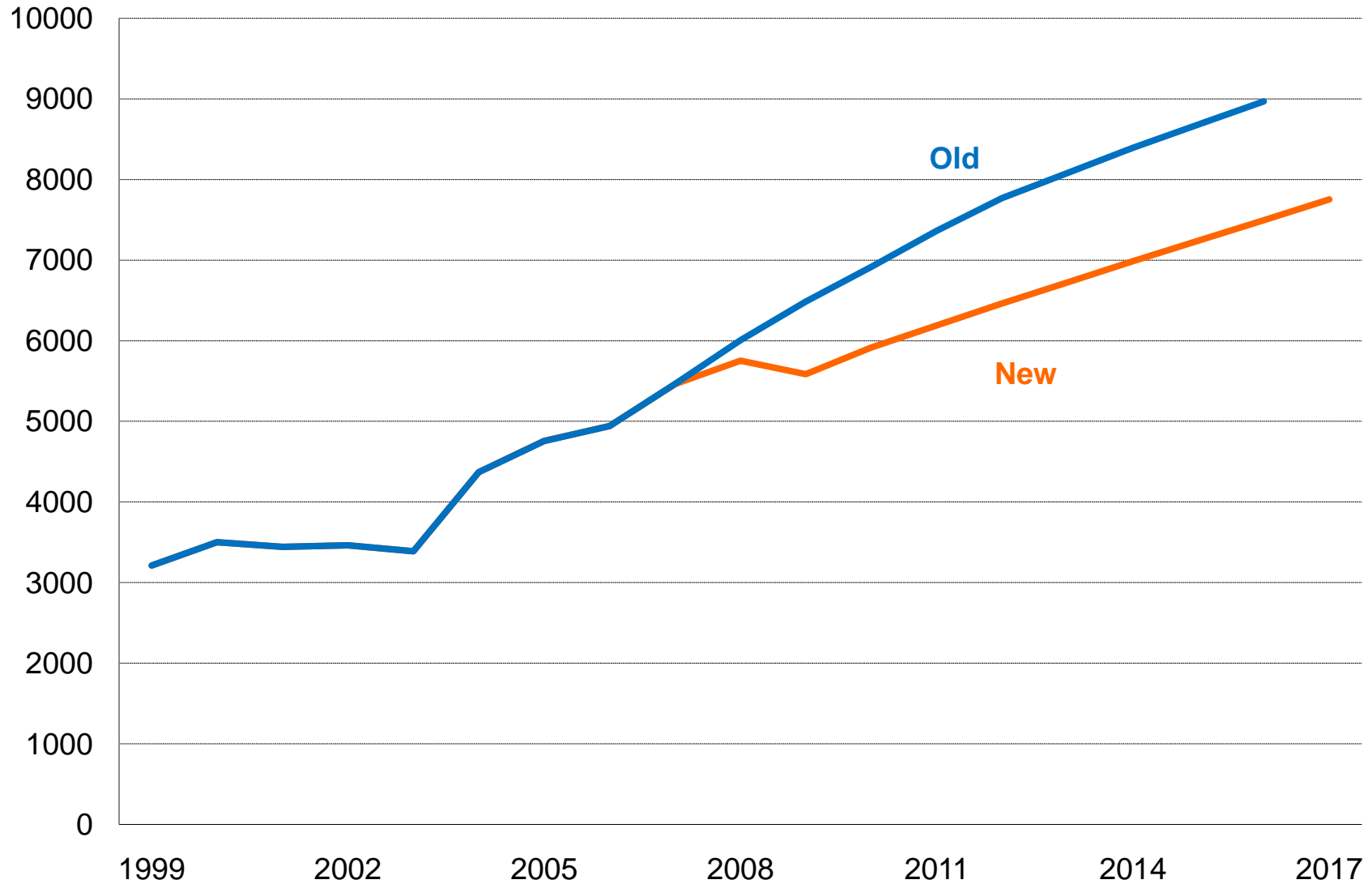


Australian Tourism Export Council

Matt Hingerty
Managing Director

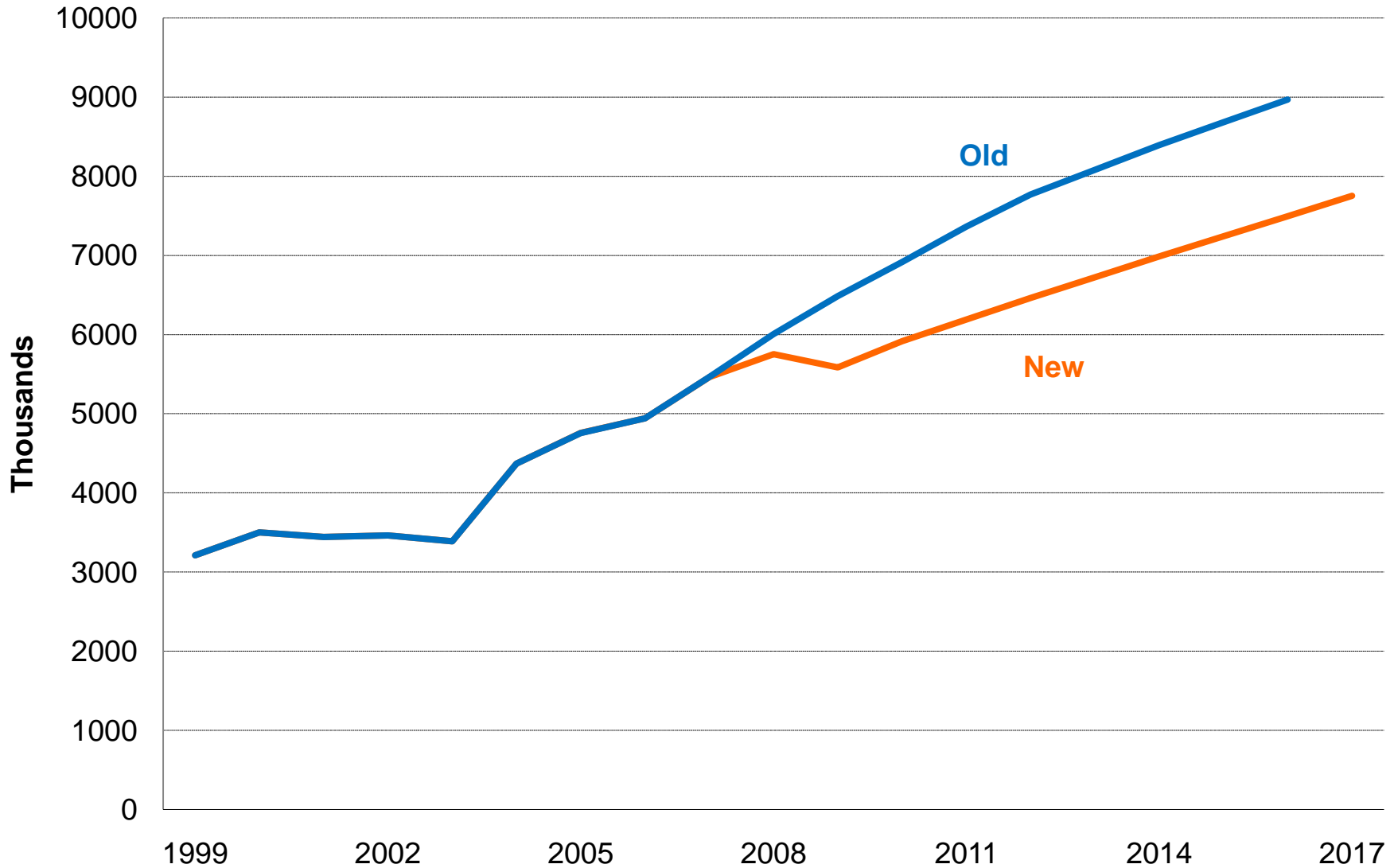
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1. Travel Trends (Inbound)



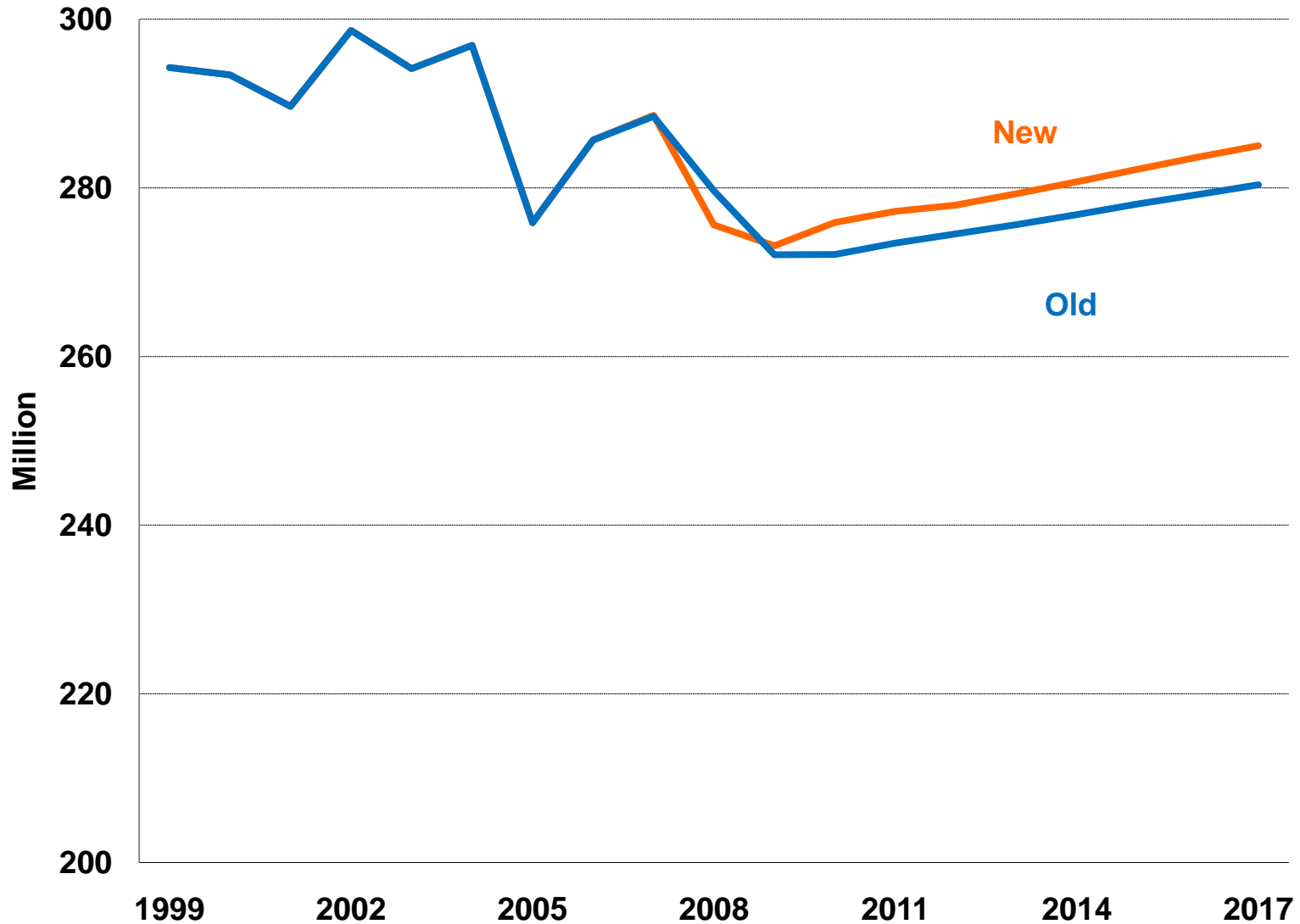
Source: Tourism Forecasting Council

2. Travel Trends (Outbound)



Source: Tourism Forecasting Council

3. Travel Trends (Domestic)



Source: Tourism Forecasting Council

4. The Current State

- Markets – the key indicator
- International competition
- Deep discounting and its impact
- Where's the light?

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5. The Government Response

- The Rudd Stimulus
- The National Long Term Tourism Strategy

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6. The Industry Response

- Direct stimulus
- Innovation and motivation

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