

NORTH AMERICA INDUSTRY UPDATE

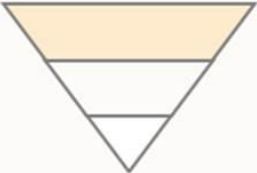



#1 – MAY 20TH, 2020

AGENDA

- The World View from TA
Robin Mack, Executive General Manager - Commercial
- North America Update
Jane Whitehead, VP – Americas
- Consumer Marketing
Jackie Dunfee, Marketing Manager - North America
- PR
Chris Maggio, PR Manager – North America
- Distribution
Glen Davis, Distribution Development Manager
- Insights and Trends
Rob Dougan, General Manager - Marketing Strategy
- A view from Industry
Leigh Sorensen, General Manager - Industry Relations

ROBIN MACK

Executive General Manager - Commercial

| | CRISIS | | RECOVERY | NEW NORMALITY |
|----------|--|---|--|--|
| | 1. PANIC | 2. RESTRICTED MOVEMENT | 3. RISING OPTIMISM | 4. FREE MOVEMENT |
| CRITERIA | Border closures Negligible travel interest | Border closures Social, search travel interest Negligible booking interest | Border closures Social, search travel interest Booking interest Negligible intent to travel | Local / Aussie borders open Air capacity available Intent to book and travel Forward bookings |
| MINDSET | Fear and trepidation | Frustration and boredom | Exasperation with optimism | Enthusiastic and adventurous |
| FUNNEL |  |  |  |  |
| INTENT | Be present Inform with sensitive tone and some inspiration / hope | Reignite the dream Lift spirits with a taste of destination Australia | Drive planning Help would be travellers plan their Aussie holiday | Drive booking Convert with partnerships as intent increases |

JANE WHITEHEAD

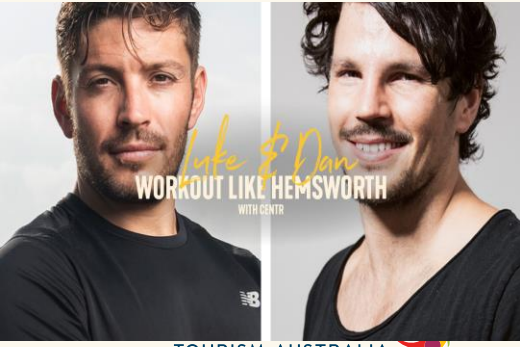
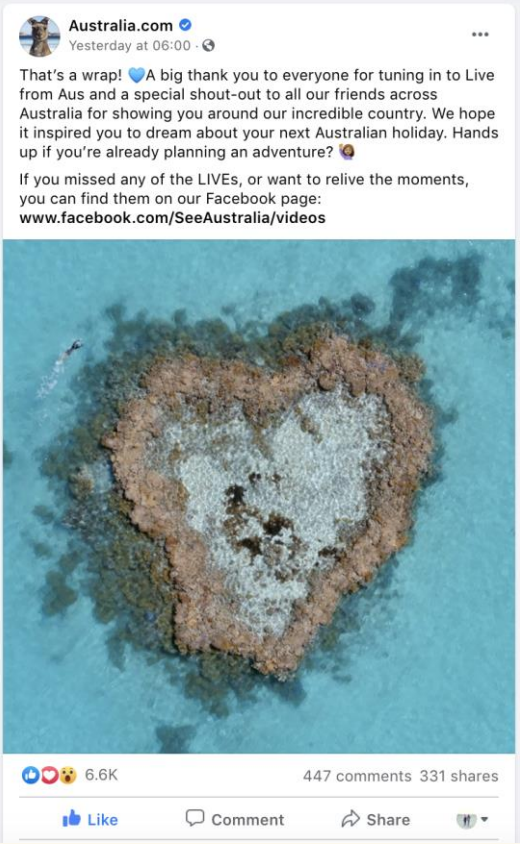
VP, Americas

LIVE FROM AUS

32 LIVE
Immersive Tourism Experiences

27 hours
Of content generated

40+
Countries inspired



SOCIAL MEDIA TRAVEL INTENT



Natalie Blanch Maher · 32:04 Wow it's absolutely stunning. Thank you for bringing the Kimberley's into our homes. ❤️
Like · Reply · 1d

Sally Brock · 34:25 This is amazing. Never seen anything like it. Can't wait to visit. Thanks for the virtual adventure.
Like · Reply · 1d

Mary Hawkins · 42:38 Absolutely stunning!! From Melbourne, Hopefully will make it to the Kimberley one day soon. Cheers for going live and sharing. ❤️❤️
Like · Reply · 1d

Bianca Keel · 25:03 Thank you, what a beautiful programme. We would love to visit you once the restrictions are lifted.
Like · Reply · 1d

Kathryn Farrell · 0:00 Penny Thompson this might just be the next place where we travel to when restrictions ease. Sounds superb
Like · Reply · 1d

Replying to Rachelle
Rachelle Rachelle · 0:43 Would be amazing! I'll just have to fly over from the US , gather my Australian family and enjoy a Tassie VACA! I need to get tuned back into the Aussie half of me 🇦🇺❤️!
Like · See thread · 1d

Robyn Maher · 1:17 How good is this! Loving these live virtual experiences. Well done @Australia.com

Anne-Marie Cecil · 12:41 This has been such a great way to showcase Australia. Can't wait to get out and visit all the places ...enjoy the beautiful colours, smells and sounds of our diverse nation 😎
Like · Reply · 1d

Ash Ley · 6:30 This is so great! Thank you for taking us there ❤️
Like · Reply · 1d

Susanne Stellberg · 12:04 I love this one... makes me feel like being in Australia at 8.00am in Germany. So cute the kangaroos 🇺🇸🇦🇺
Like · Reply · 1d

Glenise Berry · 0:00 Oooh 🥰 I just said last night this is a walk I want to do when I recover from my iso exercise fractured ankle!!!
Like · Reply · 1d

Paulien Baumont-Roessink · 0:00 We have just decided with the family that NT is going to be our next destination! ❤️
Like · Reply · 1d

PR – DREAMING STORIES

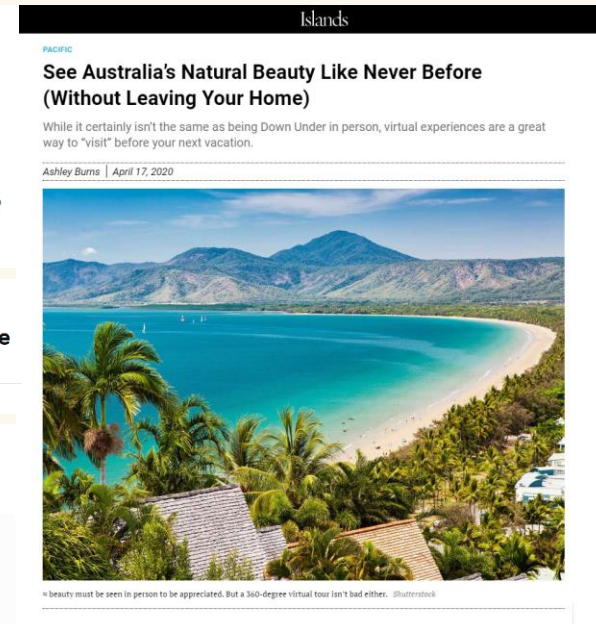
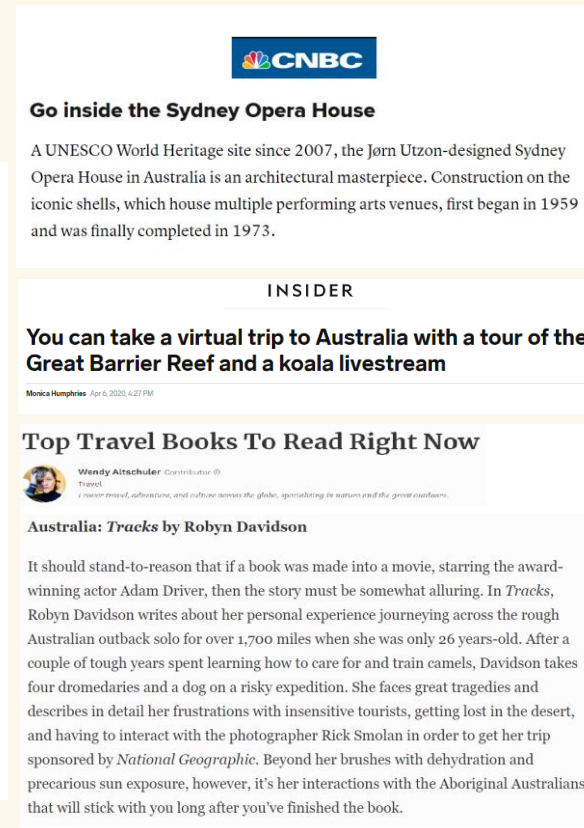
TA has managed a robust PR and content-driven program in North America as we moving through ‘Restricted Movement’ into ‘Rising Optimism,’ sharing inspirational stories about Australia to reignite the dream.

Over the last three months, story angles that resulted in coverage:

- Can’t get to Australia? Take a virtual trip Down Under
- Against all odds: Koala star Anwen returns to Australia’s bushland after a full and speedy recovery
- Let Aussie music transport you from your living room
- Books to experience Australia in your living room

RESULTS: 2.3 billion media impressions (approx. \$22m USD ad value equivalency) and counting!

Coverage in top titles including CNN Travel (including CNN’s The Good Stuff Newsletter), CNBC, Insider, Islands, Forbes, Reader’s Digest, Uproxx, and more

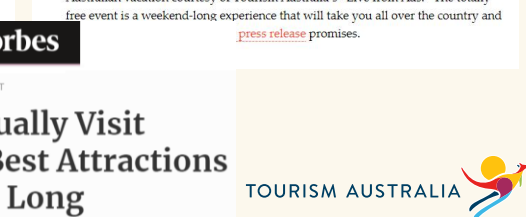
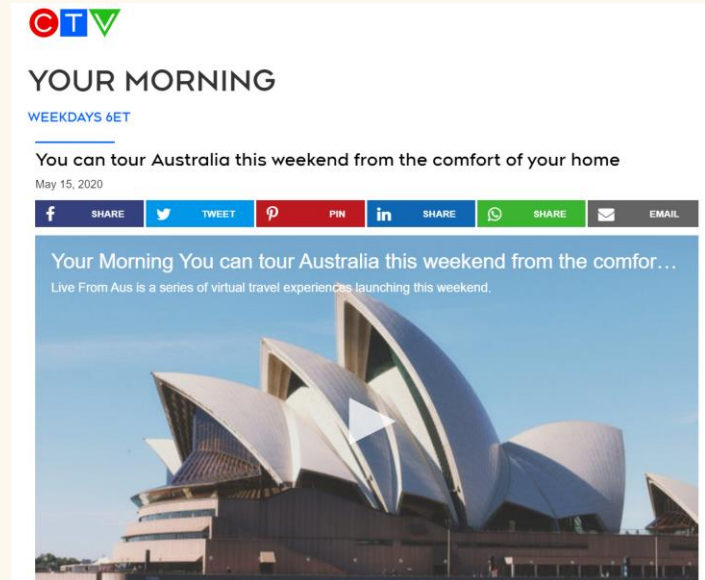


LIVE FROM AUS – PR

RESULTS: 710 million impressions to date and counting!

US: Broke the news in Thrillist, Forbes, BuzzFeed, National Geographic, Apartment Therapy, among others.

CANADA: CTV broadcast segments on morning shows CTV Your Morning (Toronto) and CTV Morning Live (Vancouver) featuring TA’s Jane Whitehead teasing the weekend’s program and encouraging Canadians to tune-in



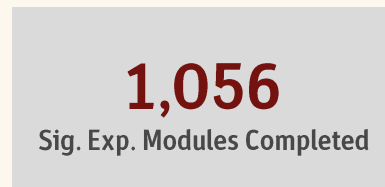
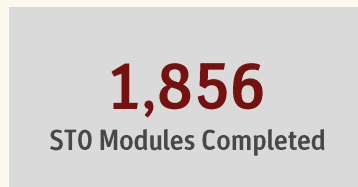
DISTRIBUTION

Trade Engagement Program

Aim: Engage and educate advisors; ensure Australia is front of mind; send a message of support

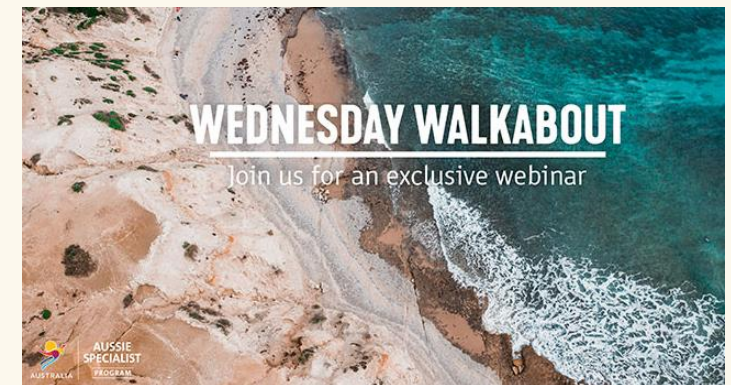
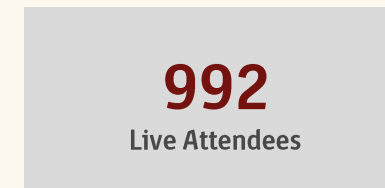
Aussie Specialist Program Incentives

- Strong results since March 15th:



‘Wednesday Walkabout’

- Weekly 30min, Q&A-style webinar series
- Hosted discussions with Aussie Specialist Ambassadors plus special guests from Australia



DISTRIBUTION

Aussie Specialist Activities

Virtual Fam Trips

- Aussie Specialist Ambassador videos
- 360-degree videos
- Video content from Australian operators
- Virtual/3D tours from museums/galleries
- Koala, Beach & Penguin cams, Australian Ballet classes + more!

Games & Activities

- Educational crosswords – brand pillars, STOs, slang etc.
- Coloring sheets

Regular Communications

- Video message from the Distribution team - ‘With Love from Aus’
- Regular email updates; incentives; latest news
- New: North America Aussie Specialist Facebook group

VIRTUAL FAMIL HUB

You can experience Australia from wherever you are with an interactive virtual famil to one of the amazing destinations below!



VICTORIA

From the scenic Great Ocean Road to the awe-inspiring art & culture found in Melbourne, there's a reason why everyone should visit Victoria!



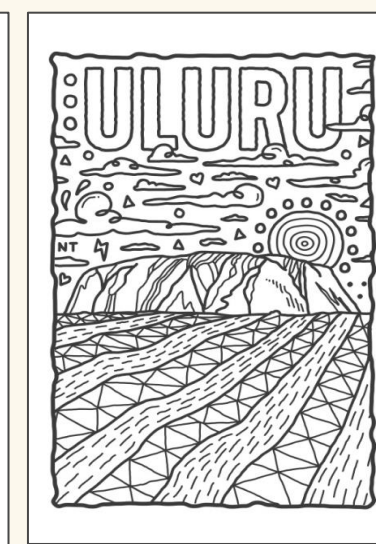
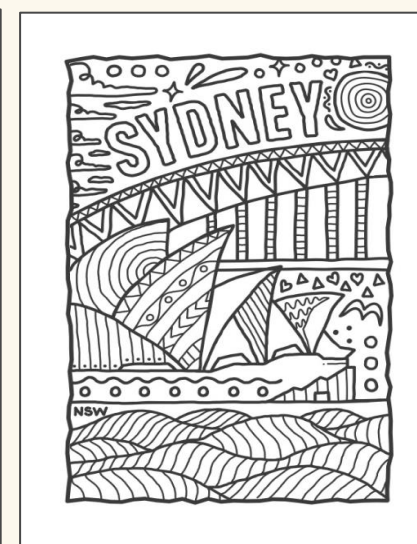
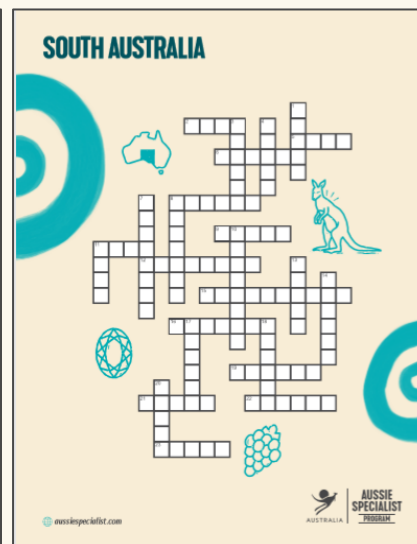
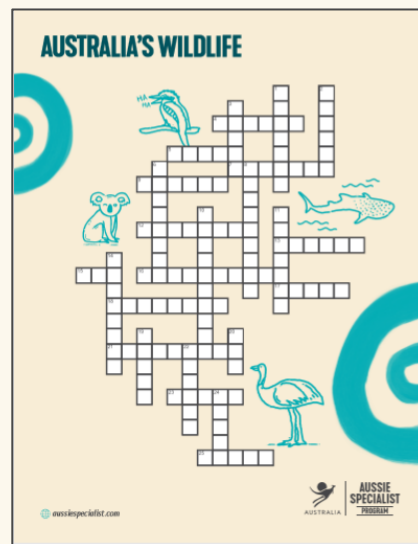
NEW SOUTH WALES

If you aren't stunned by the magnificence of Sydney, you're sure to be captivated by the scenic Blue Mountains and enchanted by the charm of New South Wales's wine regions!



QUEENSLAND

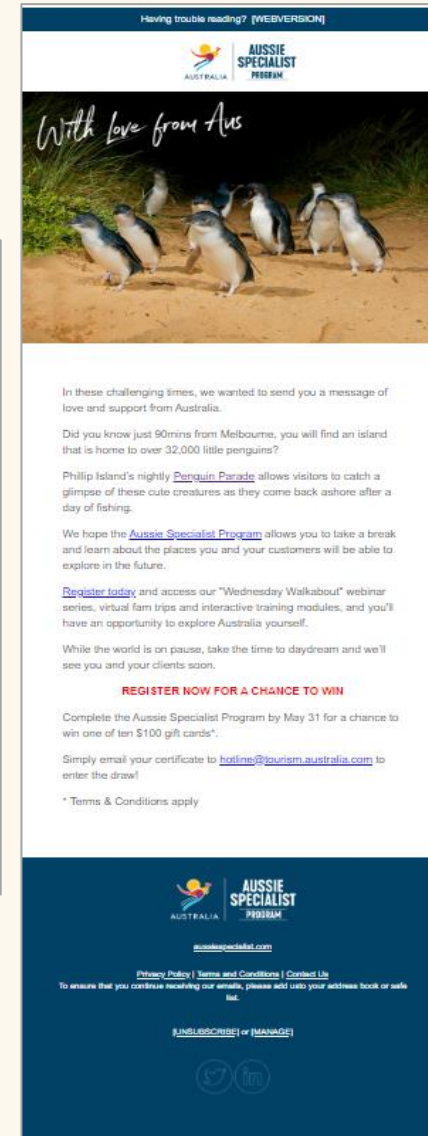
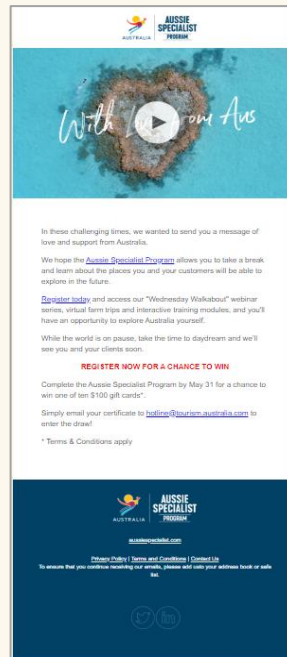
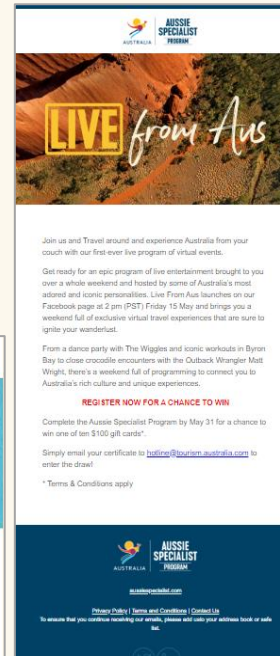
Satisfy your sense of adventure in The Great Barrier Reef, relax in the romantic Whitsunday Islands, and experience wildlife like never before in Queensland!



DISTRIBUTION

‘With Love from Aus’ trade media campaign

- Weekly email focused on educational and engaging content
- USA: Travel Weekly & Travel Age West
- Canada: Baxter Media
- Sent to wider travel advisor network plus ASPs
- Message of support with a link back to the Aussie Specialist Program
- Messaging from each State & Territory
- Strong engagement
- Travel Weekly/Travel Age West webinar
 - Record breaking!
 - 2,400 registrations
 - 1,300 live attendees
 - ASP Ambassadors – For travel advisors, by travel advisors



ROB DOUGAN

General Manager – Marketing Strategy

‘UNPRECEDENTED EVENTS’

“

**THIS IS NOT A SITUATION WHERE YOU CAN PUSH
A BUTTON ON THE COMPUTER AND OUT COMES A
NUMBER. IT'S **DETECTIVE WORK**. AND IT WILL
MOSTLY BE WILDLY WRONG.**

**PROF JONATHAN WRIGHT
JOHNS HOPKINS UNIVERSITY**

**1.
HOPE FOR THE
BEST, SCENARIO
PLAN FOR THE
WORST**

**2.
LAY DOWN A
PLAN (EVEN IF
IT'S GOING TO
CHANGE)**

**3.
JUST THE RIGHT
DATA, AT JUST THE
RIGHT TIME**

**4.
LISTEN TO A
BROAD RANGE
OF SOURCES**

**5.
FISH WHERE
(AND WHEN)
THE FISH ARE**

**6.
THINK
CONSUMER
FIRST**

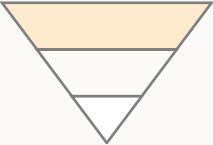
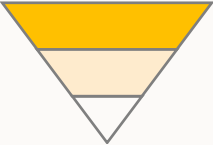
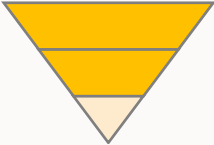

1. HOPE FOR THE BEST, SCENARIO PLAN FOR THE WORST

“

THERE WILL NOT BE ONE
DAY THAT THINGS WILL GO
BACK TO NORMAL. IT WILL
BE **TRIAL AND ERROR.**

PM SCOTT MORRISON

2. LAY DOWN A PLAN (EVEN IF IT'S GOING TO CHANGE)

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3. JUST THE RIGHT DATA, AT JUST THE RIGHT TIME

FREQUENT DATA

CRITICAL

OPEN BORDERS

AIR CAPACITY

HIGH IMPORTANCE

INFECTION RATES

CONSUMER CONFIDENCE

TRAVEL SEARCH

FORWARD BOOKINGS

MEDIUM IMPORTANCE

BOOKING / TRAVEL INTENT

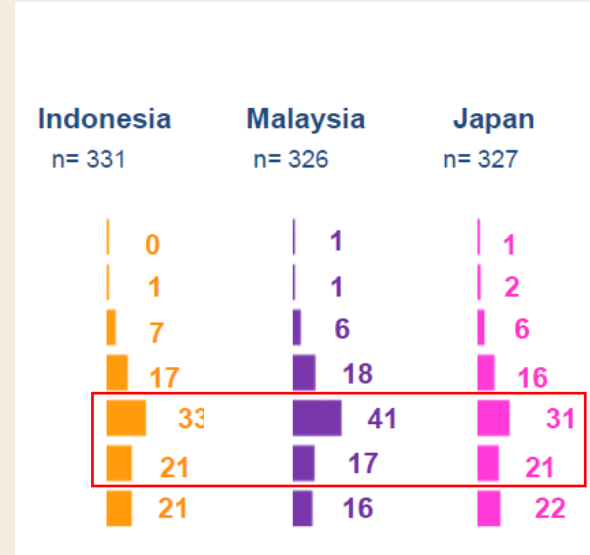
PERCEPTIONS OF AUSTRALIA

FREQUENT ASSESSMENT

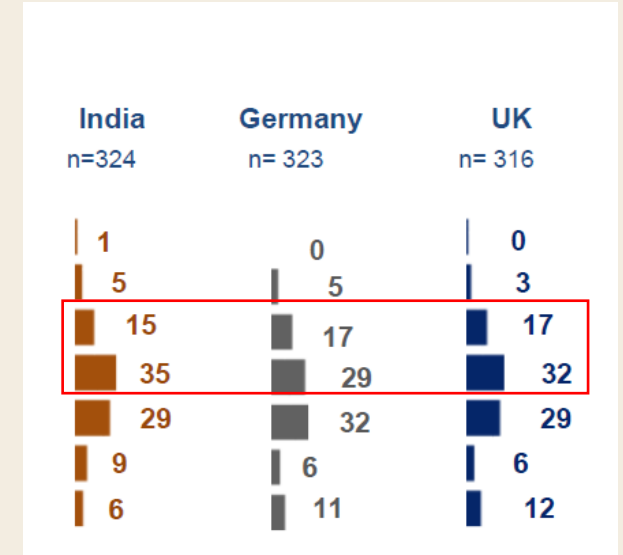
4. LISTEN TO A BROAD RANGE OF SOURCES



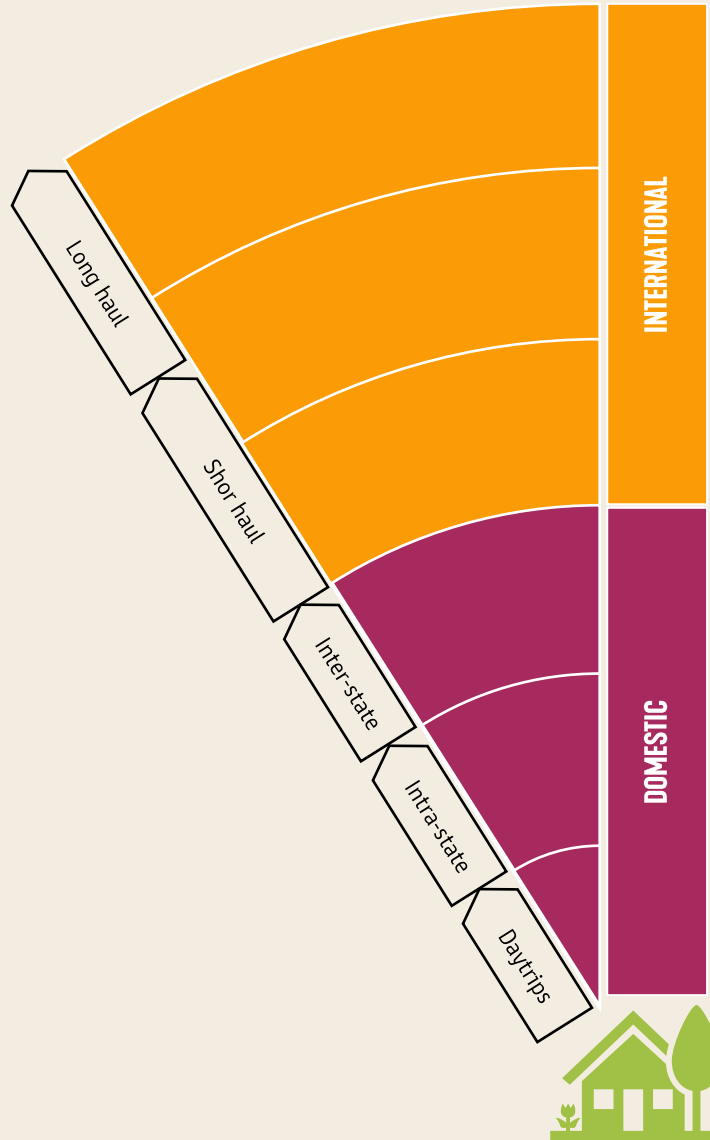
PESSIMISTIC



OPTIMISTIC



5. FISH WHERE (AND WHEN) THE FISH ARE



Other travellers

High-yield holiday

Business
VFR
Youth

Leisure: longer stay

Leisure: weekend
Business

Leisure: daytrips, overnight
VFR

98% of Australians would travel five months after restrictions lifted (TripAdvisor, Qualtrics)

67% of Australians would travel two months after restrictions lifted (TripAdvisor, Qualtrics)

'Eating at a café or restaurant' ranked first (44%) as most common activities to spend money on when pandemic is over (CT Group)

6. THINK CONSUMER FIRST

A DOSE OF OUR OWN MORTALITY

A REFOCUSING ON FAMILY AND
FRIENDS – THE INNER CIRCLE

(INCREASE IN VFR?)

GREATER AWARENESS OF THE
FRAGILITY OF LIFE ON EARTH

(SUSTAINABILITY DRIVE?)

THE DESIRE TO MAKE A DIFFERENCE OR
FIND MEANING

(RISE IN VOLUNTOURISM?)

FAST DIGITAL TRANSFORMATION

PROOF THAT IMPORTANT MEETINGS
CAN BE DONE REMOTELY

(FEWER BUSINESS FLIGHTS?)

NEGATIVE IMPACT OF REMOTE
WORKING ON CORPORATE CULTURE

(MORE NEED FOR BUSINESS EVENTS?)

HIGHER CONTROL NEED

GREATER WILLINGNESS TO PAY
FOR PHYSICAL SPACE

(PREMIUM AIRLINE SEATS WITH
SOCIAL SPACING?)

GOOD / FREE RESOURCES

TRAVEL

- Skift
- ATEC
- UNWTO
- IATA
- PATA
- Tourism & Transport Forum
- OAG
- ADARA

CONSULTANCY

- McKinsey & Company
- PWC
- Oxford Economics
- WARC

RESEARCH

- Dynata
- Roy Morgan
- Global Web Index
- YouGov
- Nature| The Lab
- STR
- IPSOS
- KANTAR
- TalkWalker
- Forward Keys
- Sorjen
- PhocusWire
- Euromonitor

LEIGH SORENSEN

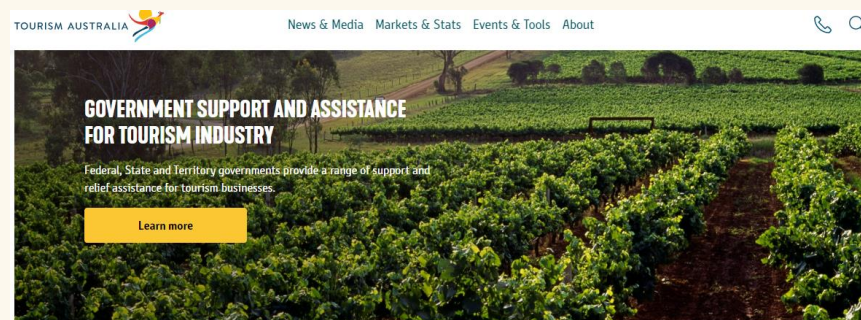
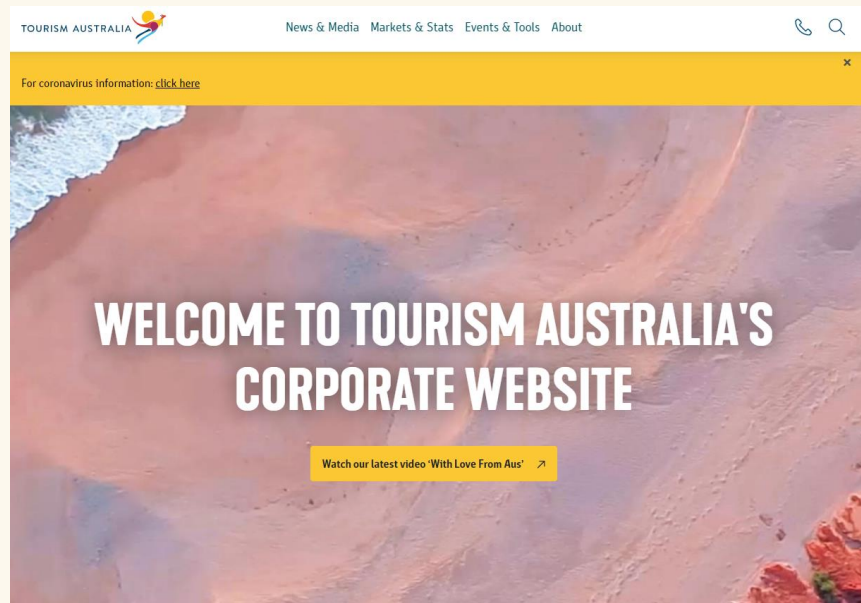
General Manager – Industry Relations

The image features several stylized, light green 'Y' shapes scattered on the left side of the page. Each 'Y' is composed of three thick, rounded strokes. The central 'Y' is significantly larger and rendered in a dark blue color, serving as the main title. The other 'Y' shapes are smaller and semi-transparent, creating a sense of depth and movement.

QUESTIONS?

SIGN UP TO HEAR FROM US

North America Industry Update – May 20th, 2020



TOURISM STATISTICS

Access the latest research and statistics that Tourism Australia provides to consumers and industry.



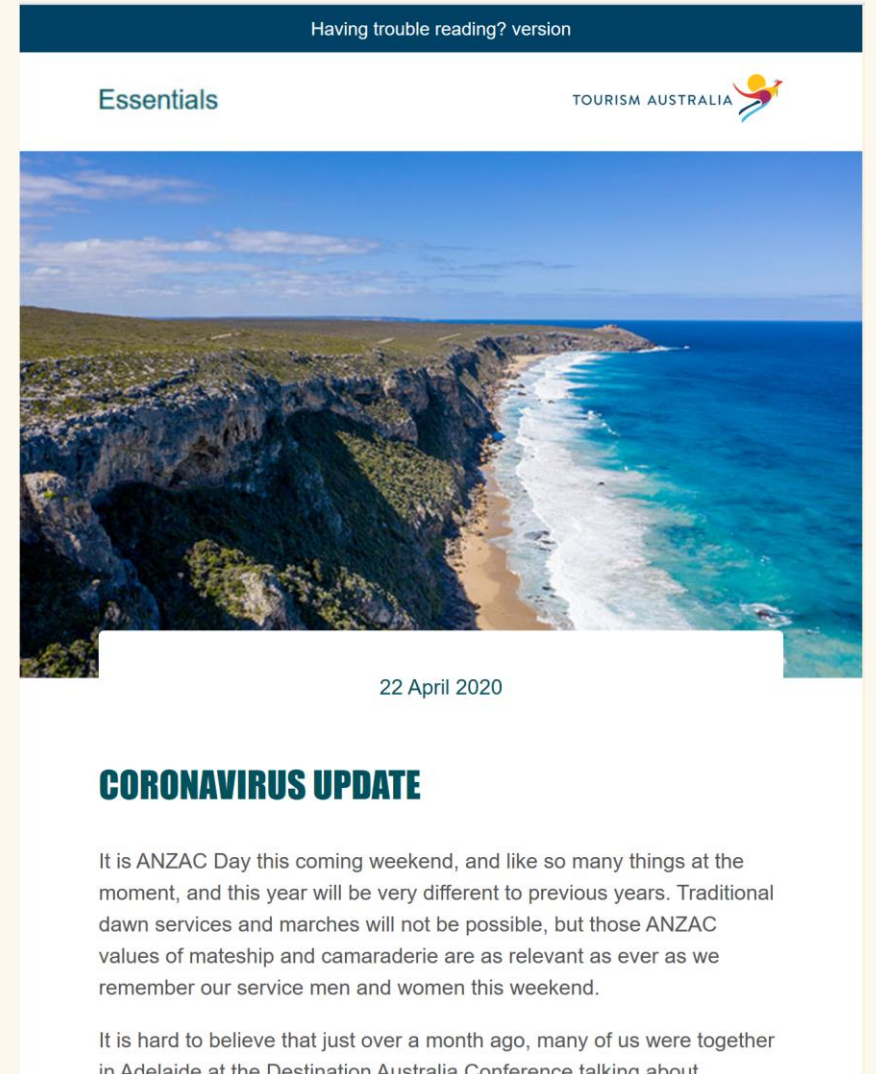
SUBSCRIBE TO OUR NEWS

Tourism Australia produces a range of industry, media and special interest newsletters. Keep up to date and subscribe to the newsletters you would like to receive via email.



INTERNATIONAL MARKET PERFORMANCE

Access our interactive market profile for statistics on international travellers to Australia including visitation, spend and more.



Having trouble reading? [version](#)

Essentials

TOURISM AUSTRALIA

22 April 2020

CORONAVIRUS UPDATE

It is ANZAC Day this coming weekend, and like so many things at the moment, and this year will be very different to previous years. Traditional dawn services and marches will not be possible, but those ANZAC values of mateship and camaraderie are as relevant as ever as we remember our service men and women this weekend.

It is hard to believe that just over a month ago, many of us were together in Adelaide at the Destination Australia Conference talking about

NEXT UPDATE

Tuesday, Jun 2nd
2pm PST/5PM EST

A photograph of two surfers in black wetsuits walking on a sandy beach at sunset. They are carrying a long, white surfboard with yellow trim. The sky is a mix of blue and orange, with a few colorful kites visible in the distance. The ocean waves are breaking on the shore. The text 'THANK YOU' is overlaid in large, white, bold letters on the right side of the image.

THANK
YOU