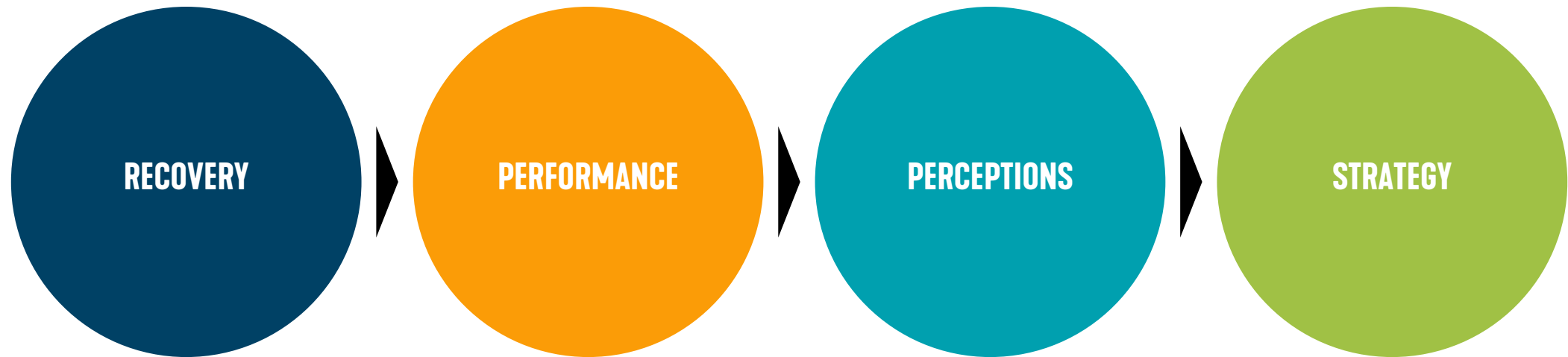


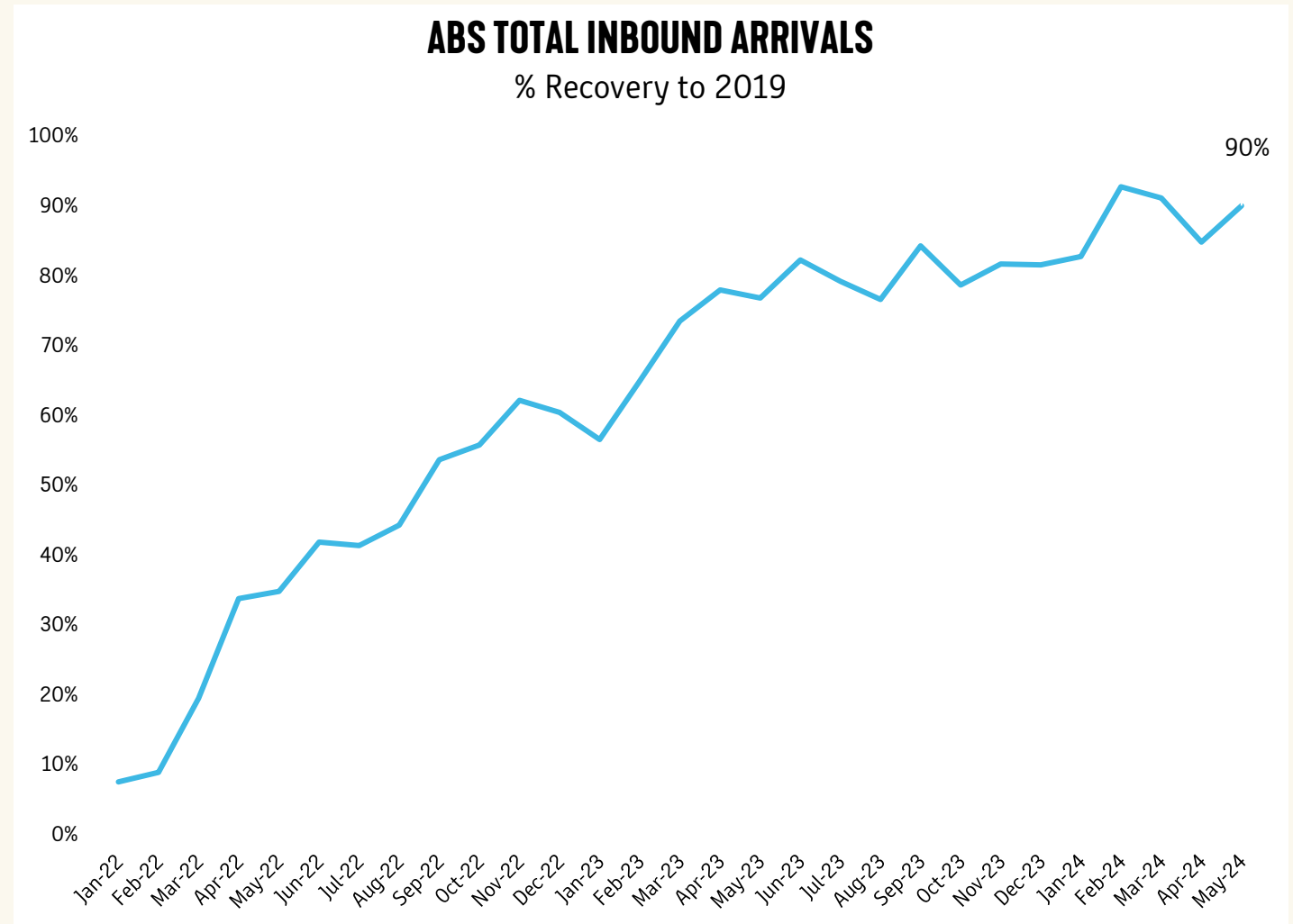
LEARNINGS FROM THE LATEST TOURISM DATA

THE NEXT 25 MINUTES...



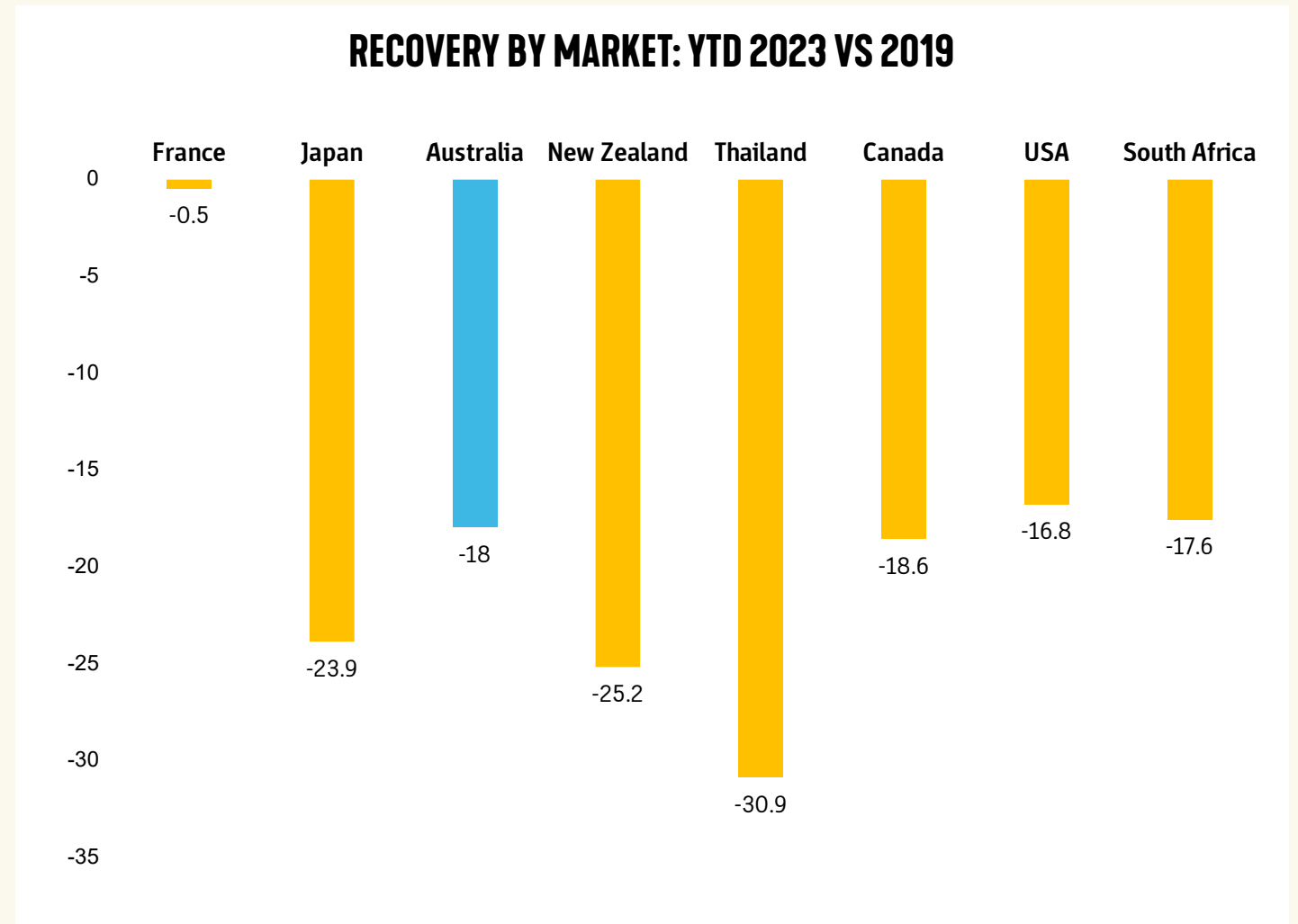
RECOVERY

OUR RECOVERY IN INBOUND VISITATION MARCHES ONWARDS...



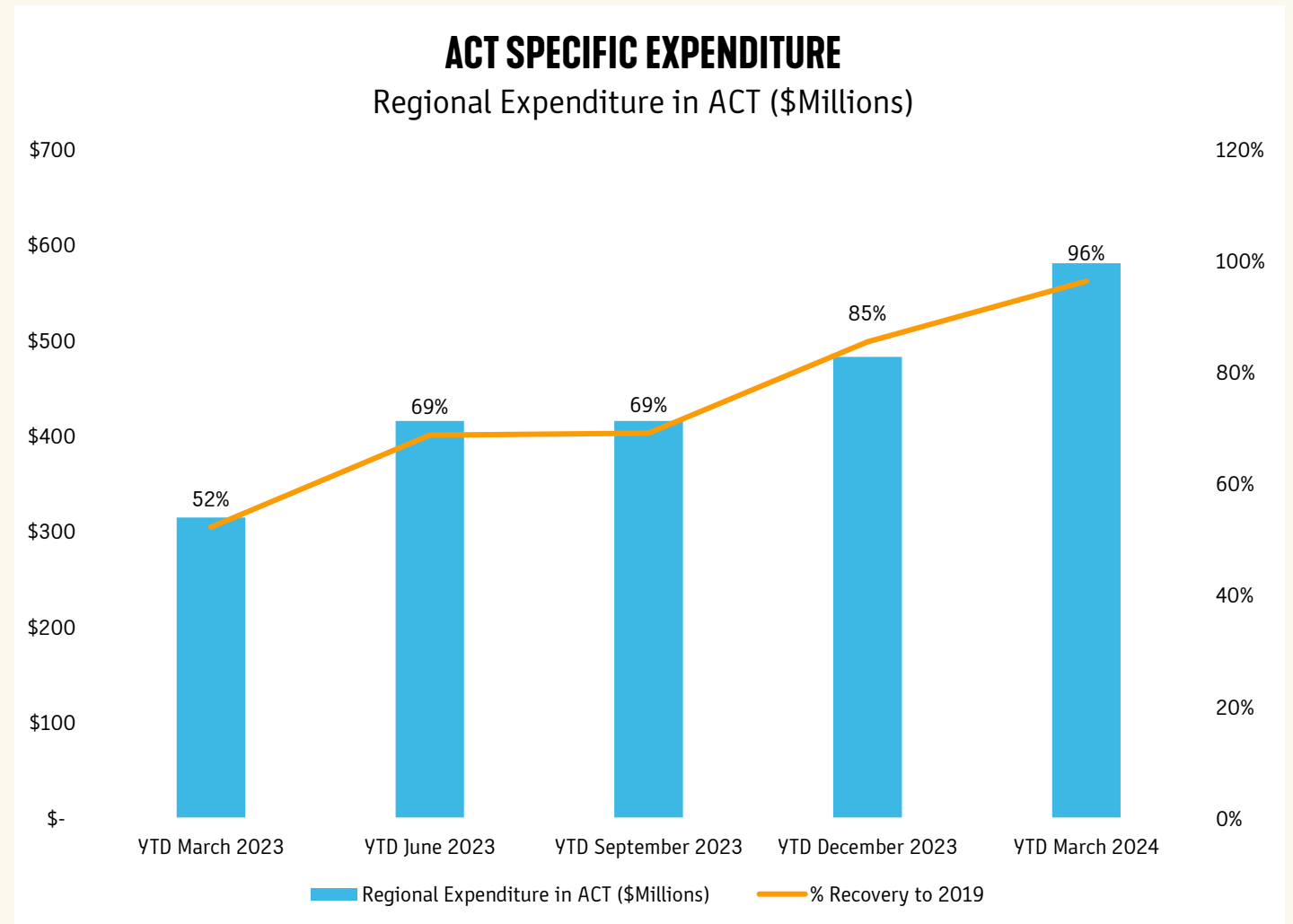
Source: ABS Short-Term Arrivals

THAT RECOVERY IS COMPARABLE TO OUR DIRECT COMPETITORS



Source: WTTC Global Tourism Barometer, March 2024

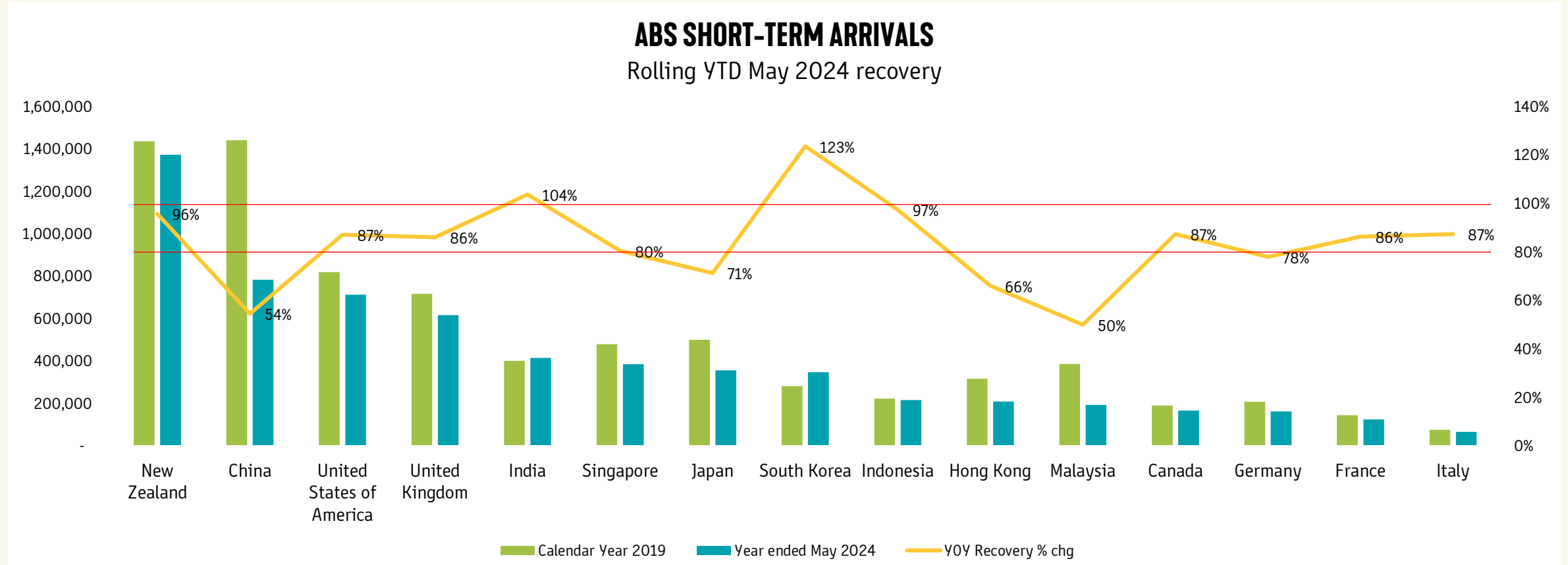
EXPENDITURE FOR THE ACT WELL ON THE WAY TO RECOVERY



Source: TRA REX

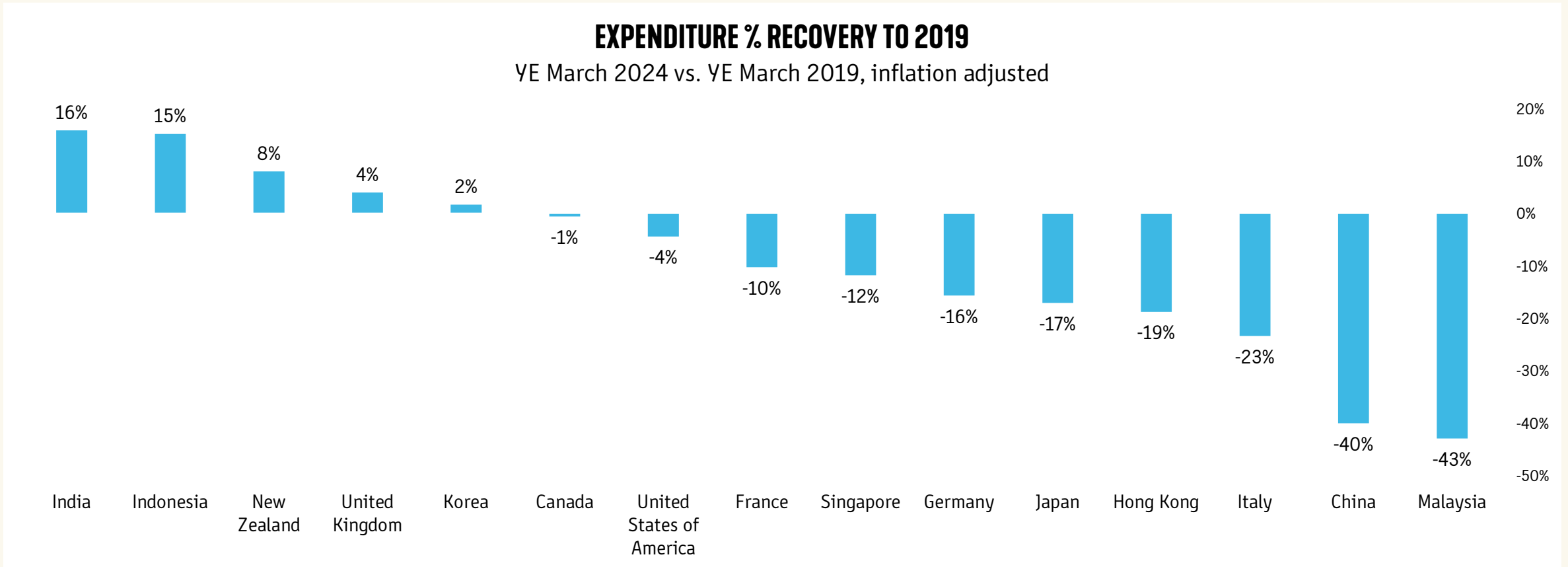
PERFORMANCE

RECOVERY IN VISITATION VARIES ACROSS MARKETS

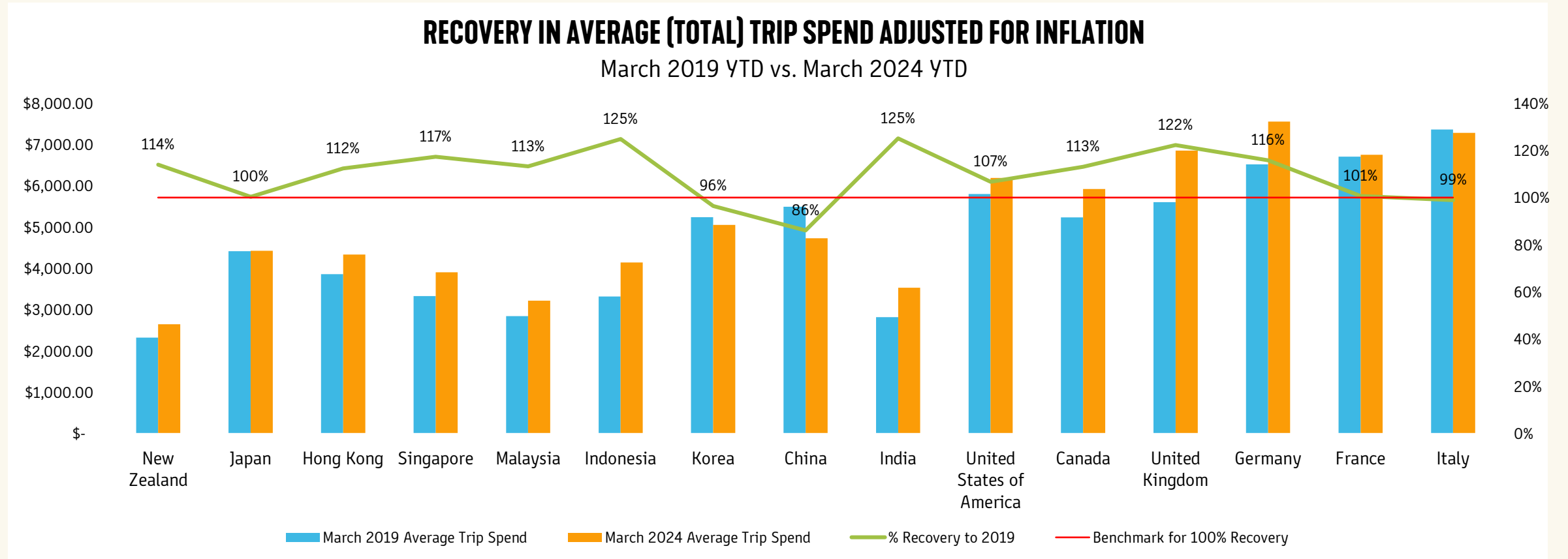


Source: ABS Short-Term Arrivals
 *Recovery to CY 2019

EXPENDITURE IS UP, BUT INFLATION IS A FACTOR

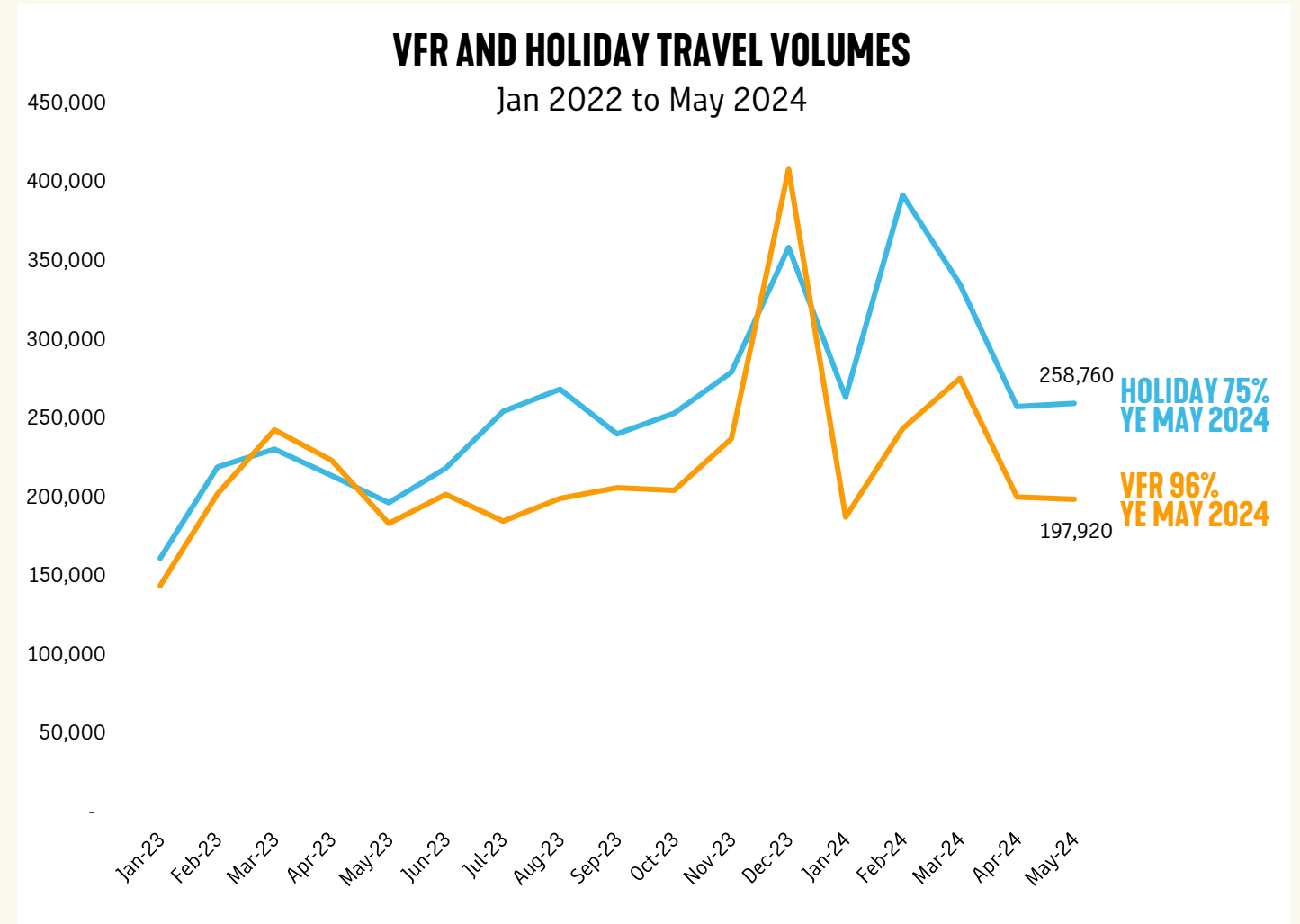


AVERAGE TRIP SPEND IS LARGELY UP!



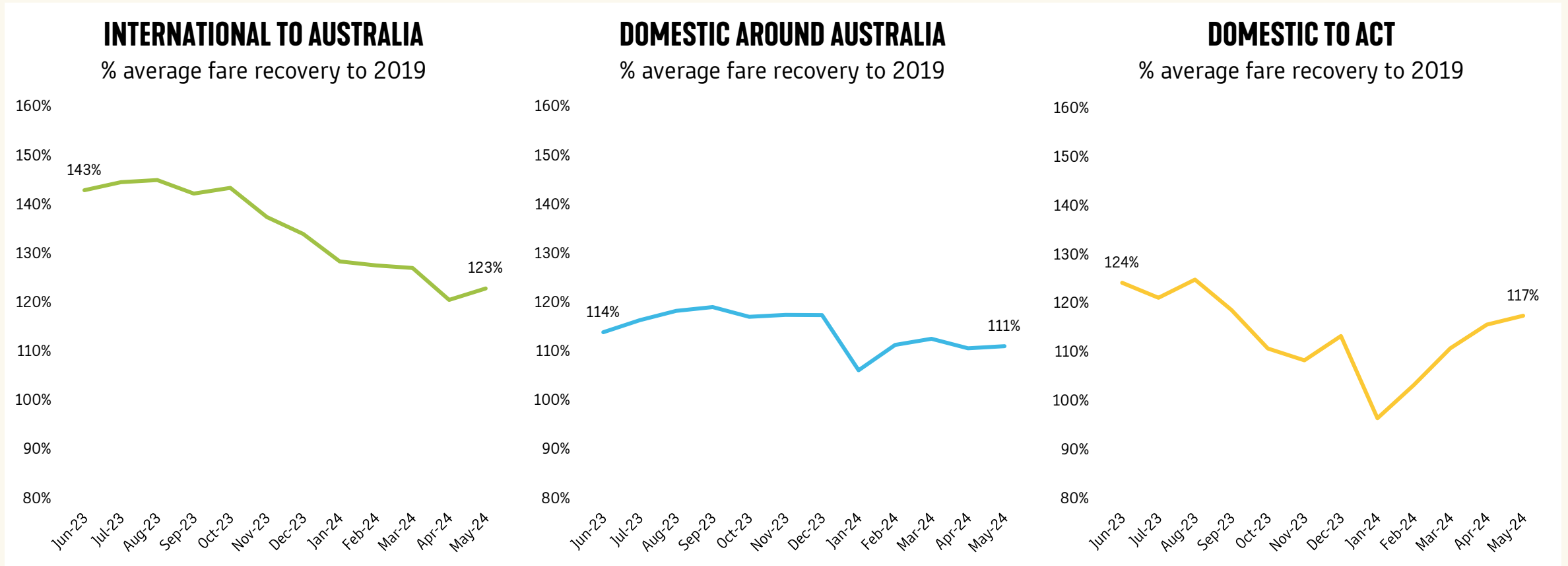
THERE'S A BIG DIFFERENCE BETWEEN HOLIDAY AND VFR, HOWEVER.

Holiday spend is around 40% higher than VFR spend levels which has big implications for yield.



Source: ABS Short-Term Arrivals

AVIATION COSTS ARE UP BUT IT'S HARD TO COMPARE TO 2019



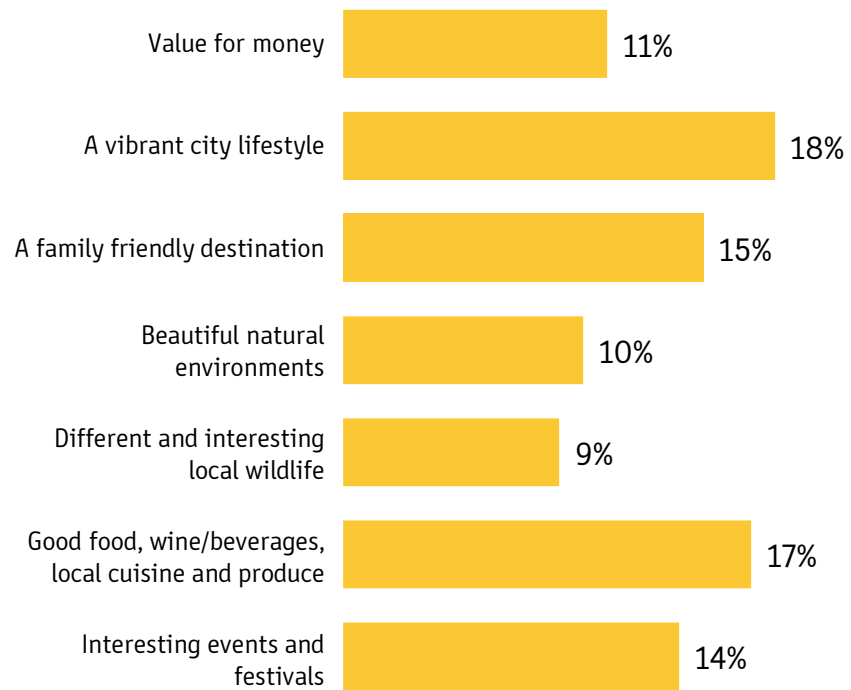
Source: IATA Airports IS

PERCEPTIONS

CANBERRA'S CURRENT ASSOCIATIONS

CANBERRA DESTINATION ASSOCIATIONS

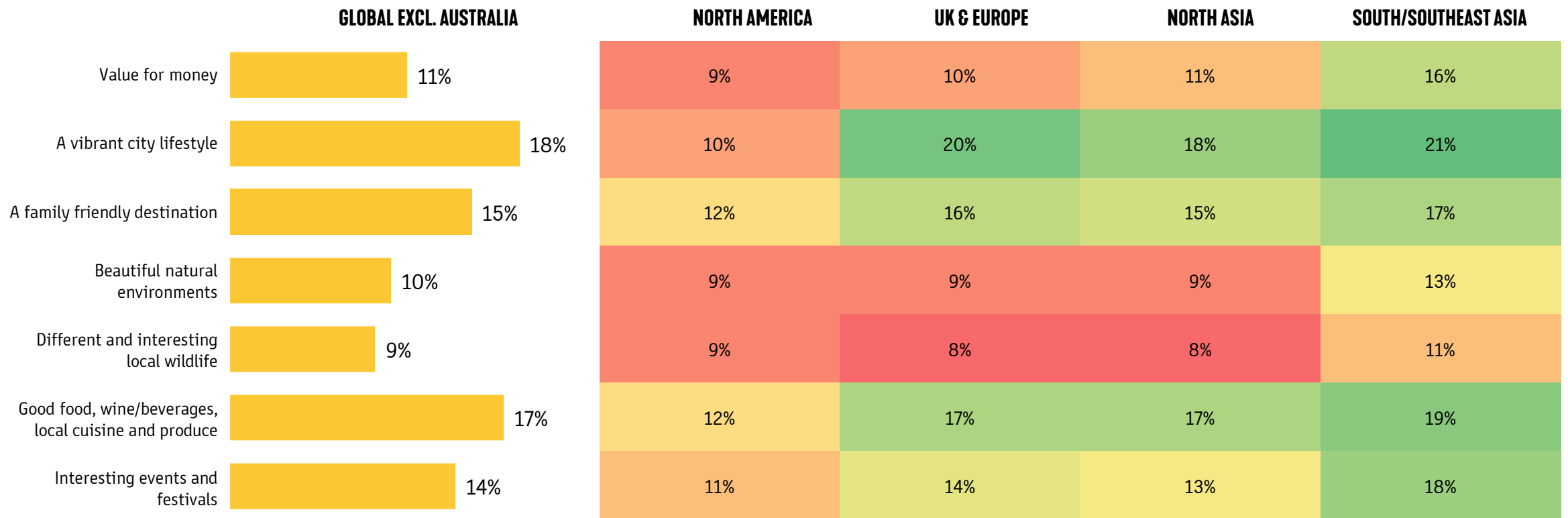
GLOBAL EXCL. AUSTRALIA



Source: Tourism Australia Consumer Demand Project
 B7. Which of these Australian destinations do you associate with the following attributes?
 Base: Oct-Dec 23 Global excl. Australia (n=12,616), North America n=1,504, UK & Europe n=3,006, North Asia n=3,600, South/Southeast Asia n=3,605.

PROXIMITY PLAYS A BIG PART IN DEPTH OF UNDERSTANDING

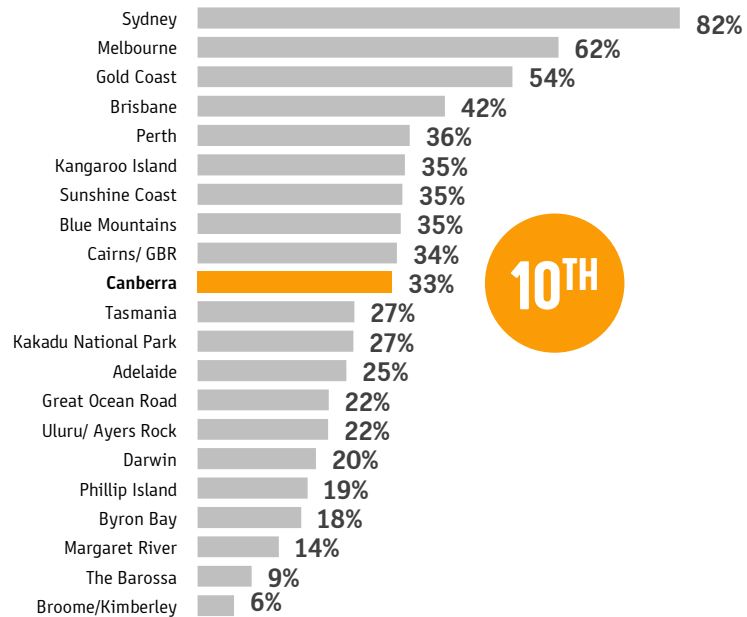
CANBERRA DESTINATION ASSOCIATIONS BY SOURCE MARKET REGIONS



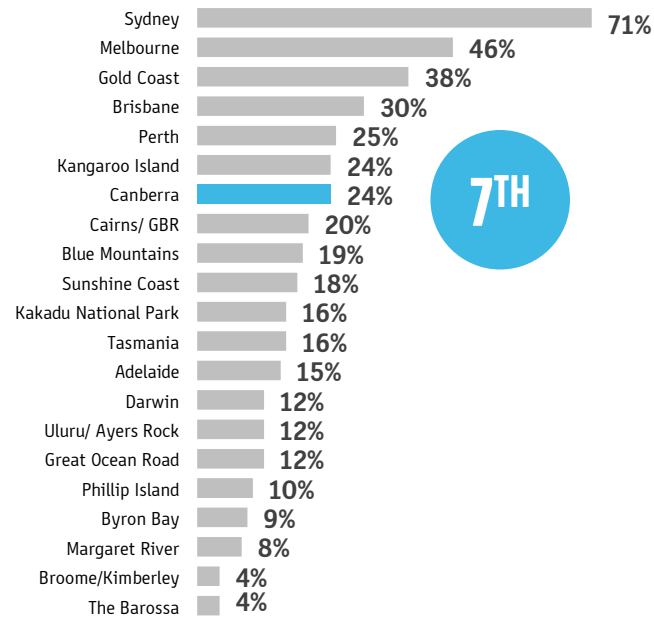
Source: Tourism Australia Consumer Demand Project
 B7. Which of these Australian destinations do you associate with the following attributes?
 Base: Oct-Dec 23 Global excl. Australia (n=12,616), North America n=1,504, UK & Europe n=3,006, North Asia n=3,600, South/Southeast Asia n=3,605.

IN GOOD NEWS...CANBERRA SELLS!

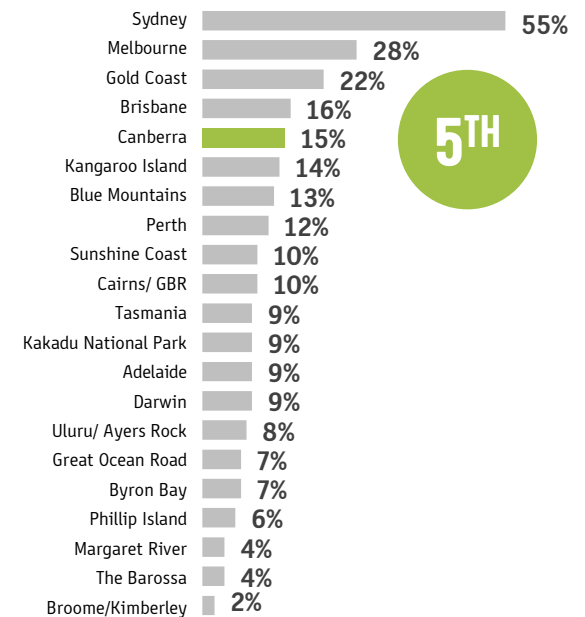
AWARENESS OF DESTINATIONS (of those aware of Australia)



CONSIDERATION OF DESTINATIONS (of those considering Australia in the next 4 years)

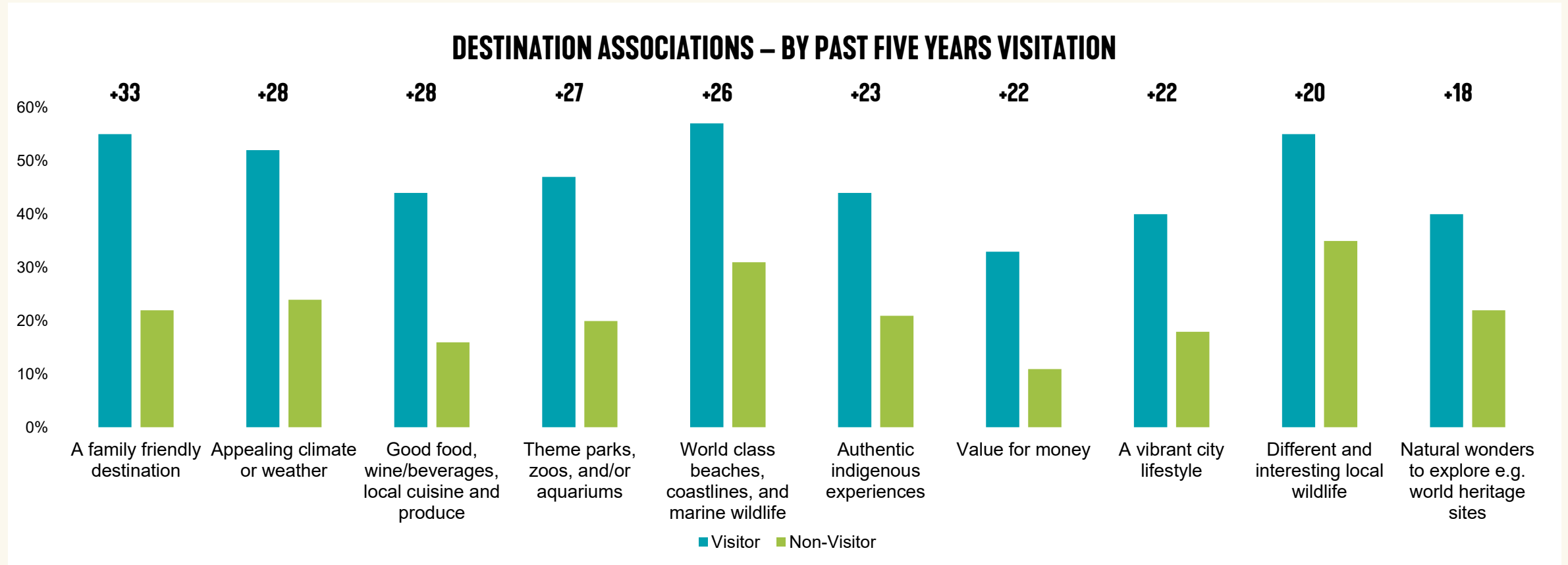


PLANNING TO VISIT (of those who have already decided to visit Australia for their next holiday)



Source: CDP VISITCANBERRA 2023

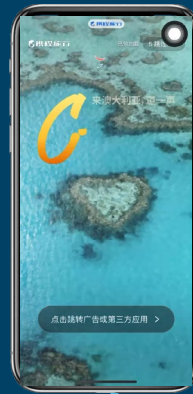
AND IN GENERAL, AUSTRALIA STILL OVER DELIVERS



Source: Tourism Australia Consumer Demand Project
 Base: Oct-Dec 23 Global excl. Australia (n=12,616)
 Question: You said [factor] is important to you. Which of these destinations do you associate with [factor]? (Those who ever visited Aus vs those who have not)

STRATEGY

THE BRAND CAMPAIGN CONTINUES TO SPEARHEAD OUR WORK



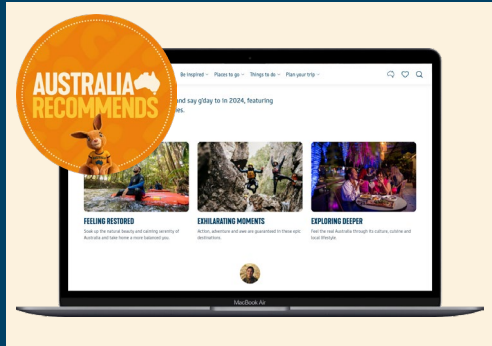
PARTNERSHIPS

HIGH YIELDING TRAVELLERS

CULTURE & EVENTS



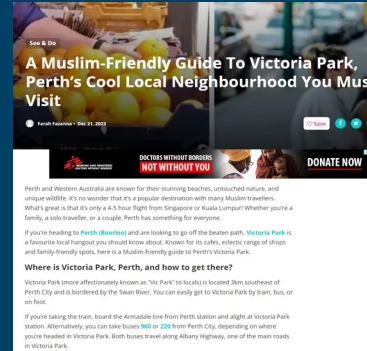
SUPPORTED BY A BREADTH OF ACTIVITIES



CONTENT CAMPAIGNS



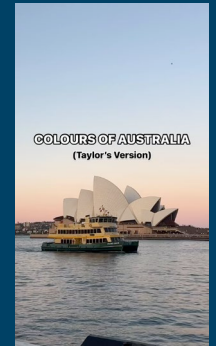
EVENTS



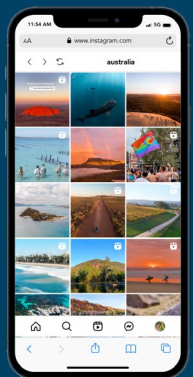
BROADCAST & IMHP



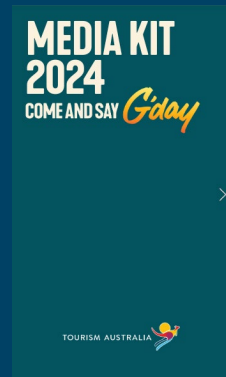
WORKING HOLIDAY MAKER



TOPICAL MOMENTS



SOCIAL MEDIA



GLOBAL PR



ADVOCACY



CONTENT PARTNERSHIPS



BUSINESS EVENTS

FILL SEATS VIA AIRLINE PARTNERSHIPS



CHINA

HONG KONG & SOUTH KOREA

MALAYSIA

MALAYSIA

SOUTH KOREA



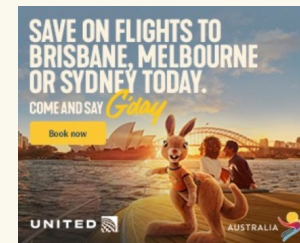
JAPAN

8 X MARKETS

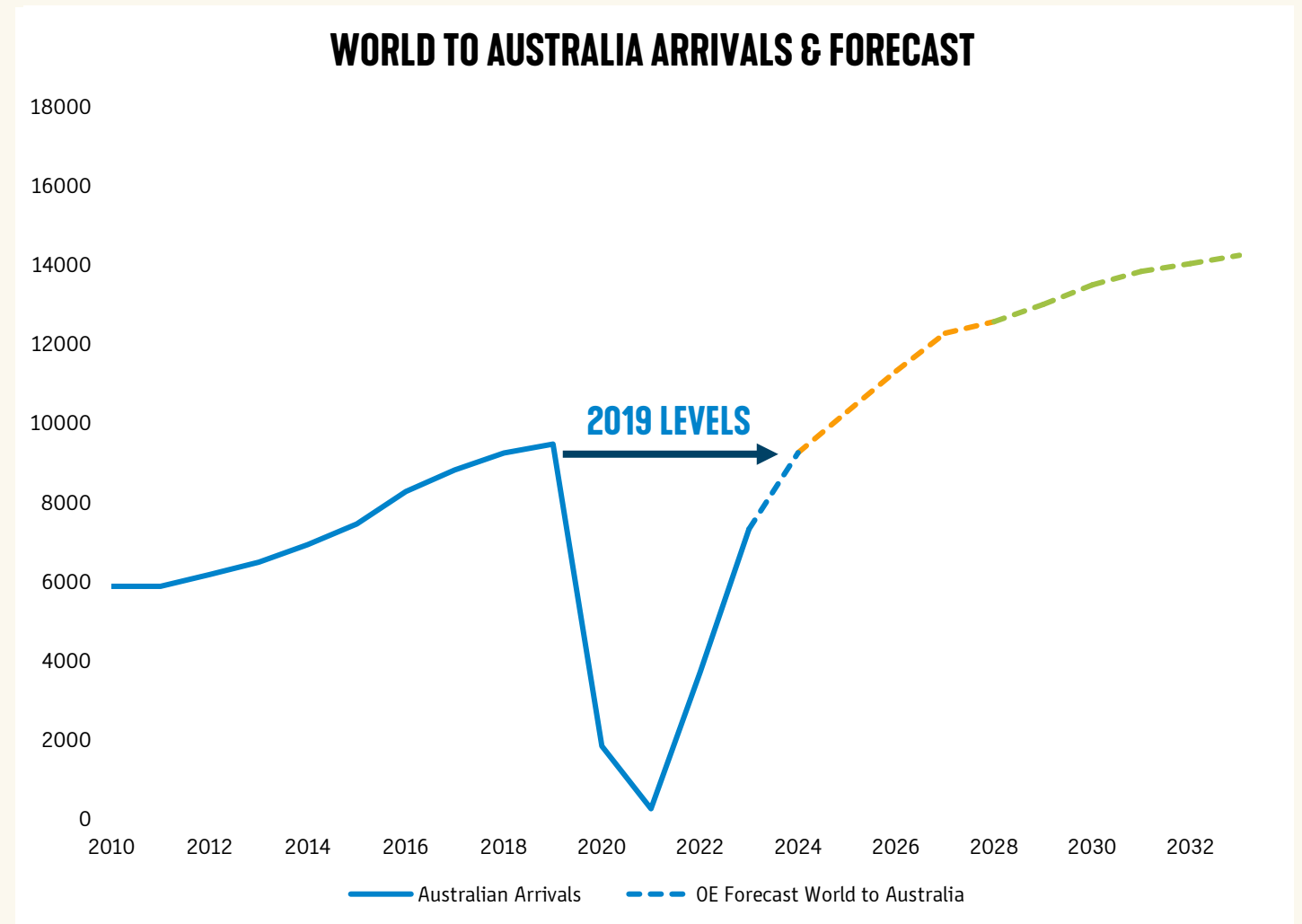
7 X MARKETS

USA

CANADA



SHIFTING OUR FOCUS TO THE NEXT CHAPTER OF SUSTAINABLE GROWTH



Sources: Oxford Economics (OE) Forecasts, December 2023.

GROWING AUSTRALIAN TOURISM IN THE LONGER TERM

DRIVE DEMAND ENABLING A COMPETITIVE AND SUSTAINABLE TOURISM INDUSTRY

RECOVER

GET BACK TO 2019 LEVELS

‘REACTIVE OPPORTUNITIES’

DRIVE

MAINTAIN A HIGH GROWTH RATE

‘INVEST IN CURRENT COMPETITIVE ADVANTAGES’

DIVERSIFY

DRIVE NEW, SUSTAINABLE GROWTH

‘BROADEN APPEAL FOR FUTURE ADVANTAGES’

THANK YOU