WINNING BACK THE TOURIST

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MORE SPECIFICALLY

WHO ARE OUR FUTURE TOURISTS
AND
WHAT ARE THEY LOOKING FOR?

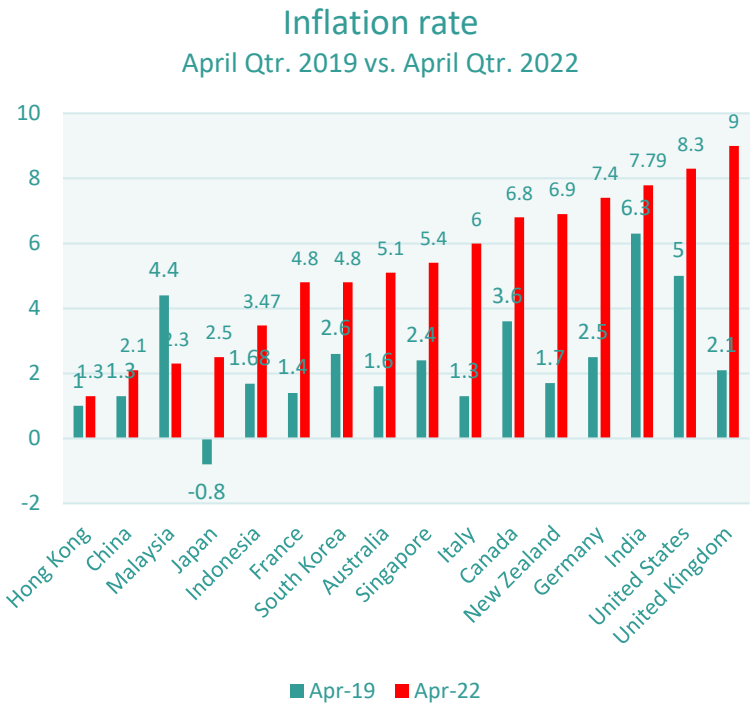

UNFORTUNATELY
I DON’T HAVE A CRYSTAL
BALL

WE CAN LEARN FROM THE LAST GLOBAL PANDEMIC?

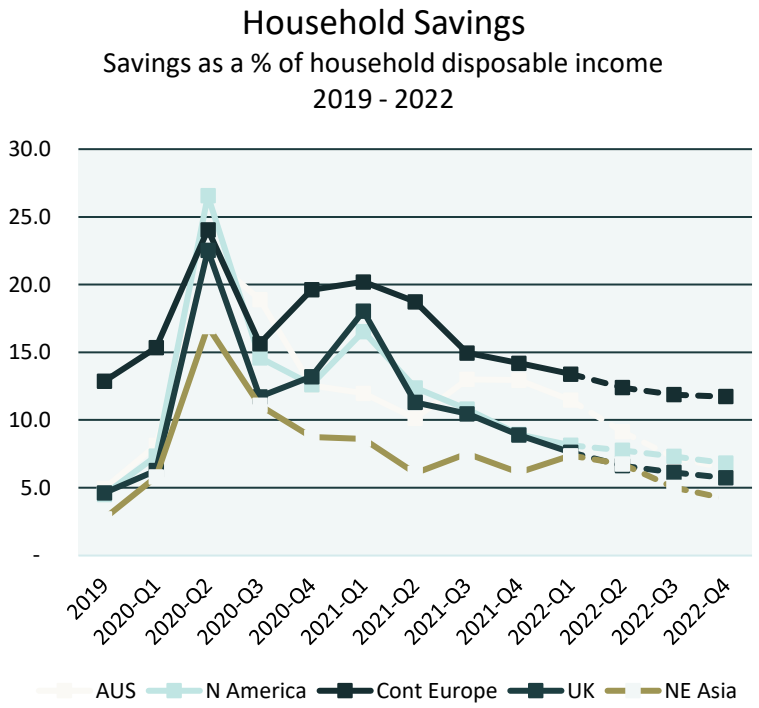
cdc.gov


FOUR SOURCES THAT CAN GIVE
US AN INSIGHT INTO THE FUTURE
PAST BEHAVIOR
LEAD INDICATORS
MARKET
INFRASTRUCTURE
CONSUMER
RESEARCH

COVID-19 HAS THROWN UP MORE CHALLENGES



Source: Various Government Agencies via Trading Economics, 2022



Source: OECD, Net Savings % of Household Disposable Income, Household Savings Forecast. Quarterly 2019-2022

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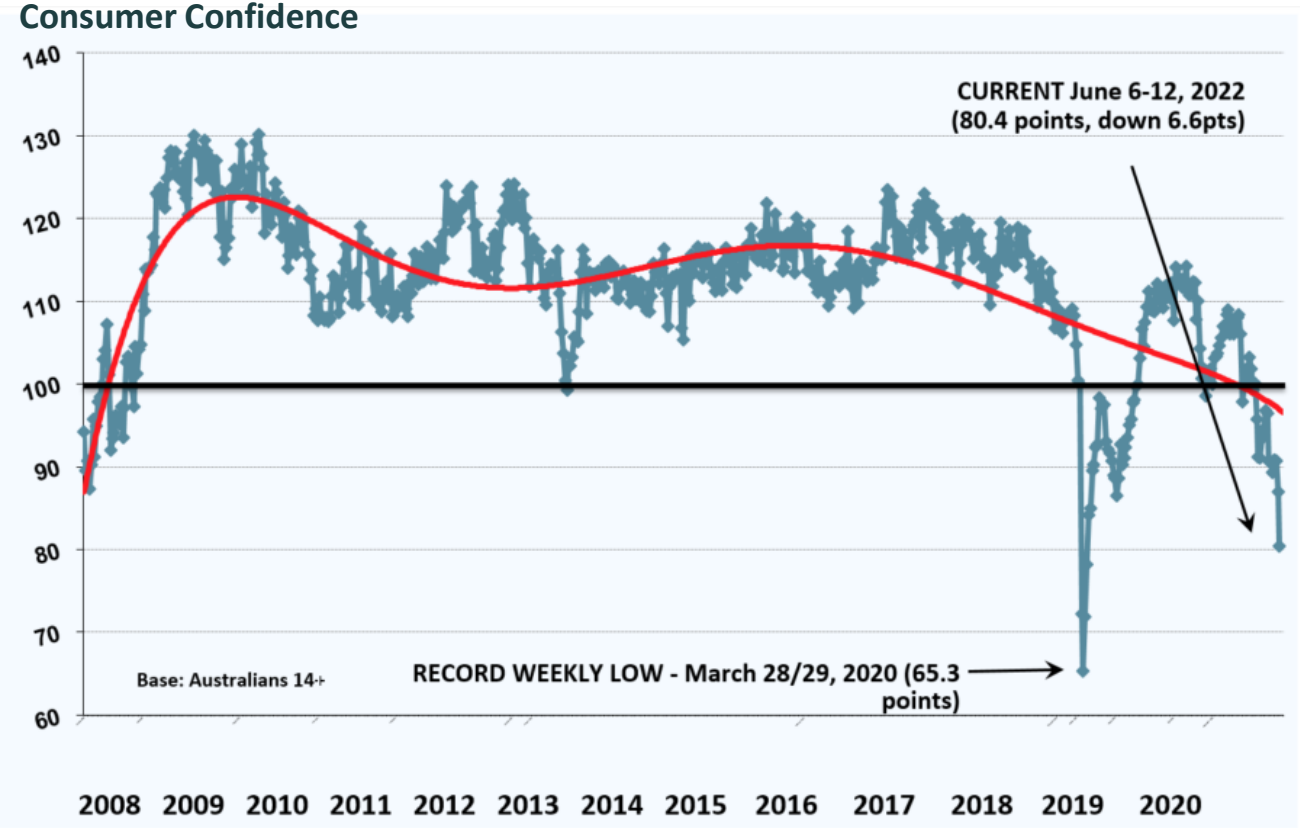


Source: ANZ - Roy Morgan, ANZ Research

LET’S SEE WHAT WE KNOW BY MARKET

INTRASTATE

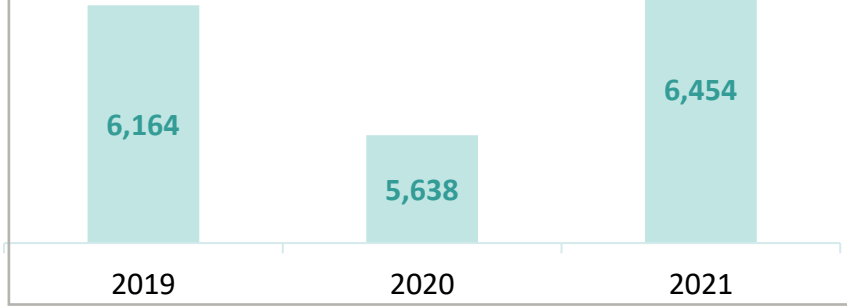
INTERSTATE

INTERNATIONAL


INTRASTATE

INTRASTATE

Overnight Leisure trips[1] (000s)



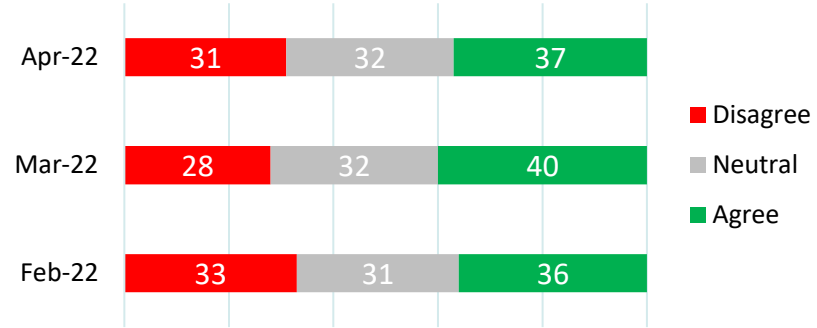
2021 v 2019

Trips up by **5%**
Average nights/trip up by **12%**
Average spend/night up by 43%
Average spend/trip up by 60%
Overall spend up by 68%

Travel Intention – next 12 months[2]

	Overseas	Interstate	intrastate
2019	79%	58%	59%
2022	56%	67%	66%
Change	-23%	+9%	+7%

I plan to take more trips in WA this year than I did last year[2]

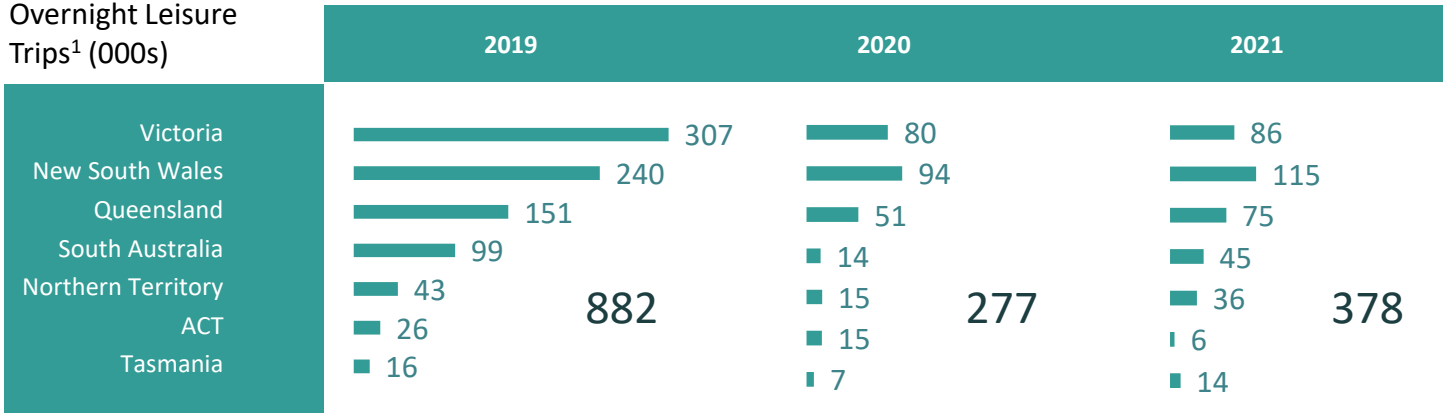


1. TRA NVS
2. Tourism WA Brand Tracker provided by Kantar

INTERSTATE

INTERSTATE

Overnight Leisure Trips[1] (000s)



Travel Intention – next 12 months[2]

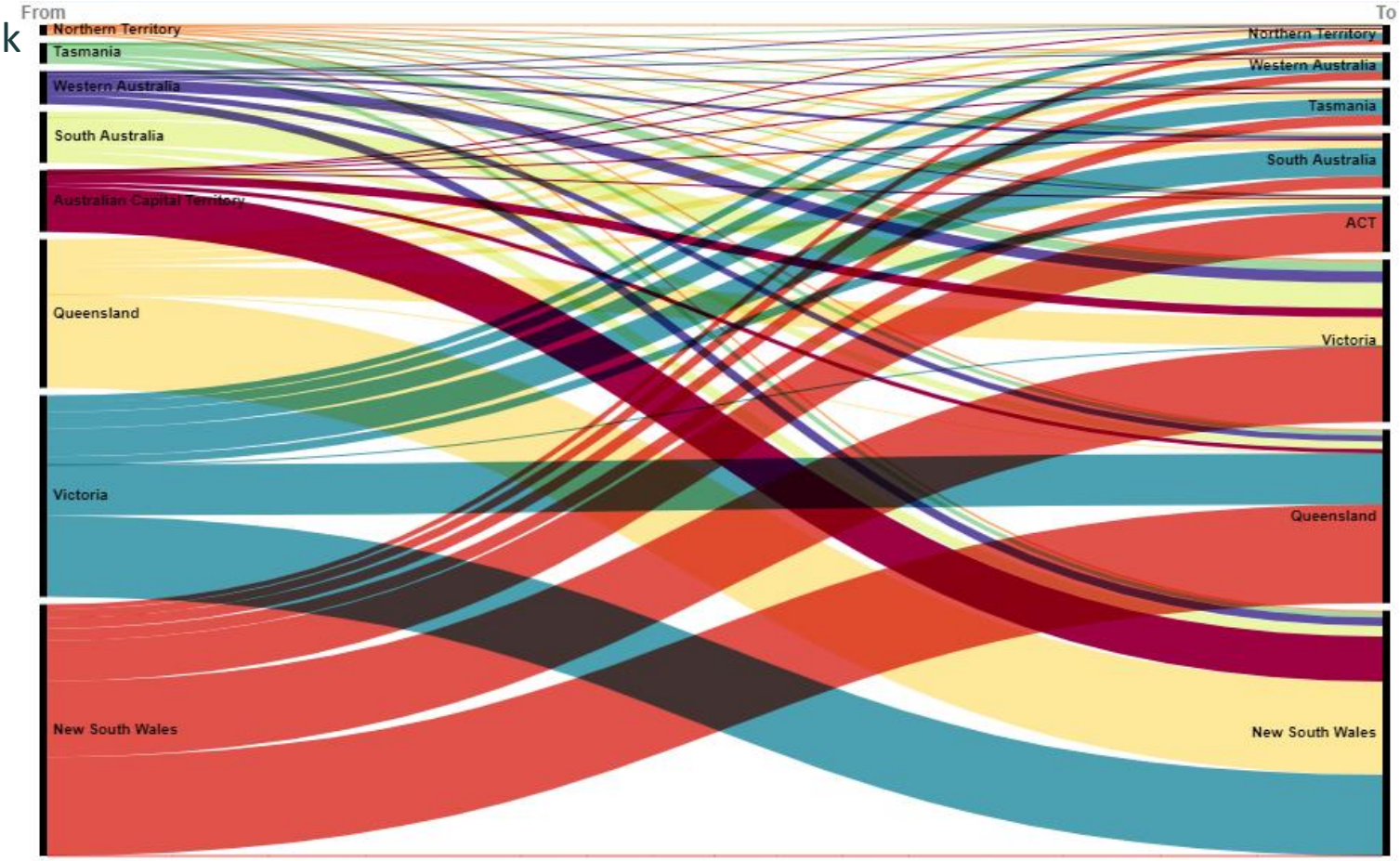
	Overseas	Interstate	intrastate
2019	85%	66%	55%
2022	69%	73%	64%
Change	-16%	+7%	+9%

	I plan to mainly travel in my own state this year[2]	I feel confident about planning / booking a holiday in WA[2]
Feb	39%	24%
March	35%	33%
April	37%	44%
May	**32%**	**49%**

1. TRA NVS
2. Tourism WA Brand Tracker provided by Kantar

Leisure interstate travel in 2019

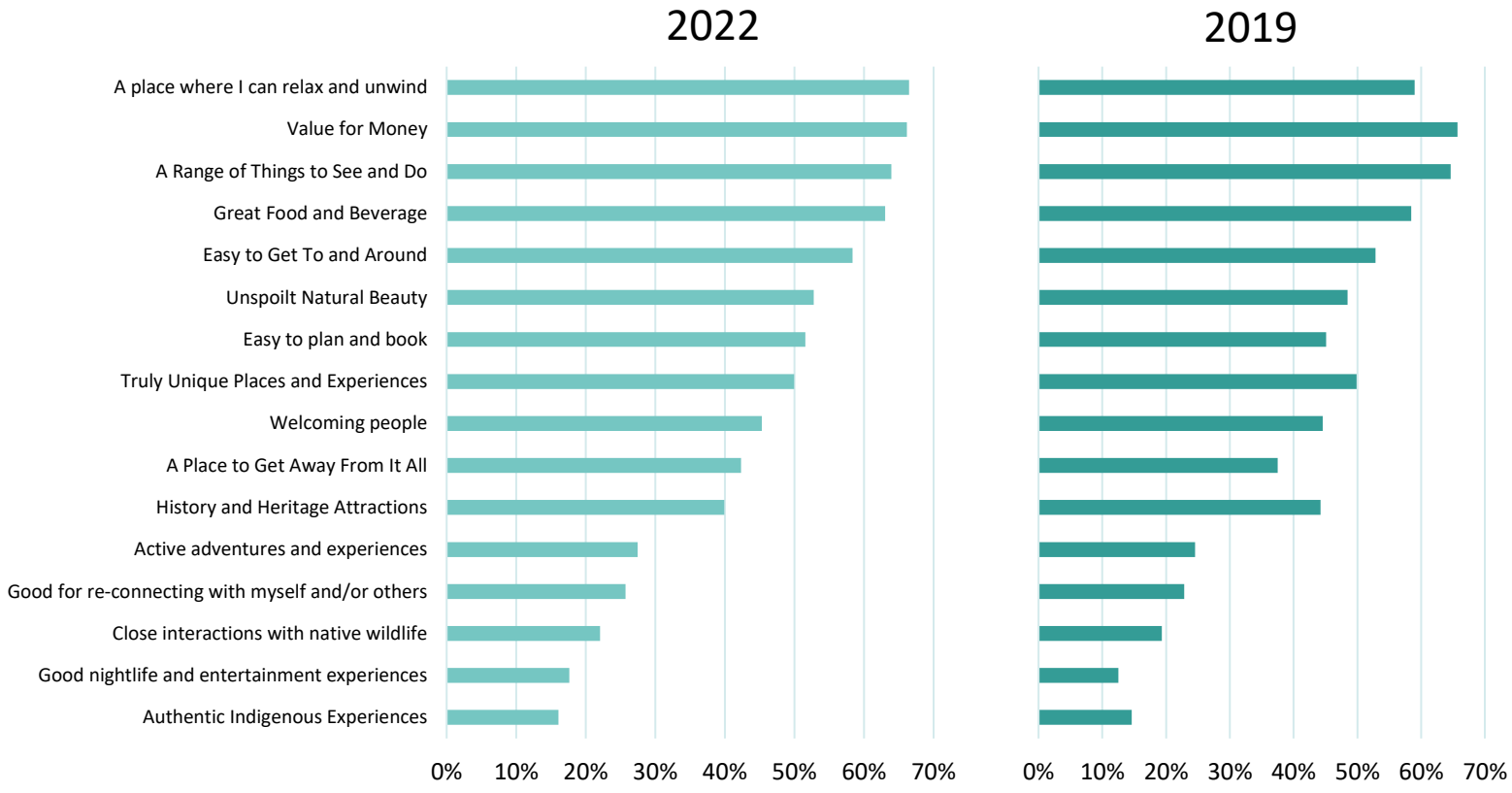
1,049k



882k

INTERSTATE

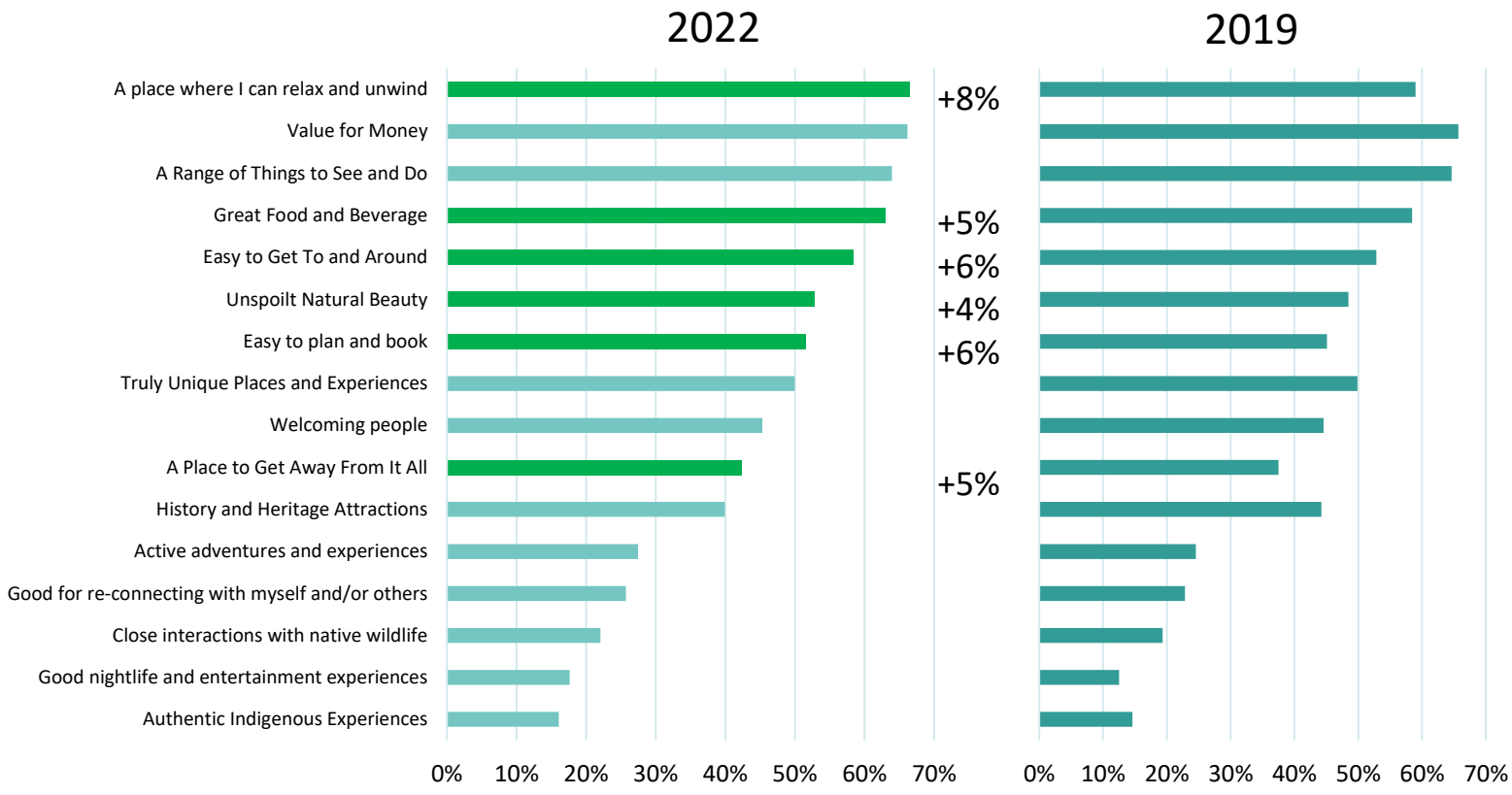
INTERSTATE HOLIDAY IMPORTANCE FACTORS



Tourism WA Interstate Brand tracker: Which of these are most important to you personally, when choosing a holiday destination? (Multiple Response)

INTERSTATE

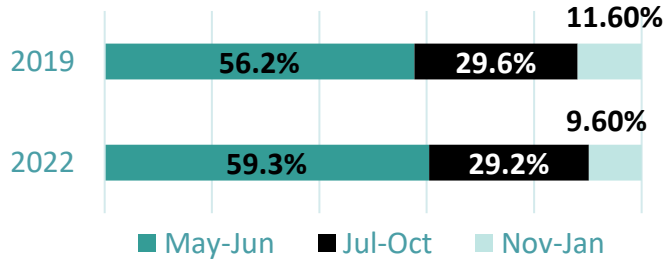
INTERSTATE HOLIDAY IMPORTANCE FACTORS



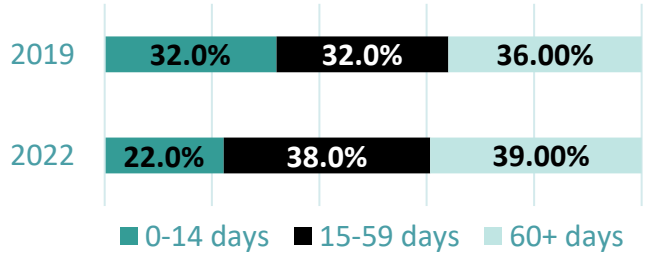
Tourism WA Interstate Brand tracker: Which of these are most important to you personally, when choosing a holiday destination? (Multiple Response)

A COUPLE OF OBSERVATIONS ABOUT THE DOMESTIC BOOKING PATTERNS

Flight Searches to WA in May – by travel date



Flight bookings to WA in 2022 – lead time



Flight Booking Source

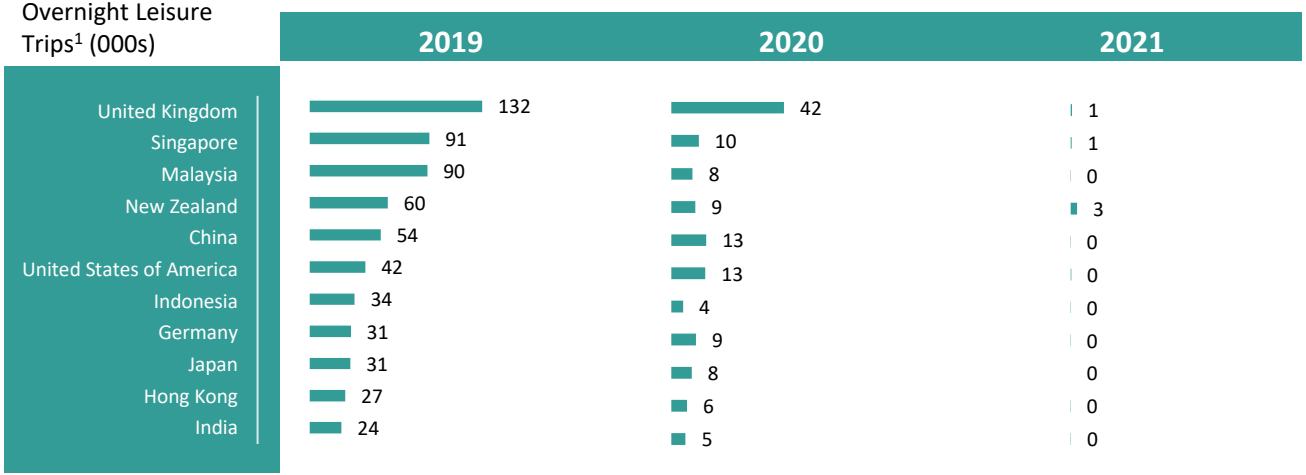
	2019	2022	Diff
On-line TA	7%	7%	-
Corporate TA	21%	12%	-9%
Retail TA	39%	33%	-6%
Other TA	3%	2%	-1%
Airline Direct	30%	47%	+17%

Source: ForwardKeys, Flight Bookings, Skyscanner flight searches

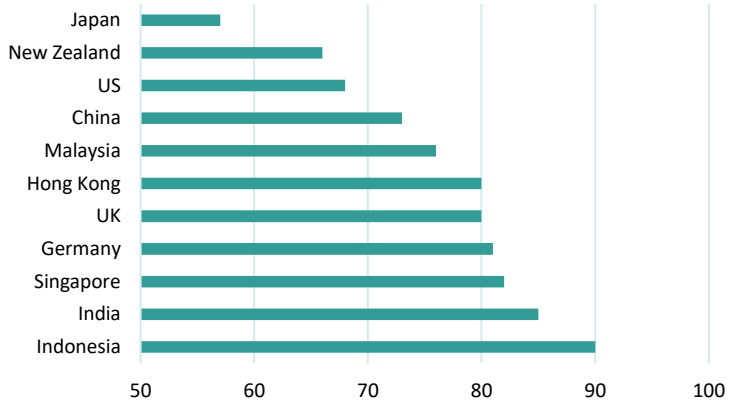

INTERNATIONAL

INTERNATIONAL

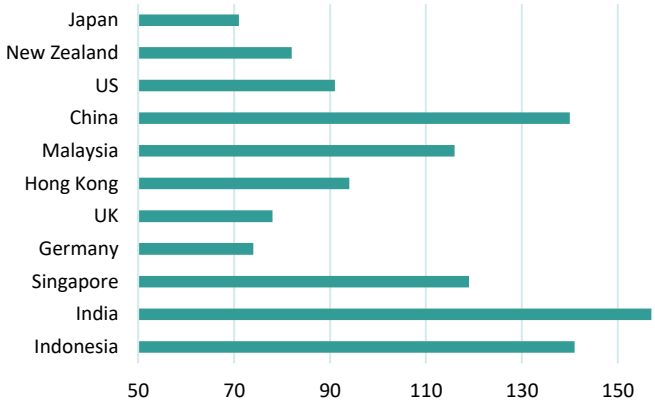
Overnight Leisure Trips[1] (000s)



Is Australia a safe place to travel to?[2]



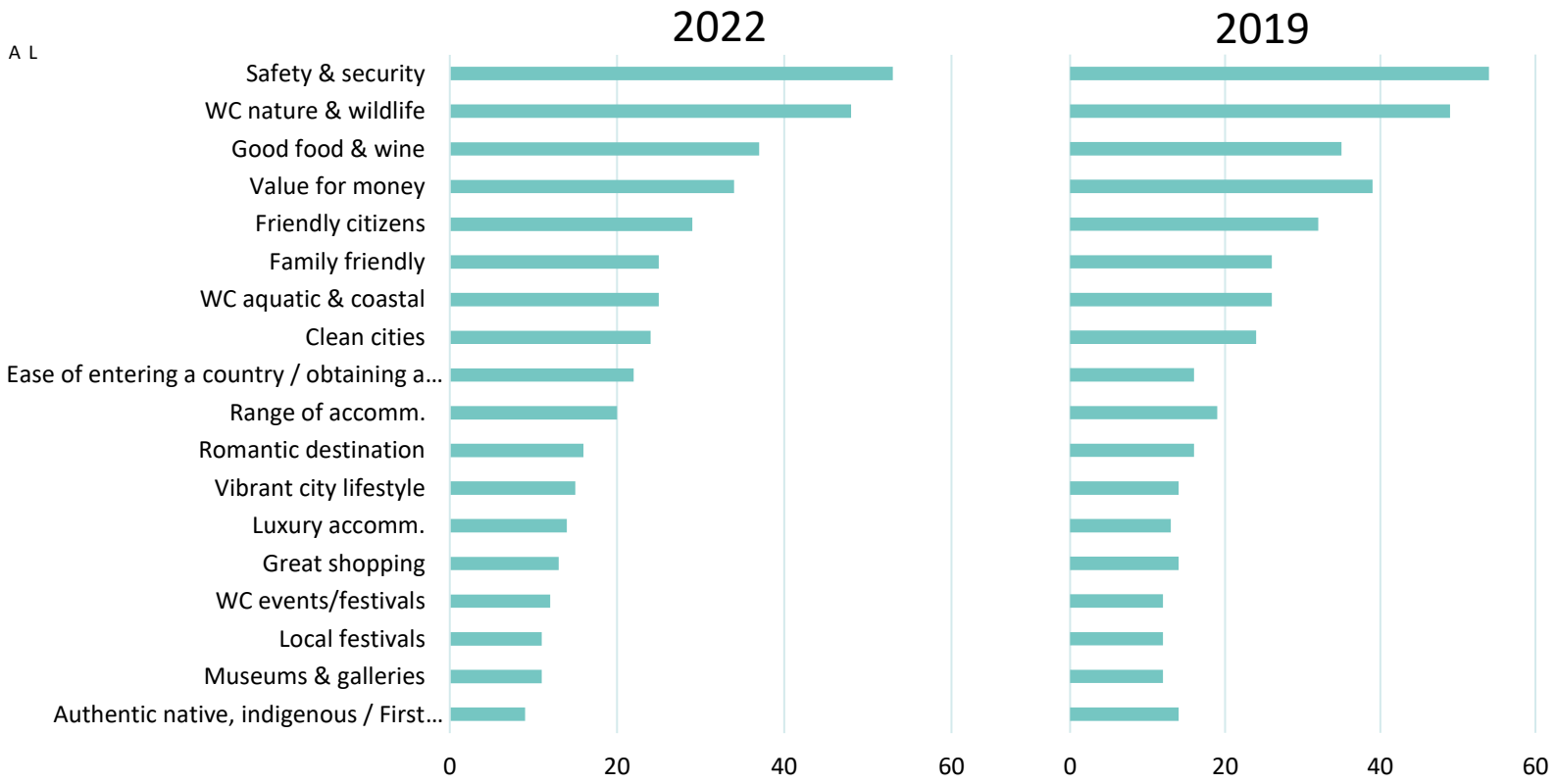
Consumer Confidence [2]



1. TRA IVS
2. TA Greenlight sentiment tracker

INTERNATIONAL

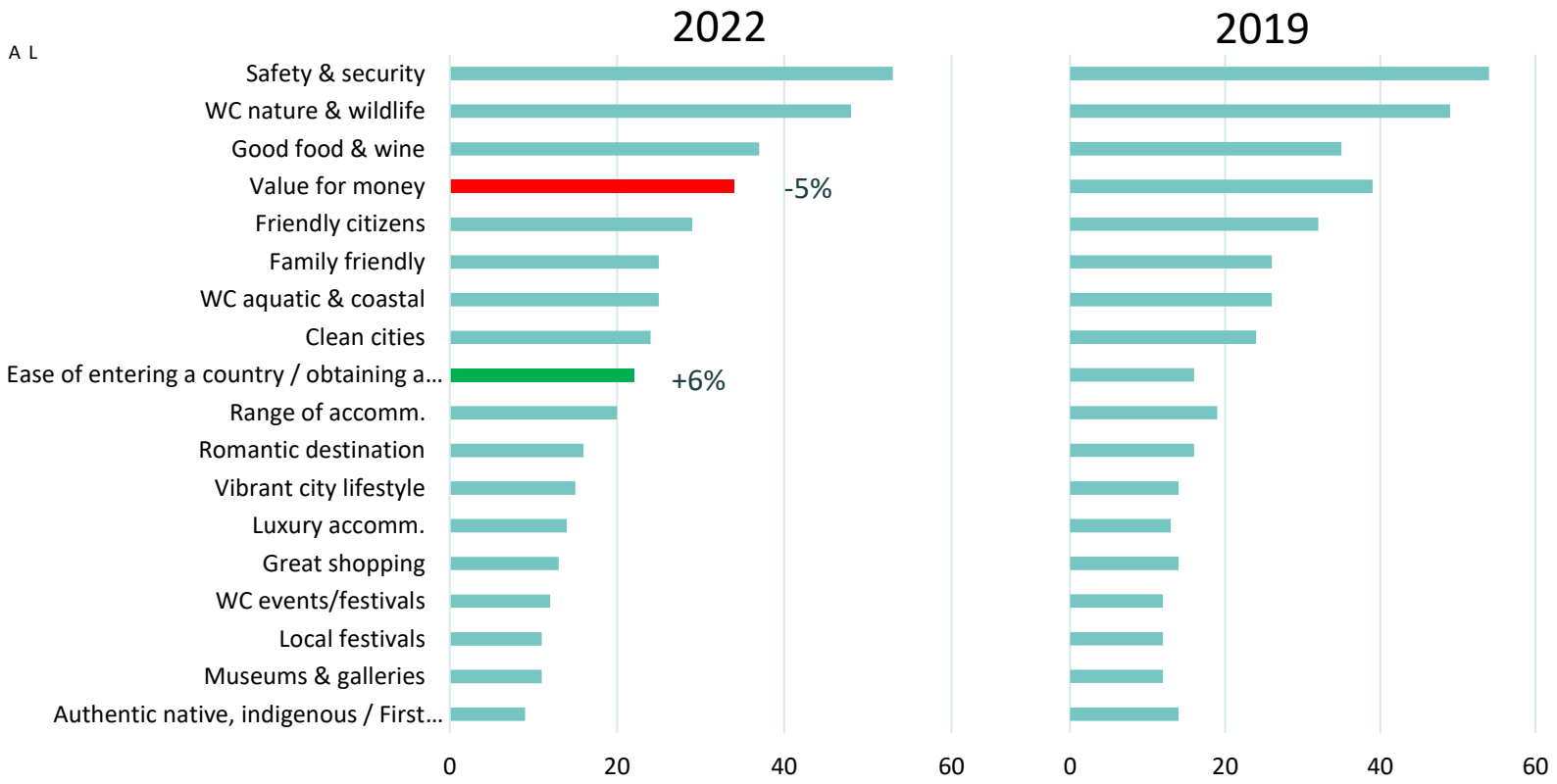
INTERNATIONAL HOLIDAY IMPORTANCE FACTORS



Tourism Australia: Consumer Demand Project 12 market aggregate

INTERNATIONAL

INTERNATIONAL HOLIDAY IMPORTANCE FACTORS

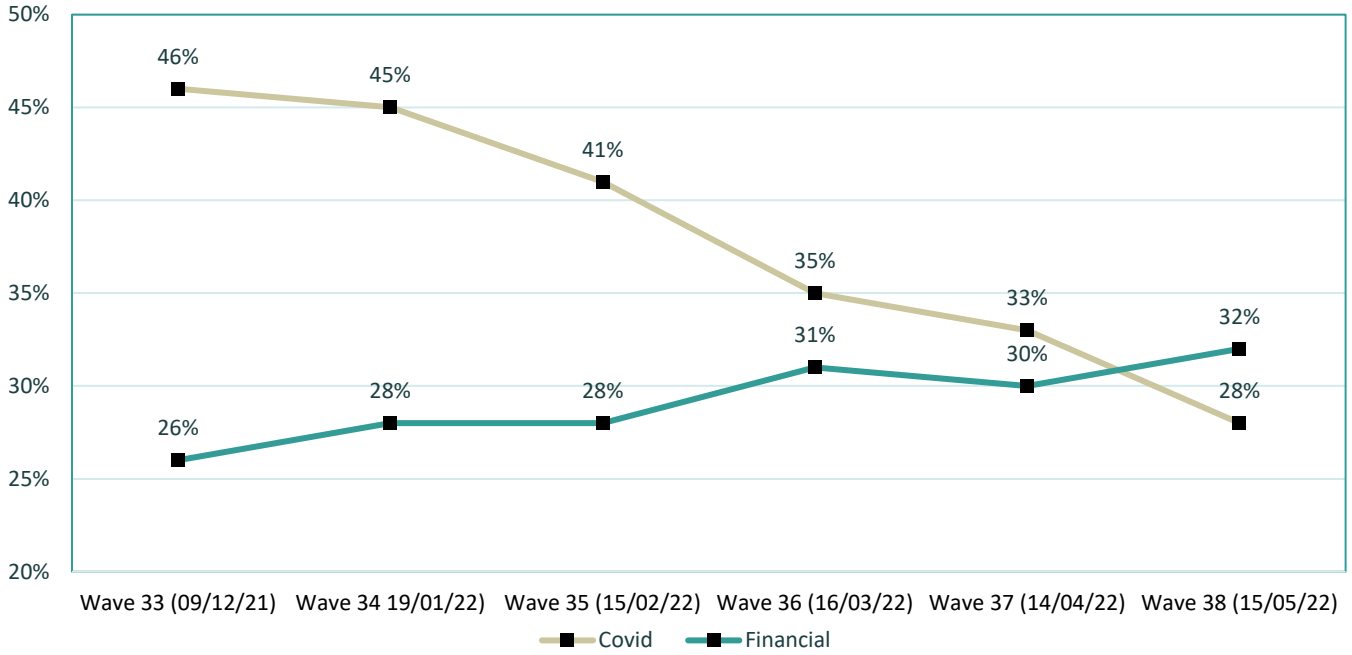


Tourism Australia: Consumer Demand Project 12 market aggregate

INTERNATIONAL

REASONS FOR NOT TRAVELLING INTERNATIONALLY IN THE NEXT 6 MONTHS

International Sentiment Tracker 12 Market aggregate



Source: Tourism Australia International Sentiment Tracker, Waves 33 - 38

IN SUMMARY

- Current travel is dominated by VFR – especially interstate
- Interstate travelers are looking for Value for money holidays, that provide relaxation, plus things to see and do – and this has not changed post COVID – but if anything, they want and expect more. There is still reticence towards international travel.
- International travel to Australia is still disrupted, with many influencing factors. However, there is no material change in what the visitor is looking for.
- The boom in intrastate tourism during COVID will drop off – but indicators suggest there will still be above ‘normal’ visitation and spend for the next 12 months.

THANK YOU

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