



Domesticate 2013

TNS Australia's annual syndicated study into the Australian travel market; their mind-set, attitudes to travel and outlook for the Australian travel industry

Optimism and uncertainty – which do we choose?

Australians are optimistic about the future economy of Australia. There is a sentiment that Australia has dodged a bullet, yet there is a fair way to go. Expectations for the new Government are somewhat reserved, factory closures remain common and housing affordability is a concern; yet generally there is a positive attitude towards 'what might be'.

Reconnection with life is central to domestic travel

Australians are looking to take a step back from technology and reconnect with people. We need to build this theme into our communications to ensure that consumers are driven to undertake these experiences and know what they will get out of them. Events and festivals are a key way for Australians to reconnect and share experiences. [TABLE 1]

Reconnect through disconnecting

- Connection (with life, with family/ friends, with oneself) is what Australians are ultimately looking for. There is a strong desire to get away from the frenetic nature of everyday life and almost 'go back to basics'.
- A desire to holiday as we did in the past - this sentiment is strongly seen among families who want to share the experiences of their childhood with their own children.



[TABLE 1]	KEY MOTIVATORS FOR ATTENDING EVENTS		
	1	2	3
Sporting events (go to watch)	●	●	●
Sporting event (participate)	●	●	●
An art or cultural exhibition	●	●	●
A cultural event or festival	●	●	●
A music event	●	●	●
A food and wine event	●	●	●
Quirky or unusual events	●	●	●
Going to events with an historical focus	●	●	●
Garden or Botanical events	●	●	●
Theatrical productions or shows	●	●	●

● Iconic Australian event	● Chance for a break
● Opportunity to do something with friends	● A bit different
● Something I am passionate about	● Learn something new
	● Helps physical/mental health
	● A world class experience
	● Always wanted to do this sort of activity

Base: Events that definitely encourage travel in Australia as a stand-alone experience (n=1006)
 D2. What would be the attraction of [TYPE OF EVENT]? (Note to compare results across different types of events some answers may not be relevant)

De-teching – Australians are looking to take a step back

- Although digital technology (smart phones, tablets, apps etc.) are highly regarded and relied upon, there is a sense that digital solutions actually ‘interfere’ with other elements of life and thus create a disconnect between face to face communication and relationships.
- Technology can help to instigate connection amongst ‘distant’ friends (at a global level) yet it thwarts connection with those closest to you – holidays can be a time to take a break from this environment.



Create the opportunity / reason to travel

Australians often require an impetus to travel domestically given the affordability of international destinations. We need to communicate about the events/experiences while promoting a region in order to entice Australians to travel more often within Australia.

Strong desire for events and festivals to offer authentic experiences

- An authentic experience is what Australians desire, particularly in terms of events and festivals. Food & wine festivals and sporting events are the most likely to encourage travel – creating an occasion and reason to travel.
- Authentic refers to not only the experience (i.e. the offer) but the location and atmosphere as well. Authenticity is what Australians crave and holidays are an opportunity to experience truly Australian experiences away from our everyday lives: the reasons for travelling centre around reconnection, indulging passions, trying something different and attending an iconic Australian event.
- Note that barriers to attending events & festivals in Australia are lack of timely promotion, distance and cost.

[TABLE 2] FOOD AND WINE EXPERIENCES WHICH ENCOURAGE TRAVELLING - OVERNIGHT TRIP						NET ENCOURAGE ME TO TRAVEL
Casual dining or experiences in a uniquely Australian location	9	26	28	25	11	63
Dining in unique or special locations	7	25	28	24	15	60
Eat at fine dining or well-known restaurants	9	23	26	27	15	59
Visit wineries/wine regions	12	21	23	24	20	57
Go to food and wine festivals	9	21	26	26	19	55
Experience one of Australia's many food cultures	7	18	27	30	18	53
Go to farmers or produce markets	7	18	24	31	19	50
Attend a festival linked to one of Australia's many immigrant cultures	6	19	25	28	23	49
Attend a festival linked to one of Australia's that included trying their traditional food	5	18	23	31	22	47

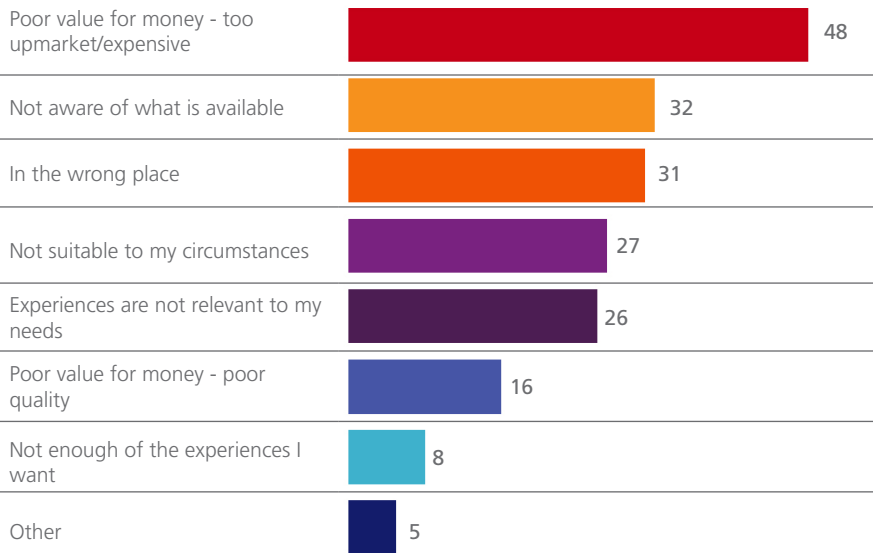
■ Definitely encourage me to travel in Australia as a stand-alone experience
■ Definitely encourage me to travel in Australia but only as part of a broader trip
■ Potentially encourage me to travel in Australia
■ Wouldn't influence my decision to travel there, but would enjoy it
■ Don't know/No impact

Base: Total sample (n=1006)
 C1a. Assuming that these are available to you, we'd now like to understand the extent to which some different food and wine experiences would encourage you to take a leisure trip or break in Australia or one night or more.



[TABLE 3]

BARRIERS TO TAKING A TRIP AROUND FOOD & WINE



Base: Total sample (n=1006)

C1a. Assuming that these are available to you, we'd now like to understand the extent to which some different food and wine experiences would encourage you to take a leisure trip or break in Australia or one night or more.

Food and wine experiences have the potential to excite Australians

- A unique casual dining experience is a must when at specific destinations, but is not enough to create a desire to travel. [TABLE 2]
- The exception to this is food and wine regions (Margaret River, the Barossa, the Hunter Valley, etc.) which are highly appealing as Australians are motivated by authentic dining experiences built around special locations. However they must offer a diverse offer to provide a stand-alone reason to travel.
- Note that the key barriers to food and wine experiences are value for money and the awareness of what is available.
- Food and wine experiences must be accessible, not exclusive and out of reach. [TABLE 3]



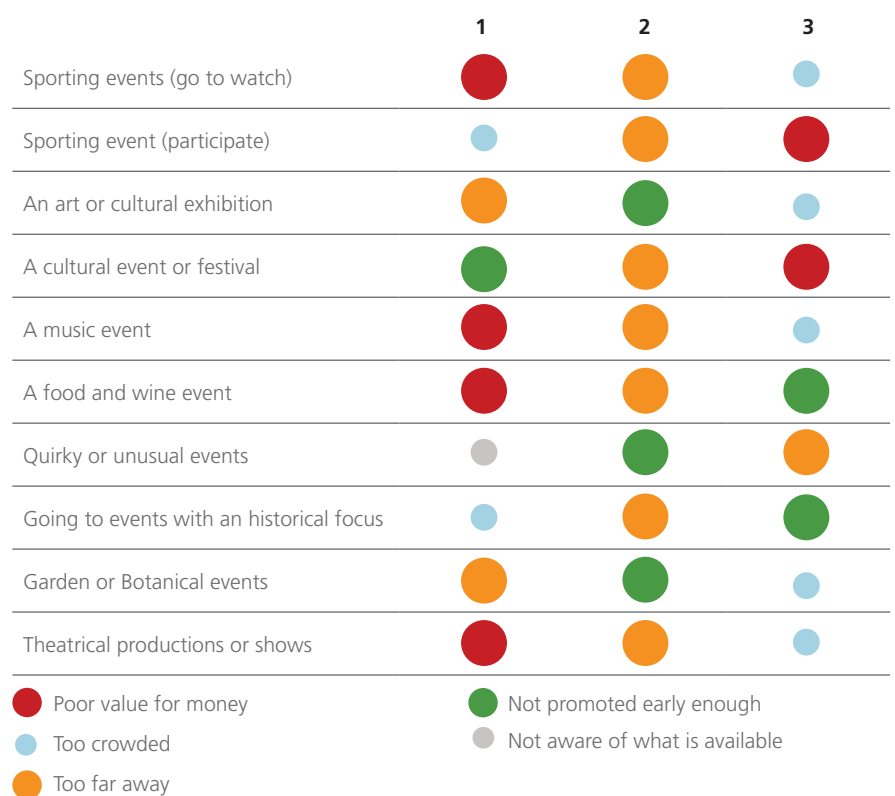
Raise awareness of experiences

- Interest is high in events and festivals and there is evidence that this creates a reason to travel. Despite this, visitation is lower due to low awareness levels. Currently, people indicate they would like to have visited an event or festival, however only become aware of it too late. [TABLE 4]
- The challenge is promoting events in advance to allow individuals to plan these experiences. A mixture of word of mouth (including social media) as well as traditional media (TV and airline magazines) is paramount.



[TABLE 4]

KEY BARRIERS FOR ATTENDING EVENTS



Base: Events that definitely encourage to travel in Australia as a stand-alone experience
 D4. What would prevent you attending this type of event or festival?

Service is paramount

While Australia may be seen as a welcoming culture, locals fail to see ourselves this way. We need to work on this negative image in order to get a better value for money perception.

Customer service importance

- The importance of service continues to grow as competitive destinations build their offer around this. Travellers compare Australian service with international destinations such as Asia, the USA and South Pacific, and we often fail to stack up.

Customer service remains a grumbling point

- There is a dissatisfaction with customer service (in terms of quality, attitude, attention to detail and overall approach).
- This also has implications for perceived value for money (or lack of) when experiencing a lack of quality service.

Make domestic travel easier

Australian holidays should be easier. Too much choice and not enough information make decisions difficult and increase the risk of making the wrong decision.

Promote the suite of experiences

- Including resources that detail how to get around or what to do when in a location makes an Australian holiday easier and more attractive.
 - Holiday time is precious - many needs must be met. Experiences are only inviting if they meet the needs of the entire travel party.
- As such, experiences need to be promoted in the context of what else is available - accommodation, transport, food, shopping, other experiences, etc.

Package deals are as motivating as ever

- Travellers are looking for deals not only for value for money. They are perceived to have a number of key benefits: transparent / filters out a selection from the extensive range / creates urgency to take up deal / provides a reason and occasion to travel / makes it easy.



If you would like further information about TNS Domesticcate please contact:

Ed Steiner

Head of Travel and Leisure
e: ed.steiner@tnsglobal.com

or visit www.tnsaustralia.com.au



TNS Sydney
L1, 181 Miller Street
North Sydney, NSW 2060
t: 02 9563 4200
f: 02 9563 4202

