

THE STATE OF AUSTRALIAN TOURISM

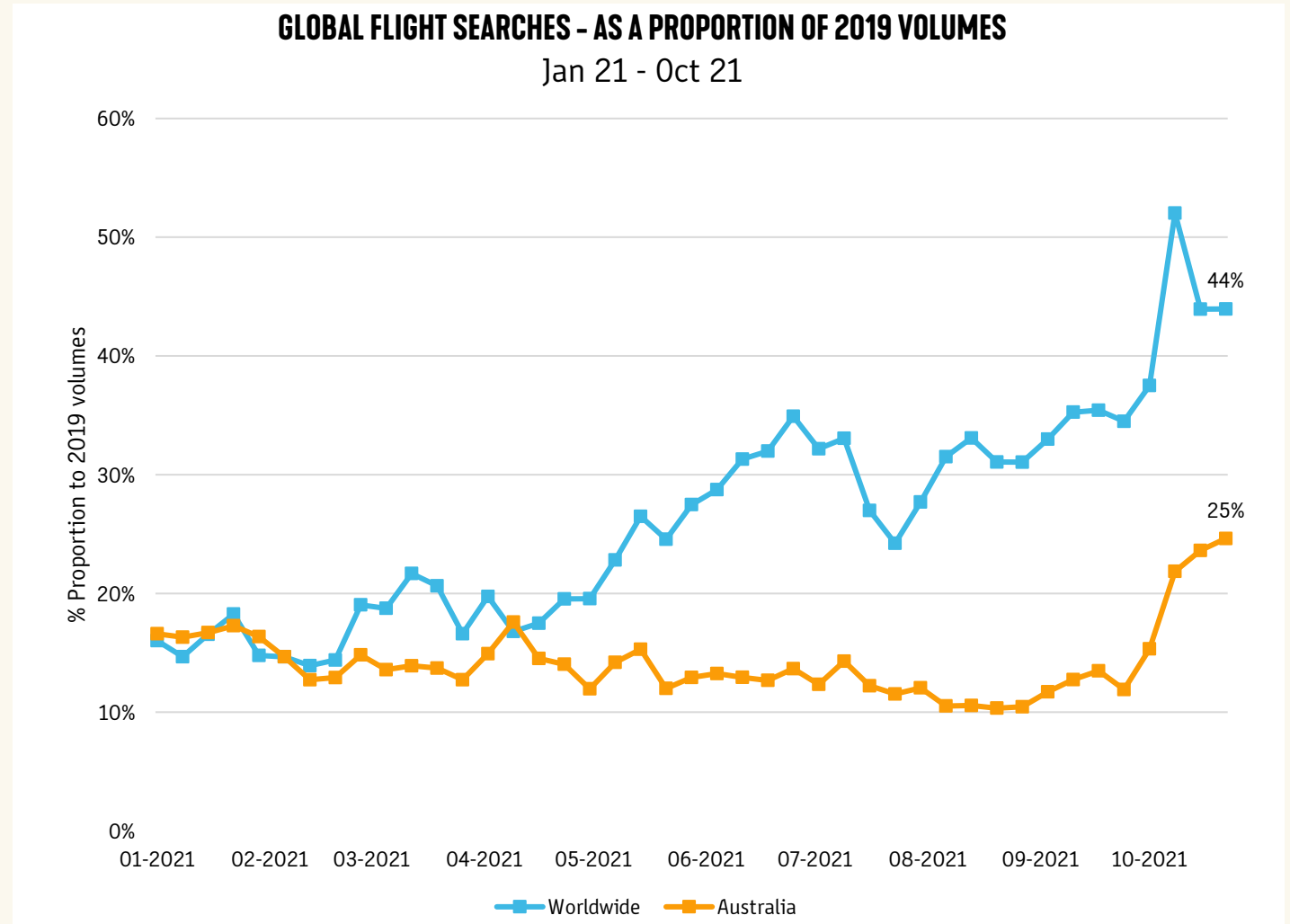
ASIA & DOMESTIC

TODAY'S INSIGHTS...

1. THE RETURN OF **GLOBAL** DEMAND
2. AUSTRALIA'S **BRAND** HEALTH
3. REASONS TO BE **OPTIMISTIC**

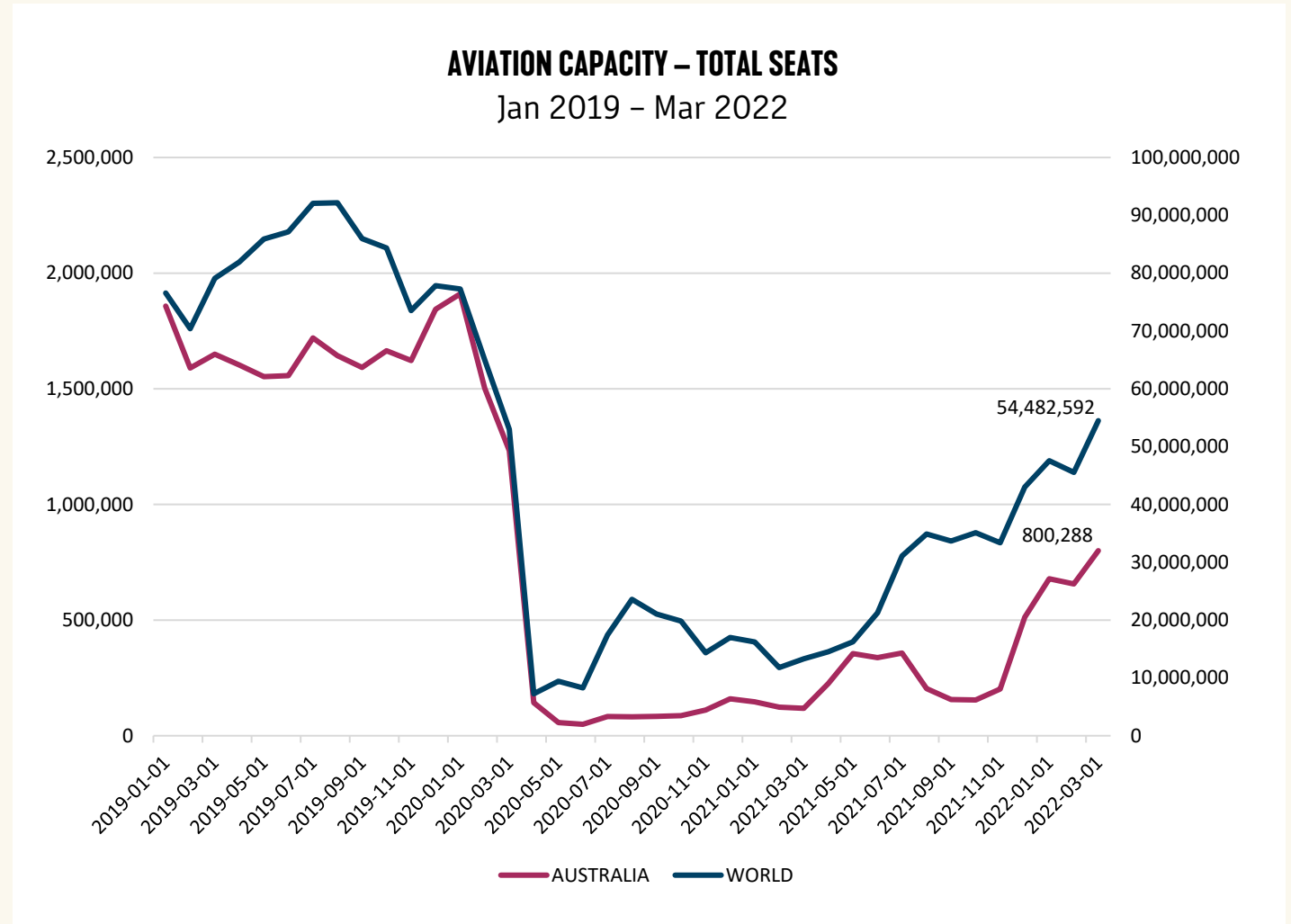
GLOBAL DEMAND

GLOBAL TRAVEL SEARCH, AND SEARCH TO AUSTRALIA IS RETURNING



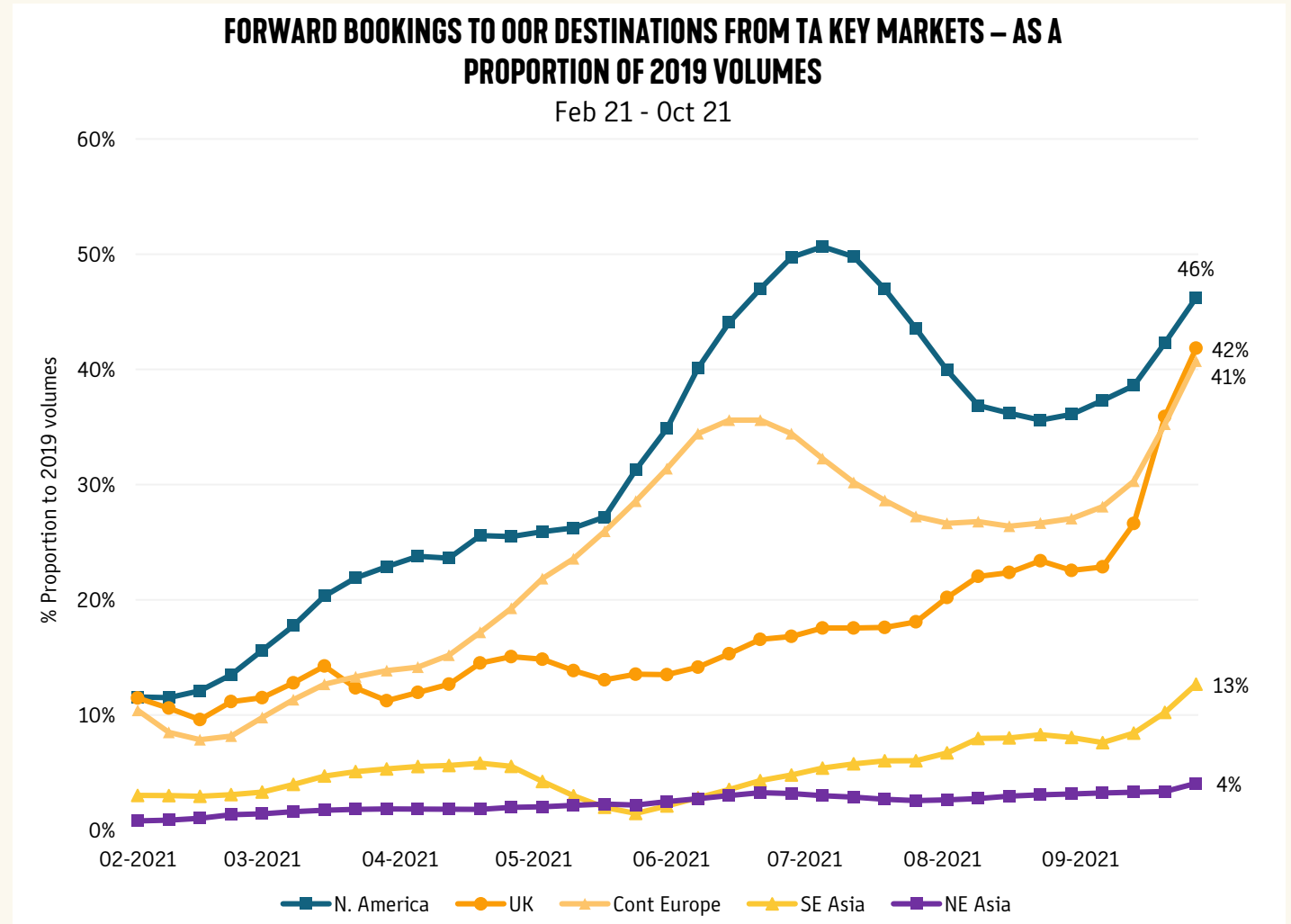
Source: Skyscanner – Flight Searches (January 2021 – October 2021), from TA’s 15 key markets. Searches globally vs searches to Aus

...AS IS AIR CAPACITY



Source: Aviation Capacity – SRS Analyzer (Jan 2019 – March 2021), from TA's 14 core markets

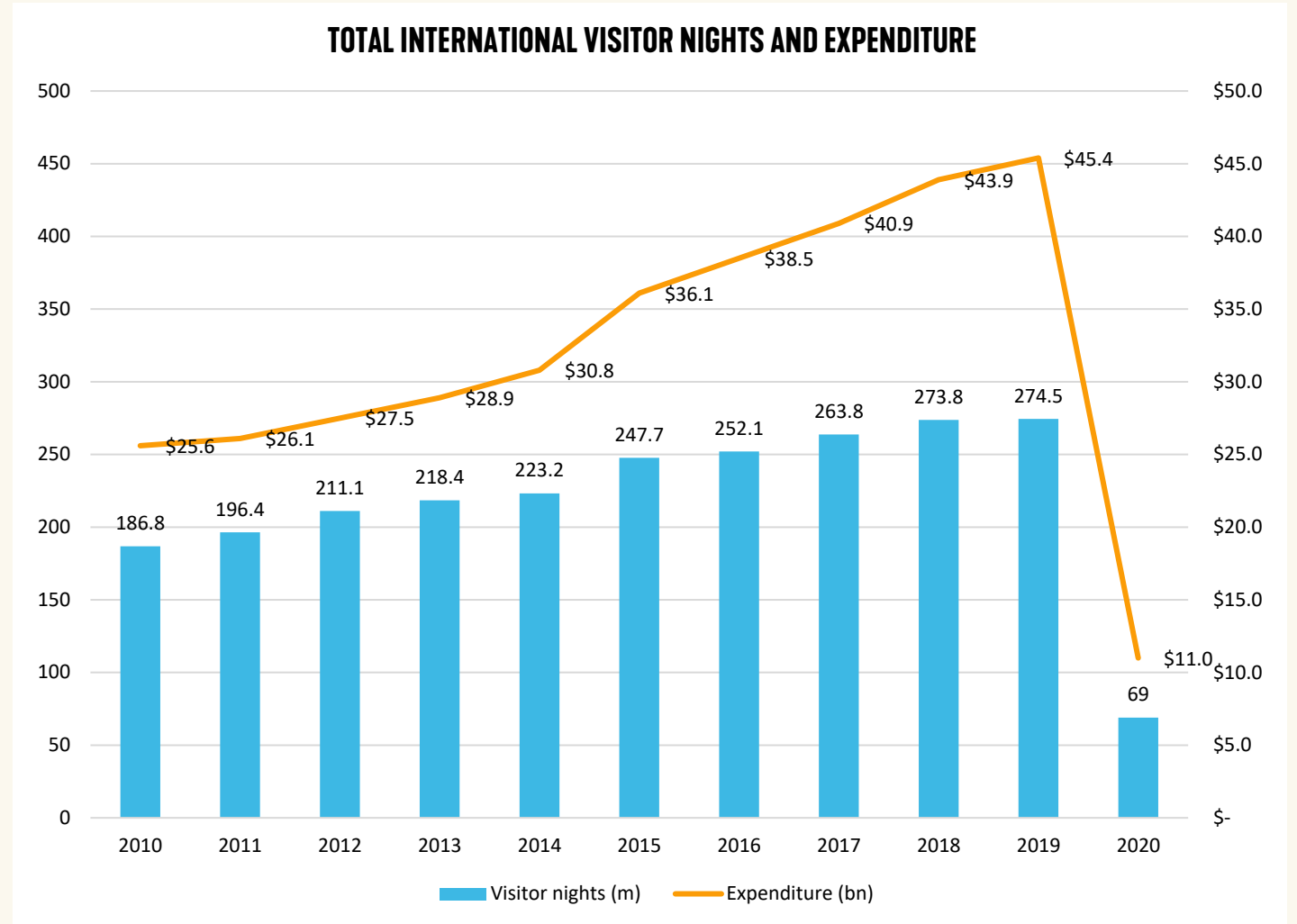
BOOKINGS TOO, EVEN AFTER A DELTA DIP. THE RETURN ISN'T HOWEVER EVENLY FELT AROUND THE WORLD.



ForwardKeys – Forward Bookings (Feb 2021 – October 2021)

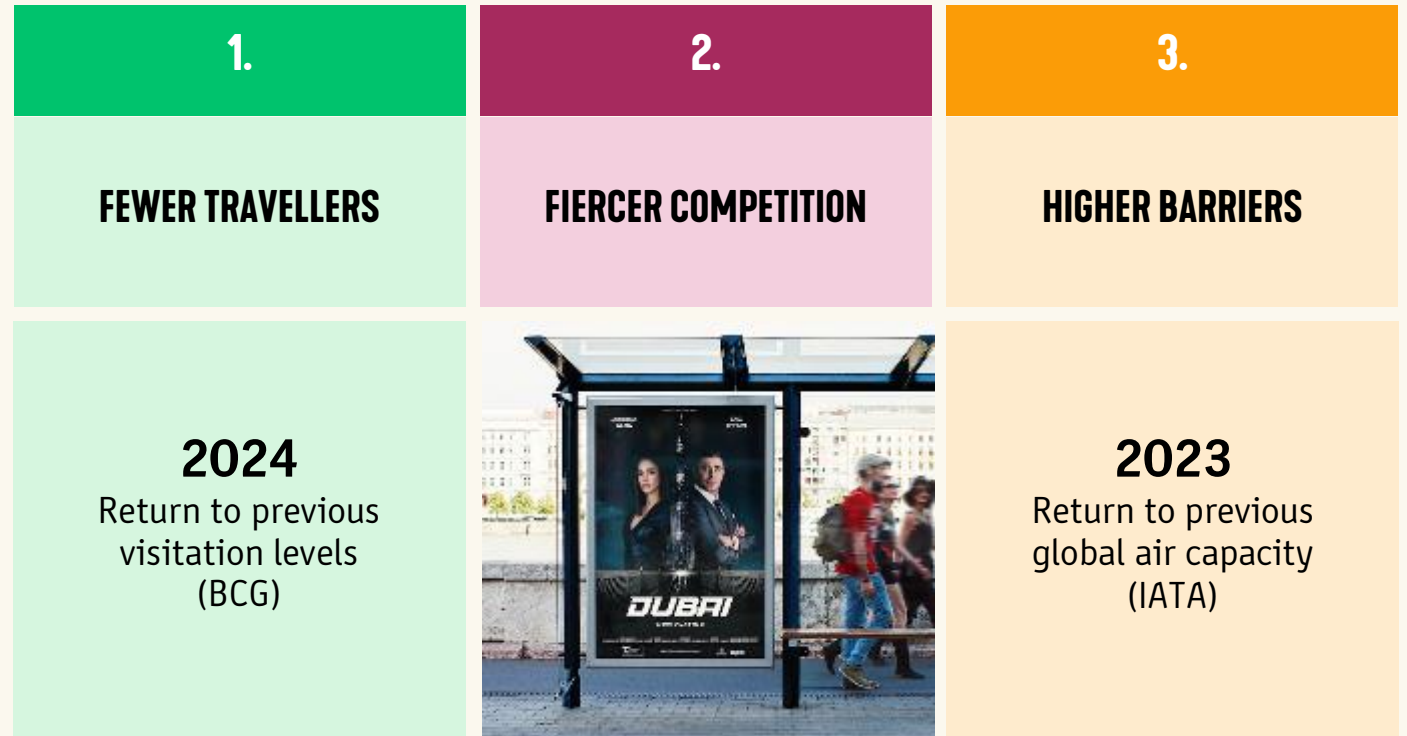
THE AUSTRALIAN TOURISM SECTOR HAS EXPERIENCED STRONG GROWTH OVER THE LAST 10 YEARS

6.57% CAGR Between 2010 and 2019



Source: IVS, 2010 – 2020, expenditure from 15 key markets into Australia

HOWEVER, THE RECOVERY WILL BE HARD FOUGHT

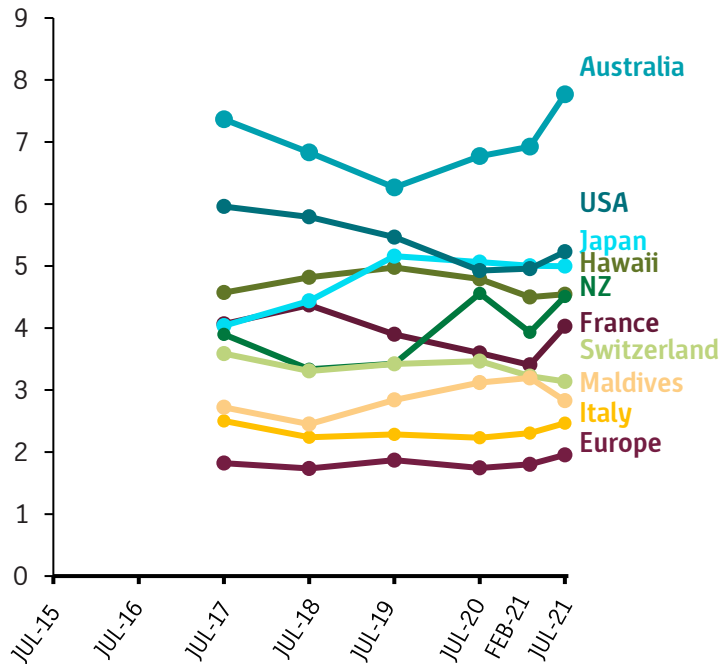


BRAND HEALTH

AUSTRALIA'S BRAND HEALTH IS STILL ON THE RISE

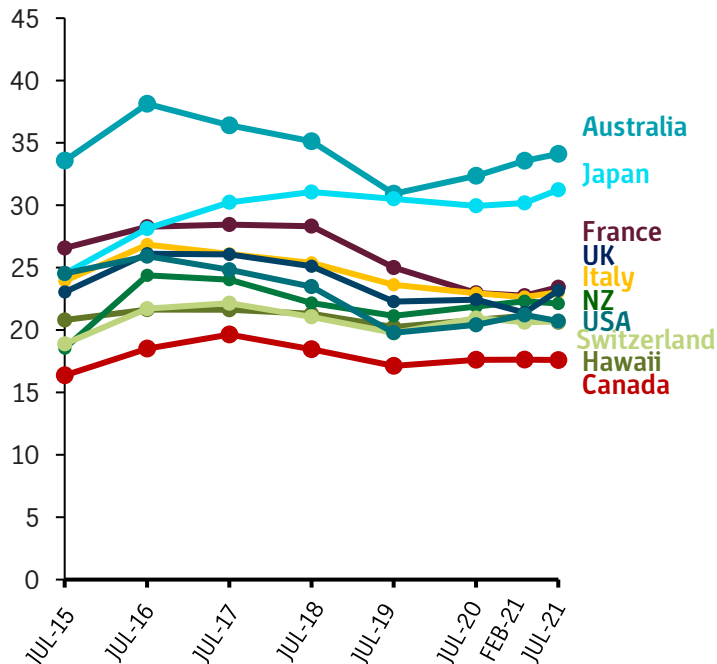
DESIRABILITY

% - Top 10 OOR destinations 11 Market Agg



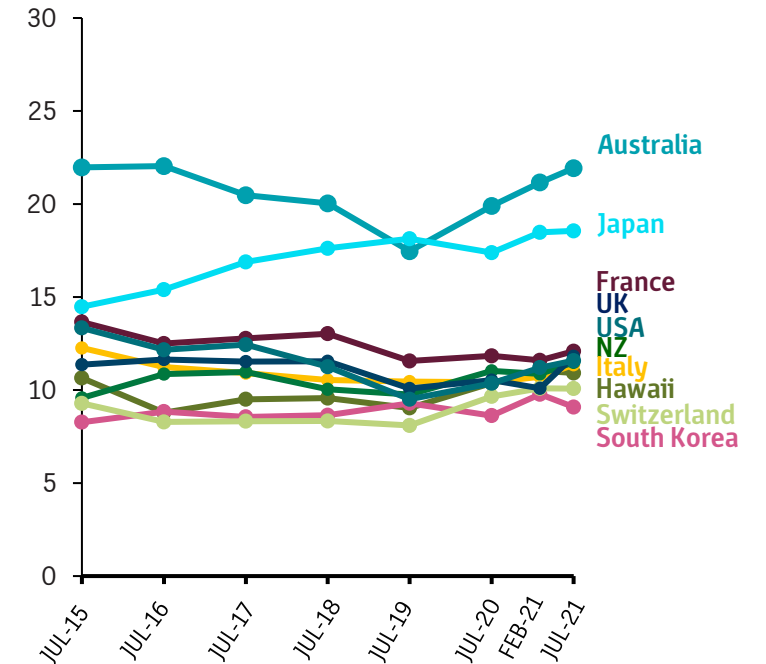
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INTENTION

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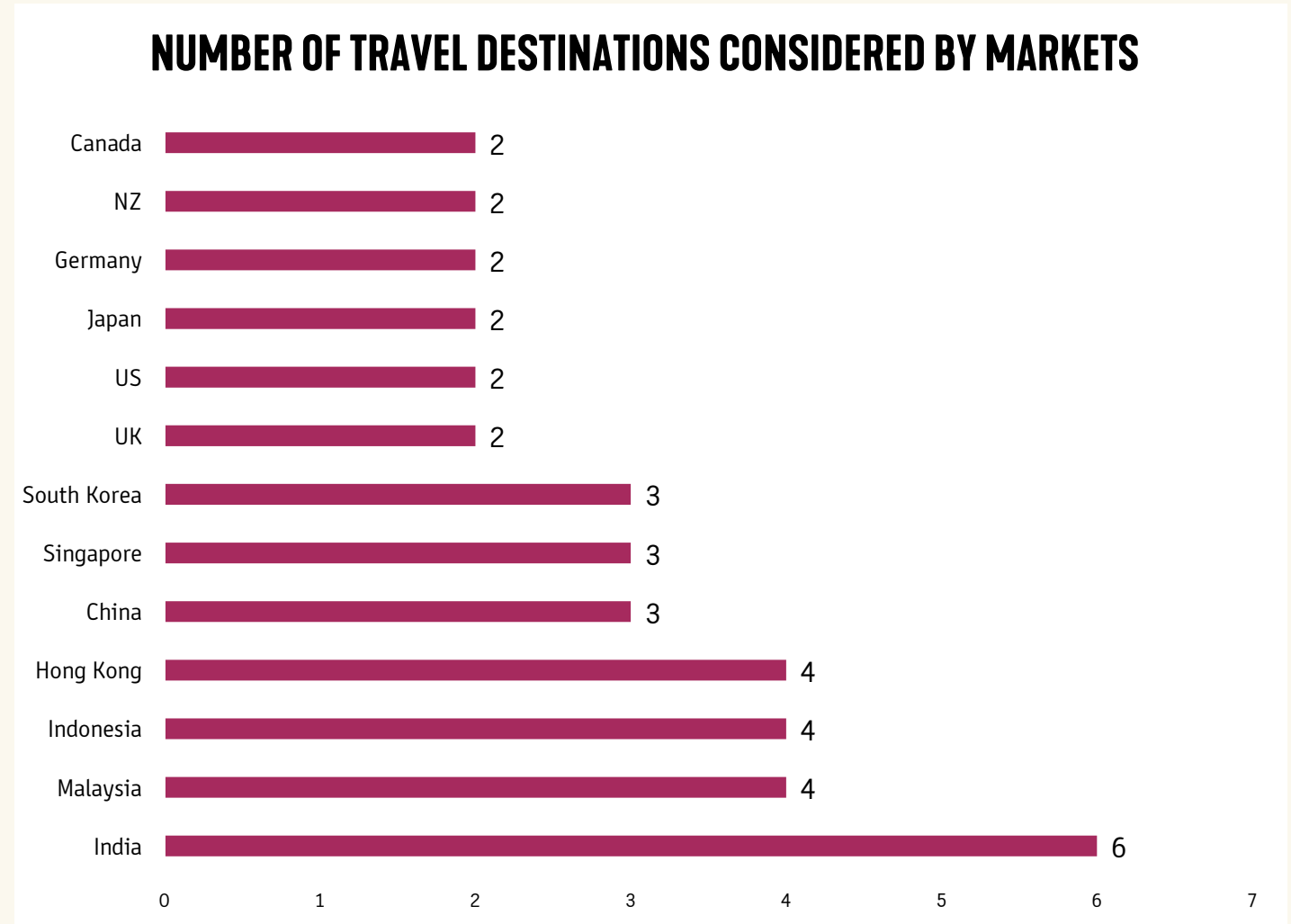


Questions: What do you consider to be the most desirable holiday destination in the world? Which holiday destinations do you consider cool or fashionable?
 Which of the following destinations are you considering travelling to in the next 4 years? Which of the following destinations are you actively planning to visit for a holiday in the next 2 years?
 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Source: BDA Marketing Planning

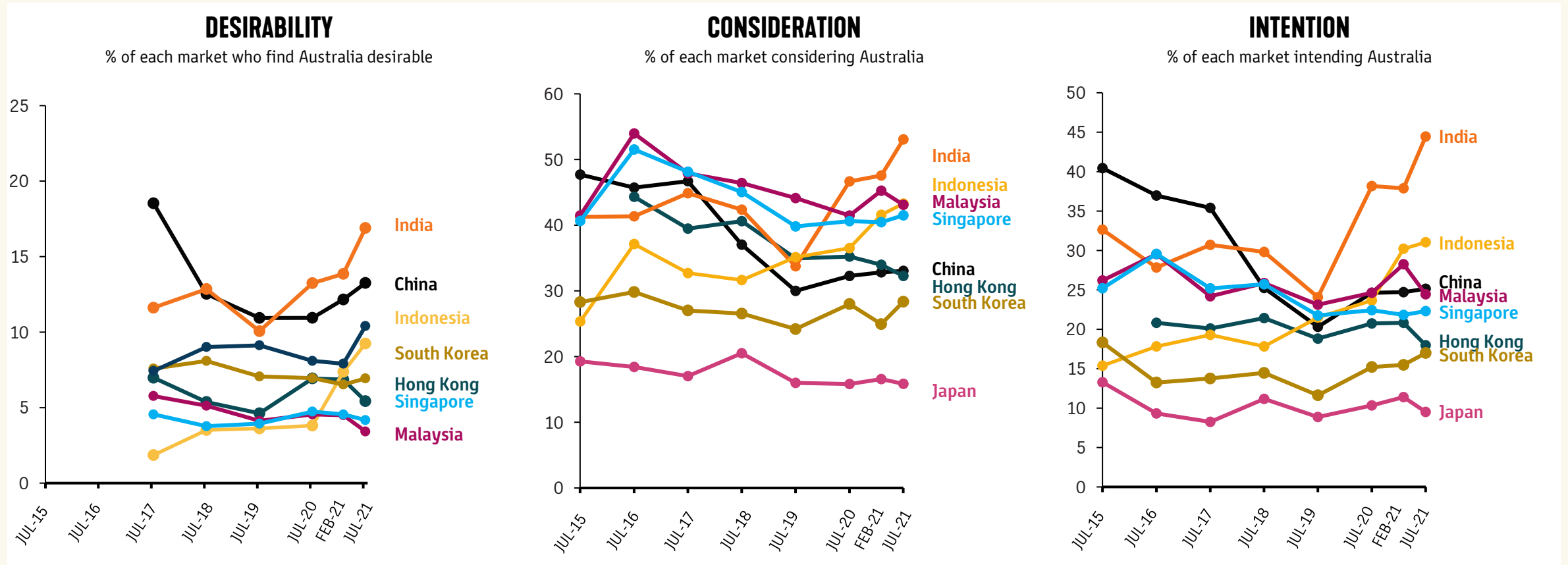
WHY CONSIDERATION IS CRUCIAL TO RECOVERY

Most OOR travellers are making a choice between **2 to 4 destinations**. For the majority of our markets, Australia is not often on that list. When Australia is on the list.



(OOR travellers considering international travel to how many destinations in the next 2 years)
Source: Rob Britain analysis of Tourism Australia's Consumer Demand Project, February 2021.

BUT PERFORMANCE VARIES BY MARKET

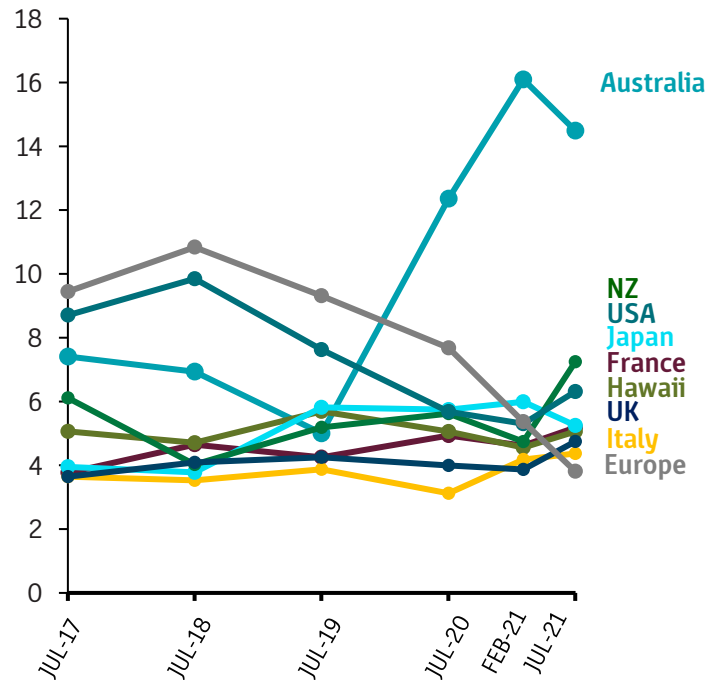


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DOMESTIC DEMAND CONTINUES TO GROW

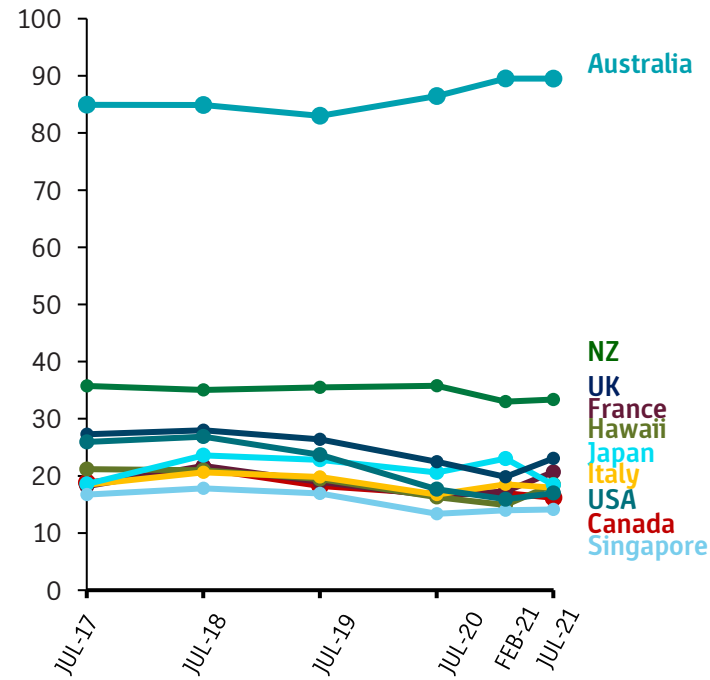
DESIRABILITY

% of Aus respondents – Top 10 destinations



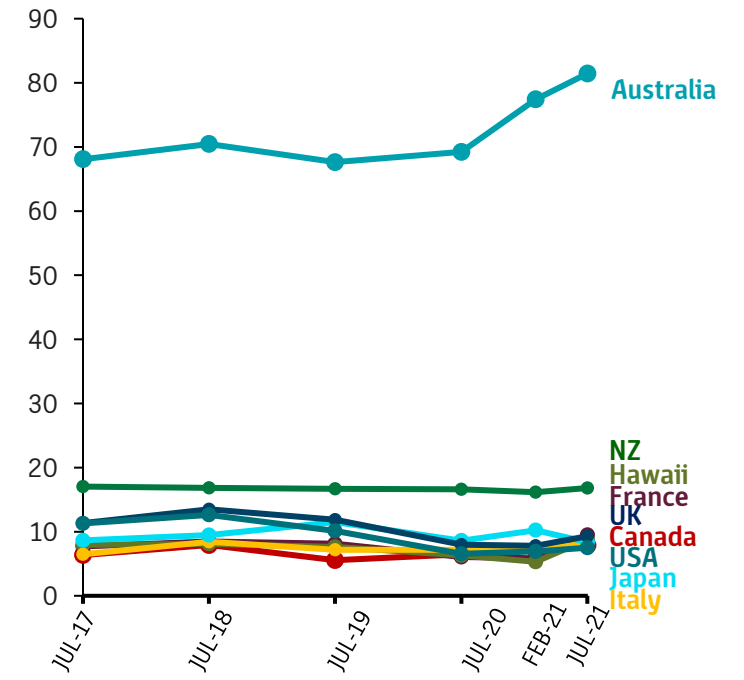
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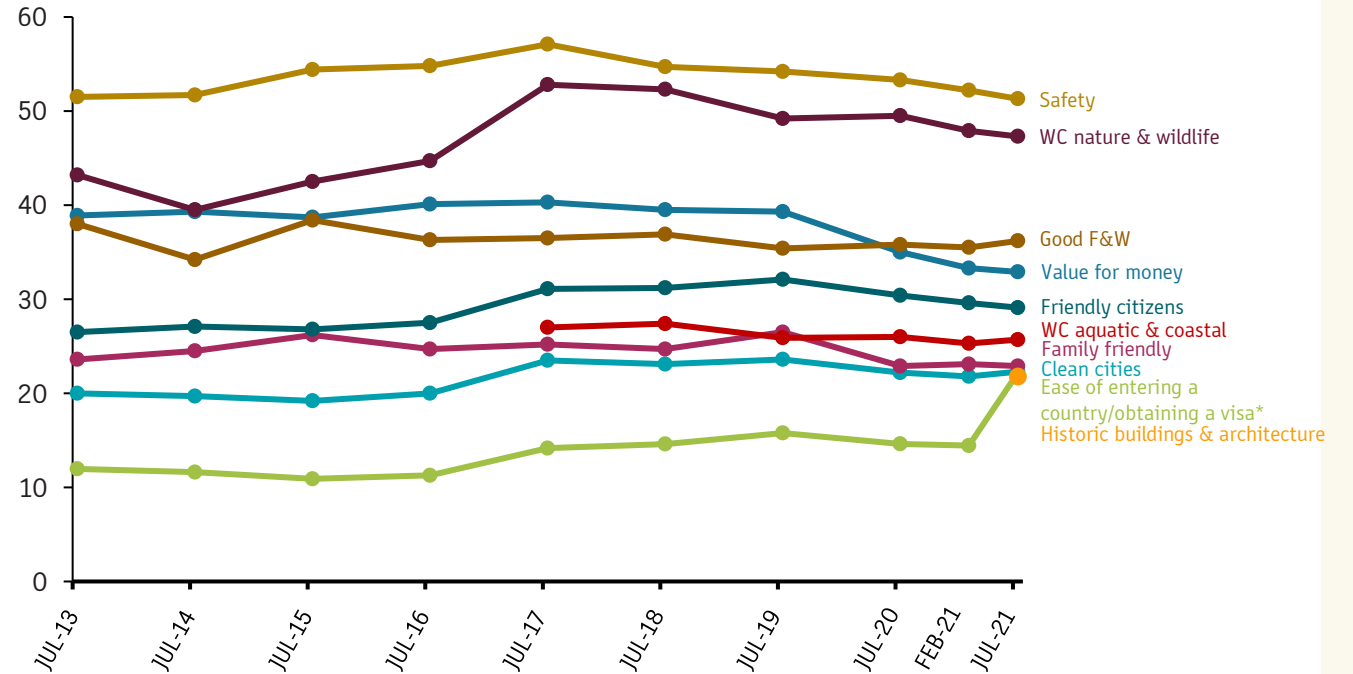


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 Source: BDA Marketing Planning

TRAVELLERS ARE STILL PRIORITISING FOOD & WINE OVER VALUE

IMPORTANCE FACTORS

(% rank factor in top 5)
11 market aggregate - Jul 2021



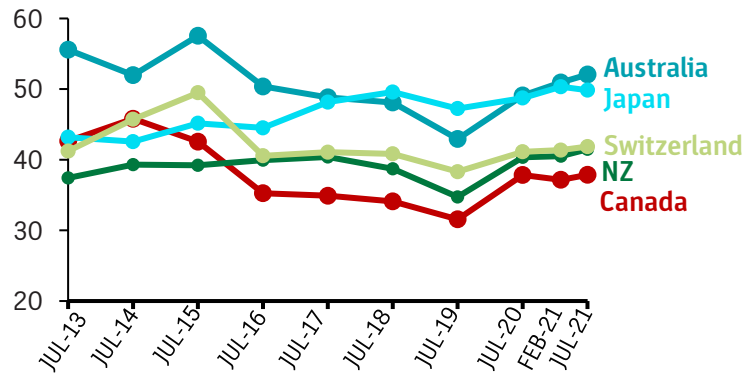
Question: Thinking about choosing a holiday destination, which of the following factors is more important to you?
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.
*In Jul 21, Ease of obtaining a visa renamed to Ease of entering a country / obtaining a visa
Source: BDA Marketing Planning

WE'RE HOLDING OR IMPROVING OUR COMPETITIVE POSITIONING

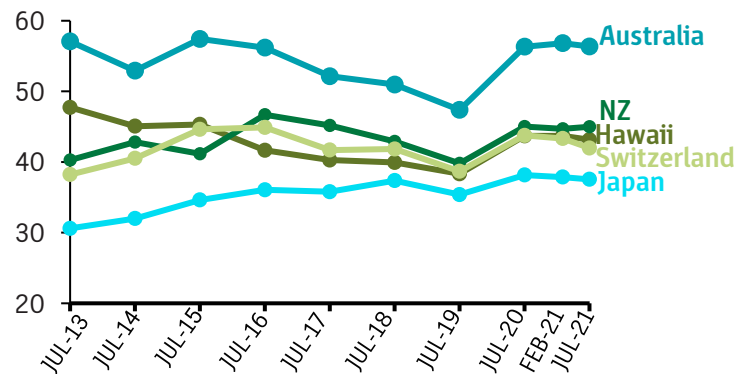
IMPORTANCE FACTOR ASSOCIATIONS

% associate OOR destinations - 11 Market Agg

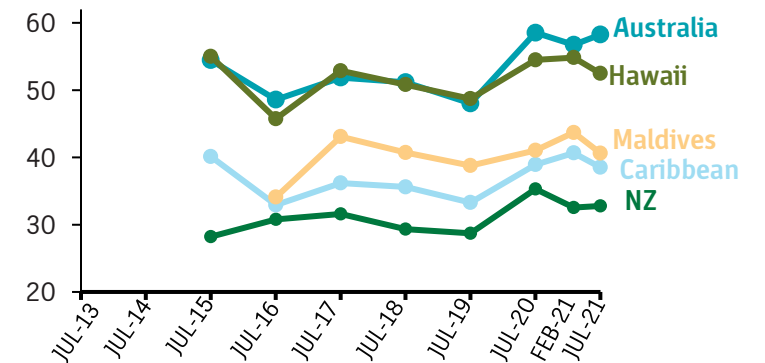
SAFETY & SECURITY



WORLD CLASS NATURE & WILDLIFE

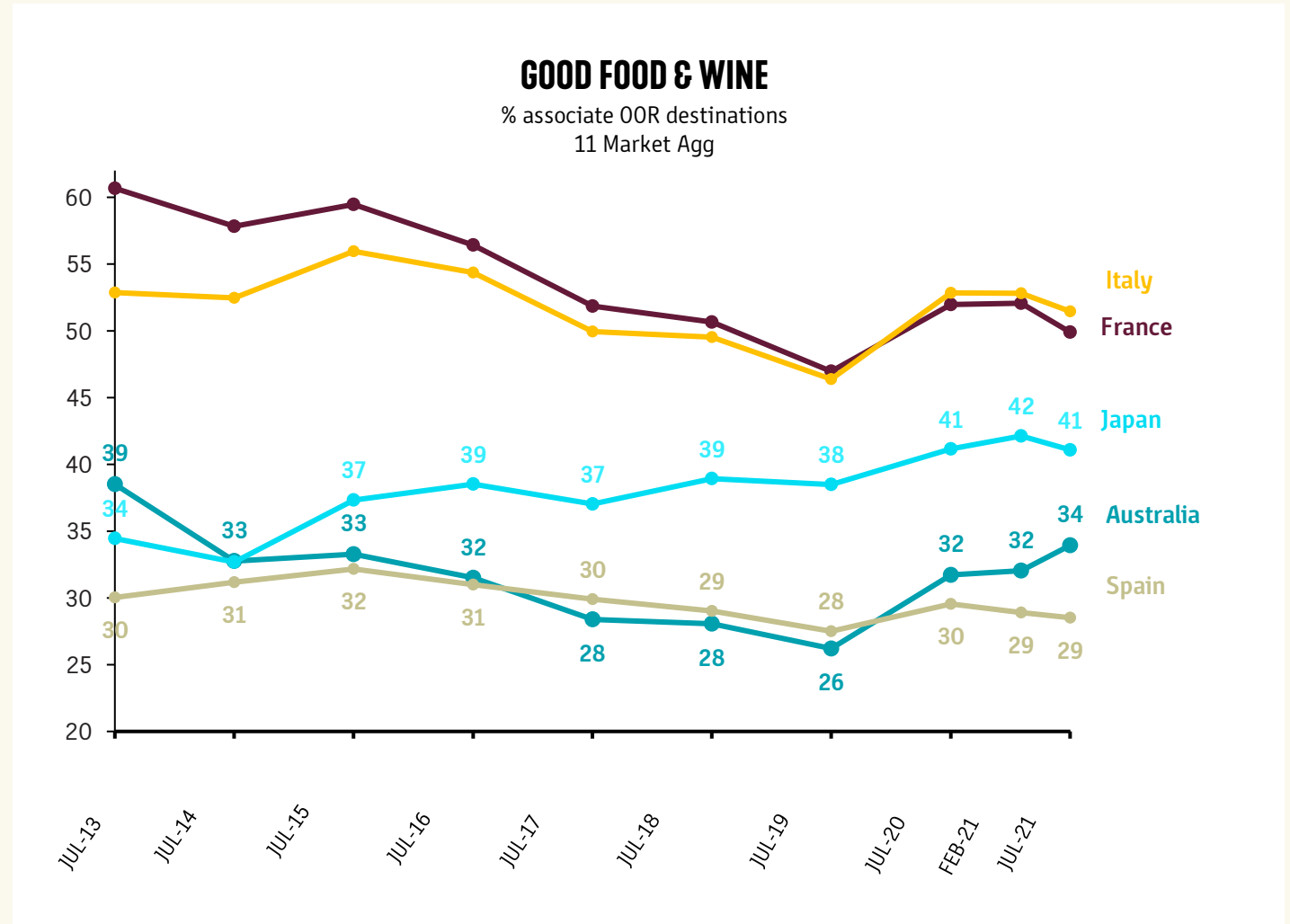


WORLD CLASS AQUATIC & COASTAL



Question: You said [factor] is important to you. Which of these destinations do you associate with [factor]?
 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.
 Source: BDA Marketing Planning

AUSTRALIA'S F&W ASSOCIATION HAS IMPROVED AT THE EXPENSE OF OUR COMPETITORS



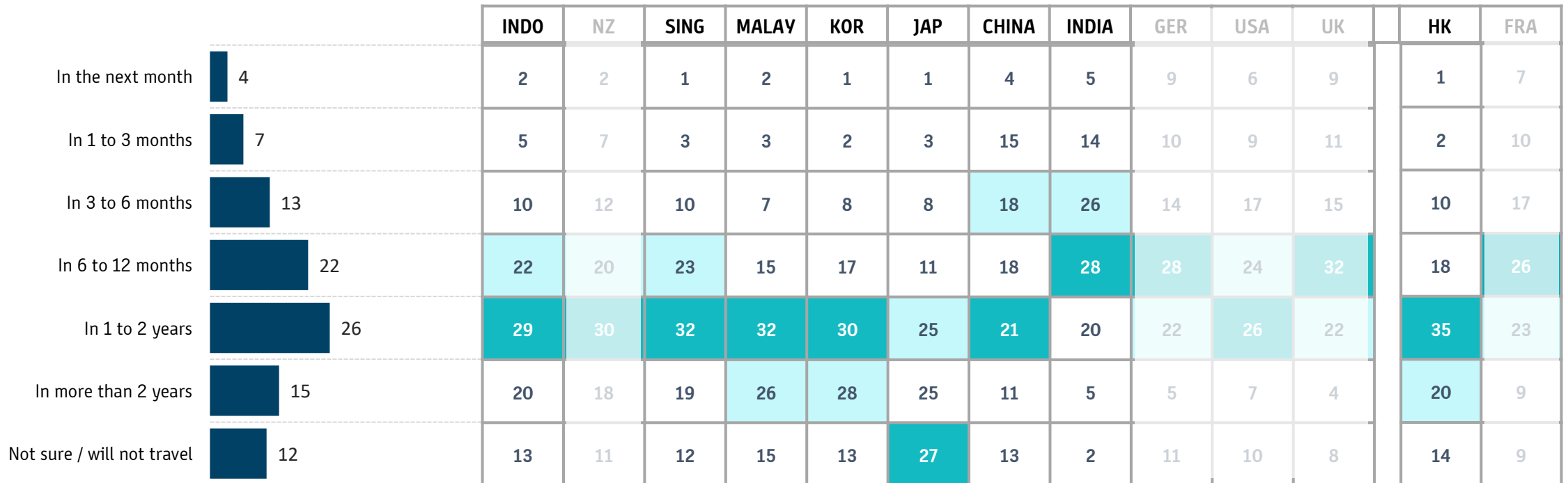
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OUR CHALLENGE IS URGENCY, THE SAME AS EVERYONE ELSE

INTENDED TIMING FOR NEXT INTERNATIONAL TRIP

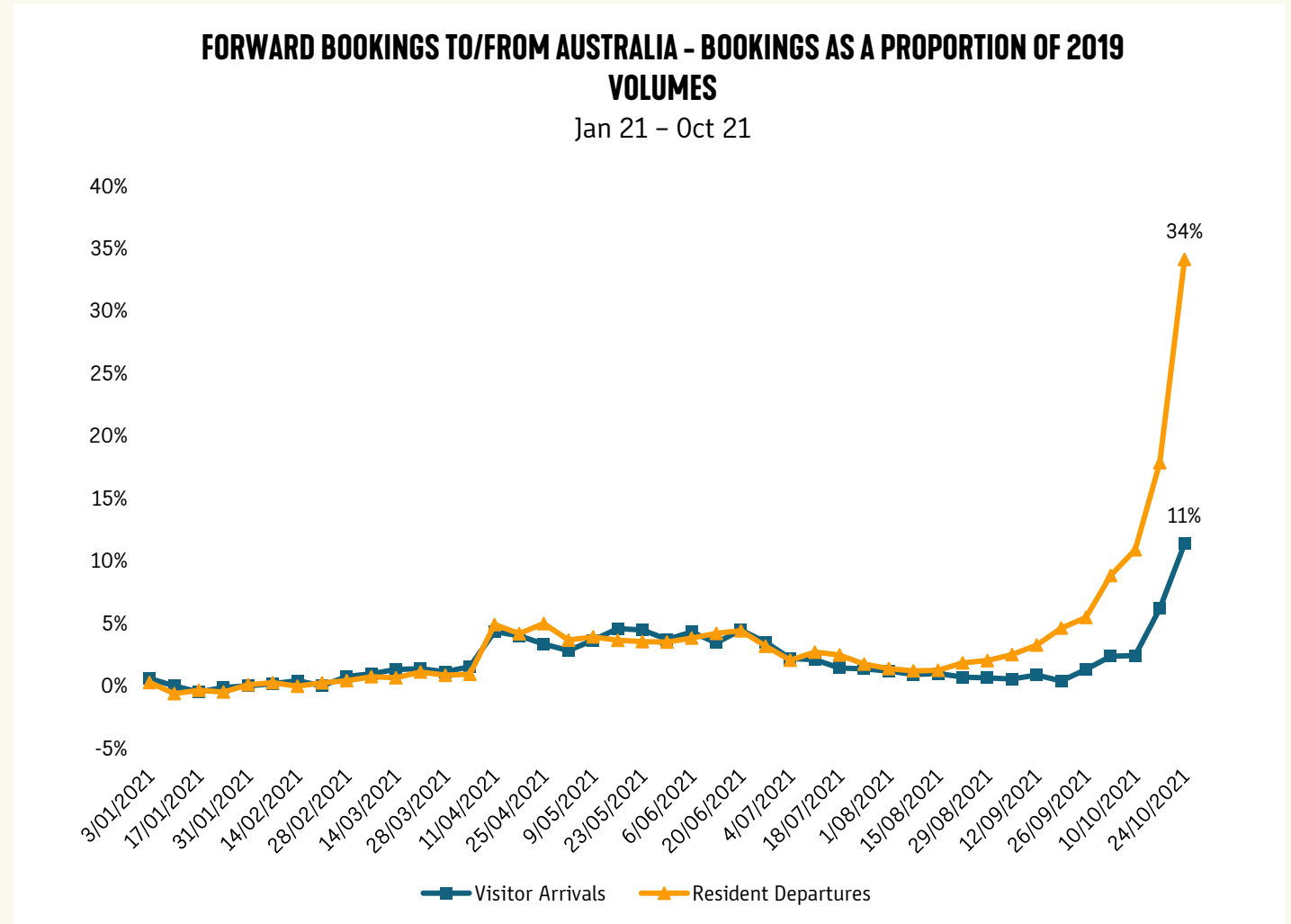
% of 11 market aggregate

Top 1 ■ Top 2 ■



Question: Which of the following best describes how you would feel about taking each of the following types of trips?
 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.
 Source: BDA Marketing Planning

THE RETURN OF INBOUND IS SLOWER DUE TO RESTRICTIONS



ForwardKeys - Forward Bookings (Feb 2021 - October 2021)

TO SUMMARISE

REASONS TO BE OPTIMISTIC

1

Global demand is clearly returning, and **returning fast**, with travellers already booking and spending in our category.

2

Crucially for us, demand for **Australia has grown**, and continues to grow, through this moment of crisis.

3

What Australia offers travellers is still highly relevant and in demand - and **quality experiences** are more in demand than ever!

HOWEVER...

1

We need to **defend our high consideration** rankings and be in the running for that first or second post-pandemic trip.

2

Urgency is the challenge, we need to reduce the hesitancy and lag to drive money into the industry, fast.

3

We need to **grow market share** and compete with the increased funding of the competition.

THANK YOU