



Global Insights 2023/2024

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Uluru-Kata Tjuta National Park

Different in every sense



What we will cover

- The now - How are we doing?
- The future - What is the forward view?
- The opportunity - Where is the demand?

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International tourism is still in recovery

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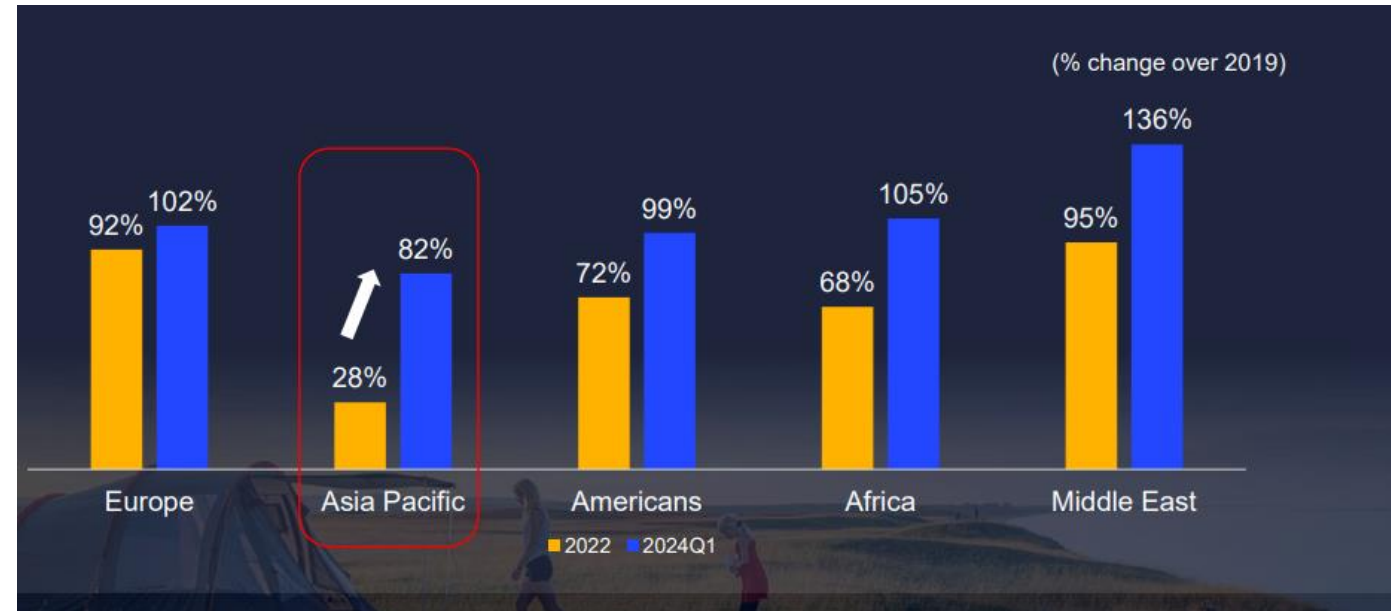
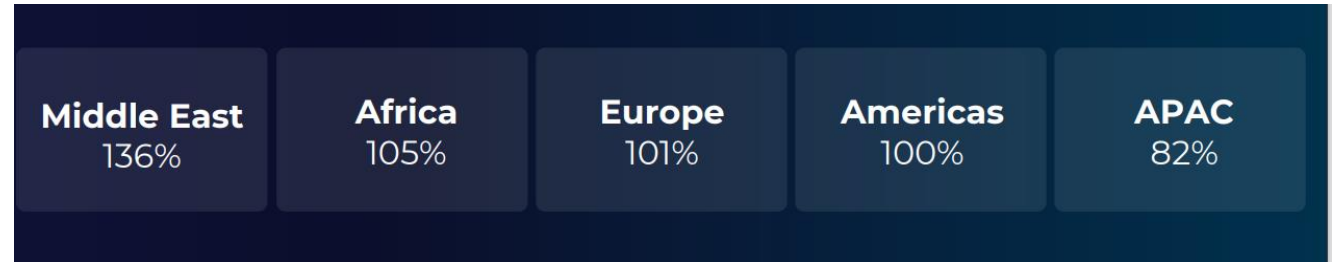


Global Rebound

International tourism has reached 97% pre-pandemic levels in Q1 2024.

Arrivals in APAC recovered 82% of pre-pandemic levels after recovering 65% in 2023.

Northern Territory is at 69% of 2019 (NAT 85% YE Jul24).



Travel sector is normalizing with significant gains yet to be reached from international recovery

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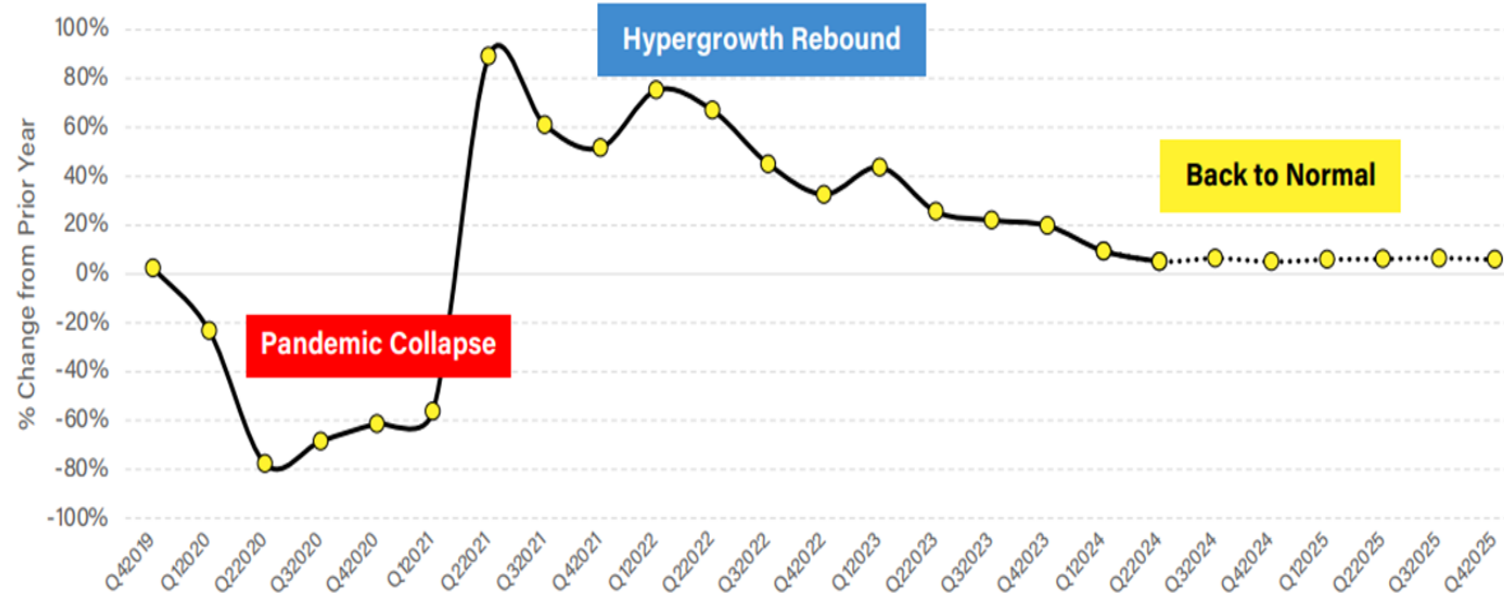


“New Normal” gives way to Normal

Recent research (US, Aug 2024) captures well what we are also seeing in Australia and NT.

The travel sector worldwide is stabilising after experiencing ‘rebound hypergrowth’.

Recent pace of growth in travel is not sustainable. Normalisation is a sign of strength as the industry moves past wild swings of the COVID era.



Source: Historical data from the [Skift Travel 200](#). Estimates from Skift Research and Capital IQ. Data as of August 2024.

How are we doing in the Territory?

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Territory aligned to sector stabilisation trend

Spend remains well above 2019 levels.

International growing share of NT visitation and spend.

NT INTERNATIONAL



VISITORS

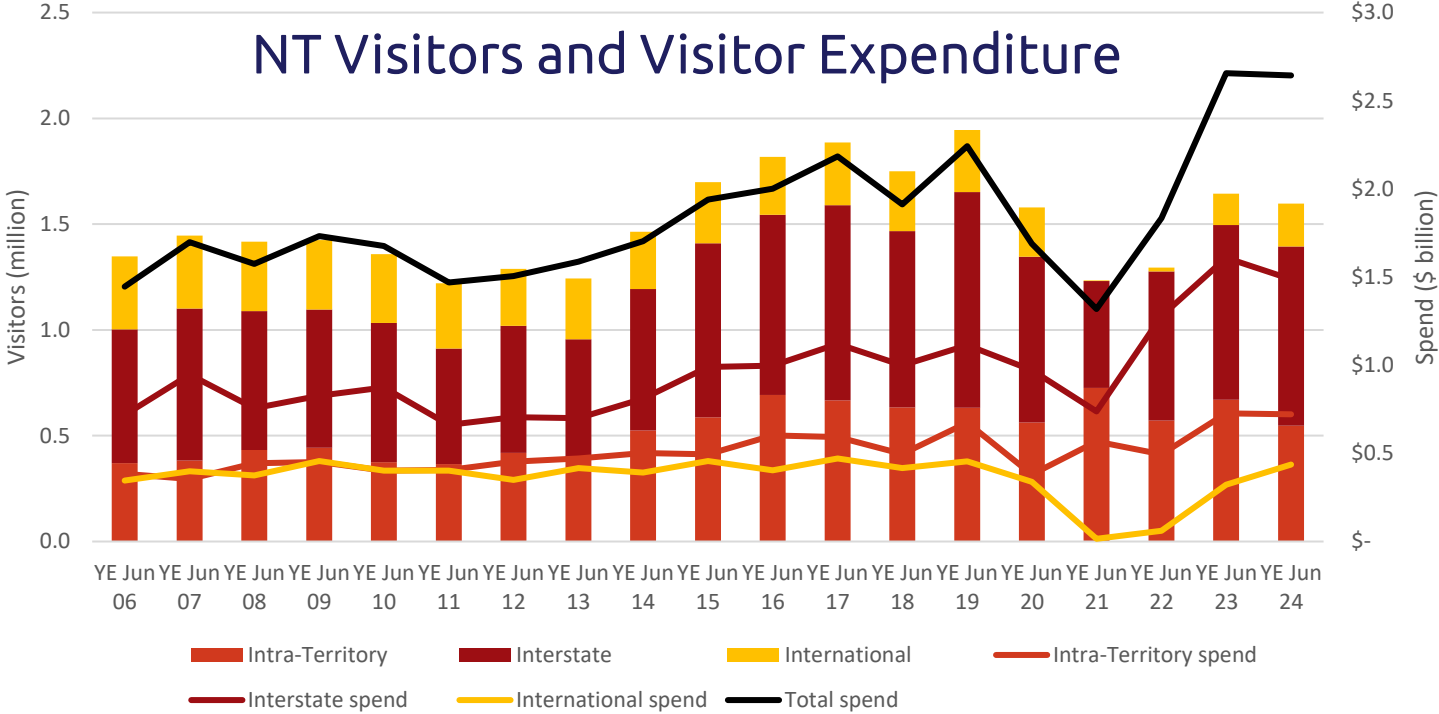
202,000

+36%

EXPENDITURE

\$435M







+35%



Northern Territory

1.6M VISITORS **-2.9%**

\$2.6B EXPENDITURE **-0.5%**

	INTERSTATE	INTRA-TERRITORY	INTERNATIONAL	HOLIDAY	VFR	BUSINESS
						
VISITORS	848,000 -2.7%	547,000 -18%	202,000 +36%	804,000 -1.7%	220,000 +5.5%	503,000 -5.4%
EXPENDITURE	\$1.6B -10%	\$771M +14%	\$435M +35%	\$1.4B +1.3%	\$211M +40%	\$621M -8.0%

Top End

International visitation continues strong towards recovery and Top End with Darwin is leading the uplift

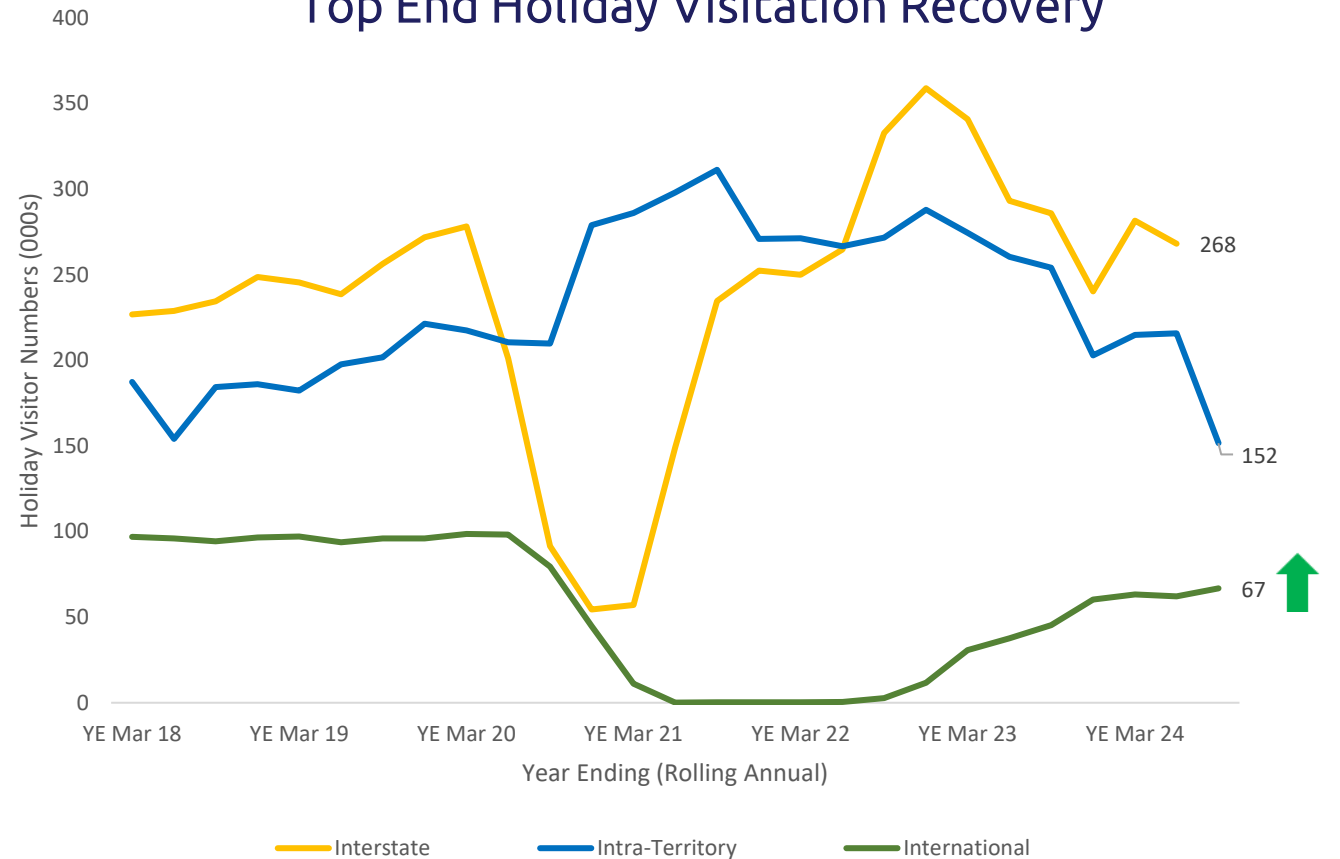
INTERNATIONAL



117,000

+36%

Top End Holiday Visitation Recovery



Centre

International continues strong towards recovery and Centre with Alice is capturing the pent-up demand

CENTRE INTERNATIONAL



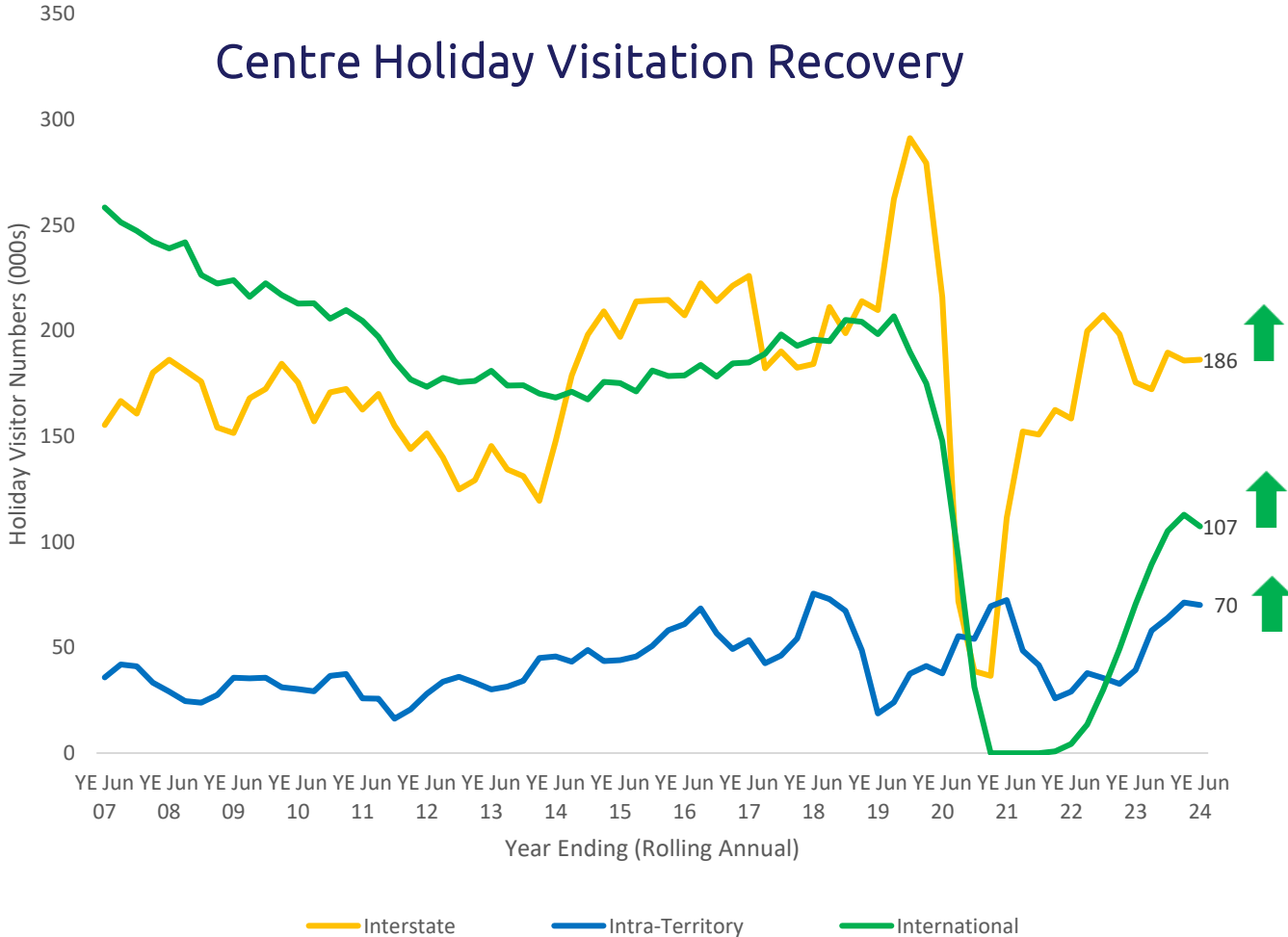
115,000
+50%

ALICE INTERNATIONAL



54,000
+52%

Centre Holiday Visitation Recovery



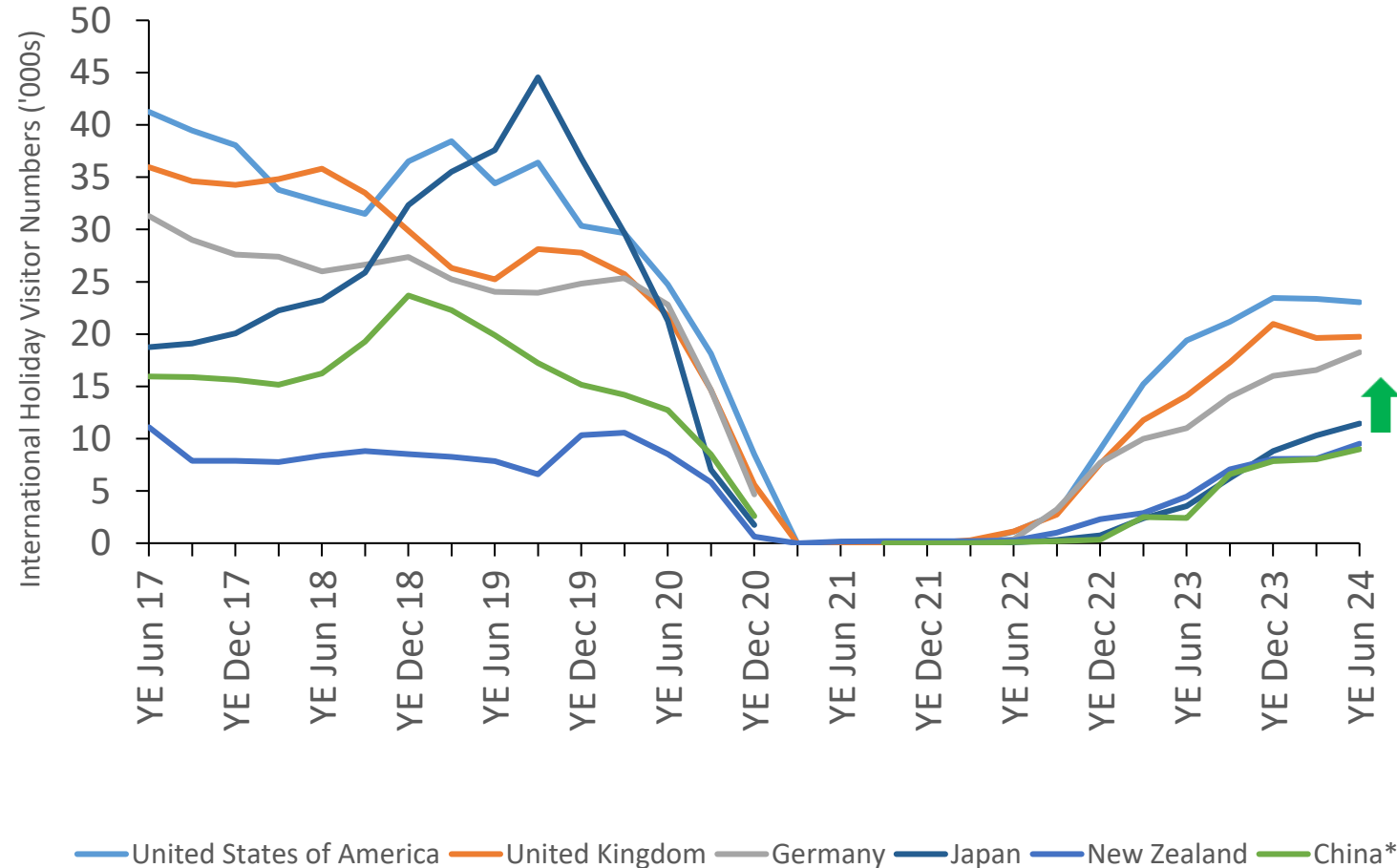
Source: International and National Visitor Survey – Year Ending June 2024



Top 5 international markets

US & UK are top performing markets

Strong growth from Germany (3rd)
followed by Japan and NZ



Northern Territory

NT INTERNATIONAL HOLIDAY VISITOR SOURCE MARKETS

202,000 VISITORS +36%

\$435M EXPENDITURE +35%

HOLIDAY



150,000
+43%

VFR



26,000
+79%

BUSINESS



10,000
+12%

OTHER



26,000
+7.0%



UNITED STATES OF AMERICA

VISITORS 23,000 **+19%**



UNITED KINGDOM

VISITORS 20,000 **+40%**



GERMANY

VISITORS 18,000 **+66%**



JAPAN

VISITORS 11,000 **+221%**



NEW ZEALAND

VISITORS 10,000 **+113%**



CHINA*

VISITORS 9,000 **↑**



FRANCE

VISITORS 6,000 **↓**



KOREA

VISITORS 5,000 **↑**



SCANDINAVIA

VISITORS 5,000 **↑**



NETHERLANDS

VISITORS 5,000 **↑**

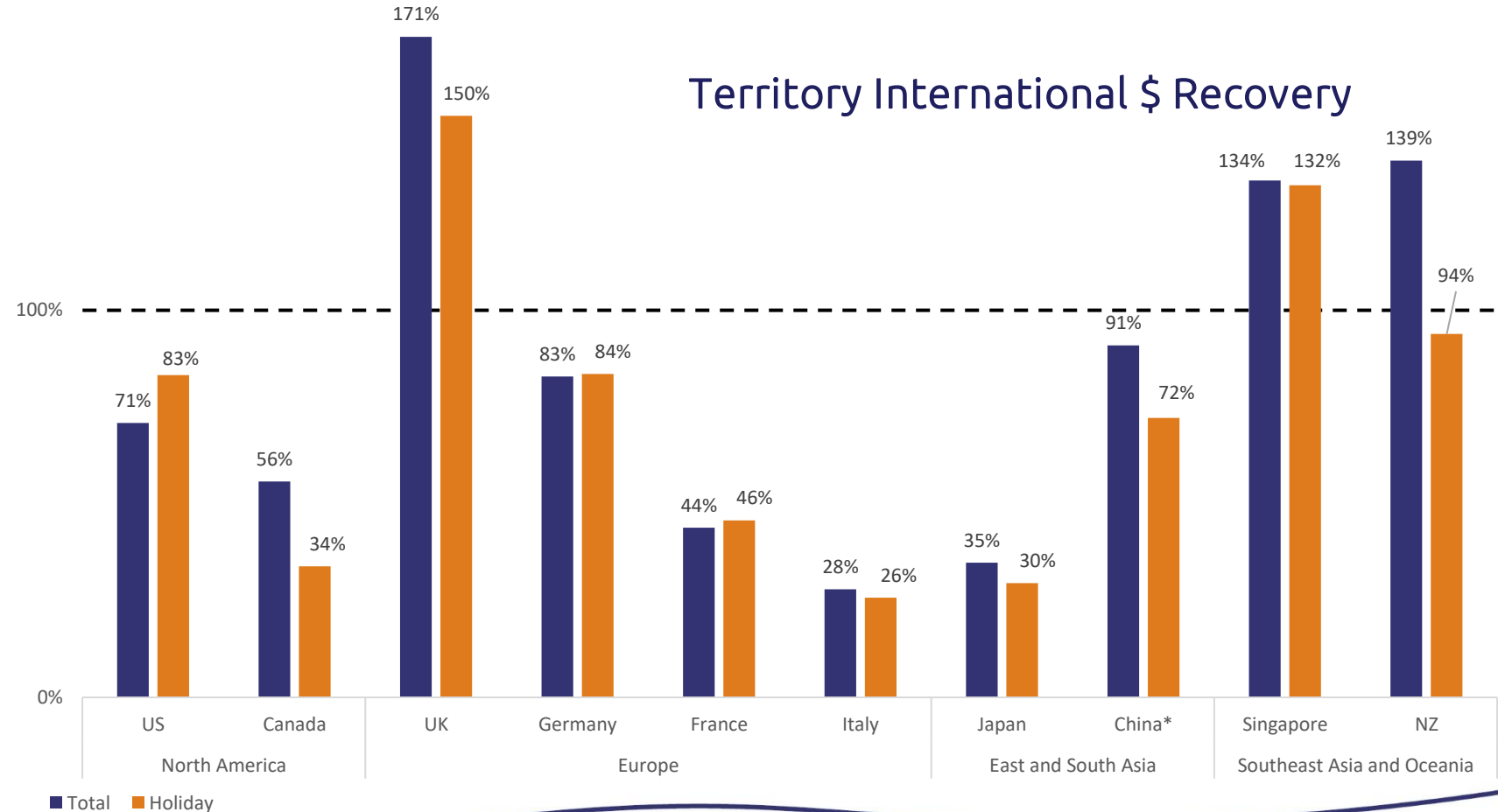
* China includes – Mainland China, Taiwan and Hong Kong

Source: International Visitor Survey – Year Ending June 2024, as compared to Year Ending June 2023

Spend

UK, Singapore and NZ visitors are spending more than pre pandemic.

Once they come to the Territory, International visitors are also staying longer – on average 24 days (more than double pre pandemic).

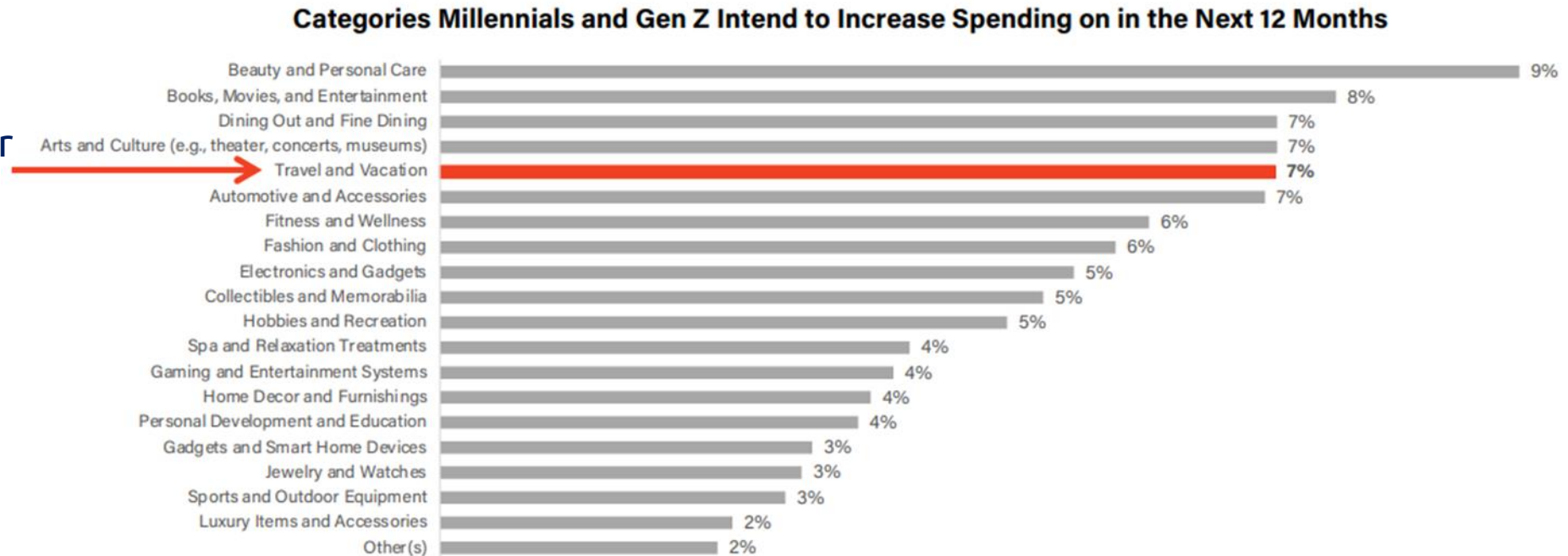


Travel is a top 5 'splurge' category

Travel is a priority for young generations

Top splurge category for Millennials and Gen Z in US and Europe

This trend will further support growth of the category overtime

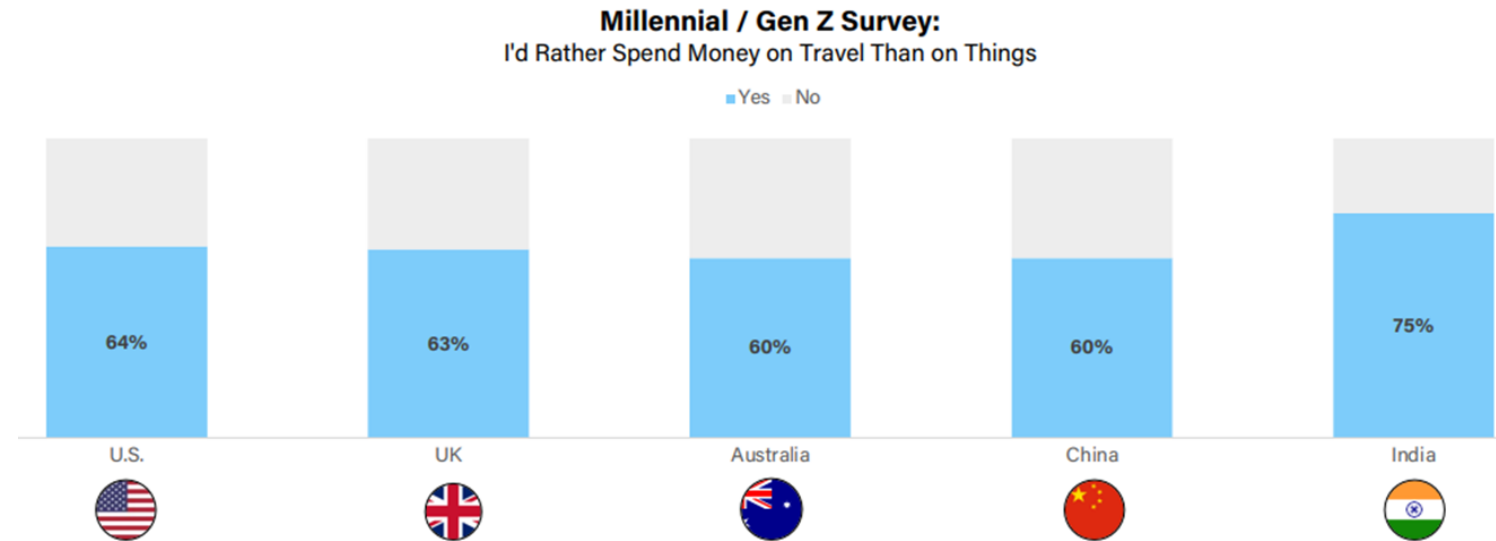


Preference for Travel is a Global Phenomenon

Global generational shift in favour of spending \$ on travel rather than things – just as true in US and EU as it is in Asia.

Millennials becoming peak purchasing power
Gen Zs are entering workforce generating own income for 1st time.

More recent surveys support this trend which should provide long-term growth for international travel.



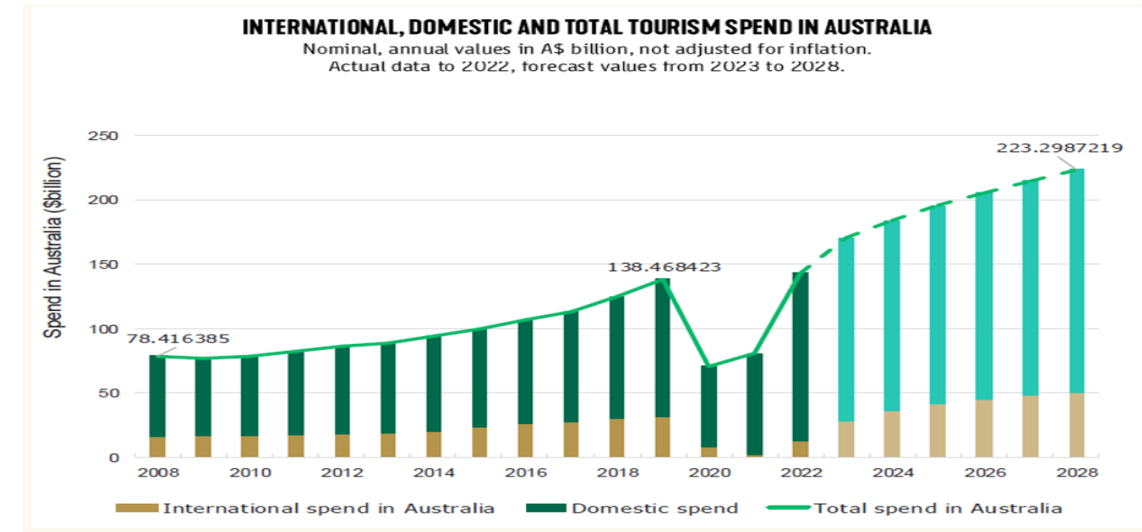
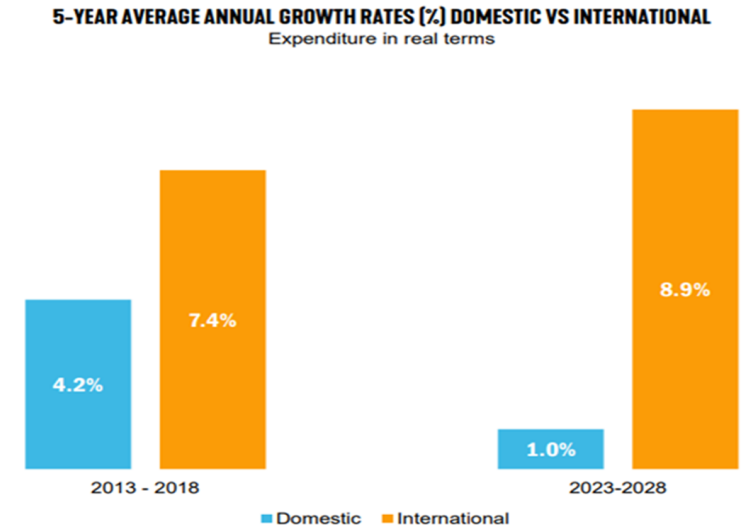
The future

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National growth projections are strong

TRA 5 year forecasts predicting consistent and stable future growth rate for International visitation and spend.

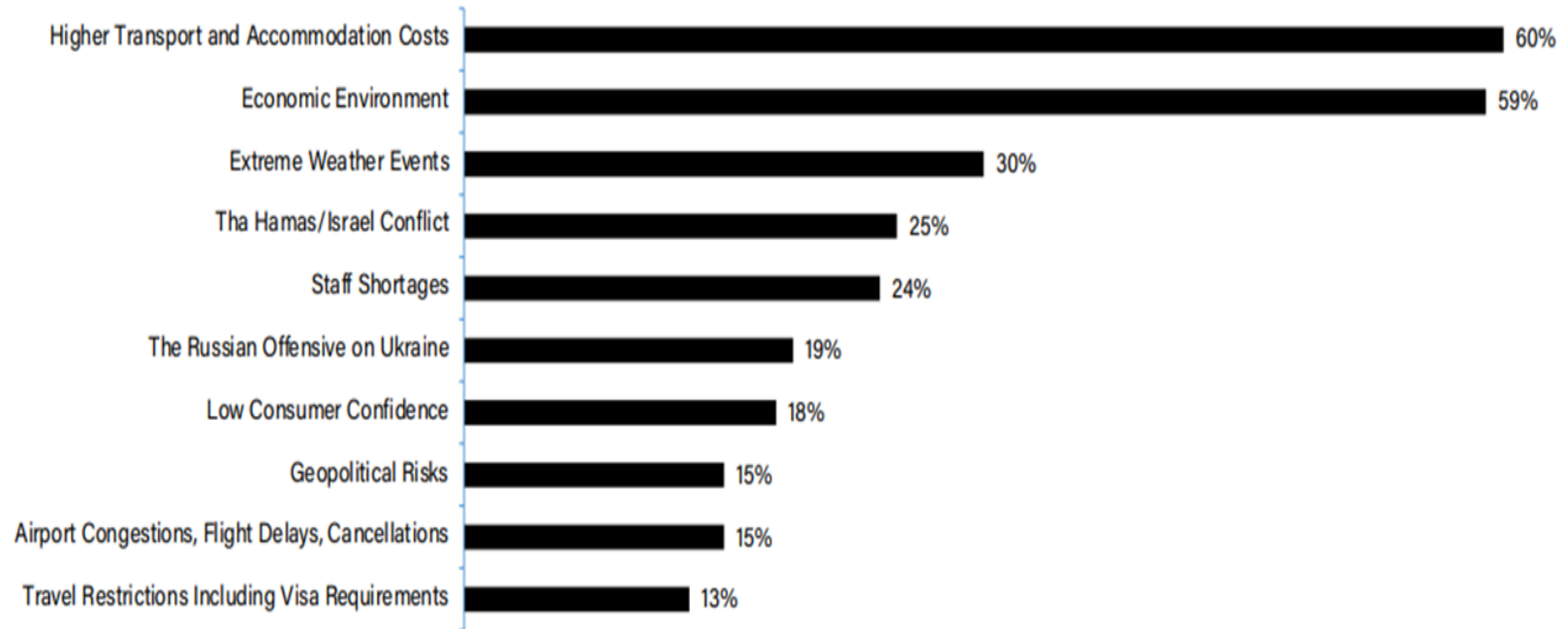


Macro-economic pressures are impacting rate of recovery

3 of to 5 challenges for international travel in 2024 are cost related

Top Challenges for International Travel in 2024

% of Tourism Experts Surveyed in May 2024



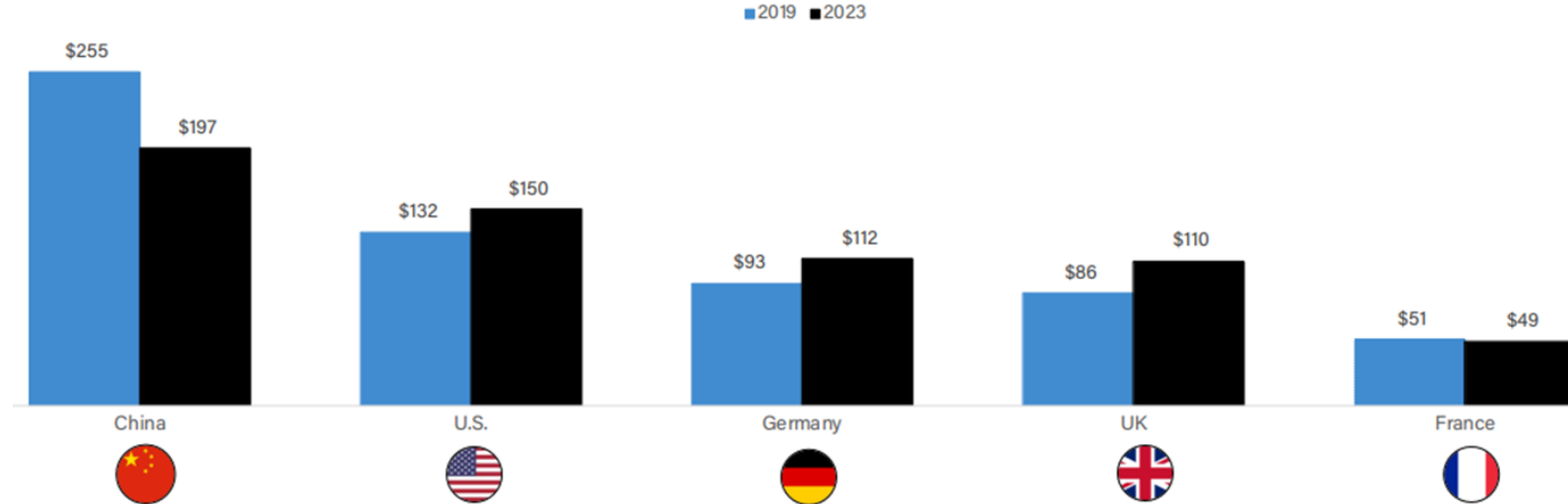
Eastern markets to fuel the forward pace

China is back being a big travel spender

While outbound is still to recover to 2019 levels, Chinese travellers are back to being biggest spenders on international travel

US, UK and DE have already surpassed pre covid spend levels

Top 5 Countries in Outbound Tourism Expenditure in 2023 (in US\$ Billion)

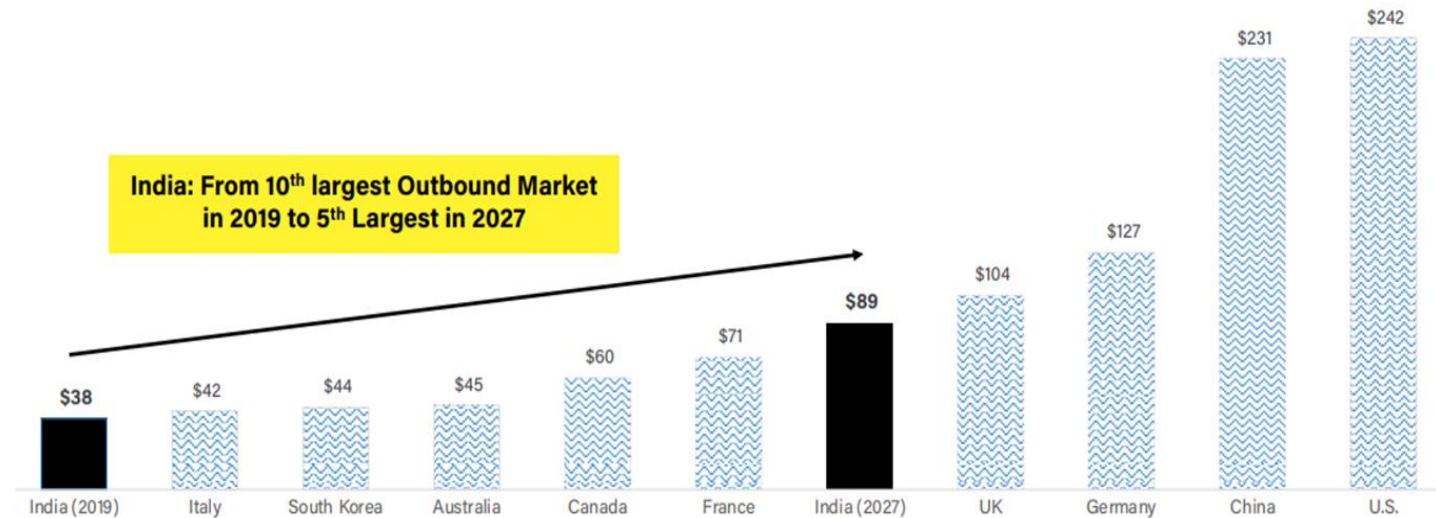


Changing dynamics of international spending

India expected to more than double the 2019 international travel spend in 2027

Eastern markets expected to take larger proportion of the outbound travel spend
- 2 of top 5 Eastern markets will make up 40% of outbound spend!

Eastern markets expected to fuel international growth beyond recovery

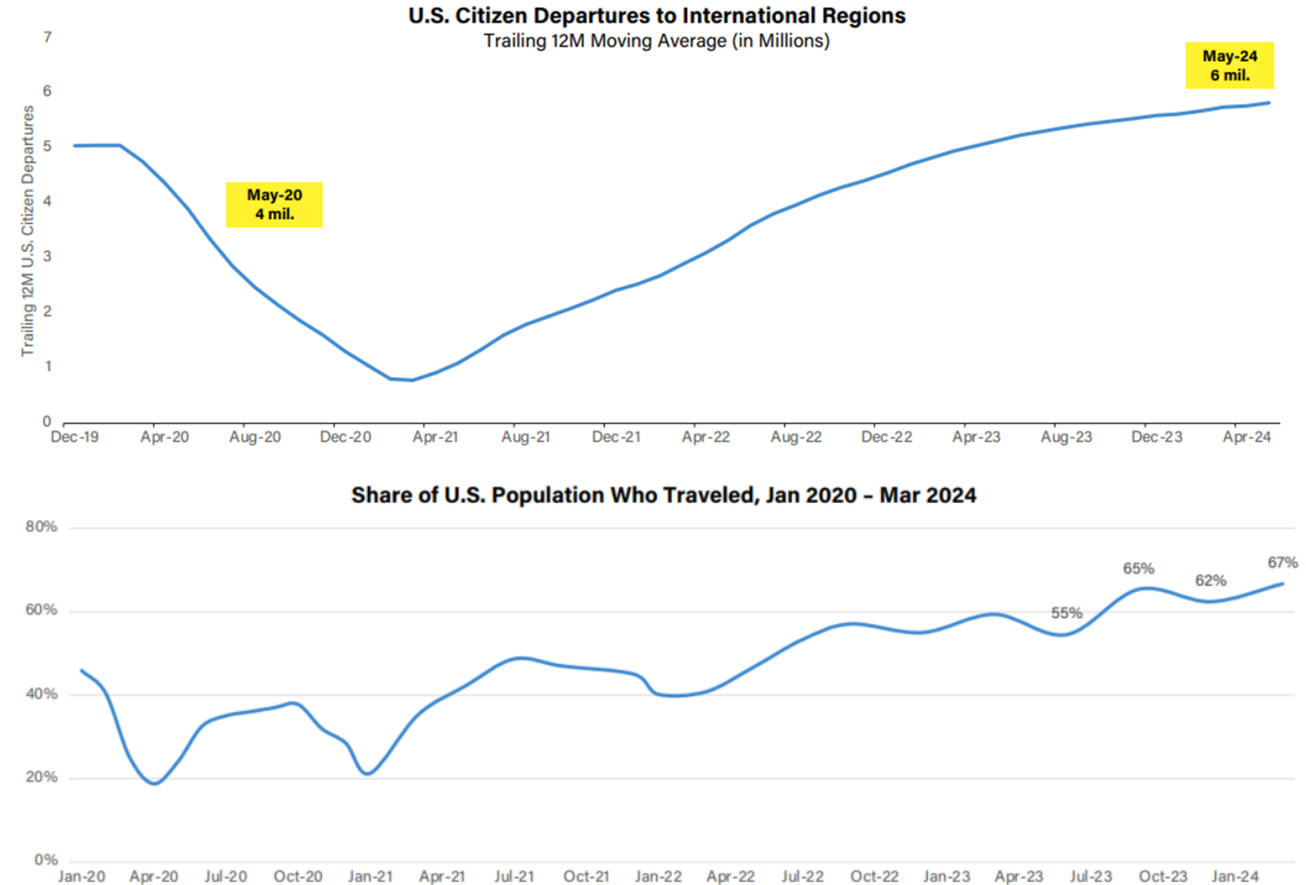


Let's not forget the Americans

Fastest and top market to recover to Australia and NT!

Uplift of +2m US outbound travellers!
(surpassed pre pandemic levels)

Share of Americans who travel on the rise
– approx. 2/3 of Americans taking at least 1 trip in Q1 2024.



The opportunity

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Set jetting Indigenous Sustainability

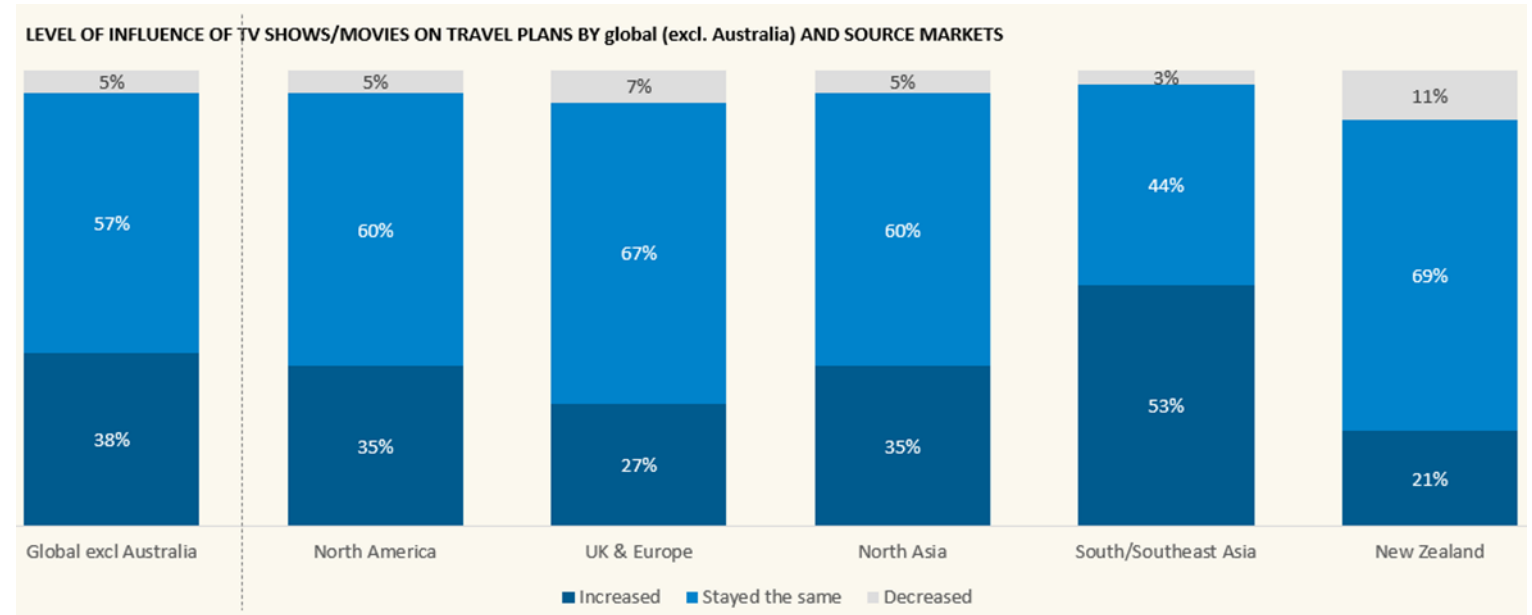
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More than 1/3 of OOR have been influenced by tv show / movie

South / Southeast Asia leading the way on Setjetting!

Netflix bring on the Territory!
Because..



Source: Tourism Australia CDP, FiftyFive5.

WLE5. Within the last 12 months, has the influence of TV shows and movies on your travel plans increased, decreased or stayed the same?

Base: Jun '24, Those who were influenced by a TV show or movie, Global excl. Australia n=2,588, North America n=304, UK & Europe n=520, North Asia n=691, South/Southeast Asia n=919, New Zealand n=154



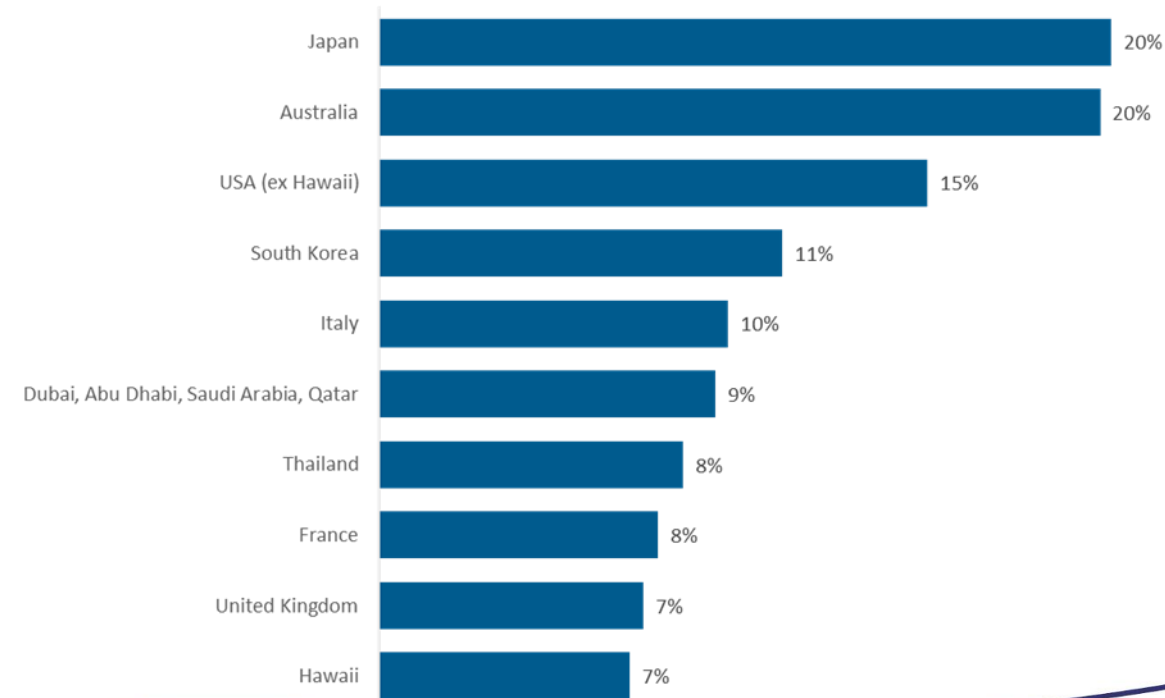
Australia as 2nd most influenced destination by set jetting

Australia are the destinations our travellers tell us they were most influenced to visit after watching tv shorts/movies,

With the rank order largely reflective of the appeal of the destination

Interest highest from SE/A & NZ

Top 10 destinations influenced by tv shows/movies (global excl. Australia)



Source: Tourism Australia CDP, FiftyFive5.

WLE3A. Please list the destinations that you previously considered, researched and/ or travelled to because of a movie/ TV show.

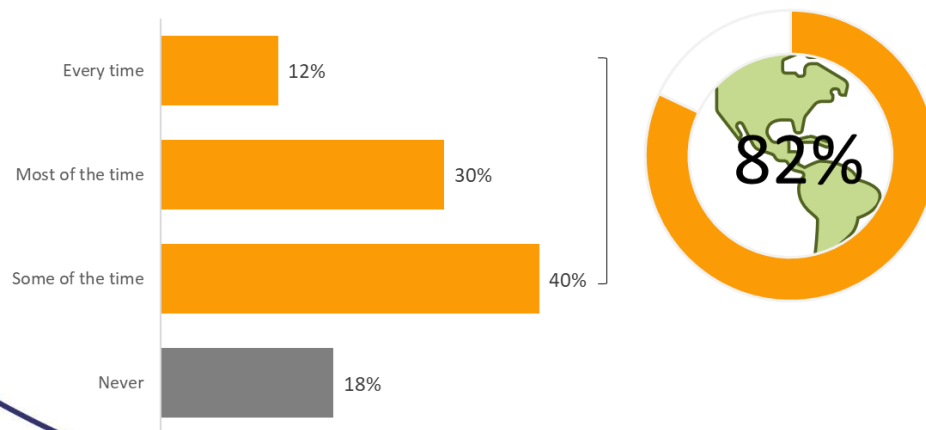
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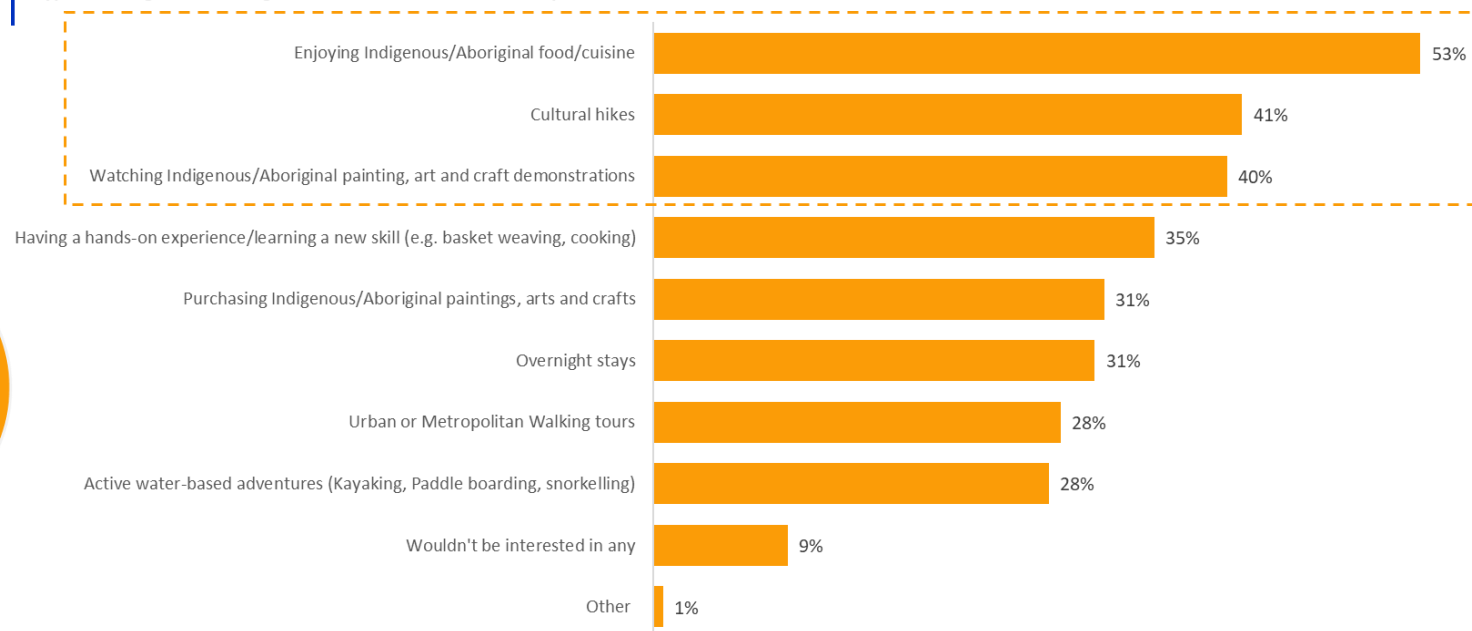
82% of international travellers seek out Indigenous experiences

Enjoying indigenous food is the top experience of interest, followed by cultural hikes and art also of interest

Choose to include indigenous experience when travelling internationally



Types of indigenous/Aboriginal and Torres Strait Islander Experiences of interest



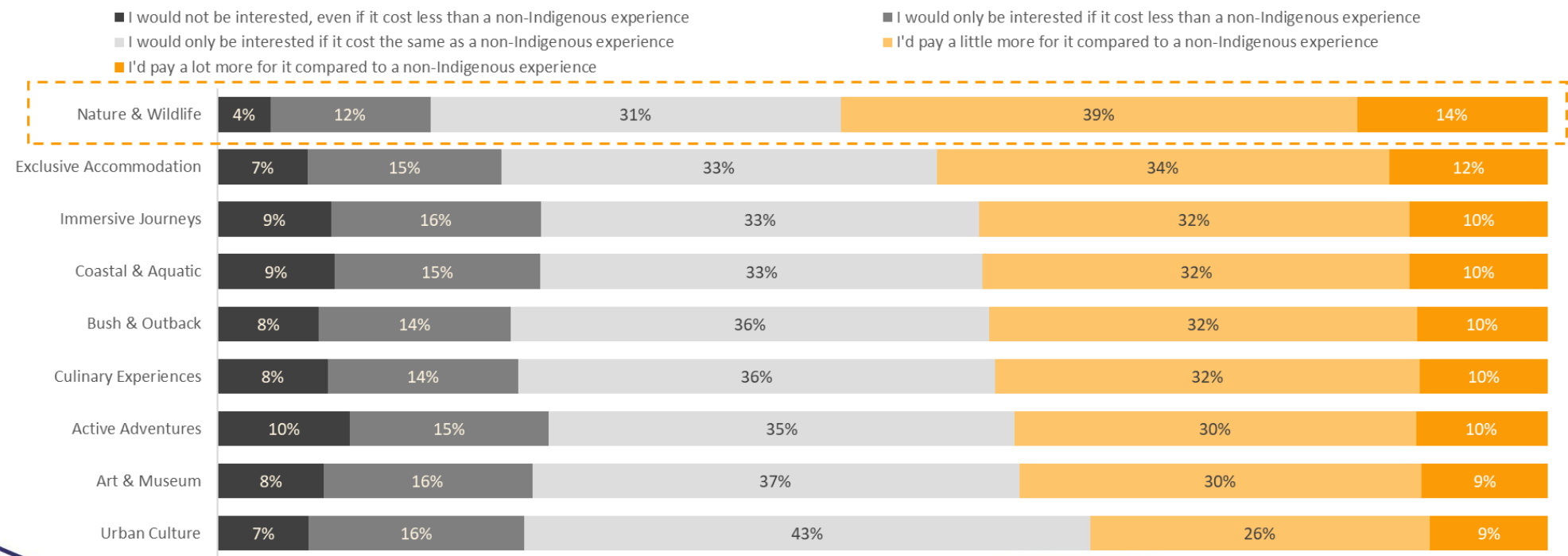
Source: Tourism Australia CDP, FiftyFive5.

INDX7. Which of the following types of Indigenous/Aboriginal & Torres Strait Islanders experiences would you be interested in participating in if you were traveling in Australia for a holiday in the next 4 years?
Base: Global excl. Australia who are aware of Australia as a holiday destination May '24 n=2,333, North America n=248, UK & Europe n=458, North Asia n=593, South/Southeast Asia n=784, New Zealand n=250



Enhancing Indigenous experiences with Nature & Wildlife increases willingness to pay

Willingness to pay more for indigenous/Aboriginal and Torres Strait Islander Experiences



Source: Tourism Australia CDP, FiftyFive5.
INDX9: If visiting Australia and you had the opportunity to do the following types of experiences in an Indigenous/Aboriginal & Torres Strait Islander setting or with Indigenous/Aboriginal & Torres Strait Islander people, which of the following is true?
Base: Global excl. Australia who are aware of Australia as a holiday destination May '24 n=2,333, North America n=248, UK & Europe n=458, North Asia n=593, South/Southeast Asia n=784, New Zealand n=250

Localisation increases the opportunity

Respect and preservation of local cultures and traditions is important to travellers as is supporting local businesses

Sustainability lens enhances offerings

Custodianship of Indigenous culture and traditions is an expression of Sustainability



Source: Tourism Australia CDP, FiftyFive5.

ST3. Which of the following types sustainable practices do you look for/consider when thinking about where and how to travel?

Base: Global excl. Australia who are aware of Australia as a holiday destination Apr '24 n=4,203, North America n=500 UK & Europe n=1000, North Asia n=1200, South/Southeast Asia n=1202 New Zealand n=301

Key takeouts

- ✓ International travel is still in recovery – normalizing sector a sign of strength and stability
- ✓ Eastern markets expected to fuel international growth beyond recovery
- ✓ New generations to shape trends in international travel
- ✓ Positioning Territory strengths to meet global traveller needs shaped by recent trends
- ✓ NT has it all!

International snapshot and Market fact sheets now available



Thank you



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