

## TOURISM AUSTRALIA

Tourism Australia is the Australian Government agency responsible for attracting international visitors to Australia, both for leisure and business events. The organisation is active in 15 key markets and activities include advertising, public relations and media programs, trade shows and industry programs, consumer promotions, online communications and consumer research.

In January 2020, Tourism Australia launched 'Holiday Here This Year', as part of the National Bushfire Recovery Fund, to encourage Aussies to holiday in Australia and support bushfire recovery efforts. As a result of Covid-19 Tourism Australia will continue to promote and support the Australian tourism industry by encouraging Aussies to get out and see their own backyard.

## CONSUMER DEMAND PROJECT

Since 2012 Tourism Australia has undertaken research annually to understand how consumers view Australia as a holiday destination, and what most motivates them to travel to and around Australia. While research has predominately focused on understanding international consumer behaviour, Tourism Australia has continued to undertake domestic research over the last eight years.

Insights from the Consumer Demand Project have been used extensively to inform and support the development of Tourism Australia's strategic direction, campaign development, as well as to inform the tourism industry of potential opportunities to build value of Australian tourism.

Safety and security, value for money and world class nature and wildlife are the most important drivers for destination choice to Australian travellers. While 66% of Australian travellers travelled within their state of residency, 34% travelled to another state. Domestic travellers stay an average of 4 nights and spend approximately \$687 per trip.

**117.4M**  
Overnight trips

**\$80.7BN**  
Overnight spend

**417.9M**  
Total nights

spending  
**~\$687**  
Per trip

Staying an average  
**~4 NIGHTS**

**~\$193**  
Spend per night

## DID YOU KNOW?



**93%**

Enjoy escaping day-to-day life when travelling



**92%**

Travel to enrich their knowledge



**92%**

Like to get a taste for the local cuisine when travelling



**91%**

Like to travel to places they haven't been to before

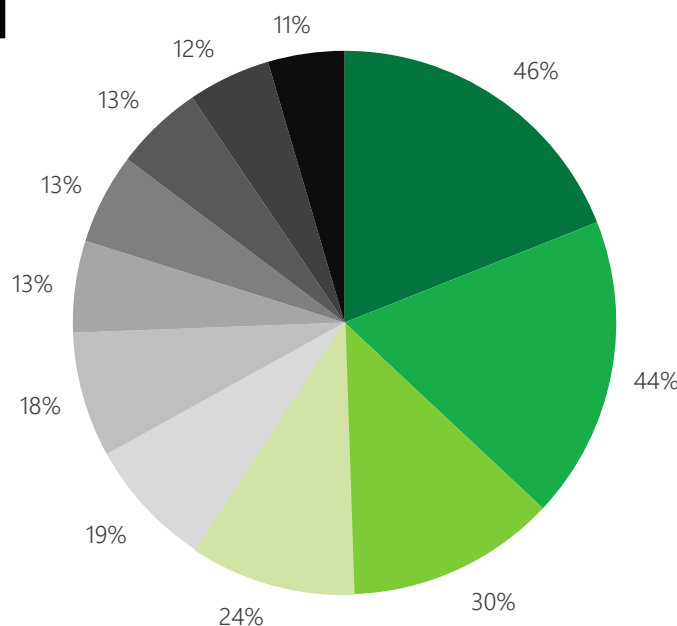


**90%**

Travel to become more open-minded and knowledgeable of the world we live in

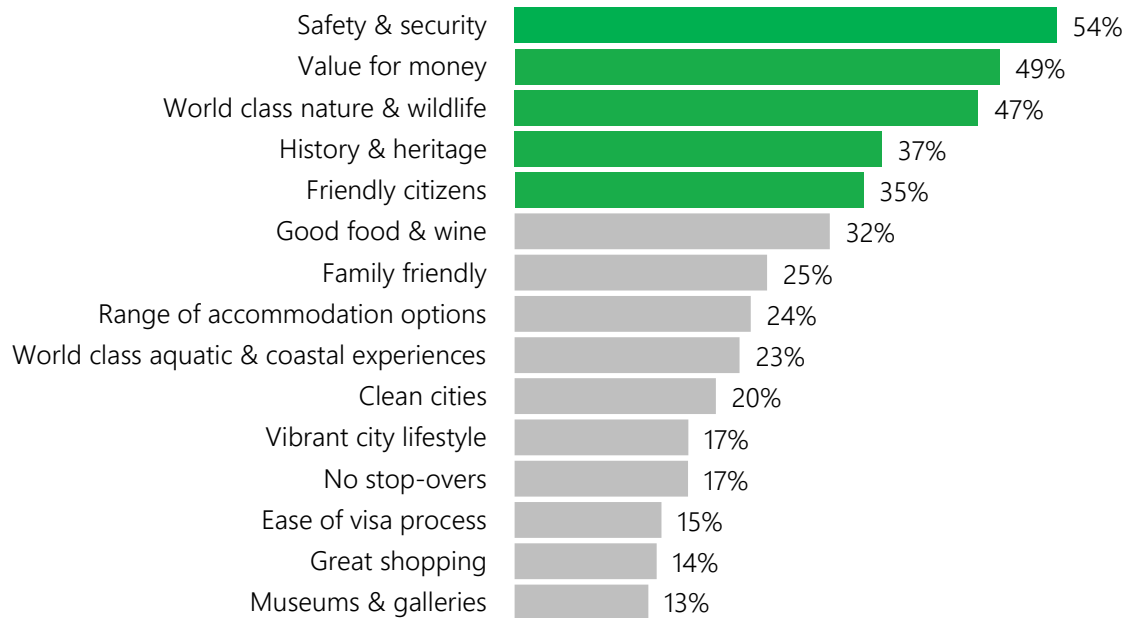
## MOOD OF THE NATION

- Uncertain
- Stressed
- Resilient
- Optimistic
- Positive
- United
- Divided
- Negative
- Disconnected
- Progressive
- Distrusting



# DRIVERS OF DESTINATION CHOICE

9-24 April 2020

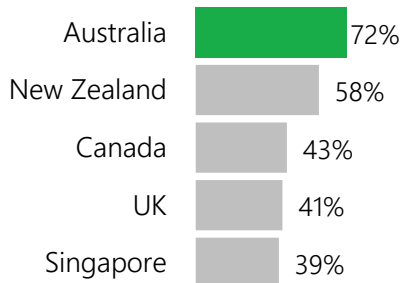


Read as: 54% of Australian travellers state safety and security is important to their destination choice.

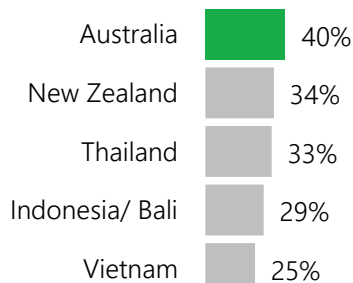
## AUSTRALIA'S PERFORMANCE

9-24 April 2020

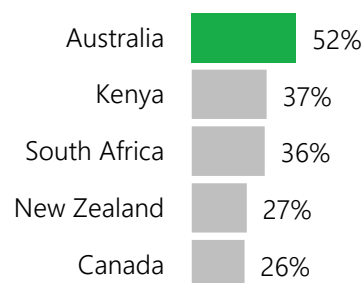
### SAFETY & SECURITY



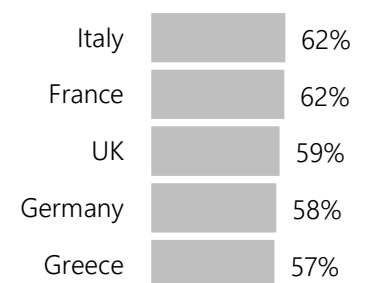
### VALUE FOR MONEY



### WILDLIFE

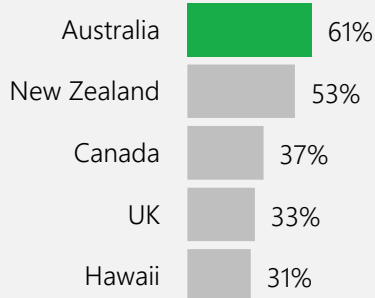


### HISTORY & HERITAGE

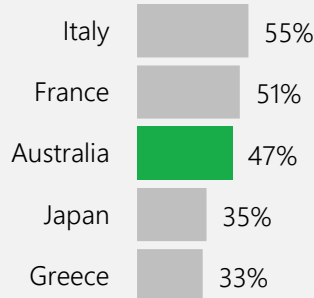


\*AUS #15

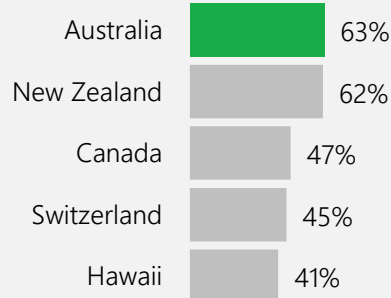
### FRIENDLY & WELCOMING



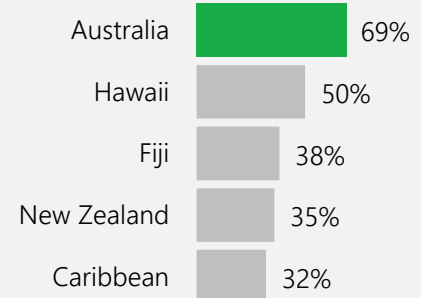
### FOOD & WINE



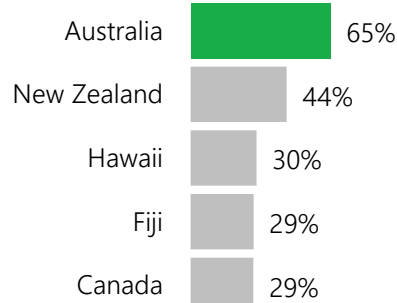
### NATURE



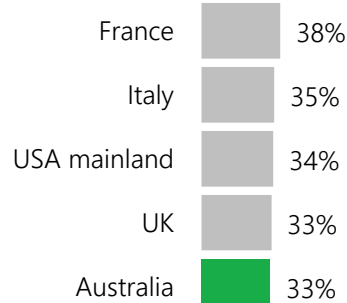
### AQUATIC & COASTAL



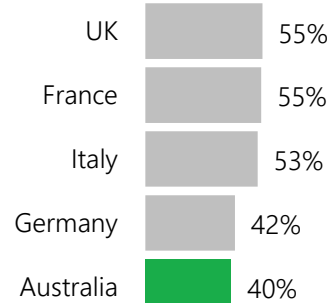
### FAMILY FRIENDLY



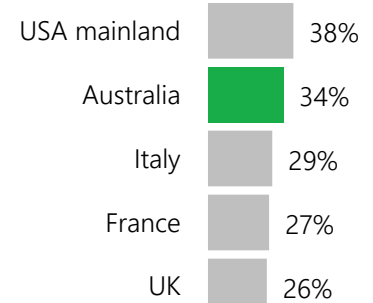
### CITY LIFESTYLE



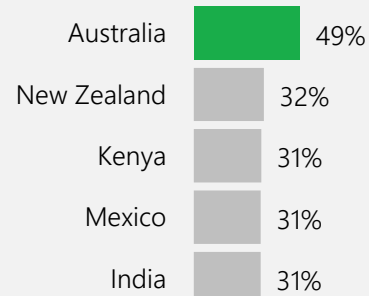
### MUSEUMS & GALLERIES



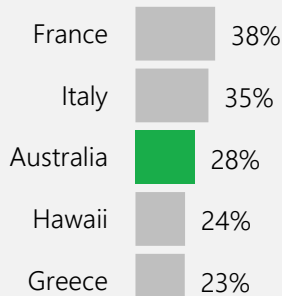
### GREAT SHOPPING



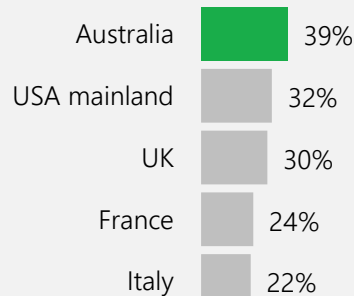
### NATIVE & INDIGENOUS EXPERIENCES



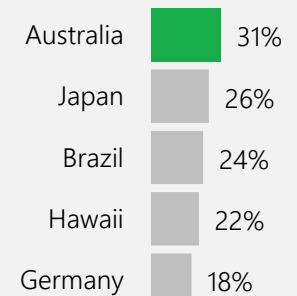
### ROMANTIC



### WORLD CLASS EVENTS

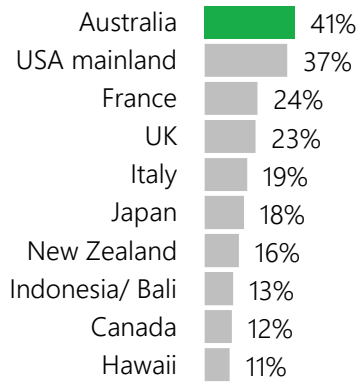


### LOCAL FESTIVALS

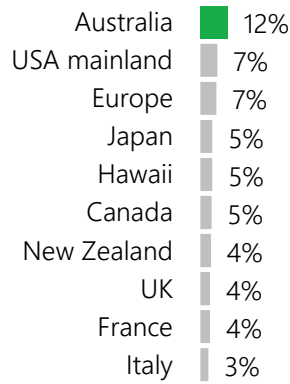


Read as: 72% of Australian travellers associate safety and security with Australia

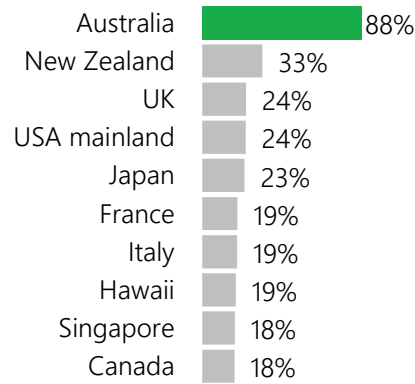
## MOST FASHIONABLE DESTINATIONS



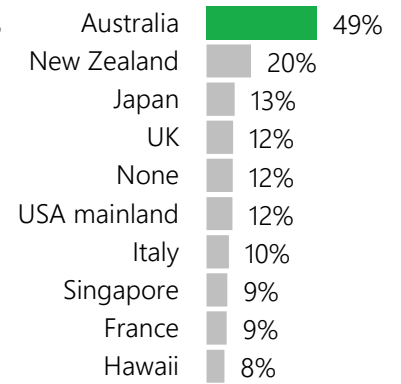
## MOST DESIRABLE DESTINATIONS



## CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)

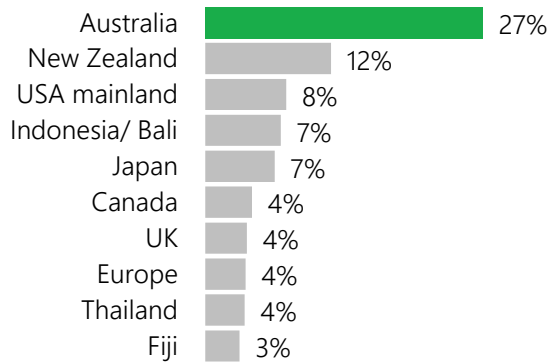


## INTENTION TO VISIT (IN THE NEXT 2 YEARS)

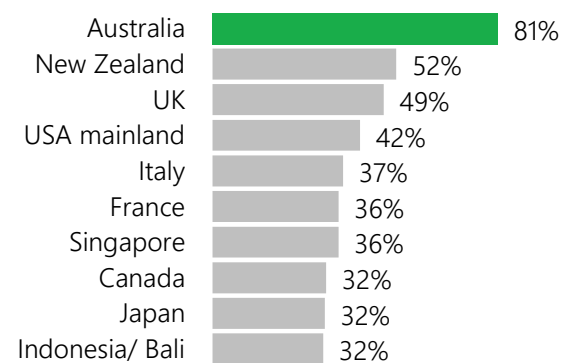


Read as: 41% of Australian travellers state Australia is the most fashionable destination.

## ADVERTISING AWARENESS



## AWARENESS OF HOLIDAY EXPERIENCES



Read as: 27% of Australian travellers have read or seen advertising for Australia.

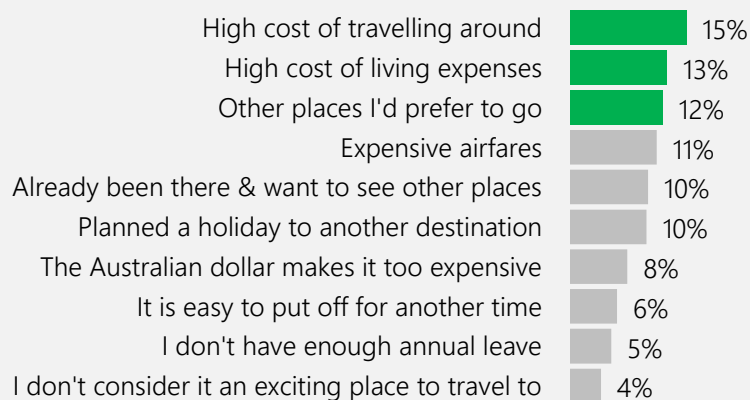


## DRIVERS FOR HOLIDAYING IN AUSTRALIA

July 2019



## BARRIERS FOR NOT HOLIDAYING IN AUSTRALIA

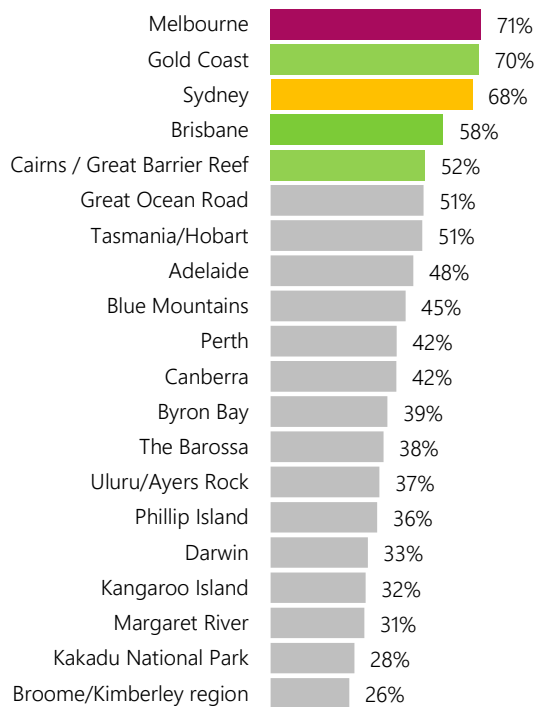


Read as: 47% of Australian travellers consider Australia as a safe and friendly place to visit as key driver in selection.

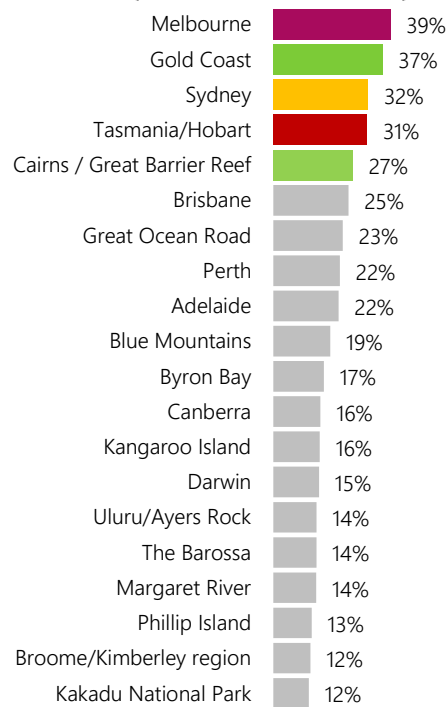
# DEMAND FOR AUSTRALIAN DESTINATIONS

9-24 April 2020

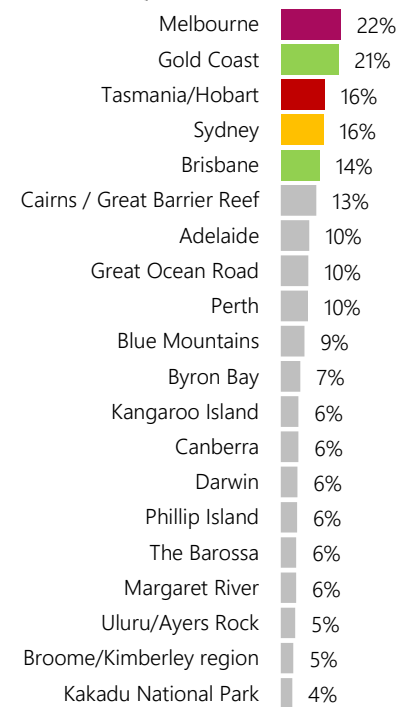
## AWARENESS OF EXPERIENCES WITHIN AUSTRALIAN DESTINATIONS



## CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



## INTENTION TO VISIT (IN THE NEXT 2 YEARS)

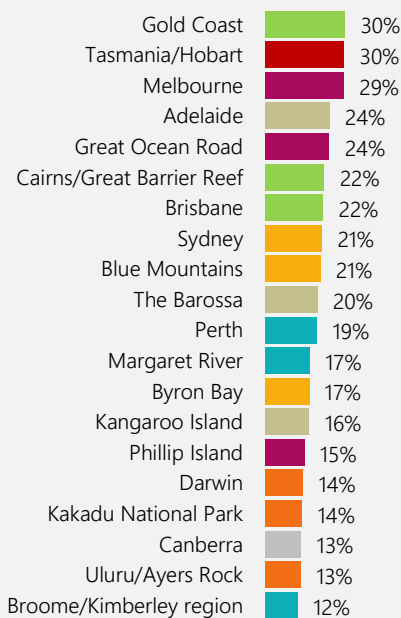


Read as: Of Australian travellers, 71% are aware of the experiences available in Melbourne.

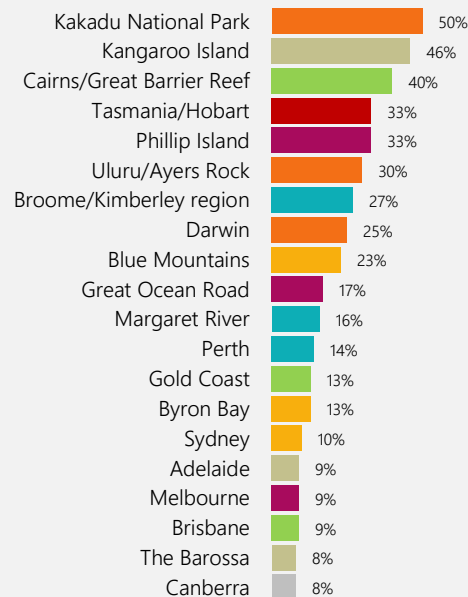
# DEMAND FOR AUSTRALIAN DESTINATIONS

9-24 April 2020

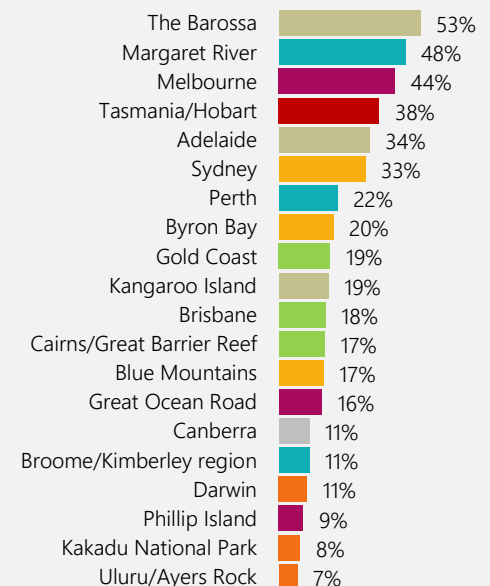
## A DESTINATION THAT OFFERS VALUE FOR MONEY



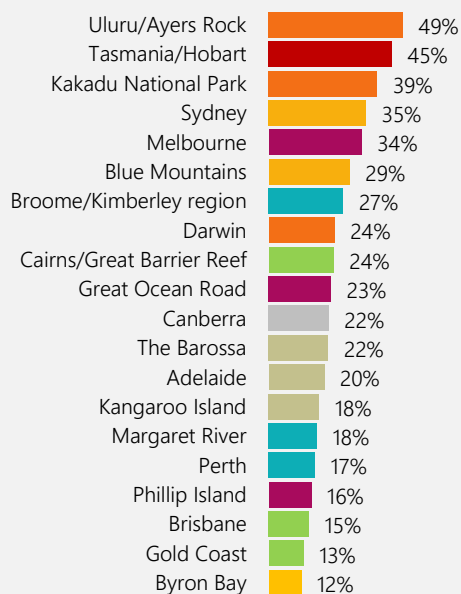
## DIFFERENT AND INTERESTING WILDLIFE



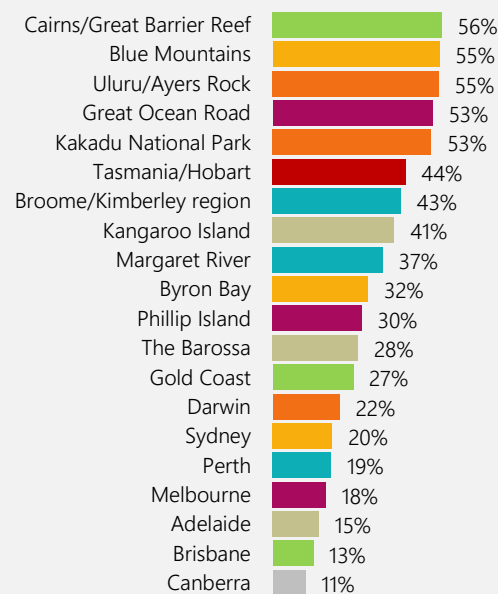
## GOOD FOOD WINE, LOCAL CUISINE AND PRODUCE



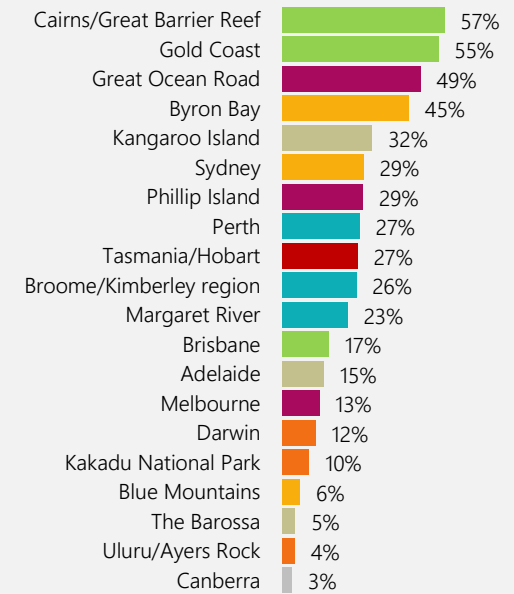
## RICH HISTORY AND HERITAGE



## NATURE AND WILDLIFE



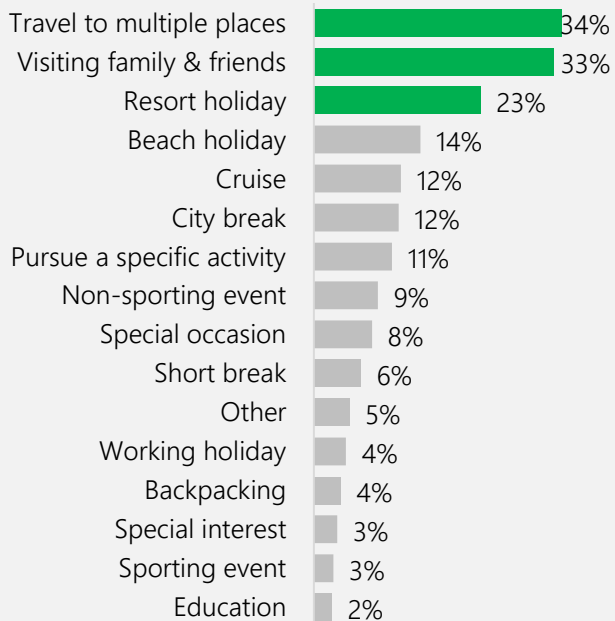
## AQUATIC AND COASTAL



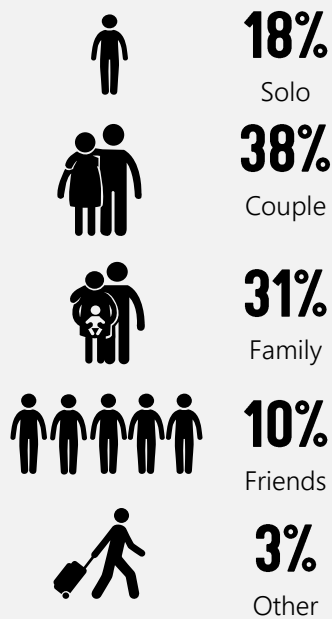


Little Cove, Queensland

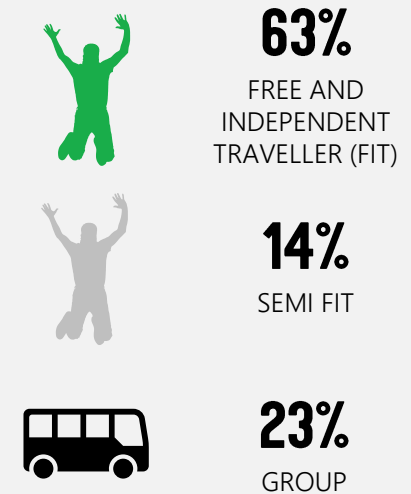
## TRIP TYPE



## TRAVEL PARTY

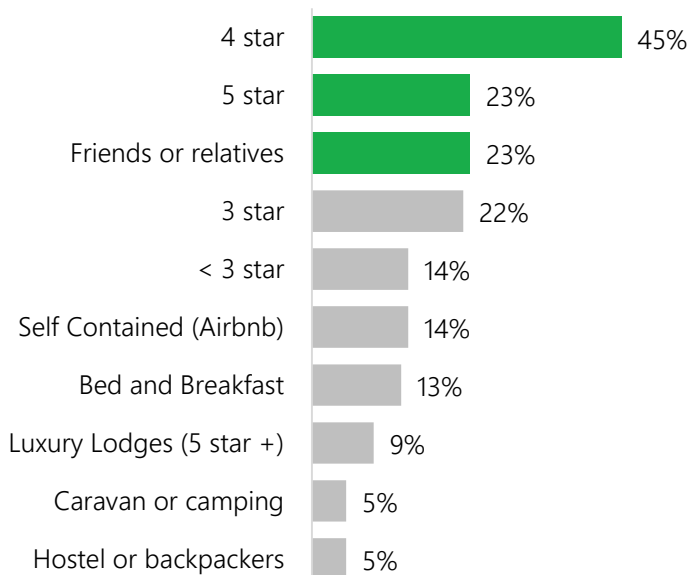


## TRAVEL STYLE

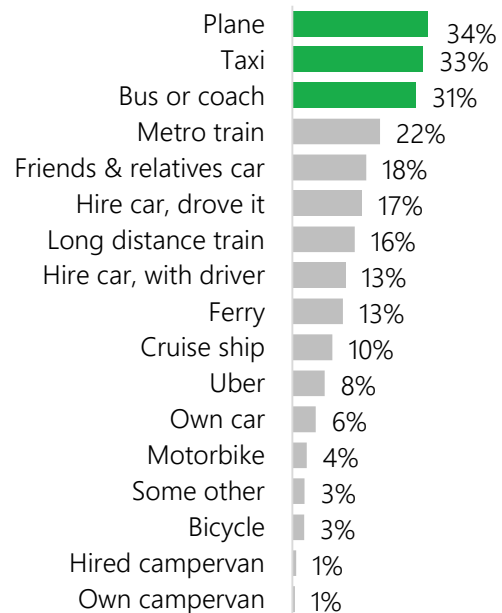


Read as: 34% of Australian travellers travelled to multiple places on their last holiday.

## ACCOMMODATION

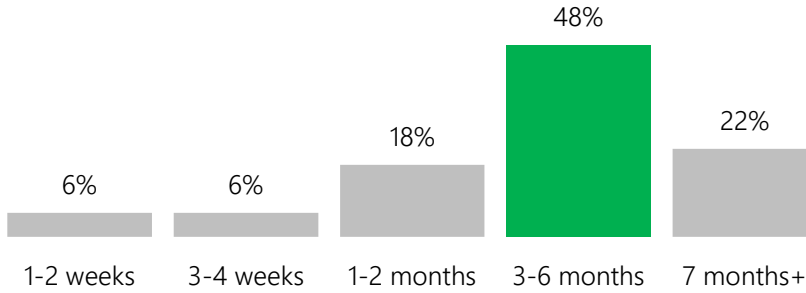


## TRANSPORT



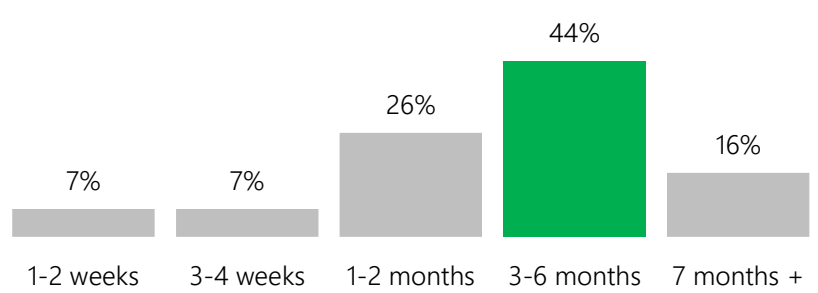
Read as: When on holidays, 45% of Australian travellers prefer to stay in 4 star accommodation.

## DESTINATION CHOICE LEAD TIME

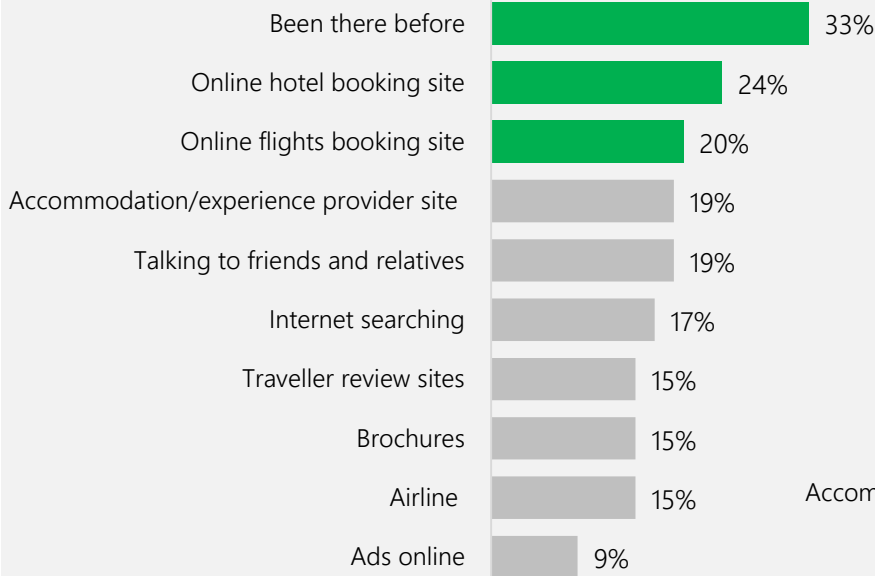


Read as: 48% of Australia select a destination 3-6 months before they travel.

## BOOKING LEAD TIME

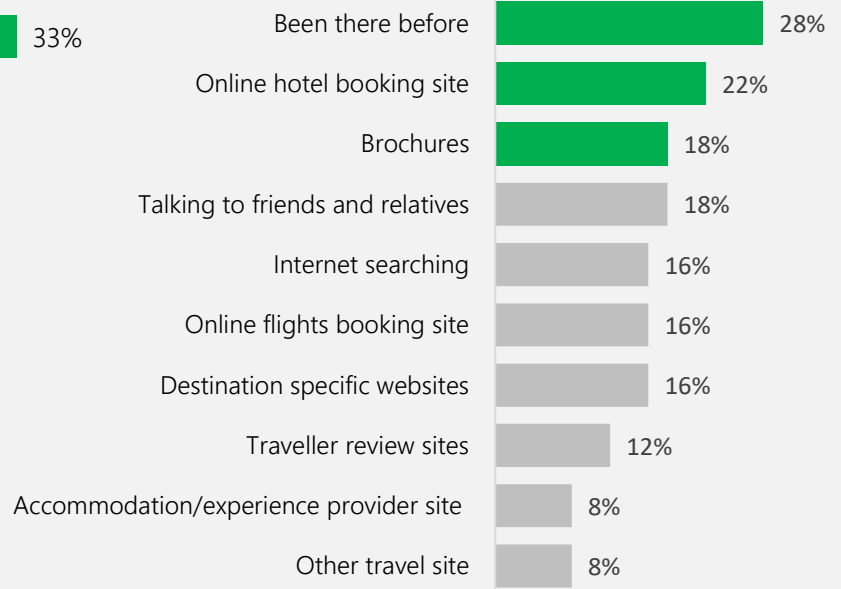


## TOP 10 SOURCES OF INSPIRATIONS



Read as: 33% of Australian travellers source of inspiration comes from visiting a destination previously.

## PLANNING SOURCES

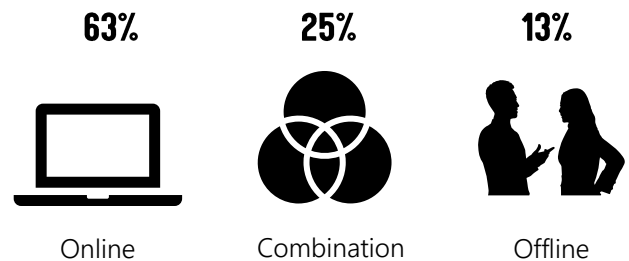


## DIRECT VS. INDIRECT BOOKING

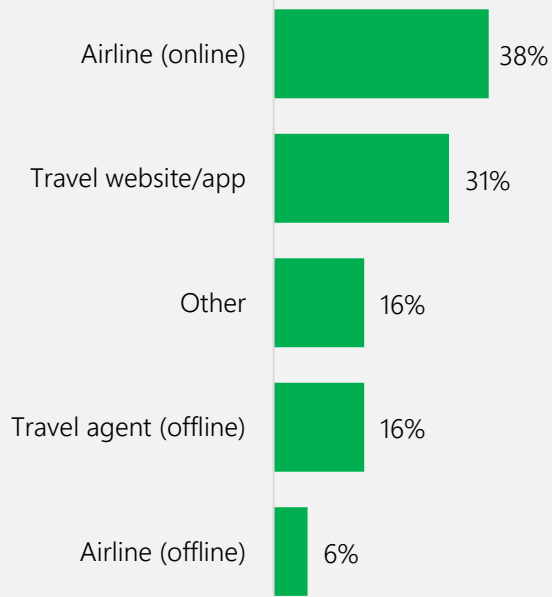


Read as: 55% of Australian travellers book direct (e.g. via a hotel or airline website).

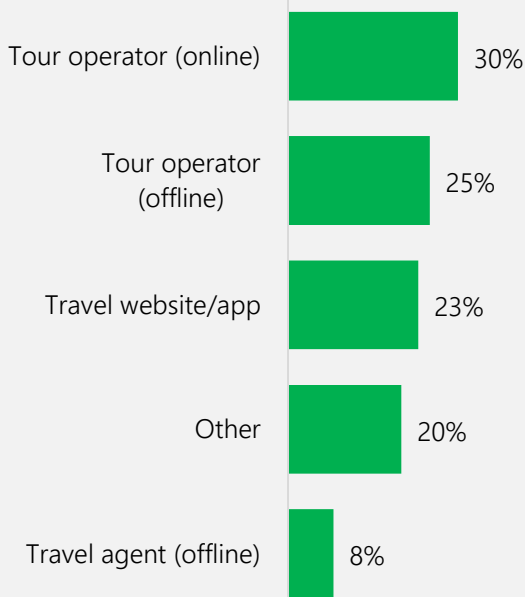
## ONLINE VS. OFFLINE BOOKING



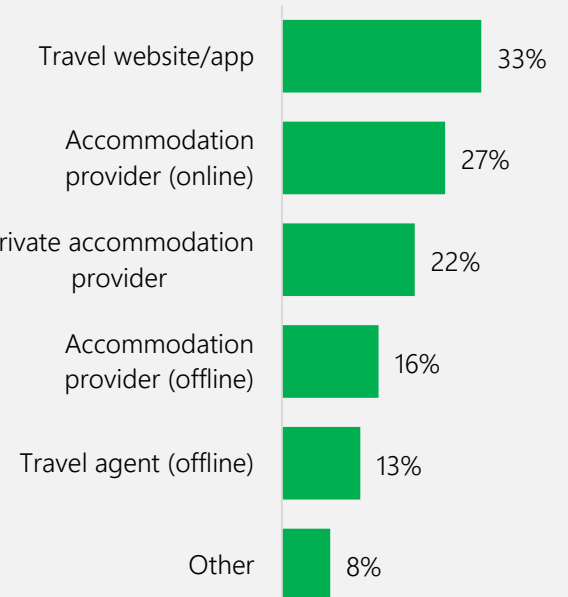
## BOOKING SOURCES FOR FLIGHTS



## TOP 5 BOOKING SOURCES FOR TOURS/ACTIVITIES

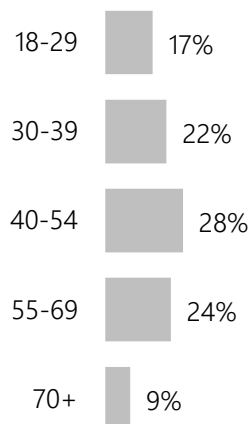


## BOOKING SOURCES FOR ACCOMMODATION



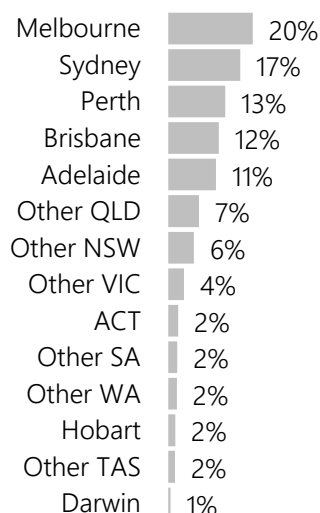
Read as: 38% of Australian travellers book flights directly through an airlines website when booking their last Australian holiday.

## AGE

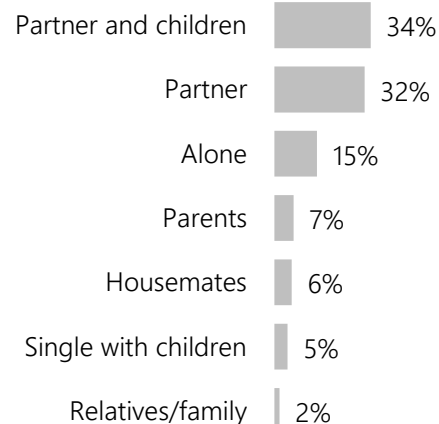


Read as: 17% of Australian's survey were aged between 18-29 years.

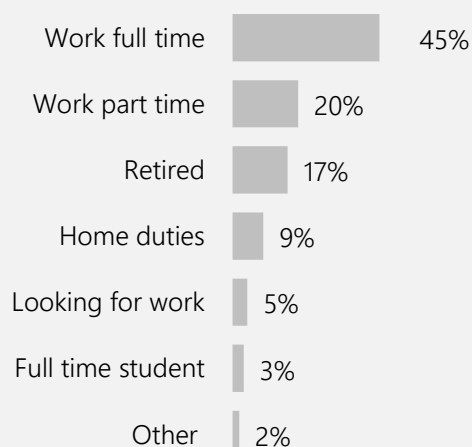
## LOCATION



## LIVING SITUATION

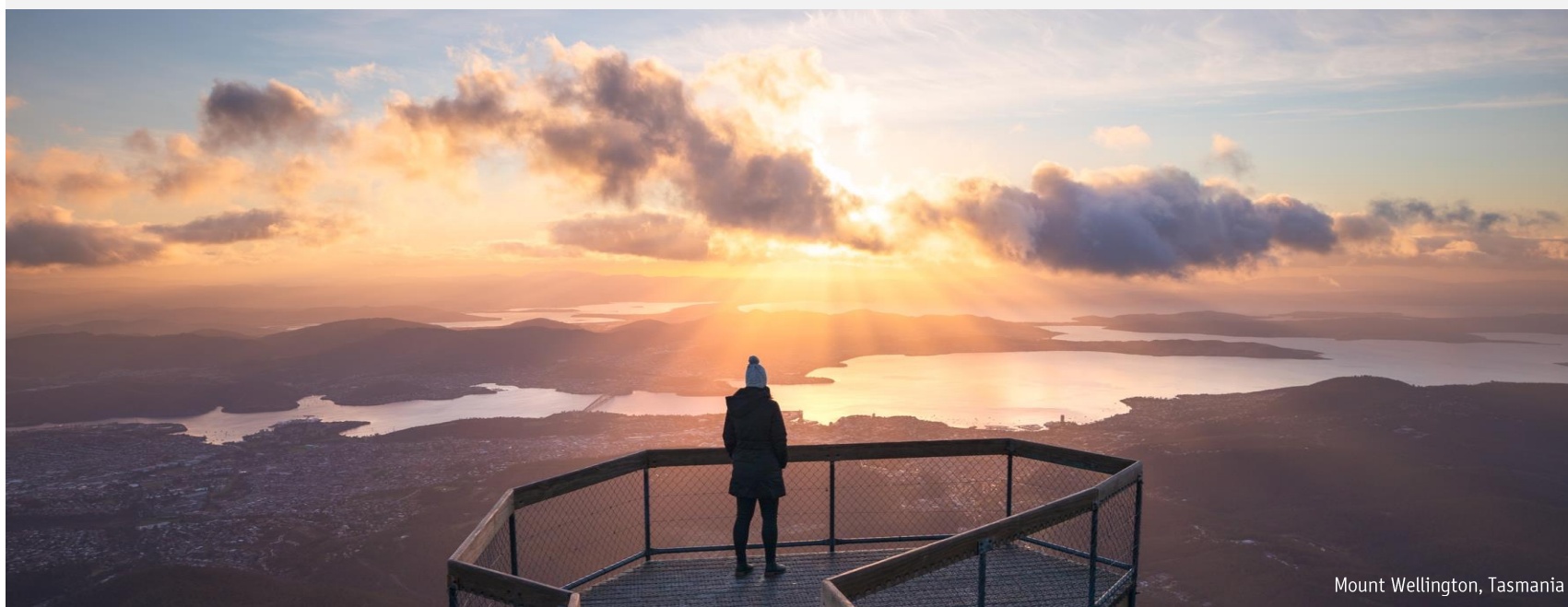


## EMPLOYMENT STATUS



Read as: 45% of Australians surveyed work full time.

## OCCUPATION



Mount Wellington, Tasmania

## ABOUT THE RESEARCH

Tourism Australia undertakes comprehensive research on a quarterly basis across eleven international markets. Annually, Tourism Australia speaks to over 1,600 Australian travellers through online research panels. Insights from the HVT research have been used extensively to inform and support development of Tourism Australia's strategic direction, campaign development and to inform the industry of potential opportunities to build the value of Australian tourism.

## WANT TO KNOW MORE?

Fact sheets for thirteen of Australia's key tourism markets can be accessed via:  
<http://www.tourism.australia.com/en/markets-and-stats/consumer-research.html>

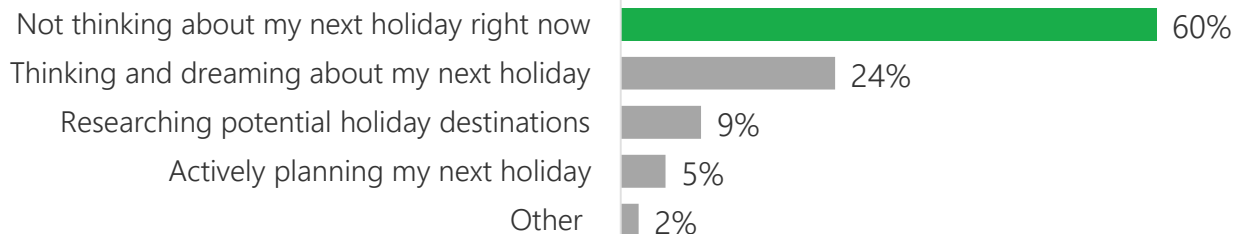
For more information, please contact:  
[ask.us@tourism.australia.com](mailto:ask.us@tourism.australia.com)  
[www.tourism.australia.com](http://www.tourism.australia.com)

### APRIL OVERVIEW

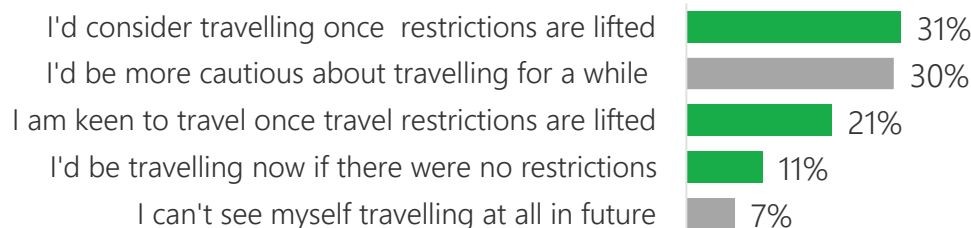
Tourism Australia continues to undertake frequent domestic research to monitor the impact of COVID-19 on domestic travel. From research undertaken in April through the Consumer Demand Project the top concern for 89% of Aussies is the long-term economic impact with 15% already losing their jobs to the outbreak, 27% are still employed but on reduced hours/income, and a further 23% fear their jobs will be impacted. While 85% of Aussies are confident we are coping with the outbreak as well as possible, 65% are afraid of contracting the virus.

### IMPACT OF CORONAVIRUS ON TRAVEL

#### Attitude towards next holiday



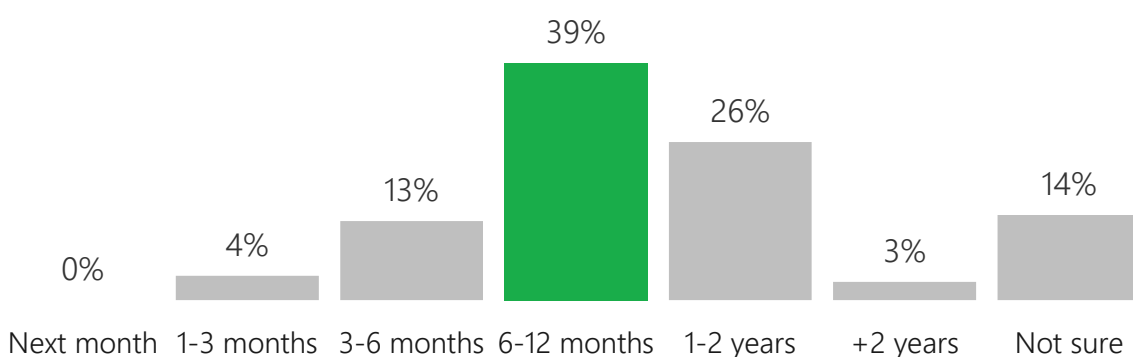
#### Attitude towards future domestic travel



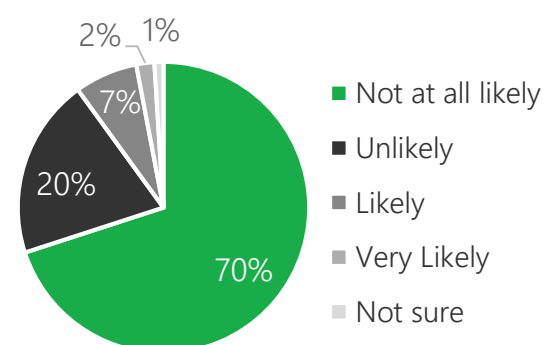
Read as: 60% of Aussies are not thinking about their next holiday right now.

### DOMESTIC TRAVEL AND BOOKING INTENTION

#### Intention to travel domestically



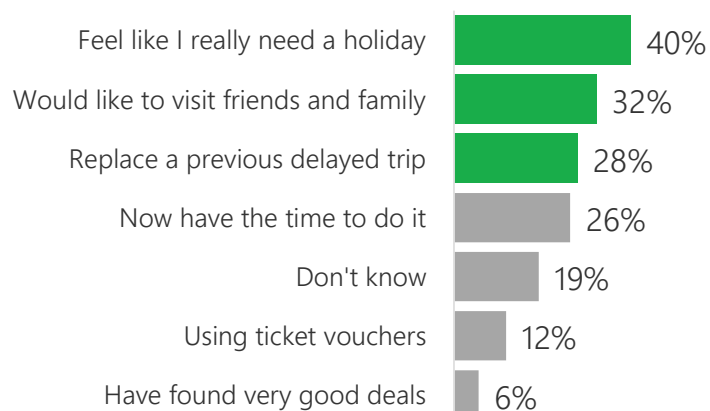
#### Intention to book domestic leisure travel in the next month



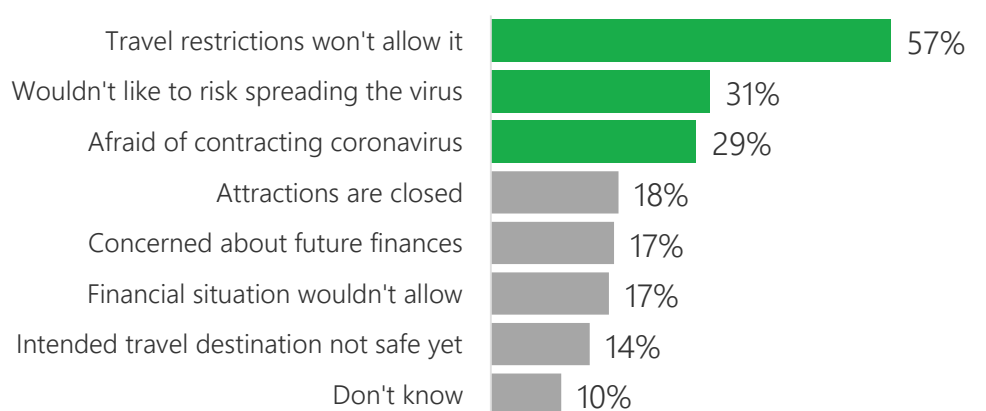
Read as: 39% of Aussies are intending to travel domestically in the next 6-12 months but are not looking to book in the next month.

### DRIVERS AND BARRIERS FOR DOMESTIC TRAVEL

#### Drivers for travelling in Australia in the next 6 months



#### Barriers for travelling in Australia in the next 6 months



Read as: 40% of Aussies feel like they really need a holiday as there top driver to take one.