

ICONIC GROWTH & MEDIocre OUTCOMES

27 June 2018

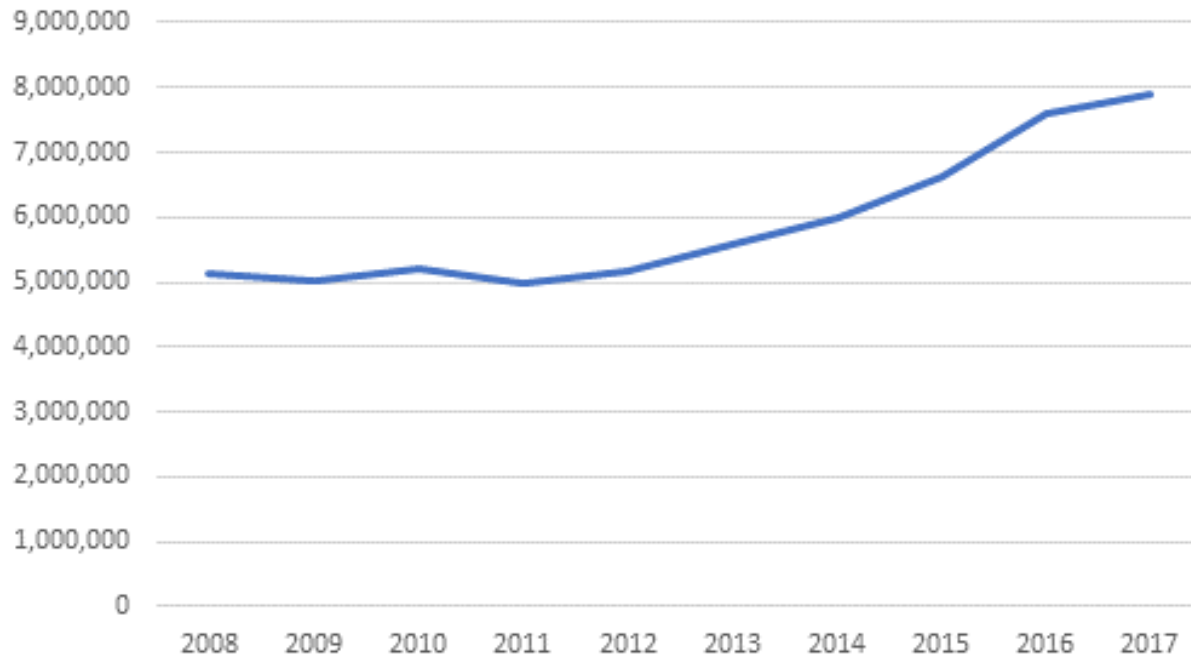


EASY AS 1,2,3

- FIT trends and insight
- Dealing with this insight
- Greyhound relevant product innovation

AUSTRALIA'S INCREASING POPULARITY

Total Australian Holiday visitors 2008 to 2017



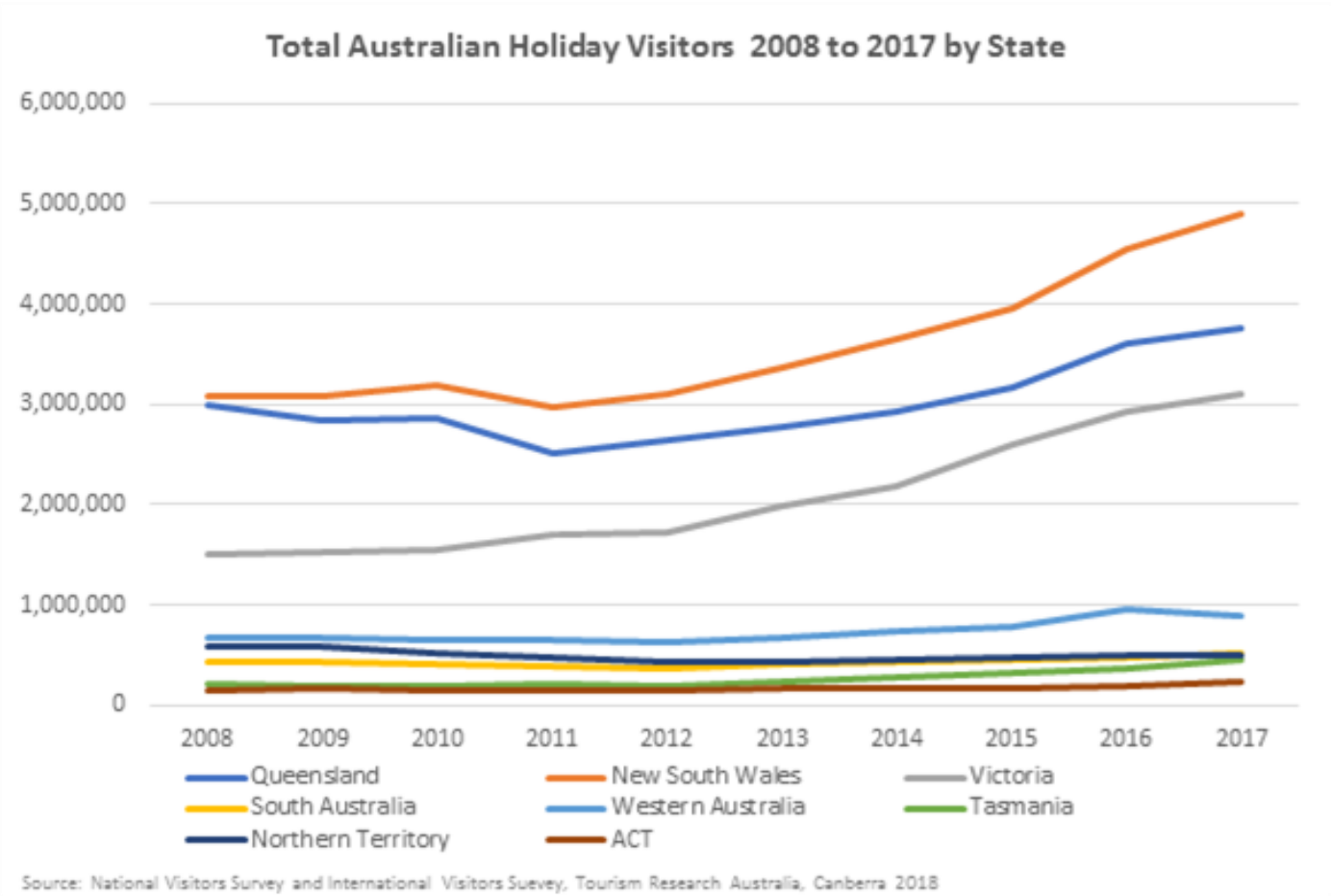
Growth of 2,768,000

numbers of visitors 2008 – 2017

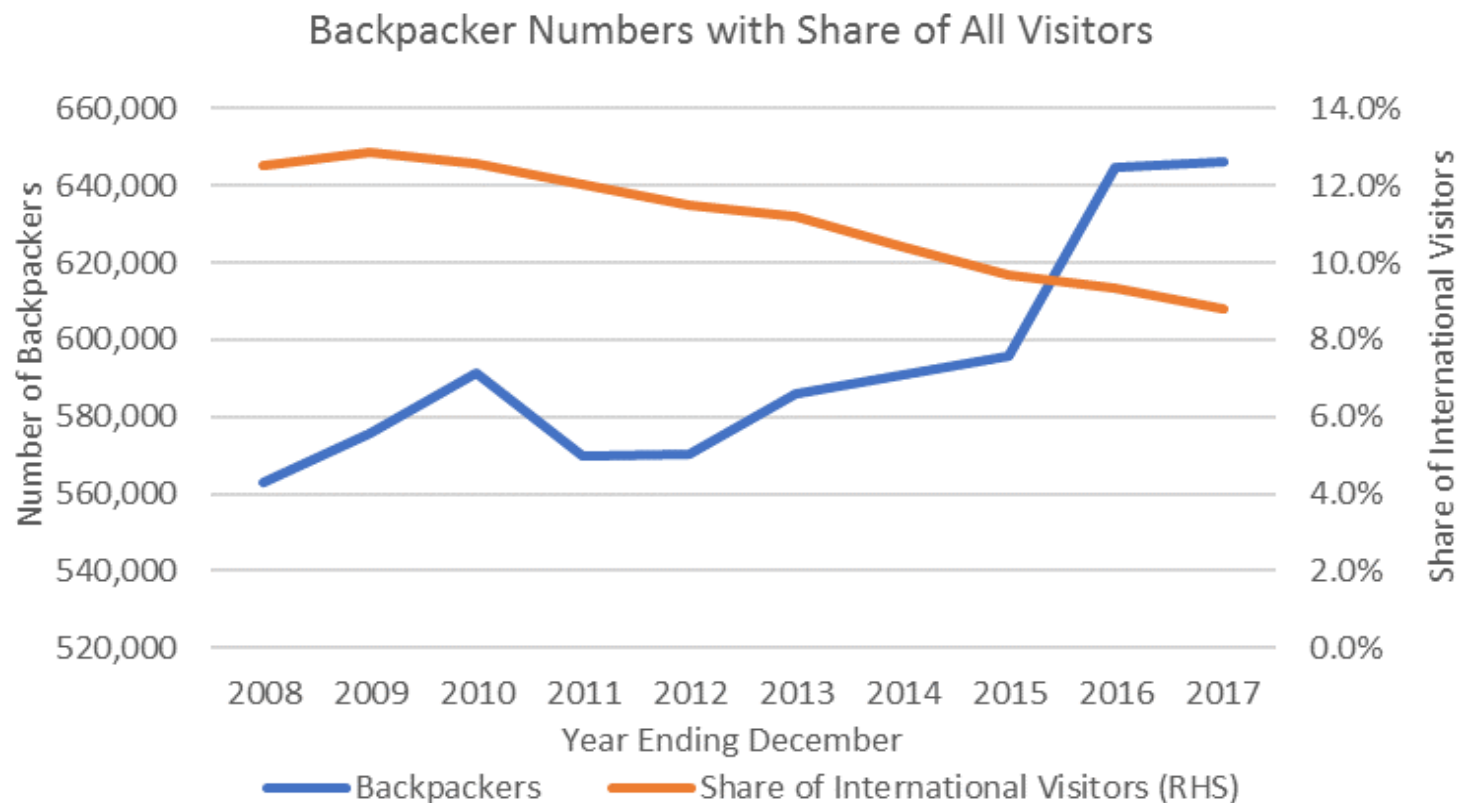
= 54 % Growth

Source: International Visitors Survey and International Visitors Survey, Tourism Research Australia, Canberra 2018

THREE STATE RACE



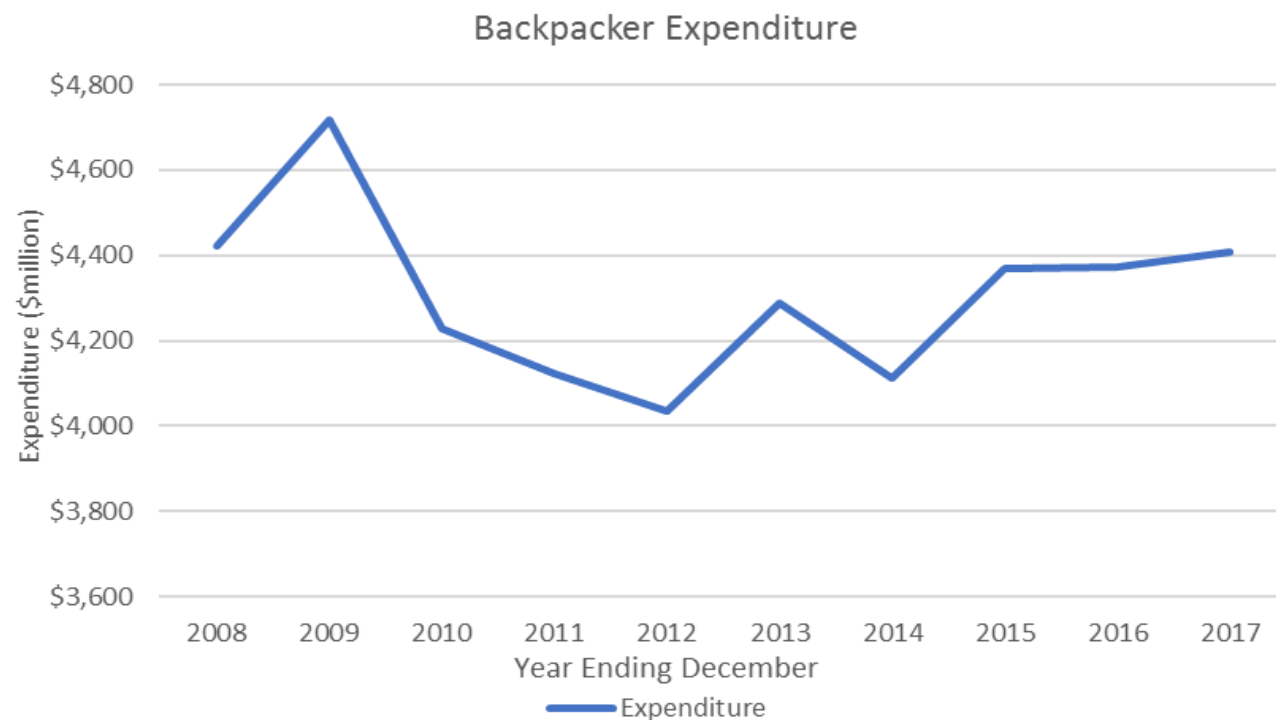
NUMBER OF BACKPACKERS WITH SHARE OF INTERNATIONAL VISITORS



- Number of Backpackers increased 2012-2016
- Growth flat in 2017
- Share of total international visitors declining

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

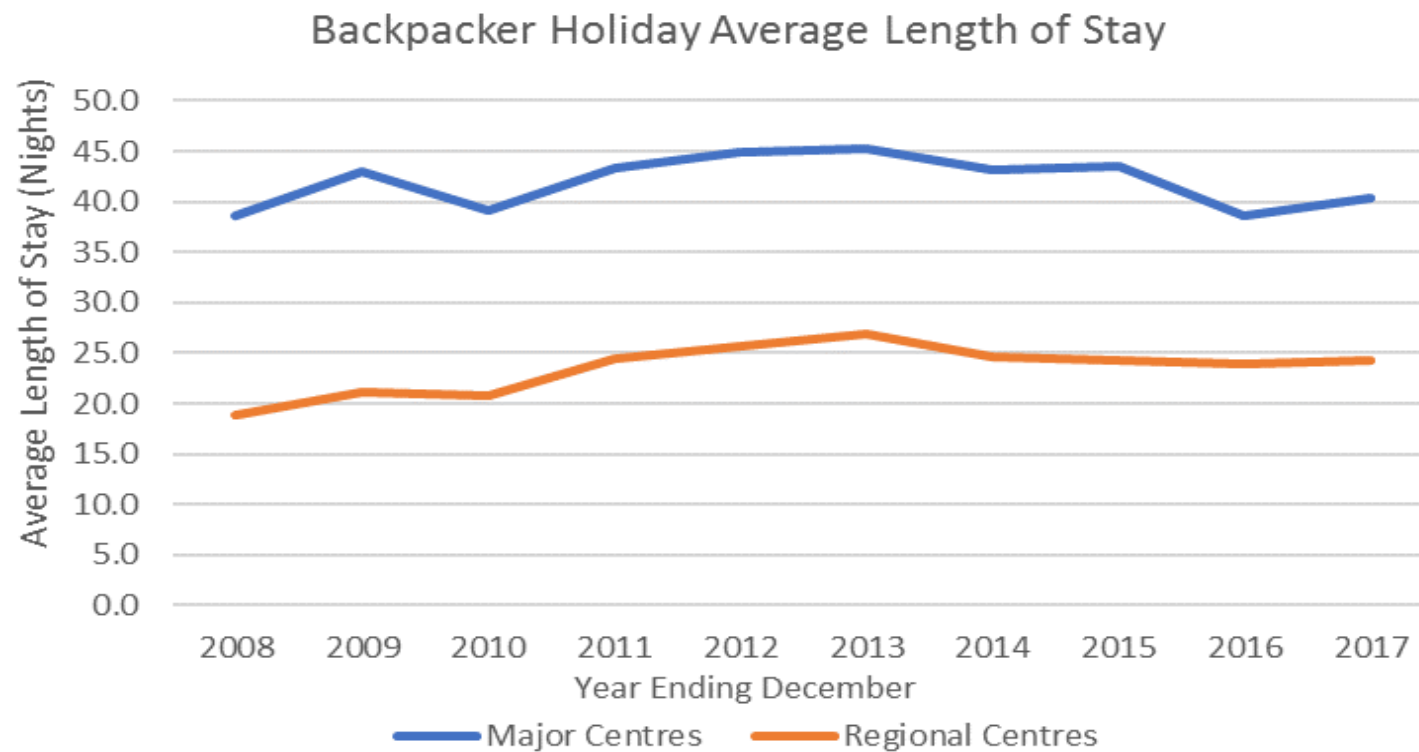
SPENDING UP 2016/17



- Upward trend since 2012
- Flatter growth last two years
- Not yet returned to 2009 peak

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

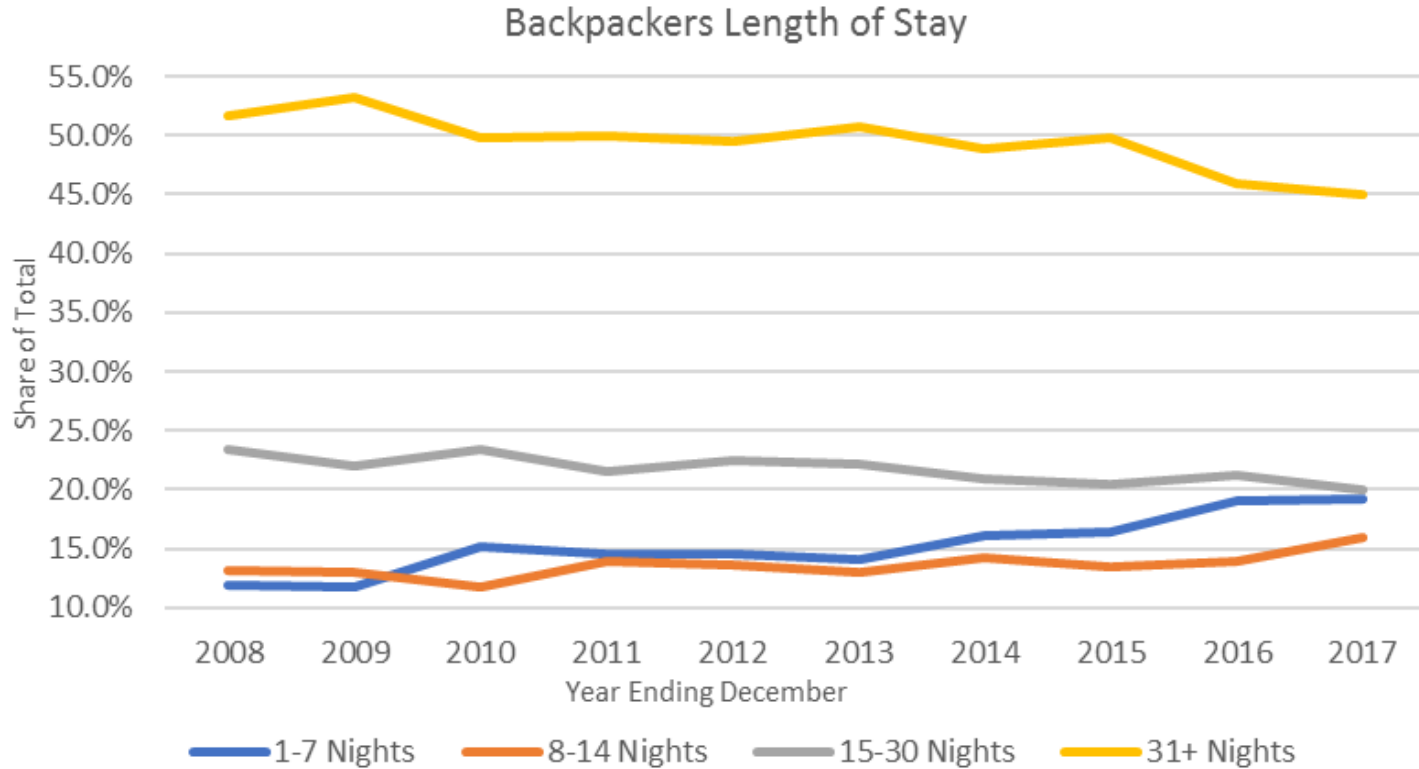
LENGTH OF STAY HOLDING, MAJOR CENTRES RETURN TO GROWTH



- Major Centres have seen slight decline since 2013
- Regional Centres slight decline since 2013

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

BACKPACKER LENGTH OF STAY BY SHARE



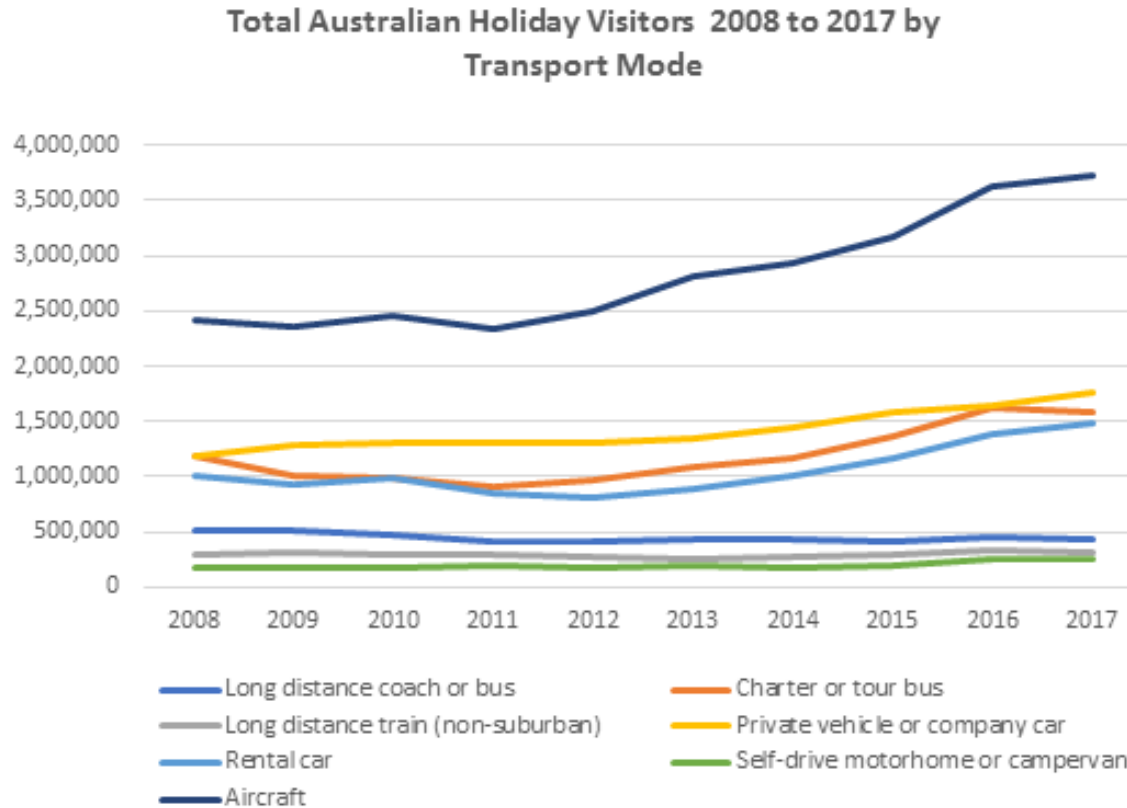
- Long stay backpackers (30+ Nights) were in decline
- Growth in shorter stay (<14 Nights)

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

ICONIC GROWTH – MEDIOCRE OUTCOMES

- Why is the backpacker tourism industry experiencing such a mixed bag of business performance across the country?
- Greyhound 16/17 growth subdued?
- Why is it so?
- Love of icons at the expense of dispersal

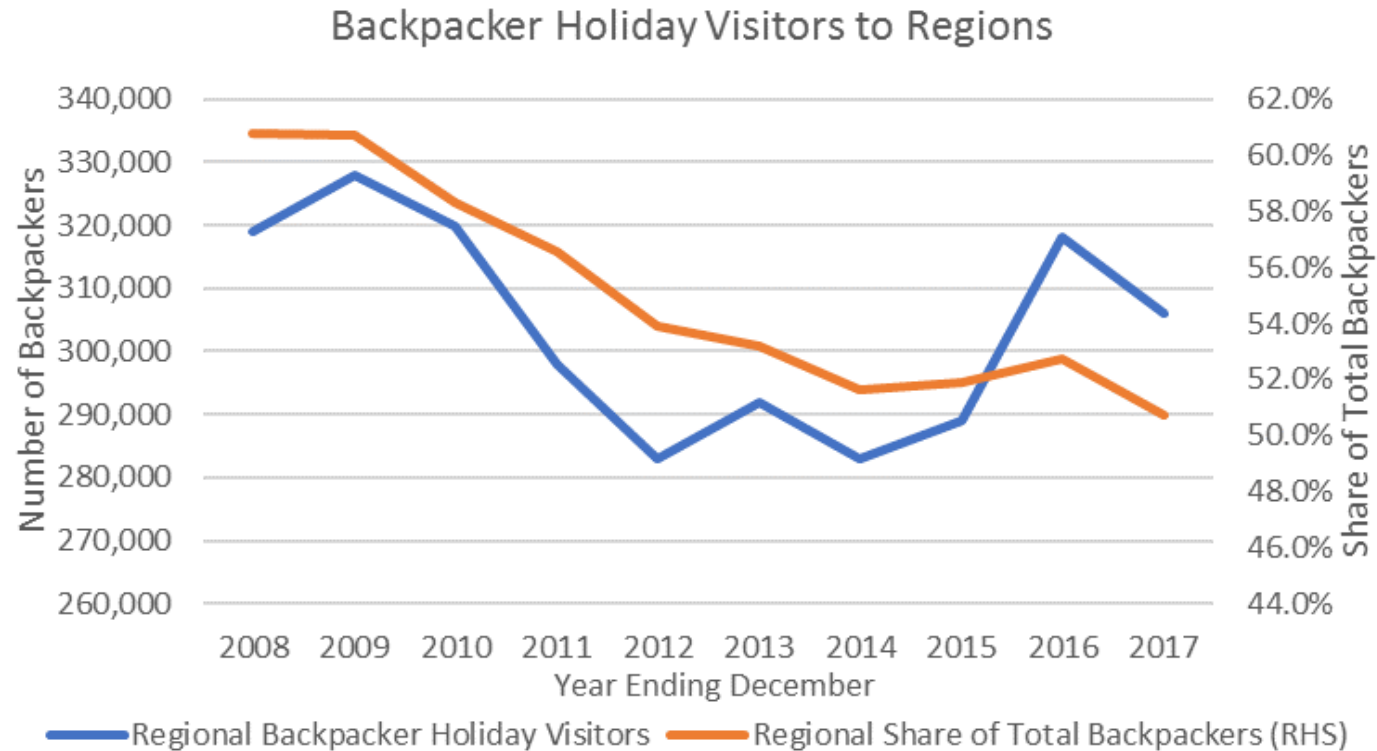
FAST & INDEPENDENT MODES ON TREND



- Aircraft & Rental/private car long term gain
- Long distance Coach travel share relatively stable 16/17

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

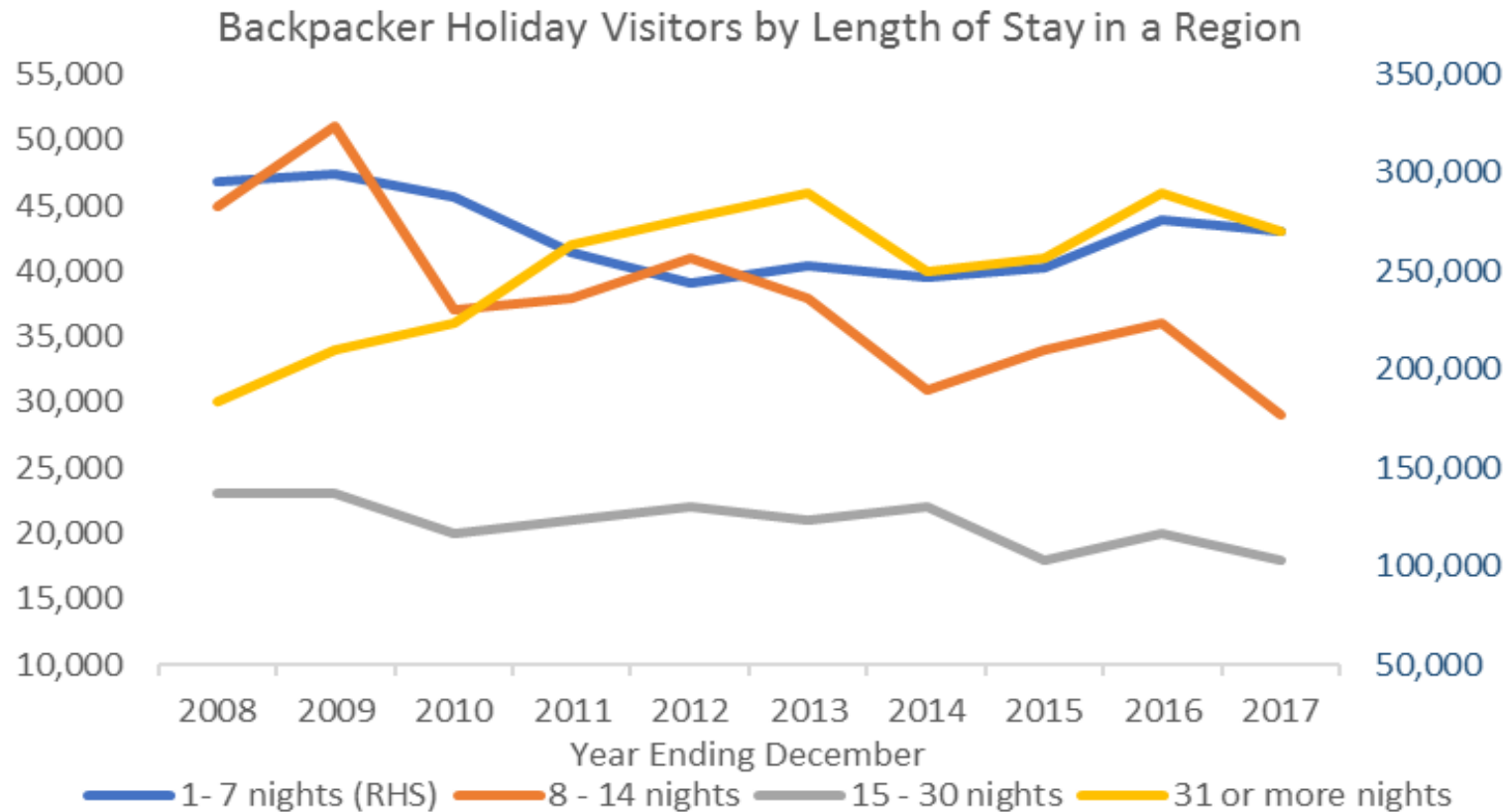
REGIONAL CENTRE'S ARE LOOSING OUT



- Decline in regions' share of backpackers

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

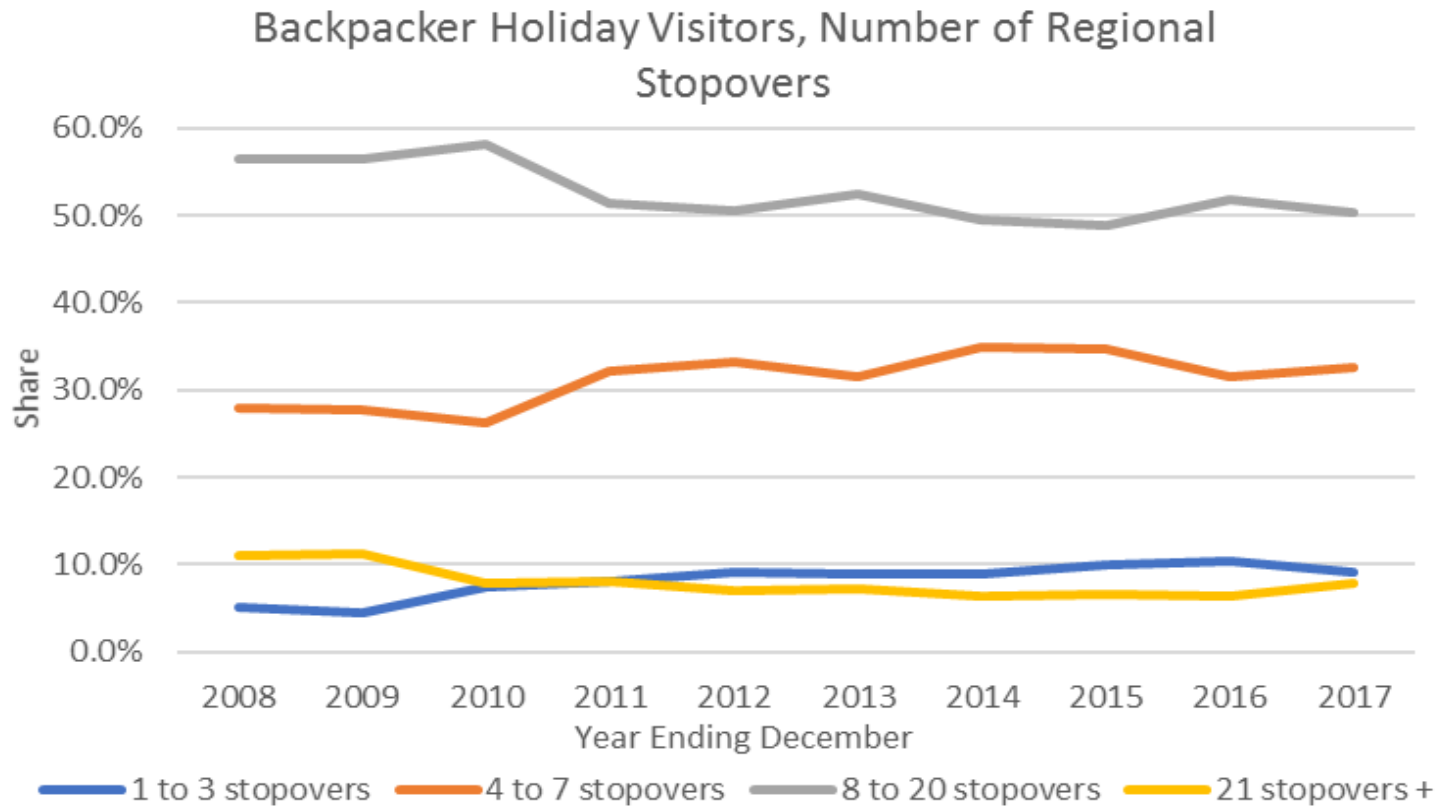
BACKPACKER HOLIDAY VISITORS REGIONAL CENTRE LENGTH OF STAY



- Fewer regional stopovers + fewer nights in each stopover.

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

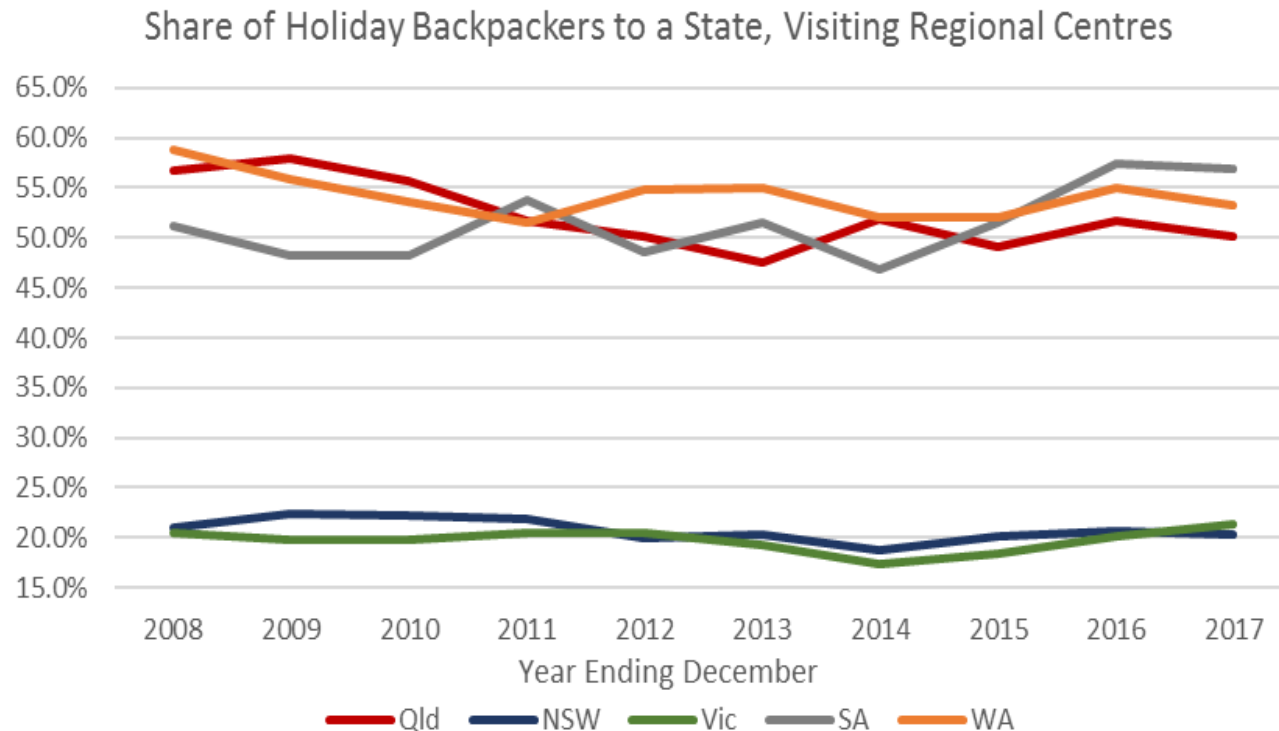
BACKPACKER HOLIDAY VISITORS REGIONAL CENTRE STOPOVERS



- Change in backpacker regional travel habits
- Decline in the number of regional stopovers
- Over last 10 years, 8-20 stopovers were down 14% and 21+ stopovers were down 31.4%

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

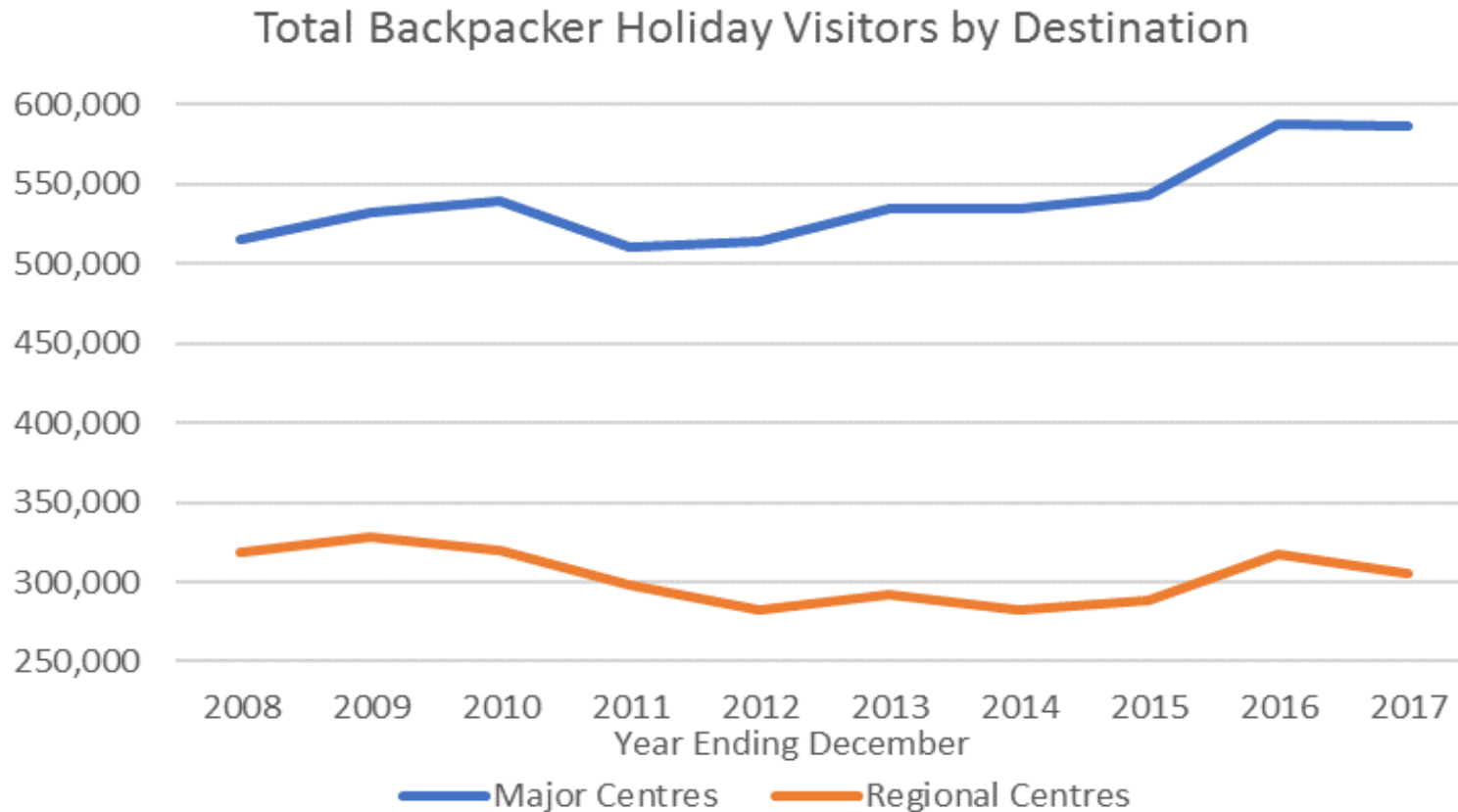
REGIONAL CENTRE'S LOSING MARKET SHARE



- All states except SA were declining
- Regional share for Vic and NSW suggests potential

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

BACKPACKER HOLIDAY VISITORS



- Major centres continuous growth since 2011
- Regional centres slight growth since 2014 with decline 2016/17

(Source: International Visitor Survey, Tourism Research Australia, Canberra 2018)

TOURISM DISPERSAL IS DOWN AND WARRANTS AN INTESIFIED FOCUS

- Dispersal creates unique and compelling experiences to share brand Australia & maintain its vitality and viability as a leading backpacker destination
- We need to remove barriers to travel, to and within Australia
- The Government has a role to play to encourage tourism dispersal to support regional communities & economies
- Coach services provide for the best tourism transport solution to service regional communities as well as representing the lightest public transport carbon footprint.
- Possible solutions
 1. Campaign to encourage coach travel and positive rural economy impact
 2. R & D fund to promote Hybrid / Electro and MASS tourism initiatives
- Greyhound is integral to backpacking in Australia & we need to be part of the solution!

TAKE IT TO THE
WHIMIT!



WHIMit

TRAVEL WITHOUT LIMIT

ALL FOR WHIMIT & WHIMIT FOR ALL

- Whimit is a revolutionary innovation for Greyhound and for contemporary tourism mobility in Australia

WHAT IS WHIMIT?

“ANY DIRECTION – ANY ROUTE – ANY TIME – “TRAVEL WITHOUT LIMIT”

- Whimit is a tourism bus pass that is sold in days, not distance, destination or direction. Whimit customers can travel on the Greyhound network anywhere around Australia for the duration of their pass: **any direction any route.**
- Whimit provides everything our customers dream of: choice, flexibility and freedom to travel how they want when they want. **“Less planning, more travel” = DISPERSAL!**
- Whimit has a start up flavor with the taste of flexibility and peace of mind that can only be provided by a Coach company with **113 years of experience.**
- Whimit has been developed to meet the **needs and preferences of backpackers** following 6 months of comprehensive research & analysis.
- Whimit analysis shows that the average travel time for an East Coast trip is 23 days with **92% of customers** completing their coach travels within **6 weeks**

WHIMIT	PRICE
7 Day	\$249
21 Day	\$399
45 Day	\$449
60 Day	\$559
90 Day	\$649
120 Day	\$799
365 Day	\$1,499

Brand Essence

We are transport and tourism innovators. We are curious, courageous, and we have an appetite to see what's over the horizon. Our sole purpose is to express ourselves in a way that influences our audience to do the same. Why be restricted when you can freely travel, live for the moment and whim it?

WHAT DOES WHIMIT LOOK LIKE?



WHAT DOES WHIMIT LOOK LIKE?



Travel any direction without limit
on Australia's largest coach network.

How many days will you Whimit?

GREYHOUND.COM.AU/WHIMIT #WHIMIT

7-365 DAY WHIMITS AVAILABLE

*See full terms & conditions and greyhound.com.au/whimit. Prices in AUD. You have twelve months to commence your travel from date of purchase. Once travel has commenced your Whimit is non-refundable. Refunds requested prior to first day of travel incur a 50% cancellation fee. Whimit is non-transferable to another person. Whimit is available for travel on any of Greyhound Australia's network services. All terms and conditions are subject to change without notice.



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A1 & A3 POSTERS

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A1 & A3 POSTERS

WHAT DOES WHIMIT LOOK LIKE?

1 WISH 2 YOU 3 WERE

4 HERE 5 HERE 6 HERE

7 HERE 8 HERE 9 HERE

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1. WhimIt's Beach, 2. Sydney, 3. WhimIt's Beach, 4. WhimIt's Beach, 5. WhimIt's Beach, 6. WhimIt's Beach, 7. WhimIt's Beach, 8. WhimIt's Beach, 9. WhimIt's Beach

1 WISH 2 YOU 3 WERE

4 HERE 5 HERE 6 HERE

7 HERE 8 HERE 9 HERE

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A1 & A3 POSTERS

WHAT DOES WHIMIT LOOK LIKE?

#WHIMIT INSPO

FIRST, DON'T FORGET TO SHARE YOUR #WHIMIT FOR THE CHANCE TO HAVE IT FEATURED AS ONE OF THESE!

Greyhound Australia is a Greyhound Australia.

FAQs

Q. IS THERE A LIMIT ON THE NUMBER OF BUS TRIPS ACROSS THE COUNTRY?
A. Nope, just go for it.

Q. ARE ANY ROUTES EXCLUDED?
A. Whimit lets you travel without limit, any direction and at any time.

Q. DO I HAVE TO TRAVEL IN THE SAME DIRECTION?
A. With Whimit you can head back as many as you want.

Q. WHAT ARE THE MUST-SEE ATTRACTIONS SO I CAN PLAN MY ROUTE EASILY?
A. We've highlighted all of the must-see experiences on our map.

Q. WHAT CLASSER CAN I USE MY WHIMIT ON?
A. Whimit is part of Greyhound Australia. Travel is valid on all Greyhound Australia routes.

Q. WHAT FACILITIES ARE ON BOARD?
A. All Greyhound Australia coaches have free Wi-Fi, USB charging, panoramic windows, reclining leather seats and air-con.

Q. HOW LONG IS MY WHIMIT VALID FOR?
A. Your Whimit is valid for 12 months from the date of purchase. Once your anniversary passes your purchased days' worth available.

Q. DOES THIS GO FORWARD OR HAVE TO ROCKET?
A. It depends! Our peak season is December-January and Easter holidays, so we recommend you book as far in advance as possible. Other days, prices usually start from \$19.95 to Brisbane.

GET SET TO SEE AUSTRALIA DIFFERENTLY

TRAVEL. WITHOUT IT GETS.

THE WHIMIT STORY

There's a whole lot of Australia out there. In fact, 15 million square kilometres of it. And if you're new, experiencing it must be a bit of a challenge. So we decided to make it easier. We prefer to do things differently. You see, travelling must be exciting. But, there's nothing better than your curiosity, accompanied by spontaneity and letting us take the wheel.

WHIMIT IS A NEW WAY TO SEE AUSTRALIA, WITHOUT LIMIT.

UNLIMITED WHIMIT TRAVEL ON AUSTRALIA'S LARGEST COACH NETWORK

AUSTRALIA BY APPROXIMATE COACH ROUTE DISTANCE & TRAVEL TIME

MELBOURNE TO SYDNEY:	970km or 12 hrs & 30 mins
SYDNEY TO BRISBANE:	320km or 7 hrs & 40 mins
BRISBANE TO CARING:	100km or 1 day & 5 hrs
CARING TO ALICE SPRINGS:	210km or 1 day, 8 hrs & 30 mins
DARWIN TO ALICE SPRINGS:	100km or 2 hrs
DARWIN TO BROOME:	180km or 24 hrs
ALICE SPRINGS TO ADLAIDE:	180km or 2 hrs

HOW MANY DAYS WILL YOU WHIMIT?

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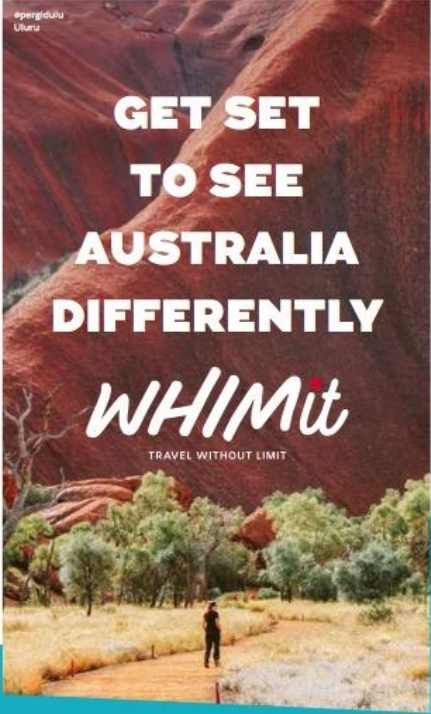
You could say it's time to see. Or travel with joy, without restriction, without limit. Each Whimit gets you to the point of departure. It means you can do as much as you want and see as much as you want. For as long as your passion allows.

BOOK YOUR WHIMIT TODAY

UNLIMITED TRAVEL, ANY DIRECTION, ANY ROUTE ON AUSTRALIA'S LARGEST COACH NETWORK. FREE Wi-Fi, USB CHARGING, PANORAMIC WINDOWS, RECLINING LEATHER SEATS, TOILETS AND AIR-CON.

A4 BROCHURE

WHAT DOES WHIMIT LOOK LIKE?



GET SET
TO SEE
AUSTRALIA
DIFFERENTLY

WHIMi
TRAVEL WITHOUT LIMIT

greyhound Australia


Let your heart wander and your travel plans follow with Whimit, coach travel that lets you explore Australia your way. Any direction, any route, for as long as your time lets you. How many days will you Whimit?

GREYHOUND.COM.AU/WHIMIT

HOW MANY DAYS WILL YOU WHIMIT?

You could say it's time travel. Or travel sold by time, without restriction, without limit. Each Whimit pass is by day and not distance. It means you can do as much, go as far and be as adventurous as you want, for as long as your pass allows.

7 DAYS \$249	21 DAYS \$399	45 DAYS \$449
60 DAYS \$559	90 DAYS \$649	120 DAYS \$799
365 DAYS \$1,499		



BOOK YOUR WHIMIT TODAY

greyhound Australia

VISIT **GREYHOUND.COM.AU/WHIMIT**
CALL +61 7 3155 1550 OR VISIT YOUR OFFICIAL
GREYHOUND AUSTRALIA TRAVEL AGENT.

*For full terms & conditions visit greyhound.com.au/whimit. Prices in AUD. First day of travel must commence within 12 months from the date pass was purchased. A day is considered to be between the hours of 00:00am - 23:59pm. All passes are non-transferable to another person. Once travel has commenced the pass is non-refundable. Refunds requested prior to first sector of travel will incur 10% cancellation fee. All Passes are available for travel on any of Greyhound Australia's scheduled timetabled services. All terms and conditions are subject to change without notice.

DL BROCHURE

WHIMIT GLOBAL LAUNCH VIDEO



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NEXT CENTURY GREYHOUND PRODUCTIONS

THANK YOU AND ENJOY THE
BIC 2018 CONFERENCE!

