

Quarterly Market Update

Tourism Australia's Quarterly Market Update provides an update to industry on the current state of international tourism for Australia, as well as Tourism Australia's major international activities. This report covers performance for the year ending September 2011, with a focus on the third quarter (July-September).

November 2011



International Performance Summary

- According to the latest ABS figures, there were 5.87 million short-term arrivals to Australia in the twelve months to September 2011, up one per cent on the previous year.
- However, arrivals have softened in the third quarter (down three per cent) with declines in several key markets reflective of global economic trends. China and South East Asian markets continue to show growth, whilst consumer confidence and outbound travel demand remains down in the UK and North America. The Rugby World Cup also affected arrivals from New Zealand in September.
- The strong Australian dollar means that the cost of an Australian holiday remains high compared to other destinations, and is also affecting expenditure and dispersal.
- The upcoming months are expected to remain challenging, with the Tourism Forecasting Committee (TFC) forecasting less than one per cent growth in arrivals in the 2011 calendar year.
- According to the June 2011 International Visitors Survey (IVS), total expenditure for the 12 months to June grew four per cent to \$26.7 billion against last year, with similar percentage growth in arrivals in that period.

Overall inbound arrivals to Australia have softened in the third quarter of 2011. North American and European arrivals have declined further, with the intensifying Eurozone debt crisis and uncertain UK and US economies affecting outbound travel demand in several key markets. US holiday arrivals to Australia have dropped particularly sharply in the third quarter, down 17 per cent. As a result of strong Australian outbound demand and the number of Australians on inbound flights, airfares also remain high in the US and UK, at a time when consumers from these markets are increasingly looking for value. Growth in business arrivals and arrivals from the 50-64 years of age group in the last quarter has demonstrated resilience in some segments in the US and UK, however the short-term outlook remains pessimistic.

The Japanese market has also continued to be affected by aviation capacity constraints, with arrivals decreasing 18 per cent in the quarter. Whilst a stronger Yen against the US dollar has helped improve overall demand for outbound travel in the last quarter, Australia remains relatively expensive and arrivals to Australia did

not pick up as much as anticipated over the Japanese summer holiday period.

Also contributing to softer results in the third quarter was the Rugby World Cup, which saw arrivals from New Zealand decline 21 per cent in September, reflective of an overall decrease in outbound departures during the event. However, the impact is expected to be short-term with the market predicted to return in the coming months to the solid numbers it has seen throughout the rest of 2011.

Global economic growth continues to be centred in Asia. Arrivals from China have maintained double-digit growth, increasing 17 per cent in the third quarter and 21 per cent in the 12 months to September 2011 against the previous year. Growth also continues in South East Asian markets for the 12 months to September 2011, however there has been some softening in growth rates in the third quarter, with the strong dollar affecting Australia's competitive position.

Industry feedback also indicated growing global demand for business events, with renewed interest from traditional long-haul markets. In the UK, customer confidence and consideration of Australia is reportedly very strong and this is reflected in business events arrivals, which increased 14 per cent in the 12 months to September. Newer business events markets such as China are also performing well with arrivals increasing 13 per cent for the same period.

During the year ended June 2011, total international expenditure increased four per cent to \$26.7 billion. The majority of this increase was from business visitors, which grew nine per cent over the year ended June 2010. Expenditure from Chinese visitors improved 21 per cent to \$3.6 billion, extending China's lead as Australia's most valuable market. Significant contribution in expenditure was also seen from Singapore (up 14 per cent to \$1.3 billion) and India (up 20 per cent to \$0.9 billion). Despite weakening in some key markets, total expenditure for the June quarter also remained up. **International tourism expenditure** currently accounts for 39 per cent of total tourism spend and is expected to grow to 45 per cent by 2020.

The upcoming months will remain challenging in terms of international arrivals with continued weakness in some of Australia's key source markets and a strong Australian dollar. International arrivals are expected to remain flat in the coming quarter, with less than one per cent growth forecast by the TFC in 2011.

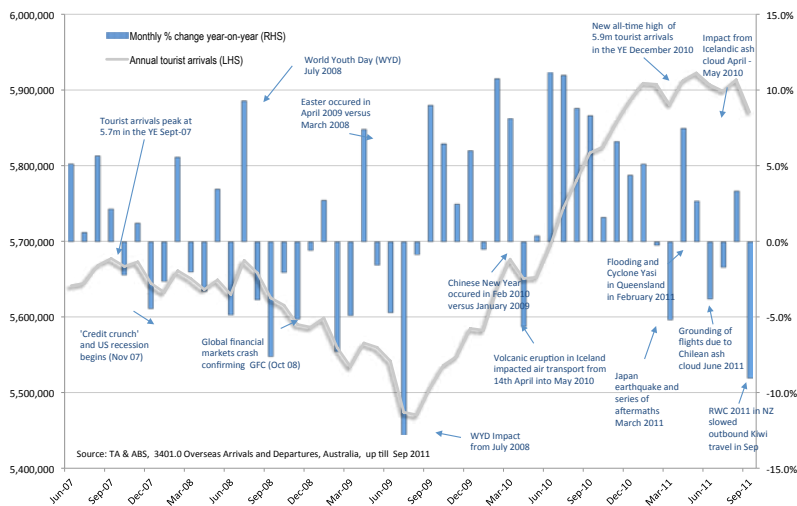


Figure 1 – Tourist arrivals to Australia (rolling annual) and monthly percentage change on the previous year.

Aviation Summary

- **Global aviation capacity has started to slow in line with the global economy. As consumer and business confidence weakens, average loads and yields are declining.**
- **However, most Australian carriers continue to report healthy profits but remain cautious and focused on restructuring, aircraft investment, alliances and new routes.**
- **Most Australian airports reported a softer third quarter in 2011. This was largely due to declines in domestic capacity related to the grounding of Tiger Airways' Australian operations and Qantas industrial disputes in the quarter.**
- **Major recent aviation developments for Australia include the commencement of China Southern's service to Perth in November; Tourism Australia and Jetstar announcing a \$10 million marketing partnership in October; and the launch of Singapore Airlines' new long-haul low-cost carrier, Scoot, with the first commercial flights expected in the middle of 2012.**

Global demand for air travel slowed in the third quarter of 2011. While September 2011 growth was stronger than expected, the outlook for 2012 has been revised downwards reflecting greater global uncertainty, rising costs and weakening yields. The International Air Transport Association (IATA) has forecast that profitability will decline from US\$6.9 billion in 2011 to US\$4.9 billion in 2012. Average loads have also started to fall, particularly in Asia, as the region absorbs significant aircraft deliveries. Demand for North American carriers is the weakest and carriers continue to tightly manage capacity growth. Latin American and European carriers reported strong growth, with the weak Euro attracting more tourists to the European region. Middle Eastern carriers also reported strong growth in demand and loads, however the rate of growth has moderated from exceptional highs seen in recent years.

For Australia, aviation capacity to and within the country continues to grow, however the rate has begun to slow after 17 consecutive months of gains. The slower growth is aligned to weaker demand, but also a result of recent declines in domestic capacity. The grounding of Tiger Airways' Australian operations for almost six weeks during July-August has been a contributing factor. Qantas' industrial relations disputes also impacted overall domestic growth in August, September and October. During these months, Qantas cancelled hundreds of flights and grounded its international and domestic operations for two days in October, affecting 108 aircrafts in 22 airports around the world. Average load factors also continue to soften on international flights to Australia in 2011, particularly on routes where there has been significant capacity growth (e.g. China). Low cost carriers continue to gain share of international services, while Australian carriers' shares have declined slightly.

Despite the softening of global aviation capacity, airlines remain focused on implementing 'deep' restructuring and 'game changing' initiatives. Airlines also continue to invest in new products (e.g. the deployment of Virgin Australia's first ATR regional aircraft to regional Australia, the launch of Qantas' new platinum frequent flyer program and A380 deployment on Hong Kong flights, development of Singapore Airline's new low cost carrier Scoot) and alliances (e.g. Virgin Australia's alliance with Singapore Airlines as well as Virgin Atlantic).

In the third quarter of 2011, the Australian Government significantly expanded Air Service Agreements with Japan (September 2011), resulting in an open skies agreement and improved access to both airports in Tokyo (Narita and Haneda). Talks were also held with the Hong Kong government but an agreement could not be reached and consequently Hong Kong carriers (including Cathay Pacific, Hong Kong Airlines) are unable to expand capacity to key gateways (Sydney, Melbourne, Brisbane or Perth) under the existing agreement. Further talks between the two countries are expected in the first half of 2012.

Table 2 - Change in international and domestic seats for the 12 months to September 2011 for selected airports

% change on same month previous year		Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	YE Sept 11
Sydney	Domestic	7%	6%	7%	6%	3%	3%	0%	-1%	-5%	-4%	-2%	-2%	1%
	International	2%	3%	1%	2%	2%	3%	7%	6%	2%	4%	4%	5%	3%
Melbourne	Domestic	9%	8%	12%	12%	5%	4%	2%	1%	-6%	-55%	-53%	-54%	-11%
	International	16%	11%	12%	17%	12%	8%	16%	13%	7%	10%	6%	5%	11%
Brisbane	Domestic	7%	12%	10%	1%	2%	6%	2%	4%	0%	2%	4%	2%	4%
	International	1%	3%	3%	2%	-1%	-1%	0%	4%	1%	4%	8%	7%	3%
Gold Coast	Domestic	17%	15%	20%	26%	-4%	-6%	-6%	-3%	-11%	-12%	-8%	-10%	1%
	International	1%	-3%	-3%	-7%	-11%	-16%	-10%	3%	-11%	-34%	-31%	-34%	-13%
Cairns	Domestic	13%	12%	13%	14%	2%	4%	4%	2%	1%	5%	9%	0%	6%
	International	30%	36%	30%	34%	13%	29%	11%	12%	17%	13%	15%	16%	20%
Adelaide	Domestic	11%	6%	7%	5%	0%	2%	-2%	-7%	-13%	-11%	-8%	-10%	-2%
	International	-15%	-14%	-12%	-12%	-9%	-9%	5%	15%	11%	8%	9%	11%	-2%
Perth	Domestic	7%	12%	11%	10%	9%	9%	10%	14%	8%	12%	15%	12%	11%
	International	5%	1%	6%	9%	4%	5%	7%	4%	2%	2%	6%	6%	5%
Darwin	Domestic	3%	1%	10%	11%	-4%	0%	6%	4%	4%	-4%	-9%	-15%	0%
	International	-3%	-7%	-7%	7%	10%	21%	37%	35%	39%	47%	47%	54%	23%

Source: Tourism Australia survey responses from Australian airports

Americas

Market	Arrivals (Year Ending September 2011)	% Change (Year Ending September 2011)	% Change (Quarter 3 2011)
USA	456,005	-5.2%	-8.7%
Canada	117,747	-5.8%	-4.1%
Brazil	28,271	+5.3%	+4.5%

Performance Summary

- **Arrivals from North America have declined further throughout the third quarter of 2011, building on successive quarters of declines.**
- **Economic uncertainty in the US continues to hamper consumer confidence and outbound travel demand. No significant improvement to market conditions is expected in the short-term, however some arrivals segments are performing better than others.**
- **The TFC has downgraded its forecast for US arrivals, which are expected to decline four per cent in 2011 against 2010.**

North American market performance remains a key concern. Industry feedback indicated that the market was 'falling off' in the middle of 2011 and this has been reflected in very weak arrivals results in the third quarter of 2011, from both the US (declining nine per cent) and Canada (declining four per cent). US leisure arrivals dropped particularly sharply, with the holiday segment decreasing 17 per cent in the quarter. Brazil, on the other hand, continues to perform strongly (from a small base) due to a growing economy.

Throughout the third quarter market conditions have worsened in North America, with the US economic situation weakening further. Combined with relatively high average airfares to Australia and a strong Australian dollar increasing the ground costs of an Australian holiday, demand remains very weak. Similarly, consumer confidence in Canada is fragile, influenced by the US economic position.

More positively, US business travel has continued to grow in the last quarter and there have also been reports of growing business events demand for long-haul destinations, including Australia. Arrivals from the high-yielding 50-64 years age group have also remained stable. Whilst total leisure expenditure from the US declined for the 12 months to June 2011, US leisure visitors who did travel to Australia spent more money per person and stayed longer in regional areas compared to the previous year.

Whilst recent industry feedback suggests forward bookings may have improved slightly for the fourth quarter of 2011, no significant improvement to overall arrivals is expected in the short-term, with the TFC downgrading its forecast for the market to finish 2011 down four per cent on 2010. Tourism Australia will continue its focus on segments of the market that present the best opportunity for Australia in the current market climate, and on delivering value-add messages.

Aviation News

- Alliances continue to dominate the US aviation environment, strengthening connectivity to Australia and distribution for Australia. From November, V Australia will arrive into Delta's Terminal 5 at Los Angeles Airport to allow faster and easier connections with the rest of Delta's network.
- Qantas is reporting good loads on its Sydney-Dallas Fort Worth service, and will increase services from four per week to daily from July 2012, using refurbished 747-400s.
- Qantas is seeking regulatory approval to codeshare with LAN on the Sydney-Santiago route from March 2012.
- Virgin Australia commenced its codeshare on Hawaiian Airlines' Honolulu-Sydney services from early November. Hawaiian Airlines also plans to increase its Sydney services from five weekly to daily from December 2011. Under the agreement, the codeshare could also be extended to destinations in mainland US.
- US-China traffic has increased by around 200 per cent over the last decade and is expected to continue to grow strongly. As a result, an increasing number of Americans are taking advantage of the increased capacity and competition on the North American-North Asian routes when flying to Australia.

Industry News

- American Airlines Vacations has significantly expanded its product offering beyond Sydney, and now offer competitive air/hotel packages to most major destinations in Australia.
- United has moved the United Vacations (South Pacific) account from Swain Tours to MLT Vacations. MLT used to manage the Continental Vacations brand, which has been effectively dissolved into the United Vacations brand with the United Airlines/Continental merger.
- Matthew Jones (formerly with Travel2) has commenced as Trade Development Manager at Tourism Victoria (Los Angeles). Tourism Western Australia has appointed Sandy Nerlich, formerly of Tourism New South Wales and wholesaler ATS Tours, for part-time trade representation in the US.
- Regent Seven Seas and Oceania Cruises have appointed Katina Athanasiou as Vice President of charter and incentive sales. This new position will be tasked with broadening the charter and incentive sales business and building and maintaining group relationships for both cruise lines.

Europe

Market	Arrivals (Year Ending September 2011)	% Change (Year Ending September 2011)	% Change (Quarter 3 2011)
United Kingdom	631,256	-2.0%	-1.0%
Germany	156,188	-4.0%	-8.0%
France	93,092	-5.5%	-5.3%
Italy	54,615	-2.9%	-6.7%

Performance Summary

- **All key markets in the region remain in decline for total and leisure arrivals, with the TFC also downgrading its 2011 forecasts.**
- **The European economic situation has worsened in the last quarter and continues to affect outbound travel demand, particularly in the UK. Whilst travellers are still spending the same amount or more in Euros or Pounds on their trips to Australia, this is translating to a decrease in total expenditure in Australian dollars due to exchange rates.**
- **Value has become an increasingly important driver in the holiday destination selection process.**

With the country's economy again on the brink of a recession, consumer confidence and demand for long-haul travel in the UK has worsened in the last quarter. The continued strength of the Australian dollar against the weak Pound sterling is also amplifying Australia's cost in a price-conscious and cautious market. UK leisure trends remain unchanged from last quarter, with travellers still booking later, taking shorter trips and undertaking fewer activities on the ground. However, whilst the leisure segment has suffered, UK business arrivals continue to perform well, and arrivals from the 50-64 age group have also grown in the third quarter of 2011 against the same period last year.

Whilst total expenditure increased slightly during the second quarter for both France and Germany, most purpose of visit segments have seen softening, with German holiday arrivals declining 10 per cent for the third quarter of 2011 against the previous year. Anecdotal feedback suggests that consumer sentiment for long-haul travel has remained buoyant in Germany, however the Eurozone debt crisis has led to value becoming an increasingly important part of the holiday destination selection process. The strong dollar is presenting a significant barrier to Australia's value proposition in the region.

No improvements are expected to the European economic situation in the short-term and the outlook for the region remains pessimistic for the remainder of 2011, with the TFC downgrading its forecasts for 2011 arrivals. This is supported by anecdotal feedback from UK distribution partners, who have indicated that sales continued to be slow over the last quarter. Tourism Australia's focus remains on targeting travellers who represent the best prospects in the current climate. The Working Holiday Visa also continues to provide a strong hook in the UK, Ireland and Continental Europe.

Aviation News

- China Southern has announced plans to establish a new 'Kangaroo Route' between Australia and Europe, using Guangzhou as a transit point.
- From early 2012, Virgin Australia will code-share on Virgin Atlantic's daily Sydney-Hong Kong services (but not on Virgin Atlantic's onward Hong Kong-London services). Eligible Virgin Australia passengers will receive frequent flyer program benefits and lounge access, including to Virgin Atlantic's Hong Kong Clubhouse.
- Qatar Airways has announced a new Doha-Perth service due to launch in 2012. Etihad has added a second daily Manchester- Abu Dhabi service from August and has also added four additional weekly Paris-Abu Dhabi services. Emirates launched A380 aircraft on its Munich-Dubai route in November and has an additional A380 on their thrice-daily London-Dubai route. These developments will help increase capacity from Europe to these carriers' middle-eastern hubs.
- British Airways plans to upgrade its daily London-Singapore-Sydney service with a larger B747 aircraft (currently a B777) and introduce its new first class cabin on services by March 2012.

Industry News

- The United States launched 'Brand USA', their new national tourism brand, at World Travel Mart in London in November. The United States' new national marketing focus is expected to increase competition for outbound travellers in the UK market.
- Many UK travel industry companies are looking at ways to add value to consumers by making savings on ground product. There is a renewed focus on Australia from many companies wanting to protect market share and ensure that Australia remains one of their core destinations.
- STA Germany is reporting that revenue has increased by 20 per cent in the first half of 2011 against last year, due to an aggressive retail expansion strategy. STA is a key distributor of Australia in the market.
- The office of Pacific Asia Travel Association (PATA) in Frankfurt has closed.
- French wholesaler Australie Tours has developed its first series tour called 'Escapade Australienne', which includes a French guide.
- Katrin Rummer has taken over the role of Product and Purchasing Manager at Stella UK and Natalie Slater has moved from STA Australia to become Director of Marketing role at STA UK.
- David Ryan is Cathay Pacific's new Country Manager Germany, Switzerland and Eastern Europe.

New Zealand

Market	Arrivals (Year Ending September 2011)	% Change (Year Ending September 2011)	% Change (Quarter 3 2011)
New Zealand	1,164,066	+1.9%	-5.7%

Performance Summary

- **The New Zealand market continues to perform well overall, despite outbound travel to Australia being disrupted in September by the Rugby World Cup.**

New Zealand has performed solidly so far in 2011. The market remains in growth for the year ending September period, however arrivals have softened in the last quarter, with the seven-week Rugby World Cup tournament disrupting outbound travel as many New Zealanders stayed home for the event. Arrivals declined 21 per cent in the month of September, and results from October are also likely to be impacted.

However, this is only expected to cause a short-term variation in arrivals to Australia. Large growth is coming from non-tourism categories such as employment, showing that more New Zealanders are exploring opportunities in the relatively buoyant Australian economy. This category has also driven an increase in overall expenditure from the market in the second quarter of 2011 (up one per cent), with the market seeing some decline in leisure expenditure despite good growth in leisure arrivals.

Consumer confidence has been steady in the third quarter and the Rugby World Cup has also had a positive impact on the national mood. This bodes well for outbound travel and going forward, arrivals are expected to return to the strong growth seen before the Rugby World Cup. The TFC has forecast New Zealand to finish 2011 up three per cent on 2011.

Aviation News

- Qantas and Air New Zealand operated additional Auckland-Sydney services ahead of the NRL Grand Final Premiership in Sydney on 2 October 2011 to meet demand from New Zealand fans attending the event.
- Jetstar announced plans to launch a twice-weekly Sydney-Queenstown service in December 2011 and increase its Melbourne-Queenstown service from twice to three times weekly. The new Sydney-Queenstown service replaces Jetstar's existing twice-weekly Gold Coast-Queenstown service, which ceased in November.
- Air New Zealand expects a NZD30 million revenue boost from the Rugby World Cup, reporting that bookings from overseas fans were continuing well into the tournament (NZ Herald, 29 September 2011).
- Air New Zealand CEO Rob Fyfe reported that the airline's trans-Tasman and Pacific operations were growing more strongly than the airline expected. Mr Fyfe attributed the strong growth to the airline's decision to withdraw business class from A320s on the routes and its "seats to suit" offering (The Australian, 2 September 2011).
- Qantas will extend its 'next generation' check-in systems to New Zealand, which will allow more passengers to make use of the Q Card and permanent Q Bag Tag. An implementation date is yet to be announced (Future Travel Experience, 18 August 2011).

Industry News

- Air New Zealand Holidays has confirmed they are looking to form a 50-50 joint venture with AOT Holidays in New Zealand to run their wholesale operation. The Air New Zealand wholesaler operates currently with a closed distribution servicing only Air New Zealand retail stores. The venture will considerably expand the Australian product range on offer.
- In addition to merging booking engines with Jetset Travel World Group (JTW) later this year to enhance their product and pricing proposition, Go Holidays are expanding their Australian, Thailand, Bali and USA product ranges in early 2012.
- Kevin Kenrick was replaced by Mark O'Donnell as CEO of House of Travel in October. The recently restructured House of Travel will continue to focus on evolving the business, particularly in the online space.

North Asia

Market	Arrivals (Year Ending September 2011)	% Change (Year Ending September 2011)	% Change (Quarter 3 2011)
China	519,282	+20.7%	+17.1%
Hong Kong	166,137	+3.1%	-8.0%
South Korea	201,143	-1.2%	-6.9%

Performance Summary

- **Very strong performance from China continues in terms of arrivals and total expenditure, driving Australia's overall performance.**
- **After previous quarters of overall growth, arrivals from Hong Kong have softened over the last summer holiday period (July and August), mainly in the holiday segment.**
- **Arrivals from Korea remain in decline and competition, economic conditions and poor aviation capacity remain key challenges in the market.**

Very strong arrivals growth from China has continued across all segments. Leisure arrivals were particularly strong, with the major holiday segment up 28 per cent for the 12 months to September 2011. In line with arrivals, total and leisure expenditure grew 21 and 25 per cent, respectively, for the year ending June 2011. High demand for outbound travel during the summer school holidays in July and August, continued growth in air capacity, aggressive promotions by airlines and the industry have helped drive further growth in the third quarter of 2011. Looking forward, strong performance from China is forecast to continue, with favourable market conditions for Australia leading up to Chinese New Year in February 2012.

After previous quarters of overall growth, arrivals from Hong Kong have softened over the last summer holiday period (July and August), mainly in the holiday segment. The strong Australian dollar has made packages for Australia more expensive than last year and affected Australia's competitive position against other destinations. In particular, the last quarter has seen heavy recovery promotions for Japan. Overall demand for Australia was expected to maintain stable in the coming months.

Arrivals from Korea have been significantly down in 2011 and this has continued throughout the last quarter. The largest drop-offs have been in the holiday and education segments. Shortages of aviation capacity have remained a key issue in the market and Australia is facing stiff competition from the United States, which has grown in popularity with favourable exchange rates, low airfares and strong publicity of the new US visa waiver program. However, industry feedback also suggests improved bookings to Australia beyond August. The TFC has revised its forecast for arrivals from Korea to finish 2011 down 6.5 per cent against last year.

Demand for business events also remains strong across the region with 22,503 arrivals in the year ending September 2011.

Aviation News

- China Southern Airlines continues to grow capacity to Australia, announcing that it will increase its Guangzhou-Brisbane service from three to four services per week, commencing from October. The carrier has also added a second daily Guangzhou-Melbourne service (from October) and launched a thrice-weekly Beijing-Guangzhou-Perth service (from November).
- Jetstar have opened its China office in Shanghai and also announced a new daily service from Beijing to Melbourne via Singapore, commencing in November.
- Hainan Airlines also launched a new service from Haikou to Singapore in September, providing good connection times to cities including Perth and other destinations within Australia.
- Cathay Pacific will add thrice-weekly Hong-Kong-Adelaide flights over the Australian summer, beginning in November. Four other weekly flights to Adelaide will continue to operate via Melbourne.
- Korean Air has announced plans to increase services in the coming winter high-season (December-January). Services to Sydney will increase from seven to ten flights per week and the carrier will also add an extra service per week to Brisbane. However, Asiana Airlines has reduced its services to Sydney from seven to six flights per week from October to March 2012 (excluding 14 December to 20 January). (Traveltimes, 22 August 2011).
- Fuel surcharges applied to Korean national carriers will be reduced in November 2011.
- Korean Air has deployed its third A380 aircraft on its Incheon-New York JFK route, increasing capacity to the US.

Industry News

- The China National Tourism Administration reported the total number of Chinese outbound travellers in the first six months of 2011 reached 32 million, an increase of 19 per cent on the previous year.
- New Zealand has opened Visa Application Centres in Shanghai, Beijing, and Guangzhou to meet increasing demand and to shorten visa processing times. New Zealand is planning to increase the number of multiple entry visas for Chinese citizens for a maximum stay of six months. The visa application form has also been simplified and can be completed in Mandarin.
- Expedia has launched a Korean language mobile application called 'Expedia Hotels'. According to Expedia, users can directly book over 140,000 hotels in 30,000 cities around the world in Korean and search four million reviews on mobile devices.
- Hong Kong retail group Travel Expert was listed on the Hong Kong Stock Exchange in September, aiming to further develop corporate and MICE business and also to expand into China.

Japan

Market	Arrivals (Year Ending September 2011)	% Change (Year Ending September 2011)	% Change (Quarter 3 2011)
Japan	342,740	-12.9%	-18.2%

Performance Summary

- **Double-digit declines have continued for the months of July (-17 per cent), August (-16 per cent) and September (-21 per cent).**
- **The TFC has forecast that arrivals from Japan in 2011 will finish down 18 per cent on the previous year, moving towards recovery in 2012.**
- **Tourism Australia signed a \$10 million marketing deal with Jetstar in October, covering Asia-wide activity but with an initial focus on boosting Japanese tourism.**

The Japanese market has continued to be affected by aviation capacity constraints including ongoing spot cancellations in the last quarter. Recovery from the Tohoku earthquake continues, however it is no longer viewed as a major barrier to outbound travel in Japan. Whilst a stronger Yen against the US dollar has helped improve overall demand for outbound travel in the last quarter, arrivals to Australia did not pick up as much as Tourism Australia originally hoped over the Japanese summer holiday period. Australia remains relatively expensive compared to competitor destinations and industry feedback suggests the short-haul market has returned but demand for other destinations remains soft.

In line with the decline in arrivals, total expenditure declined eight per cent in the June quarter and down one per cent in the 12 months to June. Throughout 2011, the holiday segment (approximately 80 per cent of the market) has declined most significantly, decreasing 26 per cent for first three quarters of the year against 2010, with trade feedback suggesting Free Independent Travel is currently one of the better performing segments.

The TFC has forecast that the market will finish the year 18 per cent down on 2010 and begin a stronger recovery in 2012. With stable aviation capacity one of the most critical issues affecting inbound arrivals to Australia from Japan, several announcements made in the last quarter have also contributed to a cautiously optimistic outlook in the coming year. Bilateral aviation talks in September resulted in an open skies agreement between Australia and Japan, increasing airport slots at both Haneda and Narita for flights to Australia. Further, Jetstar Japan and Air Asia Japan are due to start their Japanese domestic services from mid 2012 and this is expected to open new source regions markets across Japan.

Tourism Australia anticipates that further improvements to capacity combined with returned outbound demand for long-haul travel will help drive the market towards recovery in 2012.

Aviation News

- Tourism Australia signed a \$10 million marketing deal with Jetstar in October, aimed at further expanding brand Australia's presence in Asia Pacific and boosting Japanese inbound tourism. The first tranche of \$2 million will be directed to co-op activities in Japan.
- Jetstar Japan and Air Asia Japan are expected to start their domestic Japan services from summer 2012.
- An open skies agreement between Australia and Japan was signed in September. This has resulted in more slots becoming available now at Haneda airport and from 2013 at Narita airport, providing an opportunity for existing and new Australian carriers to increase flights between the two countries
- Hawaiian Airlines commenced a new Kansai-Honolulu service from July 2011, following strong performance on their Haneda-Honolulu route.

Industry News

- At the recent JATA Symposium, the CEO of wholesale company JTB highlighted three major issues for Japanese travel in the coming 12 months: an increase in outbound travel from regional ports, the importance of developing new destinations and a clear split between those who have an intention to travel and those for whom it is simply not an option. (Source: JATA Symposium 29 September 2011).
- Expedia Japan recently announced the launch of a specific website for travel agents called 'Bear's Paw'. A 10 per cent commission will be paid for all hotel bookings made on this site.

South and South East Asia

Market	Arrivals (Year Ending September 2011)	% Change (Year Ending September 2011)	% Change (Quarter 3 2011)
Singapore	318,356	+6.3%	+4.2%
Malaysia	243,971	+6.9%	+0.2%
India	144,931	+9.2%	+1.8%
Indonesia	137,153	+12.1%	+10.8%

Performance Summary

- **Whilst overall growth continues, the growth rate of key markets in South and South East Asia has slowed in the third quarter of 2011 after periods of stronger arrivals.**
- **Industry feedback suggests that the strong Australian dollar has begun to impact Australia's competitiveness against other destinations.**
- **Strong growth in arrivals and total expenditure continues from Indonesia. The peak Lebaran holiday period has been very successful for Australia and growth is expected to continue.**

There has been an increase in arrivals for all key markets in the region (Singapore, Malaysia and India) for the year ending September 2011, however growth rates have begun to flatten in the third quarter of 2011 after periods of stronger increases.

Whilst overall arrivals from Singapore have shown good growth, there has been a continued softening of the holiday segment in the last quarter, declining nine per cent. Despite noise in the market for Australia, there's been widespread promotion from destinations with more favourable exchange rates (such as the US and Europe) and there has also been heavy discounting for travel to Japan. However, there has been good growth in business and employment arrivals, helping drive overall market performance. Total expenditure also saw double digit growth in the year ending June 2011, in line with increases in arrivals over this period.

Malaysia, which has been a strong performer in the region throughout the year, has seen flat arrivals in the third quarter of 2011. There's been slight growth in business and holiday segments, however education arrivals have declined. The market has also seen a decline in expenditure. Trade feedback indicates that Malaysian consumers are holding back for bargains, with last-minute bookings expected for the peak November-December school holiday period.

Arrivals growth from India has also slowed. Holiday is up, however education and business arrivals have seen recent declines. Trade maintain that aviation capacity and connectivity persist as barriers to faster growth. As in other markets, the strong Australian dollar is also impacting Australia's competitiveness against other destinations.

Aviation News

- Singapore Airlines has officially launched its new long-haul low-cost carrier, Scoot, with the first commercial flights expected in the middle of 2012. Low-cost services on medium- to long-haul routes will operate to and from Singapore's Changi Airport's Terminal 2 to Australasia and China, with longer term plans to fly to India, Europe, Africa and the Middle East.
- Singapore Airlines will increase Singapore to Perth services from 21 to 24 weekly services over December and January.
- Air India plans to increase its Delhi-Singapore capacity with B777-300ER aircraft to replace A310 aircraft on the route from December, a positive step for onward connection to Australia.
- AirAsia-X will increase capacity from Malaysia in December and January. Melbourne services will increase from 10 to 12 flights weekly, Gold Coast services from five to six flights weekly, and Perth services from seven to 10 flights weekly.
- The Australian Competition and Consumer Commission (ACCC) has granted draft approval in October to the Virgin-Singapore Airline alliance.

Industry News

- In Singapore, industry continues to focus significant advertising and promotions on package tours to Europe and North America.
- In Singapore, feedback from major agencies suggests that sales for Australian package tours are marginally up in comparison to FIT travel, as consumers decide to offset the high exchange rate with bundled value offerings that are available through packages.
- In Malaysia, the MATTA consumer travel fair was held from 12 to 14 August and saw 80,000 visitors. Feedback indicated that sales were slower than expected with consumers adopting a 'wait and see' approach on promotions.
- In Malaysia, airlines and agents are expecting high demand for North Asia gateways during the upcoming November-December school holidays and have introduced 19 chartered flights to destinations throughout Greater China over the period.
- In India, trade are reporting that Indian travellers are increasingly choosing to travel in 'off-season months' to avoid high-season prices and crowds.

Marketing Activity Calendar

Marketing Activity Calendar of Tourism Australia's key campaigns and events.

	Jul-Sept 2011	Oct-Dec 2011	
UNITED STATES	TNLA Co-op Partnership with Qantas – American Airlines Brand co-op partnership targeting at least 10 American Airlines feeder markets in US; promoting package offers to American Airlines customers in the US. Partners: Qantas, American Airlines Timing: Oct-Nov (second flight Feb/March) Media: Digital, Print, in-flight Creative: TNLA		
	TNLA Co-op Partnership with Qantas - Airpass Brand co-op partnership targeting up to 10 source cities in US; promoting high value package offers bundled with the Airpass. Partners: Qantas, Qantas Vacations Timing: Sep-Nov (possible second flight Feb) Media: Digital, Outdoor Creative: TNLA		
	TNLA Media and Co-op Activity Media content partnerships designed to syndicate Australian messaging to customers through a variety of channels, with an emphasis on digital partnerships. In addition, partnerships with leading US retail consortia are designed to reach new customers and recruit high performing agents to the Aussie Specialist Program. Famils to be run for each consortia. Partners: Media Partners (TBC), STOs, Travel Leaders, Virtuoso, AAA, Ensemble, Signature Timing: Oct-Jun Media: Digital, Broadcast, Print, Social Media and IMHP programs Creative: TNLA, TNLA co-op and Branded Content		
		Corroboree 2011 This event brings together over 160 Aussie Specialists from the US, Canada and Latin America to Melbourne to meet with over 100 Australian suppliers and 20 industry sponsors and participate in destination famils. Location: Workshops in Melbourne and famils across Australia Partners: Aussie Specialists, Australian Experiences select Tour Wholesalers, STOs and Airlines. Timing: 28 Oct – 1 Nov	
		United States Tour Operators Association (USTOA) Conference & Marketplace. Sponsorship event and destination development with the top outbound tour wholesalers and operators in the US. Location: Marco Island, FL Partners: TNSW, TQ, Qantas Timing: 11 – 13 Dec	
		The Worldwide Exhibition for Incentive Travel, Meetings & Events (IMEX) Americas Trade show facilitating meetings between Australian suppliers and qualified buyers from the United States and the world Location: Las Vegas Partners: 13 Australian suppliers Timing: 11-13 Oct	
CANADA	TNLA Media & Co-op Activity Media content partnerships designed to syndicate Australian messaging to customers through a variety of channels, with an emphasis on digital partnerships. Timing: Nov-Mar Media: Digital, Print, IMHP (project includes PR and SEM) Creative: TNLA		

TNLA: *There's Nothing Like Australia*

	Jul-Sept 2011	Oct-Dec 2011
CANADA Continued		<p>Consortia / Retail Partnerships (Ensemble, Flight Center, Sears, Marlin) Consumer Partnerships with leading Canadian retail consortia partners designed to reach new customers with TNLA creative and messaging, and recruit high performing agents to the Aussie Specialist Program. Partners: Airline, preferred wholesalers. Timing: Oct - Mar Media: Digital, Print Creative: TNLA</p>
		<p>Corroboree 2011 This event brings together over 160 Aussie Specialists from the USA, Canada and Latin America to Melbourne to meet with Australian suppliers and participate in destination famils. Location: Workshops in Melbourne and famils across Australia Partners: Aussie Specialists, Australian Experiences, select Tour Wholesalers, STOs and Airlines. Timing: 28 Oct – 1 Nov</p>
UNITED KINGDOM	<p>TNLA Co-op Campaign with Qantas Inspire UK consumers to travel to Australia and drive urgency through tactical offers. Partners: Qantas Timing: 25 Aug-20 Sept Media: Digital, Print Creative: TNLA</p>	
	<p>Co-op Campaign delivering value proposition with Tour Operator Inspire UK consumers to travel to Australia and drive urgency through value offers aligned to Qantas co-op campaign. Partners: Travel 2 Timing: Sept Media: Press, DM and In store Creative: TNLA and partner</p>	<p>Co-op Campaign with Tour Operators Drive urgency through tactical offers aligned with Emirates co-op campaign. Partners: TA, Austravel and Emirates Timing: Oct-Nov Media: Press, online and in store Creative: TNLA</p>
	<p>Co-op Campaign with Tour Operators...cont... Drive urgency to travel to Australia through tactical offers. Partners: Saga, Bridge and Wickers, Virgin Cruises, Freedom Australia, Travelbag, Barrhead Travel, Great Aussie Sale Timing: Sept 2011 – June 2012 Creative: A mix of TNLA and partners own</p>	
	<p>TNLA 30 Days in Oz promotion Re-build the 18 to 30 year old youth travel market to Australia with a focus on WHV opportunities for school leavers. Partners: Nil Timing: Aug-Sept Media: Digital Creative: TNLA video content</p>	<p>World Travel Market (WTM) Global trade show facilitating meetings between Australian products/ITOs and distributors worldwide. Location: London Partners: 13 Australian suppliers, Tourism NZ Timing: 8-11 Nov</p>
		<p>UltraAustralia Special Inspire high-yield UK consumers to holiday in Australia using editorial supported by partner offers in this glossy travel magazine format. Partners: Emirates exclusive airline partner with various UK and Australia travel industry partners including STOs Media: Print Creative: Editorial with TNLA messaging</p>
	<p>Broadcast Editorial – Daybreak Down Under Inspire UK consumers to travel to Australia by showcasing key experiences across the country. Coverage September through November. Partners: Qantas, STOs Media: TV (ITV1 Daybreak) with online and social media support Creative: Editorial with TNLA messaging</p>	
		<p>TV Sponsorship Inspire UK consumers to travel to Australia by showcasing key experiences and maintaining consistent presence on TV to continually fuel intention. Partners: Nil Timing: Oct-Nov Media: TV Creative: TNLA</p>

TNLA: There's Nothing Like Australia

	Jul-Sept 2011	Oct-Dec 2011
GERMANY		TNLA Co-op campaign with Qantas Drive intention and create a sense of urgency to book through tactical offers. Partners: Qantas Timing: Oct-Nov Media: Digital, Print (TBC) Creative: TNLA (Journeys)
	TNLA Trade Co-operative partnerships Drive intention and create a sense of urgency to book through tactical offers and content. Partners: Tour Operators Timing: Sep onwards Media: various Creative: TNLA (Journeys) themed	TNLA User Generated Content Promotion Leverage very high satisfaction rate of previous German visitors to Australia and utilise this advocacy to drive further visitation and peer to peer recommendations for Australia. Partners: Tour Operators, Travel Agents, Airline Timing: Oct-Nov Media: Digital plus TBC Creative: TNLA (Journeys)
	QF, Tourism New Zealand, STOs Road Show Attending wholesale partner travel agent training road shows in 4 German cities Timing: 27th-29th Sep	FTI Road Show Attending wholesale partner FTI's travel agent training road shows in 5 German cities Timing: Oct
		TNLA Youth Activity Stimulate market demand and inspire German holiday makers. Partners: Qantas, Explorer. Timing: Oct-Nov Media: radio, print
		TNLA Youth Affinity Partnership Campaign Increase buzz about Australia and drive conversation via affinity partner promotion. Partners: TNT, TVIC, TA, Chiemsee Timing: Nov-Dec Media: online, social
FRANCE	International French Tourism Market (IFTM) Leading French trade show facilitating meetings between Australian products/ITO's and distributors from France. Location: Paris Partners: 10 Australian Suppliers Timing: 21-24 Sept	TNLA Co-op Campaign with Qantas Increase knowledge and drive urgency through tactical offers and content. Partners: Qantas Timing: Sept – Oct Media: Digital Creative: TNLA
		Travel Agent Window Display Increase awareness and generate bookings to Australia through Tour Operator tactical offers. Partners: Australie Tours Timing: Dec Media: 900 Window displays of AS Voyages Creative: TNLA
ITALY		TNLA Co-op Campaign Increase knowledge and awareness of Australia's world class honeymoon experiences and drive conversion via tactical airline offers. Partners: Tour Operators, Airline (TBC) Timing: Nov-Dec Media: Digital, Print
	TNLA Co-op Campaign - SPEEDO Partnership Increase buzz, knowledge and awareness about Australia and drive conversion via major competition led promotion. Partners: Qantas, Speedo, Tour Operators Timing: Sep-Nov Media: Print, online, In store, TV, collateral, mobile	TTG Incontri, Rimini Trade show facilitating meetings between Australian products/ITO's and distributors from Italy. Location: Rimini Timing: 6-8 Oct
PAN EUROPEAN EVENTS		International Luxury Travel Market (ILTM) Luxury trade show facilitating meetings between Australian products/ITO's and distributors worldwide. Location: Cannes Partners: 11 Australian suppliers Timing: 6-8 Dec

TNLA: There's Nothing Like Australia

	Jul-Sept 2011	Oct-Dec 2011
CHINA	TNLA Brand Campaign Phase 1 Brand campaign to differentiate Australia from major competitors and build consumer knowledge of Australia in key cities and prioritised secondary cities. Timing: Oct-Dec Media: Digital, Outdoor, Print Creative: TNLA	
	Content Development Program Consumer promotion with media partner to build consumer knowledge about Australia. Partners: World Traveler Timing: Sept-Nov Media: TV, Outdoor and Print Creative: TV Program / Footage / Print Supplement	A Dream Come True' Digital Promotion Digital campaign with multi-channel media partner to drive aspiration for Australia. Partners: Sina.com & Travel Channel TV Timing: Sept - Dec Media: Digital/TV Creative: TV Program, SNS & online banner with TNLA asset
	TNLA Co-op Campaign with CZ/TWA Brand campaign to create awareness of CZ's new service to Perth. Partners: CZ, TWA Timing: Sept - Dec Media: Print, TV, OOH, Inflight Creative: TNLA WA Whale Shark	TNLA Co-op Campaign with CZ/DNSW Brand campaign to create awareness of CZ services to Sydney. Partners: CZ, DNSW Timing: Nov - Dec Media: Print, OOH, digital, inflight Creative: TNLA
	TNLA Co-op Campaign with Cathay Pacific Brand campaign and tactical offers/call to action to grow intention for Australia. Partners: Cathay Pacific Timing: Aug Market: Beijing, Shanghai, Nanjing, Hangzhou, Chengdu, Xiamen. Media: Digital, Outdoor Creative: TNLA	TNLA Co-op Campaign with Airline Brand campaign to create awareness of airline's services to Australia. Partners: CZ Timing: Dec Media: Print, Outdoor Creative: TNLA
		TNLA Co-op Campaign with Qantas Brand campaign and tactical offers/call to action to grow intention for Australia. Partners: Qantas Timing: Nov Market: Shanghai Media: Print Creative: TNLA
		STO Digital Promotion Create awareness and build knowledge of STO using online channels. Partners: SATC Timing: Dec Market: National Media: Digital Creative: TNLA
		Content Development Program Program to build consumer knowledge of Australia by developing radio content for national broadcast. Partners: China National Radio Timing: Oct – Dec 2011 Media: Radio broadcast & SNS Creative: content
		Australian Open Promotion Program to build consumer knowledge of Australia's major sport event Australia Open through digital, trade and bank promotion. Partners: Tourism Victoria Timing: Nov - Jan 2012 Media: Digital, Travel Trade Distribution & Bank database Creative: content
	Co-op Campaign with Key agents Partnership with key agents in prioritised cities to drive conversion, promoting suitable product with competitive pricing. Partners: Premier ASPs/Online Agencies Timing: Aug-Oct Media: Digital, Direct Mail, e-Direct mail, Print Creative: TNLA	

TNLA: There's Nothing Like Australia

	Jul-Sept 2011	Oct-Dec 2011
CHINA Cont...		Greater China Travel Mission Provide a platform for Australian suppliers to meet with key buyers from Greater China and match products for FIT affluent couples. Location: Nanjing, China Timing: 6-9 Nov
	China Incentive, Business Travel and Meetings Exhibition (CIBTM) Trade show facilitating meetings between Australian suppliers/Bureaux and qualified meetings and incentive buyers from North Asia Location: Beijing Partners: 5 Australian suppliers Timing: 30 Aug – 1 Sept	
HONG KONG	TNLA Natural Playground Campaign Campaign using nature and adventure messaging to differentiate Australia and grow preference amongst adults aged 25-39. Partners: Tao-Ti beverages Timing: Sept Media: Digital, Social Networking Sites, POS Creative: TNLA and integrated promotion	TNLA SIT Campaign Campaign using nature and adventure messaging to position Australia as a nature destination. Partner: Virgin Atlantic Timing: Nov Media: Digital Creative: TNLA – Nature/Adventure
	TNLA SIT campaign Integrated campaign using nature and adventure messaging to position Australia as a nature destination. Partner: Capital CEO Timing: Sept Media: Non-Traditional, Digital, Print, TV Creative: TNLA – Nature/Adventure	Jetour Co-op Campaign Campaign to promote Australia itineraries/products with tactical offers to enhance conversion. Partners: Jetour Timing: Sept-Dec Media: Print Creative: TNLA
	TNLA Co-op Campaign with Qantas Promote Australia itineraries/products with tactical offers to enhance conversion. Partners: Qantas Timing: Sept Media: Digital, OOH, Print Creative: TNLA	Kuoni Co-op Campaign Campaign to promote Australia itineraries/products with tactical offers to enhance conversion. Partners: Kunoi Timing: Oct - Jan Media: Print Creative: TNLA
		Charming Holiday Co-op Campaign Campaign to promote Australia itineraries/products with tactical offers to enhance conversion. Partners: Charming holiday Timing: Oct - Jan Media: Print Creative: TNLA
KOREA		Honeymoon Tactical promotion Partner-led TNLA tactical promotion to grow conversion of Honeymoon packages. Timing: Sept-May Media: Print, Digital, OOH
		Boomers Tactical promotion Partner lead TNLA tactical promotion to enhance conversion of boomers packages. Timing: Sept-May Media: Print, Digital, Outdoor
	TNLA Co-op with TQ Promote FIT to Adventure Seekers and leverage TQ sponsorship of CATV program. Partners: TQ Timing: Dec (TBC) Media: print, digital Creative: TNLA (Adventure Seekers)	
		I am a Singer Partner with national TV network to showcase entertainment program in Melbourne and engage agents to promote packages to Victoria. Partners: MBC (TV network), TVG, Korean Air Timing: Nov <i>TNLA: There's Nothing Like Australia</i>
		TNLA Korea Travel Mission 2011 Platform for meetings between Australian suppliers and buyers from Korea. Location: Seoul, Korea Timing: 3-4 Nov

	Jul-Sept 2011	Oct-Dec 2011
JAPAN	TNLA Airline Co-op Campaign Tactical consumer activity to support TNLA campaign. Partners: Singapore Airlines Timing: Sep Media: Digital Creative: TNLA	TNLA Airline Co-op Campaign Tactical consumer activity to support TNLA campaign. Partners: Qantas Timing: Oct Media: Digital Creative: TNLA
	Global Study Increase arrivals from the youth segment by promoting opportunities to learn English and develop career-enhancing global skills. Partners: Austrade, STOs Timing: Jul-Jun Media: PR, Digital Creative: TBC	
	TNLA Campaign Drive visitation to Australia by providing competitive travel experiences that meet the Special Interest Travel needs of consumers. Partners: Airlines, travel agents Timing: Sept-Jun Media: Broadcast, Digital Creative: TNLA	
	Japan Australia Mission Provide opportunity for Australian product suppliers to meet product planners, retail store staff and group promotion staff. Location: Tokyo Partners: STOs, Airlines Timing: 31 Aug - 2 Sept	
SINGAPORE	TNLA Co-op Campaign with Qantas Phase 1 Continue showcasing unique Australian experiences and drive sales to Australia Partners: Qantas Timing: Aug-Nov Media: TV Digital, Print Creative: TNLA	
	TNLA Co-op Campaign with Agents Continue showcasing unique Australian experiences and drive sales to Australia. Partners: TBC (key agents) Timing: Aug – May 2012 (TBC exact periods) Media: Digital, Print Creative: Majority TNLA	
MALAYSIA	TNLA Brand and Co-op Campaigns phase 1 Strengthen Australia's brand position, showcase unique Australian experiences and drive dispersal. Partners: Non-traditional e.g. Gyms, Banks (credit cards) Timing: Nov - Jan Media: Digital, Print, Outdoor, Radio, PR Creative: TNLA	
	TNLA Co-op Campaign with Agents Increase awareness of unique Australian experiences and drive sales to Australia. Partners: Golden Deluxe Travel and PNL Travel, with 4 more agents TBC Media: Digital, Print Creative: TNLA	
INDIA	India Travel Mission Platform for meetings between Australian suppliers and Indian buyers. Location: Hyderabad Partners: ITOs, STOs, CVBs Timing: 25-28 Aug	TNLA Co-op Campaign with Qantas & Travel Agents Increase awareness of unique Australian experiences and product; spread seasonality into off-peak periods, and encourage early bookings during peak periods. Partners: Qantas, Travel Agents Timing: Phase 1 Oct – Nov Media: Online, Print, TV, Digital & Outdoor Creative: TNLA

TNLA: There's Nothing Like Australia

	Jul-Sept 2011	Oct-Dec 2011
INDIA Continued		<p>Namaste Australia Campaign Deliver the message of “Australia as a safe and welcoming destination” through the eyes of Indian nationals highlighting Australia’s unique experiences, iconic landmarks and attractions. Timing: Phase 1 Media: PR driven, using TV, Digital, Outdoor, Print Creative: Local ‘Advocacy’ campaign</p>
		<p>Media Activity Capitalise on India’s cricket tour of Australia through public relations to showcase Australia as a destination. Partners: STOs/ Airlines Timing: Dec – Mar Media: PR driven using TV, Print & Digital platform</p>
INDONESIA		<p>TNLA Co-op Campaign with Agents Increase awareness of Australia, working in partnership with agents to reach target segment. Partners: Wonder Holidays consortium of 6 agents Timing: Nov – Dec Media: Digital, Print Creative: TNLA</p>
		<p>TNLA Co-op Campaign with Singapore Airlines Increase awareness of Australia and drive sales to Australia. Partners: Singapore Airlines Timing: Nov Media: Digital, Print Creative: TNLA</p>
VIETNAM		<p>TNLA Co-op Campaign with Agent 1 Increase destination awareness. Partners: Agent consortium of 2 agents. Timing: Nov – Dec (TBC) Media: Print Creative: TNLA imagery</p>
		<p>Dreamtime A series of educational visits for international incentive agent buyers from key markets and facilitation of networking opportunities with Australian suppliers/Bureaus. Location: Event held in Sydney with educational in Melbourne, Adelaide, Gold Coast, Cairns NT, Perth and Whitsundays Timing: 13 – 18 Nov 2011</p>

For more information on upcoming activities or working with Tourism Australia, please see Tourism Australia’s **Global Marketing Prospectus**.

TNLA: There’s Nothing Like Australia