

ROB DOUGAN

GM MARKETING STRATEGY

‘UNPRECEDENTED EVENTS’

It's an overused statement, but it's not wrong. This crisis is more severe than any other in living memory so predicting outcomes is challenging without any like for like proxies.

INFORMATION ACCURATE AT 24 APRIL 2020

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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**

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**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**

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

It's impossible to give accurate forecasts in this highly fluid environment but scenario planning highlights the potential outcomes and forces us to think about how to achieve them.

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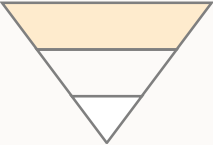
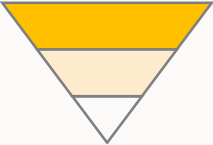
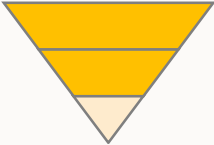

THERE WILL NOT BE ONE
DAY THAT THINGS WILL GO
BACK TO NORMAL. IT WILL
BE **TRIAL AND ERROR.**

PM SCOTT MORRISON

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

Plans developed in this environment are certain to change but having something down on paper will either align the organisation or give people a chance to challenge and collaborate around a better or at least more robust plan.

	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

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

There's lots of great data available right now. The challenge is selecting the most useful metrics and sources of data and following them closely instead of getting constantly distracted by the wealth of other fascinating information out there. This example is how TA is determining which stage of recovery each market is in.

FREQUENT DATA

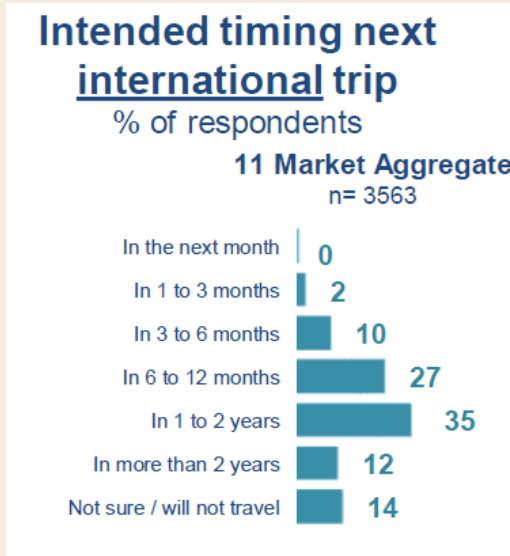


FREQUENT ASSESSMENT

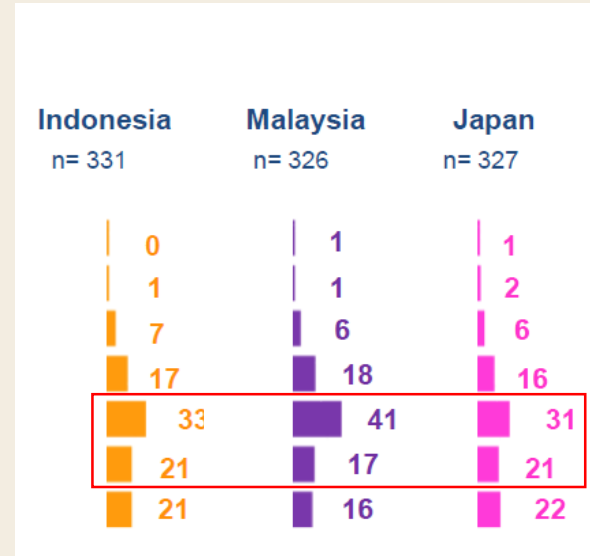
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4. LISTEN TO A BROAD RANGE OF SOURCES

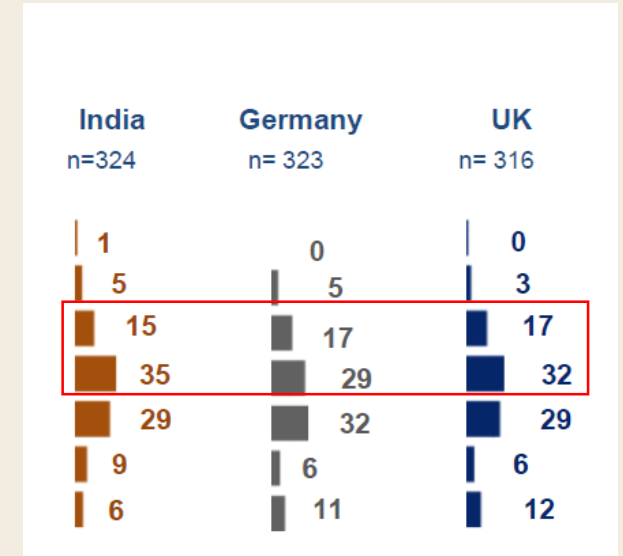
This data indicates the mindset of consumers in various markets. It's important to understand the consumer from a variety of angles – what they're thinking but also what they're doing in terms of search or bookings etc.



PESSIMISTIC



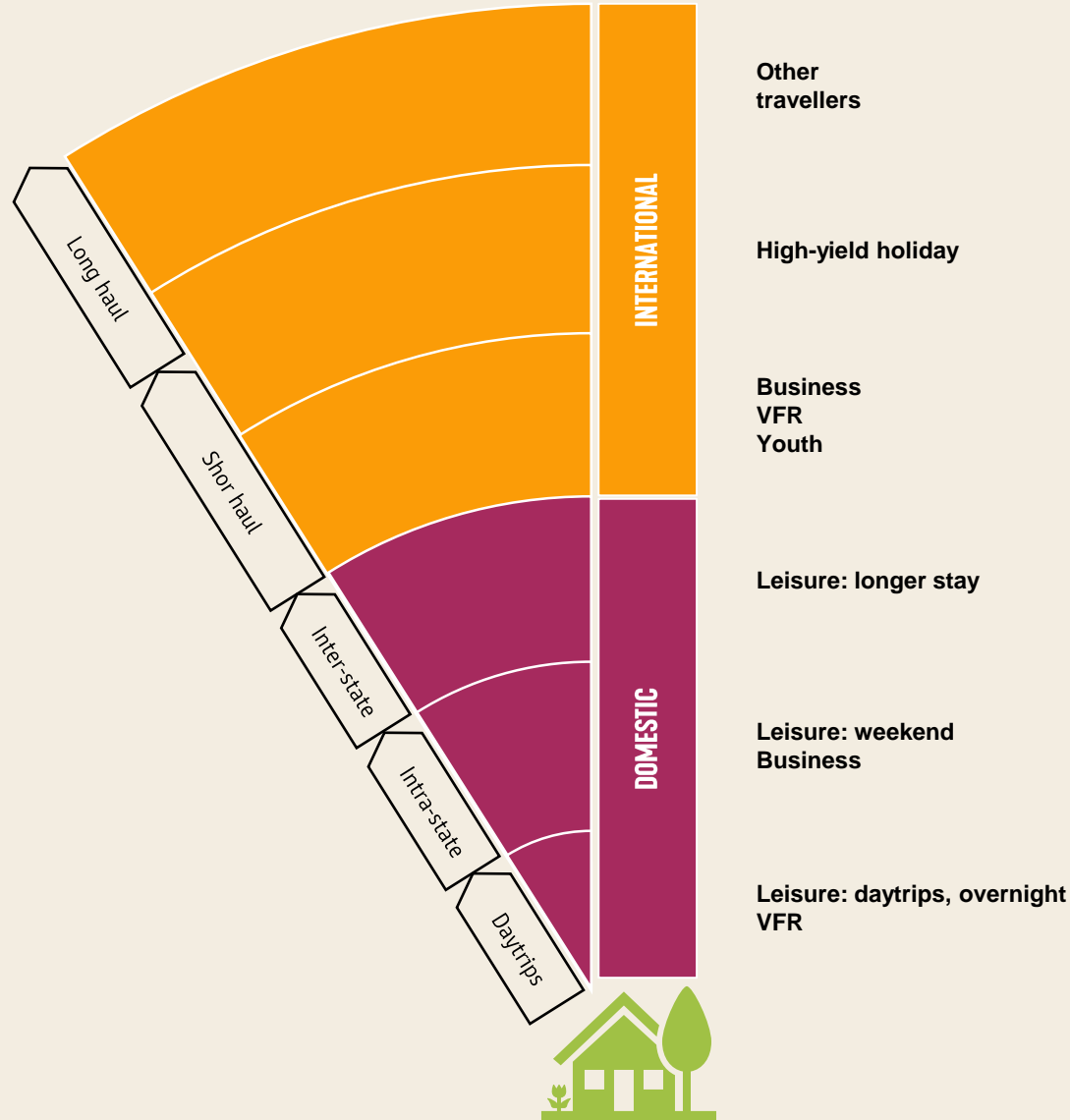
OPTIMISTIC



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5. FISH WHERE (AND WHEN) THE FISH ARE

Research and early data indicates that travellers will spread out from their home locations in concentric rings with short trips preceding longer ones for both domestic and international audiences. There are also specific audience segments more likely to travel early on so these people will be the most lucrative targets in the short term, and the best place to look for a swift recovery.



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

At this stage it's impossible to know exactly what the longer term changes in consumer behaviour will be as a result of this global crisis. The fundamentals of human nature or Australia's offering won't change, but to remain competitive we have to be prepared to adapt our offering future needs even better than we have in the past.

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?)

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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

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A night sky filled with stars and constellations, with a silhouette of a forest in the foreground. The text "THANK YOU" is centered in the sky.

THANK YOU