure: \$47.5B International tourism expenditure: \$29.8B Business Events: \$2B	Awareness: 55.2% Consideration: 39.9%	Industry NPS: 43 Event satisfaction maintain (>90%)	Bid Fund Program TA ROI: \$50:1
<b>TARGET CUSTOMERS AND MARKETS:</b>	<b>LEISURE</b>			<b>BUSINESS EVENTS</b>
	<b>High Yield Travellers STARS</b> (USA, China/HK, India, Singapore, Germany, Japan, Sth Korea) <b>SOLID DELIVERIES</b> (NZ, France, Indonesia, Italy, Malaysia, Canada) <b>REST OF THE WORLD</b> emphasising emerging, high growth markets	<b>LUXURY Markets:</b> China, USA, UK	<b>WORKING HOLIDAY MAKERS Markets:</b> UK	<b>INCENTIVE &amp; ASSOCIATION DECISION MAKERS</b> Incentive markets: NZ, China, Nth America, UK, S/SEA Association markets: UK/ Europe, Nth America
<b>PRIORITIES</b>				
<b>CREATE DEMAND</b> Make Australia the most memorable and desirable destination on earth		<b>CONVERT DEMAND</b> Work with industry and partners to convert demand into visitation	<b>CHAMPION INDUSTRY</b> Help industry to drive Australia’s next competitive advantages	
<b>ENABLING</b> Engaged and supportive stakeholders   Timely and accessible data and insights   Motivated staff Agile resourcing   Strategic financial management   Robust governance				

Figure 3: 2024/25 Strategy map

## OUR AUDIENCES AND MARKETS

### AUDIENCES

#### High yield travellers (HYTs) – Leisure travellers and business events decision-makers in key markets

We will target international travellers in the leisure and business events segments.

HYTs travel for a holiday or to visit friends and relatives. They spend more than A\$200 per day and their overall trip spend is more than A\$1,500. They place value on travel and are motivated by what Australia has to offer. Most importantly, they are more likely to spend more, stay longer and disperse further across Australia during their visit. The high yield traveller is our primary target audience across all target markets.

#### Luxury travellers

Luxury consumers are very high value travellers. Travelling for a holiday or to

visit friends and relatives, they spend more than A\$1,000 per person per night during their stay. We will target luxury high yield travellers in China, the UK and the USA.

#### Working holiday makers

Working holiday makers (WHMs) live, work and travel in Australia under an Australian Government Working Holiday Visa (subclasses 417 and 462) and are aged 18 to 35 years. We will target high yield working holiday makers in the UK in 2024/25.

#### Business events decision-makers

Our business events target customers come from two sectors – international associations and incentive trips. We will continue to undertake a differentiated marketing approach for each of these sectors, targeting Incentive decision-

makers in New Zealand, China, North America, South-Southeast Asia and the UK; and Association decision-makers in North America and UK/Europe.

### MARKETS

Tourism Australia’s role in international markets is to work with the tourism industry, government agencies and partners to promote Australia as a compelling tourism destination and to encourage people to visit, to grow spend in Australia and to increase numbers of long-haul visitors.

We will target consumers in markets that offer the best potential to build Australia’s tourism recovery, remaining active in 14 countries: China, the UK, USA, Germany, Japan, Malaysia, New Zealand, Singapore, Canada, France, Italy, South Korea, India and Indonesia.

# PRINCIPLES OF DESTINATION *Marketing*



## WIN IN CONSIDERATION

If we're not on our audiences' consideration list we've already lost.



## COMPETITIVE EXPERIENCES

Focus on what drives demand versus what others offer, not just what we are already known for.



## ALWAYS BE DISTINCTIVE

Rely on what's familiar about Australia, but build fresh associations too.



## CREATIVELY AMBITIOUS

World leading creative thinking supercharges our media investments.



## INVEST IN ATTENTION

Be where audience attention is high and amplify across channels (paid, earned, and owned).



## MEANINGFUL IMPACT

Make big differences to industry by appealing to big spenders.



## BROAD APPEAL

Maximise perceptions of value and fashionability with broad sets of experiences.



## TIMELY DELIVERY

Work with the natural spikes in behaviour: dreaming > booking > visiting.



## CONSISTENT PRESENCE

Drive long term brand growth with consistent assets and investment.



## FEED THE FUNNEL

Focus on what we, and only we, do best, and partner with experts to do the rest.

## MARKET PRIORITISATION AND MARKETING APPROACH

Our market prioritisation and marketing approach will continue to be based on our principles and practices of destination marketing. These principles are shown in Figure 4.

To determine market prioritisation and investment in leisure markets, we identified the best prospect target audiences (high yield travellers, luxury travellers, working holiday makers) and the size of these segments in each of our key markets, based on forecast expenditure performance. Insights from this analysis were used to prioritise each audience/market as a 'star' or 'solid deliverer', with the aim of increasing consideration of Australia as a tourism destination, and subsequent visitation.

We then defined a marketing mix to take advantage of the opportunity presented by each target audience/market. A similar approach was undertaken for business events, with analysis of Incentive and Association priority audiences.

### Priority markets

As shown in Table 3, the USA, China, UK, Germany, South Korea, Japan, Singapore and India have been identified as 'star' markets – these markets present opportunities to increase HYT consideration of visiting Australia for a holiday or business event. Marketing in 'star' markets will include a full suite of activities across brand paid (advertising, global search), brand earned and owned (PR, social media, international media hosting, advocacy, broadcast, consumer events, digital), partnerships

(activity with airlines, key distribution partners and affinity partners) and distribution (trade education, events and familiarisations). To heighten the efficiency of our paid media activity, we will move to a core geographies strategy in our star markets.<sup>42</sup>

New Zealand, Indonesia, Canada, Malaysia, Italy and France have been identified as 'solid deliverer' markets – these markets present opportunities to maintain consideration by high yield travellers to visit Australia for a holiday or business event. Marketing activity in these markets will concentrate on brand earned and owned initiatives, activity delivered in partnership with airlines, key distribution partners and affinity partners, and distribution development initiatives.

2024/25 TARGET AUDIENCE, MARKET PRIORITISATION AND MARKETING APPROACH							
AUDIENCE		LEISURE HIGH YIELD TRAVELLER (HYT)		LEISURE (HYT) LUXURY	LEISURE (HYT) WHM	BUSINESS EVENTS	
PRIORITISATION		STARS	SOLID DELIVERERS			INCENTIVE	ASSOCIATION
MARKET/S		USA, China, UK, Germany, Sth Korea, Japan, Singapore, India	Indonesia, Italy, France, NZ, Malaysia, Canada	USA, UK, China	UK	China, NZ, USA, South-Southeast Asia, UK	UK/Europe, USA
APPROACH <sup>43</sup>	BRAND PAID	✓	✓	✓	✓	✓	✓
	BRAND EARNED, OWNED	✓	✓	✓	✓	✓	✓
	PARTNERSHIP	✓	✓	✓	✓	✓	✓
	DISTRIBUTION	✓	✓	✓	✓	✓	✓

Table 3: 2024/25 Target audience, market prioritisation and marketing approach

<sup>42</sup> In the current environment of considerable increases in media costs. To respond to this we will undertake paid media buy in specific cities or geographies, ie we will invest in areas where our target customers live and often where there are existing aviation routes. This approach will improve our media buying efficiencies and measurement accuracy.

<sup>43</sup> Marketing approach: Brand paid (advertising, global search), brand earned and owned (PR, social media, international media hosting program, advocacy, broadcast, consumer events, digital), partnerships (activity with airlines, key distribution partners and affinity partners) and distribution (trade education, events and familiarisations).

## DIVERSIFICATION

We monitor and assess our priority markets to ensure our portfolio is balanced. This helps ensure the long-term sustainability of Australia's tourism industry and mitigate the risk of over-reliance on any specific market.

We will continue to support markets outside priority markets, predominately through our distribution development program. We recognise the importance of source market diversification, and also Australia's capacity for resilience, given growth opportunities in the medium to longer term. Accordingly, we will continue to invest in Rest of World markets, including responding to opportunities as they arise. Whilst there is no brand campaign media spend beyond our priority markets, many of these countries benefit from our broad consumer digital presence through Australia.com and our social media platforms.

Servicing Rest of World markets will focus on education, building business

connections, general insights and resources and management of ad hoc media enquiries and requests. We will also continue to support tourism elements of the Australian Government's economic and public diplomacy programs.

### Education

We will continue to support sales and destination training for frontline travel sellers in our Rest of World markets, ensuring prospective visitors have the right information and can easily access and book Australian tourism experiences. This will be delivered through our global Aussie Specialist Program.

### Connect for business

Dedicated trade communications and resources will increase Australia's visibility in the programs of international distributors in our Rest of World markets, as will opportunities to attend industry events in Australia, such as the Australian Tourism Exchange, and in-market, such as Marketplace events held in Asia, the

Americas and UK/Europe. We will also continue to lead industry delegations to major tourism trade events across the globe such as ITB Berlin, PURE in Morocco, ILTM Americas and ILTM Cannes. Participation in these events provides useful access, exposure and opportunities to build business relationships.

### Insights and resources

Access to the latest tourism research, data and insights will be delivered on Tourism.Australia.com and through the participation of our executives as speakers at tourism events and conferences in Australia and overseas.

### Media

We will continue to manage ad hoc media enquiries as well as familiarisation and broadcast support requests. Media across the world will also be provided with access to our media kits and publicity materials.



### CREATE DEMAND | Make Australia the most memorable and desirable destination on Earth

While Australia's tourism industry is on the road to recovery, the performance of our priority markets remains uneven.<sup>44</sup> The impact of this performance is amplified by significant activity from competitor destinations, which continue to ramp up their marketing activity. We will counter this activity with inspiring campaigns and initiatives that focus on the experiences that Australia is known for and that attract travellers, heightening their consideration to visit, supported by marketing communications that drive a positive emotional response and desire to visit.

The delivery of our strategic priorities will be undertaken through a Team Australia approach with our state and territory tourism organisation partners. This alignment and leveraging of activities at a state and federal level will heighten the return of our investment.

#### 2024/25 initiatives

##### Leisure

- Our global brand campaign *Come and Say G'Day*, will continue to be the cornerstone of our marketing activity. The campaign is an invitation to the world to discover the true meaning of an Aussie welcome and demonstrates the unique nature of Australia and Australians as it showcases the breadth and depth of our nation's world-class experiences. In 2024/25 we will begin the next phase of the campaign, with strategic and creative development aimed at broadening the perception of Australia as a tourism destination. The campaign will retain Ruby, the Souvenir Kangaroo and continue to feature the breadth of Australia's unique experiences, and the warm Aussie welcome that awaits prospective visitors, while presenting Australia in a fresh, yet familiar way. This activity will be delivered in partnership with our creative agency.<sup>45</sup>
- Paid media activity will target the high yield traveller audience, but with a more nuanced approach at a regional level. This will be informed by media planning guides that include insights from our work on attention, the effective targeting of high yield travellers within media, and the setting of key performance indicators and targets to measure success.
- Earned activity, including PR, advocacy and the international media hosting program, will focus on inviting the world to *Come and Say G'Day*, using editorial and messaging that sends a warm Aussie welcome and heightens consideration for travel to Australia. Always-on content and community engagement will continue across our social media channels, including the creation of content for each main channel, improving our presence by amplifying the right content and messaging to the right audience while maximising relevance and impact. We will also work with broadcast programs to deliver newsworthy Australian travel content with reach across multiple markets, including making the most of major events. For example, a dedicated campaign will be run in the UK in 2024/25, leveraging the British and Irish Lions Rugby Tour.
- Recognising that a holiday to Australia can be a prolonged purchase decision for international travellers, engaging and inspiring storytelling will continue across our websites [australia.com](http://australia.com) and [australia.cn](http://australia.cn), as well as through earned channels. Content will be shorter and more 'snackable', allowing improved sharing and distribution with partners. We aim to make planning and booking a trip to Australia easy and ultimately provide leads and bookings to industry operators. Digital platforms will be enhanced to improve customer experience, enhance speed and accessibility.
- Indigenous, sustainable and accessible tourism will continue to be woven into all marketing activities. This involves integrating Indigenous, accessible and sustainable tourism products and experiences in brand content; the creation and implementation of an Indigenous tourism communications strategy across owned and earned activities and Discover Aboriginal Experiences platforms; and the selection and inclusion of sustainable tourism products wherever feasible. From an advocacy perspective, a priority for the Tourism Australia's Friends of Australia program will be the recruitment of new Indigenous Friends of Australia and the development of a program to leverage these advocates.

<sup>44</sup> For example, while markets such as South Korea and, India have recovered fast, some of our most important markets have lagged behind due to ongoing travel frictions and later reopening to international travel. China and Japan are two key examples. While market share for Australia has grown in both those markets, visitor numbers and spend remain down compared with pre-pandemic performance.

<sup>45</sup> The contract with our incumbent creative agency concludes in FY24. In Q2 FY24, we undertook a tender for the appointment of our creative agency for the period 2024 to 2027. It is anticipated that the announcement of the successful agency will be announced early in FY25.



## Business events

- Driving consideration of Australia as a business events destination and converting this into Association and Incentive business will continue. The brand campaign, *There's nothing like Australia for business events* will remain as the creative platform for marketing communications. Areas of focus will be the consistent targeting of our audiences through paid, owned and earned media; making the most of word-of-mouth advocacy through fame moments from key events such as Australia Next; and an updated content approach that is nuanced to meet the needs of target customers by market.
- Proactive and reactive press office, media famils, content and social to support distribution trade activity will continue, providing inspiration to plan or book a business event in Australia.
- Ongoing development of the Business Events Australia website will focus on the customer experience and seamlessly connecting our target audience to the next step in planning their business event in Australia.
- For the Association sector we will showcase Australia's offering and sector strengths through case study/ testimonial style content that shows Australia as a world-leading association meetings destination.
- Incentive-focused content will be sent to the Incentive sector, including *Australia Next* magazine. Content will provide event planners with the latest inspirational information on Australia's business events offering including venues, accommodation, and experiences to support industry and their product.

## Working holiday maker (WHM)

In 2024/25 we will connect and engage with intending WHMs to increase their consideration of a working holiday in Australia, to boost visitation and provide ongoing support to Australia's workforce, particularly in the tourism sector. Our support and campaign activity will focus on prospective WHMs in the UK. We will invite intending WHMs to *Come and Say G'Day to Life the Aussie Way*, reframing an Australian working holiday as an opportunity for self-development and to inspire possibilities of what a working holiday in Australia could be. Activity will be delivered through content fuelled by real stories and experiences, with an invitation from current WHM to fellow compatriots to join them and experience the Aussie lifestyle. This will include:

- Launching the *Come and Say G'Day to Life the Aussie Way* campaign to drive awareness of Australia in the UK. Media will focus on social and digital buy using specific WHM assets and content.
- The content series will follow WHMs in Australia across all states and territories, hearing about their experiences and personal growth experienced during their time immersed in Australia's culture.
- Ensuring visa and core information about Australia's working holiday maker program is accurate and easily found on australia.com and official government websites in local markets; and continuing to engage in relevant government and industry forums to support and ensure policy initiatives reflect the needs of the sector.



## CONVERT DEMAND | Work with industry and partners to convert demand into visitation

Our distribution activities focus on ensuring that target audiences have the right information and that they can easily access and book quality Australian tourism products and experiences. These activities work in tandem with our partnership initiatives, which focus on collaborating with airlines and key distribution partners to drive bookings.

A priority in 2024/25 is to increase coverage and reach by growing the presence of Australia in the programs of international distributors. This will be undertaken through the delivery of distribution events that connect industry with distributors, enhancing stakeholder communications, and hosting famils and educationals to enable key decision makers to experience Australia.

Our annual distribution events program includes the Australian Tourism Exchange (ATE), G'Day Australia and our premier business event for incentive decision-makers, Australia Next. We will also partner with Australian industry members to host events offshore, and to support familiarisation (educational) visits to Australia for key decision makers and frontline travel sellers.

Our business events distribution and partnership activity aims to drive short- and long-term demand for Australia's business events offering and support the conversion of business events in Australia.

This will be delivered by targeted distribution development and partnership activities in our key markets – North America, the UK, Europe, New Zealand, South-Southeast Asia and China.

A healthy aviation environment and aviation connectivity are central to converting demand and the sustainable growth of Australia's visitor economy. To support this growth, we will work with industry to identify and target international aviation routes that present opportunities for Australian tourism. This will be undertaken through commercial partnerships that support capacity recovery or the introduction of new routes, using a Team Australia<sup>46</sup> approach.

Tourism Australia aims to influence seasonality and airline prioritisation through marketing activity as well as direct engagement with airlines to demonstrate Australia's attractiveness as a safe, year-round destination. The path to international growth involves capturing existing international demand through destination marketing, building aviation capacity and increasing air frequencies. Capturing demand from China with adequate aviation supply will be critical to Australia's competitive positioning. Together with our partners, we will target key routes and tourism destinations to ensure Australia has an extensive offering of tourism experiences for international visitors into the future.



Emerald Beach, Coffs Harbour

<sup>46</sup> Our Team Australia approach involves engaging with international airlines, airports, state and territory governments, the Department of Infrastructure, Transport, Regional Development and Communications and Austrade for the support of route development, and coordinated participation at aviation events such as World Routes, ATE and CAPA.



## 2024/25 initiatives

### Leisure

- Conversion Marketing (B2B2C): Working with airlines and key distribution partners (retail, wholesale, online travel agents), we will identify the optimal mix and selection of partners to maximise conversion, ensuring partner activity is aligned with our *Come and Say G'Day* brand and delivers optimum return on investment.
- Connect for Business (B2B): We will connect Australian industry with global distributors to increase coverage and reach. This includes delivering ATE, Australia Marketplace events in Japan/Korea and UK/Europe as well as other localised events. Opportunities to enhance stakeholder communication will be an area of focus.
- Education via the Aussie Specialist Program (B2B): We will emphasise engagement and recruitment, with activities including the delivery of G'Day Australia, our global Aussie Specialist Program mega famil and training event, and making the most of hosting frontline travel sellers by inviting them to experience Australia firsthand. Online education will continue through the Aussie Specialist Program digital platform, with modules to focus on short-form content.
- Advocacy via famils to experience Australia (B2B): Trade famil activity will predominantly be delivered before and after our major distribution events – G'Day Australia and ATE25. At G'Day Australia we will host around 300 frontline travel sellers for famils across all states and territories; while at ATE25, we will provide a famil program for key distribution decision makers both in the host state and across Australia.
- Distribution development (B2B): We are planning for Australia's growth

by monitoring insights and trends to inform our distribution development activities, actively sourcing new distributors in key international markets and exploring relevant opportunities. This will include exploring Indigenous, sustainable and accessible experiences and sector development in luxury, working holiday maker and cruise segments. Insights from our Distribution 2035 research project will be shared with industry to inform sector development.<sup>47</sup>

- Alignment under One Voice:<sup>48</sup> In partnership with industry and STOs, we will align under One Voice principles to deliver events, education, research and marketing initiatives. We aim to reduce duplication while simultaneously increasing the presence of Australia and continuing long-term distribution planning.

### Business Events

- Engagement platforms: We will provide platforms for Australian industry to engage with international business events decision-makers through the delivery of innovative, engaging face-to-face distribution activity that inspires and educates target audiences, facilitates connections and drives demand for Australia's business events products, services and experiences. This includes leading Australia's delegations at IMEX Frankfurt and IMEX America as well as Business Events Australia-owned events. A dedicated Business Events development role will be introduced in South-Southeast Asia to bolster effort across the region.
- Hosting a targeted famils program: This ongoing program enables key incentive decision-makers and association planners to see and experience Australia firsthand.

- Showcasing incentive experiences and products: Business Events Australia's incentive showcase, Australia Next, will be delivered in September 2024 in Cairns/Gimuy and in December 2026 (host city to be announced at a later date). The event will increase awareness of Australia as an outstanding incentive destination by showcasing Australia's best incentive experiences and products through the host city program, as well as a series of pre- and post-event famil visits around Australia.
- Driving a strong pipeline of international business events: This will be achieved through ongoing partnership programs with Australian industry members (via the Bid Fund Program and the Advance Program). We will also support the conversion of both short and longer lead business to help maintain Australia's international competitiveness and counteract our barriers.

- Managing the Business Events Bid Fund: Continuing to manage the Bid Fund through a dedicated application process that increases the conversion of bids for new international business events for Australia by providing financial support to offset event delivery costs at the bidding stage.
- Supporting industry through the Advance Program: By providing access to Tourism Australia's international marketing and distribution expertise, including assistance with best-practice delegate acquisition marketing activities to increase delegate attendance at international business events confirmed to be held in Australia, we will support the industry to grow.

<sup>47</sup> Distribution 2035: Research into the future of the distribution landscape will be launched, providing insights into the current state and outlook for distribution to 2035. This includes implications for consumer trends and behaviours, technology trends and innovations, the distribution environment, best practice, Australian industry's strategic approach to distribution and an outline of Tourism Australia's strategy and distribution platform.

<sup>48</sup> One Voice' refers to initiatives undertaken in partnership with STOs with the aim of reducing duplication while increasing the presence of destination Australia in our priority markets

## 2024/25 initiatives

### CHAMPION INDUSTRY | Help industry to drive Australia's next competitive advantages

With a focus on building competitiveness, particularly around the drivers of destination choice for prospective visitors to Australia, we will undertake initiatives that bolster industry development and growth.

This includes delivering insights to help inform strategy and decision making; continued development of Indigenous, sustainable and accessible tourism opportunities as these areas present significant competitive advantage for Australian tourism; extending the Signature Experiences of Australia<sup>49</sup> program to include a new agritourism collective; and continuing to be a platform for and advocate on behalf of industry with government stakeholders. Close collaboration with the Australian Government will continue to ensure the views of industry members are heard and incorporated into policy initiatives that aid industry growth.

## 2024/25 initiatives

### Strategy, research and insights

Research and insights are key pillars of Tourism Australia's activities, providing the base for our marketing strategies as well as providing intel for Australia's tourism industry to aid planning and decision making.

We use consumer research to help drive our strategy and inform the industry of potential opportunities to build the value of Australian tourism. Our primary consumer research project is the *Consumer Demand Project* (CDP).<sup>50</sup>

This research enables us to understand what motivates consumers so that we can better craft our marketing messages to build demand, stimulate bookings to Australia and work towards the industry's *Thrive 2030* goals. The CDP is also widely used by STOs and the industry.



#### Key deliverables in 2024/25:

- Recognising that the COVID-19 pandemic radically disrupted travel and evolved the experiences that people are looking to have, in 2023/24 the CDP was evolved and improved. The new CDP uses an updated approach and methodology, including some changes to survey questions and the way results are reported. Overall, the main aim has been to improve and future-proof the quality, robustness and sophistication of the project's outputs. In 2024/25, we will continue to roll out the research, as well as additions to the program, with new flexi-modules including Path to purchase, Drivers of destination choice, Sustainability, Accessibility and Indigenous experiences, and STO deep dives.
- Sharing latest data, trends and insights from our research and strategy program, to inform decision-making and thinking about future opportunities. This will include regular reporting through our corporate website, [tourism.australia.com](http://tourism.australia.com), and updated PowerBI dashboard reporting, to enable timely and easy access to the latest tourism and marketing insights and trends.

<sup>49</sup> The Signature Experiences of Australia program packages and promotes Australia's outstanding tourism experiences within a variety of niche areas and special interest categories. It is delivered in partnership with select industry collectives comprising wineries, luxury lodges, golf courses, guided walks, Aboriginal guided experiences, fishing adventures, wildlife encounters and cultural attractions. A new agritourism collective will be launched in 2024/25.

<sup>50</sup> The CDP has been in place since 2012 and is recognised as the key data source for international consumer understanding. We survey respondents across 16 source markets. Analysis of competitor activity has been expanded to include 39 destinations across the Americas, Oceania, UK and Europe, the Middle East and Africa, North Asia and South/Southeast Asia.

## Indigenous tourism

Indigenous tourism experiences are a significant element of our tourism offering and differentiates Australia from competitor destinations. Indigenous tourism is central to Australia's story and an important path towards reconciliation.

We recognise the Traditional Owners of the land and respect their connection to and ownership of Country, cultural protocols, traditional knowledge and intellectual property. We are committed to reconciliation as reflected in our Stretch Reconciliation Action Plan (RAP), which was launched in May 2023. Through education, advocacy and promotion, we will help to build awareness of Aboriginal and Torres Strait Islander tourism and increase the uptake of Indigenous tourism experiences by visitors.

### Key deliverables in 2024/25:

- Increasing the range of Indigenous experiences promoted across our campaigns and content and embedding diverse Indigenous voices and talent across our tourism events.
- Continuing to support the Discover Aboriginal Experiences program, creating inspiring content to educate trade and media on the depth and diversity of Indigenous cultural experiences on offer in Australia and providing media and trade engagement activities that facilitate leads to members of the program.
- Continuing to build the Tourism Australia team's knowledge, understanding and competency in promoting Indigenous tourism through our Stretch RAP.
- Collaborating with key stakeholders such as STO partners and Australian government agencies to deliver campaigns and policy initiatives that support Indigenous tourism.

- Providing guidance to industry and decision makers, encouraging industry and governments to embrace, mentor and expand the development of authentic and diverse cultural experiences; and contributing to the broader government agenda on Indigenous tourism. This includes supporting the National Indigenous Australians Agency by promoting the National Indigenous Tourism Mentoring Program and participating in the Tourism Reconciliation Industry Networking Group to hear the voices of Indigenous peoples and communities on topics relevant to reconciliation, culture and tourism.

## Sustainable tourism

As a destination that attracts millions of visitors from around the world each year to experience the unique natural and cultural assets that Australia has to offer, sustainability is critical to the work that we do. Tourism Australia aims to champion and elevate the importance and appeal of sustainable tourism, in response to growing demand for sustainable tourism practices in Australia and across the globe; consumer demand for 'conscious travel' is increasing with tourism operators recognising the benefits of adopting these practices for their business performance and competitiveness.

We will continue to support sustainable tourism practices through advocacy, education and proactive promotion, aiming to increase the economic value of Australian tourism, protect and enhance our natural environment, and enrich the lives of Australians. We recognise this needs reportable and measurable actions.

We also recognise the need for robust and transparent sustainability reporting metrics, as a pathway to Net Zero by

2050 and the Australian Government's commitment to at least 43 per cent reduction (below 2005 levels) in carbon emissions across Australia by 2030.

### Key deliverables in 2024/25:

- Developing a three-year Sustainability Action Plan that aligns Tourism Australia's environmental, social and governance (ESG) objectives, including an emissions reduction plan and reporting framework to meet current and future reporting obligations.
- Continuing to upweight our sustainable tourism focus, driving awareness and demand by championing sustainability storytelling as a core element of our narrative across our owned, earned and paid marketing and distribution channels.
- Guiding industry and decision makers; driving understanding of, and capability for, sustainable travel experiences through thought leadership; sharing best practice case studies, resources and insights; and education and advocacy via Tourism Australia's channels and alignment with global and Australian Government policy approaches to Carbon Zero.
- Continuing to embed consideration of sustainability-driven actions across our organisation, including minimising our office footprint (waste, energy, travel, operations), reducing our events footprint and ensuring sustainability considerations are included in our procurement activities and partnerships.



Mount Field National Park, Southern Tasmania

## Accessible tourism

Accessible tourism is an ongoing endeavour to ensure tourist destinations, products and services are accessible and inclusive for all people, regardless of their physical or cognitive limitations, disabilities or age.<sup>52</sup> As we prepare for Australia's hosting of the 2032 Olympic and Paralympic Games in Brisbane, there will be increased demand for travel and tourism experiences that are accessible to all.

Our marketing activities aim to heighten awareness and capability across the industry to better support the accessibility needs of visitors to Australia. This will focus on providing a voice for accessibility in Australia's tourism industry, through advocacy and education across our marketing channels and engagement with industry.

We will also increase awareness of the opportunities on offer to visitors with special needs by incorporating accessible and inclusive travel experiences and business practices, both externally and internally, through advocacy, education and promotion of inclusive tourism practices. As part of our ongoing commitment, we will develop a medium- to long-term accessible and inclusive framework for our organisation.

### Key deliverables in 2024/25:

- Developing a medium- to long-term accessible and inclusive framework for Tourism Australia. This includes examining our corporate policies and procedures to ensure that we are doing all we can to be inclusive and accommodating for all staff and potential employees.

- Embedding accessibility considerations across our consumer marketing activity, including creative briefs and casting, and building the presence and importance of accessible tourism across our assets.
- Driving awareness and understanding of the importance of accessible tourism experiences by profiling best practice case studies, resources and insights from Tourism Australia's *Future of Demand* research, and by presenting at key industry and distribution events, including the Australian Tourism Exchange.

<sup>52</sup> Accessibility is about making sure all people of all abilities have the tools to enjoy the same products and services as everyone else. Inclusion is about ensuring everyone gets a chance to take part and is focused on cultural practices and shifting norms so that everyone can enjoy themselves while participating.

## OUR ENABLING FACTORS

### Engaged and supportive stakeholders

Our teams in market remain close to our commercial, distribution and airline partners as we rebuild international visitation to pre-pandemic levels and move beyond recovery towards a future of sustainable growth.

To ensure stakeholders are engaged and integrated into our ongoing recovery plans, we maintain long-standing relationships and gather intelligence on market trends, consumer sentiment and competitor activity. In a highly competitive market for tourism globally, these insights are important inputs to ongoing industry recovery and growth strategies as well as our competitive advantage.

Whilst our global *Come Say G'Day* campaign continues to run internationally, our ongoing work with government and industry partners in Australia and key markets overseas maximises its impact. This includes working with our airline and distribution partners to convert interest into bookings.

Working closely with our PR team in Sydney, our international teams also keep Australia top of mind with consumers by actively pitching stories to local media that highlight products and experiences that are available for visitors to enjoy.

In the year ahead we will continue to engage our key business events stakeholders and take advantage of the long lead times for business events to develop future business opportunities for Australia.

Our program of events both in Australia and overseas will also play role in supporting Australian industry to connect with the international distribution network to market their products to prospective visitors.

### Timely and accessible data and insights

We will provide insights, evaluation and advice to the tourism industry and the Australian Government to support Australian tourism's continued growth.

The development and delivery of organisational and marketing strategies and initiatives will continue, informed by a comprehensive research and analysis program that will be delivered across three main areas:

- Marketing (with a heightened emphasis on attention and marketing effectiveness and timely delivery of insights to inform marketing activities)
- Campaigns (campaign tracking, testing, evaluation and benchmarking)
- Organisation (*Consumer Demand Project* and sentiment tracking, mini polls for quick turnaround on topical issues, continued incorporation of insights from the *Future of Demand*<sup>53</sup> study into our mainstream research suite, and assisting Tourism Australia teams with research and reporting).

Over the past year, significant effort has focused on improving the accessibility and timeliness of research and data through the development of dedicated PowerBI reports and dashboards. In the coming year we will roll out these tools, ensuring all staff can make the most of insights in their reporting and activity development.

### Motivated staff

Our proactive people programs are designed to drive motivation and engagement, and we will continue to finetune these programs in response to staff feedback. New legislation, industry and workplace developments are other key

drivers behind the programs we offer to support and motivate our staff. We also know that being part of a global team with a shared purpose around creating world-class campaigns for Australia is a powerful and unifying motivation.

One highlight for staff is our annual conference – totally owned and delivered by staff with inspiring speakers and creative team-building activities.

On a day-to-day basis, staff find meaning and purpose in learning about Australia and its tourism offerings – from awareness of our Aboriginal and Torres Strait Islander heritage to sustainability issues and diverse and inclusive travel experiences.

Our staff say they are proud to work for Tourism Australia – for two consecutive years 96 per cent of our staff said this in the annual engagement survey. To ensure we maintain this positive trajectory, we will stay close to our people and their career aspirations, as well as their developmental needs.

As workplaces evolve, we also need to ensure our people are equipped and empowered to do great work as we keep pace with changing workplace dynamics – from IT tools and support through to an enabled coaching culture.

Our engagement survey and ongoing pulse surveys, along with our employee net promoter score<sup>54</sup> keep management informed of staff engagement. These surveys provide valuable insights into how our people and programs are tracking so we can respond to changing needs.

As an organisation, we will focus on enabling high performance in everything we do as we grow the skills and abilities of our global workforce. Our behaviours and decisions will be guided by our values as we live the TA Way.

<sup>53</sup> Future of Demand research was released in 2023. Further detail on the research, including an overview of findings and market fact sheets are available at [tourism.australia.com/](https://tourism.australia.com/) (under Future of Demand > Consumer Research > Tourism Australia).

<sup>54</sup> Staff NPS measures staff feedback on whether staff would recommend Tourism Australia as a great place to work.

## Strategic financial management and performance reporting

Tourism Australia will maintain an agile and productive finance function to drive efficiency, accountability and capability across the organisation. We will manage our finances strategically and dynamically to meet our goals. Through solid financial planning we will improve our response to changing business conditions, ensuring our financial resources are used to maximise our business opportunities. This will be further enhanced through the introduction of a corporate performance management tool, improving efficiencies as well as tracking activity against our strategic priorities.

Insights from management reporting will continue to underpin decision making. We will measure performance by reporting on activities against targets and our corporate goals and ensure our marketing investment delivers value for money.

We will comply with Commonwealth Procurement Rules and maintain solid corporate governance. This includes developing and executing long-term plans to ensure timely supply of goods and services that are critical to meeting our corporate objectives. Our strategic procurement approach will be aligned with our organisational strategy and aims to increase efficiency and sustainability while encouraging competition and ensuring accountability and transparency. This approach will be reinforced and managed by the introduction of an end-to-end automated contract management system.

### Robust governance

We will deliver on the Minister's Statement of Expectations and Australian Government policies and adhere to statutory and legislative requirements

prescribed by the *Tourism Australia Act 2004* (TA Act) and the *Public Governance, Performance and Accountability Act 2013* (PGPA Act). We will ensure our fiscal management, accountability, risk and audit obligations are met.

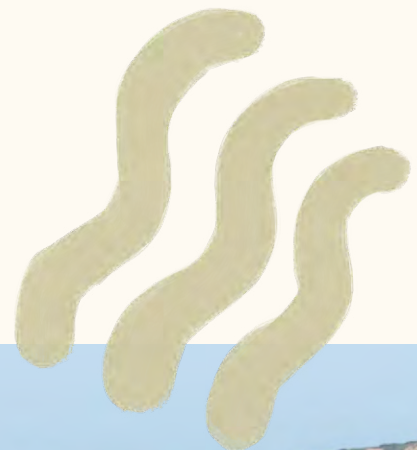
We are governed by a Board of Directors with oversight by an Audit and Risk Committee. The Board reports to the Australian Minister for Trade and Tourism. Under the PGPA Act, the Board must govern Tourism Australia in a way that promotes the proper use and management of public resources, promotes the achievement of our purposes and ensures our financial sustainability.

Tourism Australia delivers robust corporate governance across all business activities. We achieve this through:

- Planning and monitoring performance of major projects and contracts
  - Open communication with the Australian Government, the Minister for Trade and Tourism, Australian tourism industry and regulatory bodies
  - Adherence to legislative, internal compliance, procurement and delegation procedures
  - Regular business evaluations by the Executive Leadership Team (ELT)
  - A strong internal audit program
  - A sound legal and contract management framework
  - Regular review of key governance documents, strategies and policies
- Annual compliance and conflict of interest declarations and reporting
  - Staff training in governance matters.

Our risk management framework addresses strategic, operational, project and targeted risks. At a strategic level, this includes annual Strategic Risk Workshops undertaken by the ELT and discussed at Board and Audit Committee meetings, with regular follow-up by the Executive. From an operational and project perspective, risk assessments are performed as part of planning processes; for procurement and insurance purposes as required under Tourism Australia policies; and to identify and eliminate workplace hazards. The Executive also undertakes annual crisis management workshops where we test the organisation's ability to respond to various risk scenarios, such as cyber incidents or terrorism events.

Tourism Australia takes seriously its responsibilities under the *Modern Slavery Act 2018* (the Act). 'Modern slavery' is an umbrella term used to describe human trafficking, slavery and slavery-like practices, such as forced labour and forced marriage. Each year, we complete a Modern Slavery Statement that reports on our performance against criteria set out in the Act. The statement is published on the corporate website [tourism.australia.com](http://tourism.australia.com).



## IMPLEMENTATION: DELIVERABLES BY PROGRAM COMPONENT

Tourism Australia delivers on its purpose through its Australian Government outcome and program components.

Purpose: Grow demand to enable a competitive and sustainable tourism industry	
Government outcome: To grow demand and enable a competitive and sustainable Australian tourism industry by undertaking marketing activities that target best prospect consumers in key markets.	
Program component 1: Grow demand	Program component 2: Industry development
Objective: Identify and target best prospect consumers, inspire them to travel to and around Australia, and to spend more and disperse throughout Australia.	Objective: Support an Australian tourism industry that is competitive and sustainable and meets the needs of the target customer.
<p><b>Target leisure customers</b></p> <ul style="list-style-type: none"> <li>• Use data and research insights to define best prospect target audience segments and the priorities of these segments by market. Use these insights to inform market prioritisation and budget allocation by target audience and market.</li> <li>• Deliver consumer research in partnership with STOs, including consumer demand research and insights, to ensure messaging is relevant and timely.</li> <li>• Deliver marketing activities that stimulate target customers to consider Australia for their next holiday. Activities use channels and programs that make the most of Tourism Australia's resources, consumer media consumption and consumer travel buying behaviour. Channels include brand advertising and promotions as well as digital and online, broadcasts, public relations and advocacy, media hosting, content development and social media.</li> <li>• Collaborate and work in partnership with government and industry to align efforts and activities that increase Australia's share of voice in the international marketplace and are efficient and effective.</li> <li>• Evaluate campaign and project performance through a range of tracking and direct consumer response research.</li> </ul> <p><b>Target international business events customers</b></p> <ul style="list-style-type: none"> <li>• Continue to use research insights to inform marketing communications that target corporate and association decision makers in international markets.</li> <li>• Deliver activities that promote Australia as a business events destination, including trade and experiential events, buyer and agent familiarisation visits, direct marketing and public relations and marketing toolkits.</li> <li>• Drive visitation through marketing support for large-scale incentive and association events through a dedicated Business Events Bid Fund.</li> </ul>	<p><b>Develop the distribution system</b></p> <ul style="list-style-type: none"> <li>• Build the capacity of the tourism and business events industry to confidently sell Australia through dedicated training initiatives.</li> <li>• Provide Australian destination and product content to the tourism and business events distribution system for tourism marketing and sales activities and provide a consistent approach for marketing Destination Australia.</li> <li>• Facilitate direct connections between tourism and business events sellers and Australian tourism products through familiarisation visits and trade events.</li> <li>• Use market and consumer insights to identify special interest experiences that have high potential to drive travel to Australia. Work with these sectors through the Signature Experiences of Australia program to bundle and promote these experiences.</li> <li>• Continue initiatives to improve understanding and support industry readiness in the areas of sustainability, Indigenous and accessible tourism, and build Australia's competitiveness as a tourism destination.</li> </ul> <p><b>Provide platforms to do business</b></p> <ul style="list-style-type: none"> <li>• Manage a range of trade events in Australia and overseas to promote Australia as a destination for leisure and business events travel, including the Australian Tourism Exchange, Australia Next (formerly called Dreamtime), and industry missions to key markets</li> </ul> <p><b>Support supply-side industry goals</b></p> <ul style="list-style-type: none"> <li>• Work with government stakeholders to address issues that are impediments to growth.</li> <li>• Disseminate tourism research and insights and engage with industry stakeholders.</li> <li>• Share market and consumer insights and trends through owned and partner marketing channels.</li> <li>• Deliver an annual conference, industry briefings and communications to build awareness and understanding of Tourism Australia strategies and initiatives (delivered virtually as required).</li> </ul>

Table 4: Implementation of activities by program component

## 6. RESOURCING

Tourism Australia is primarily funded through parliamentary appropriations. We operate on a financial year basis.

Tourism Australia budget 2024 to 2028					
PROGRAM COMPONENT	2024/25 BUDGET \$M	2023/24 EST. ACTUAL \$M	2025/26 BUDGET \$M	2025/26 BUDGET \$M	2027/28 BUDGET \$M
Grow demand	\$143.7	\$144.7	\$146.3	\$147.8	\$150.1
Industry development	\$25.4	\$25.5	\$25.8	\$26.1	\$26.5
<b>TOTAL FUNDING</b>	<b>\$169.1</b>	<b>\$170.2</b>	<b>\$172.1</b>	<b>\$173.9</b>	<b>\$176.6</b>

Table 5: 2024–28 budget by program component

## 7. PERFORMANCE MEASUREMENT

We track our effectiveness under Tourism Australia's two program components – 'Grow demand' and 'Industry development'. Key performance indicators and goals are provided in Table 6. We also have project metrics that are used to provide insight into our organisational performance indicators.

Tourism Australia key performance indicators and targets 2024 to 2028								
Deliverables		Key performance indicators	2023/24 GOAL (JUN 24)		2024/25 GOAL (JUN 25)		2027/28 GOAL (JUN 28)	
Program	Goal		YoY change		YoY change		YoY change	
Grow demand	Increase visitor expenditure	Total tourism expenditure (domestic <sup>55</sup> and international) <sup>56</sup>	\$156.5B	+9%	\$169.6B	+8%	\$220.8B	+4%
		Total international tourism expenditure <sup>56</sup>	\$42B	+18%	\$47.5B	+12%	\$71.8B	+10%
		International leisure tourism expenditure <sup>56</sup>	\$25.3B	+26%	\$29.8B	+15%	\$40.3B	+10%
		Business events expenditure <sup>56</sup>	\$1.7B	+12%	\$2B	+15%	\$2.8B	+8%
	Increase consideration of Australia as a tourism destination <sup>57</sup>	Destination brand – awareness	54.6%		55.2%		57.1%	
Destination brand – consideration <sup>58</sup>		39.5%		39.9%		41.4%		
Industry development	Maintain industry satisfaction	Industry NPS – Tourism Australia	42		43		46	
		Event satisfaction of participants	>90%		>90%		>90%	
		Bid Fund Program ROI <sup>59</sup>	\$49.1		\$50.1		n/a <sup>62</sup>	
Corporate		Year-end financial performance to budget	>0.5%		>0.5%		>0.5%	
		Employee NPS – staff recommend	+30		+32		+38	
		Tourism Australia as good place to work						

Table 6: 2024-2028 Key performance indicators and targets

<sup>55</sup> Domestic spend forecasts provided by Tourism Research Australia

<sup>56</sup> Spend goals were developed based on Tourism Research Australia forecasts for international total trip spend. As forecasts are provided by calendar year, we converted data to a financial year basis for the purposes of this corporate plan.

<sup>57</sup> In 2023, FiftyFive5 was appointed by Tourism Australia for the delivery of the Consumer Demand Project and measurement of our core brand metrics. With the move to this new supplier, refined survey and brand metric measures have resulted in a step-change in the awareness and consideration metrics.

<sup>58</sup> Destination Brand consideration: percentage of out of region travellers considering travelling to Australia in the next four years.

<sup>59</sup> ROI is calculated by dividing the predicted economic impact of events won by TA's Bid Fund Program total investment in the events.



# APPENDIX

## Risk appetite

Our strategic risk assessment is undertaken using our risk appetite, which spans eight perspectives that are significant to Tourism Australia's operations. Our risk appetite for 2024/25 is outlined in Table 7.

### Risk appetite 2024

Perspective	Risk appetite statement	Rating
Strategic	We will ensure that a three- to five-year recovery plan is at the heart of all that we do by aggressively pursuing strategies that drive our short-term organisational objectives and foster future growth. These objectives are key to recovery and competitiveness for the Australian tourism industry, and as we seek to reinvent, build and shape innovative strategies, our appetite for risks is moderate.	Moderate
Government	We will ensure that our relationship with the Government is a priority and act transparently. We place a high importance on Ministerial and departmental satisfaction and have a low tolerance for political risk-taking.	Low
Brand and reputation	We are an innovative and adaptive agency, however as our reputation is integral to supporting our mission to encourage tourism in Australia, we seek to actively protect our brand through our activities and stakeholder relationships. Our appetite for risks in this area is moderate and we will manage situations that could have a negative impact on our brand.	Moderate
Legal and regulatory	As a corporate Commonwealth entity with a global footprint, we will seek to meet all legal and regulatory expectations. We have a low appetite for risks in this category and zero tolerance for fraud, collusion or theft risks.	Low
Financial / Operational	Our appetite for financial and operational risk is low. We will ensure that value for money underpins our fiscal and operational decisions. Financial risks and rewards will be assessed against both short- and long-term strategic and operational priorities.	Low
Marketing initiatives	We are committed to undertaking bold marketing initiatives intended to drive desired commercial outcomes that are aligned with our recovery plan, strategy and government priorities (where appropriate). We will exercise diligence in monitoring performance against these objectives and foster an environment of continuous improvement. Our appetite for marketing project risk is high.	High
Work health and safety	We will provide a safe environment for staff and a culture that values continuous learning, collaboration and accountability. Our appetite for risks related to health and safety is low.	Low
Information/ Data	We will safeguard information and data, be transparent, open and collaborative with stakeholders and operate within global privacy laws. We have a low appetite for system failures or information / data security breaches.	Low

Table 7: Tourism Australia Risk Appetite 2024